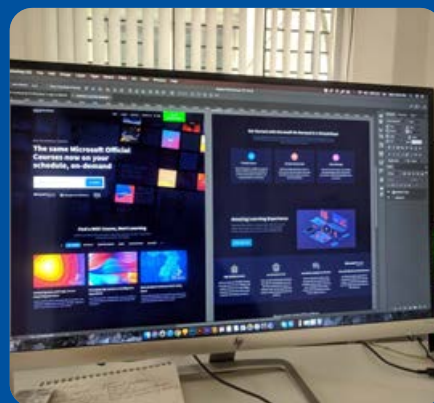
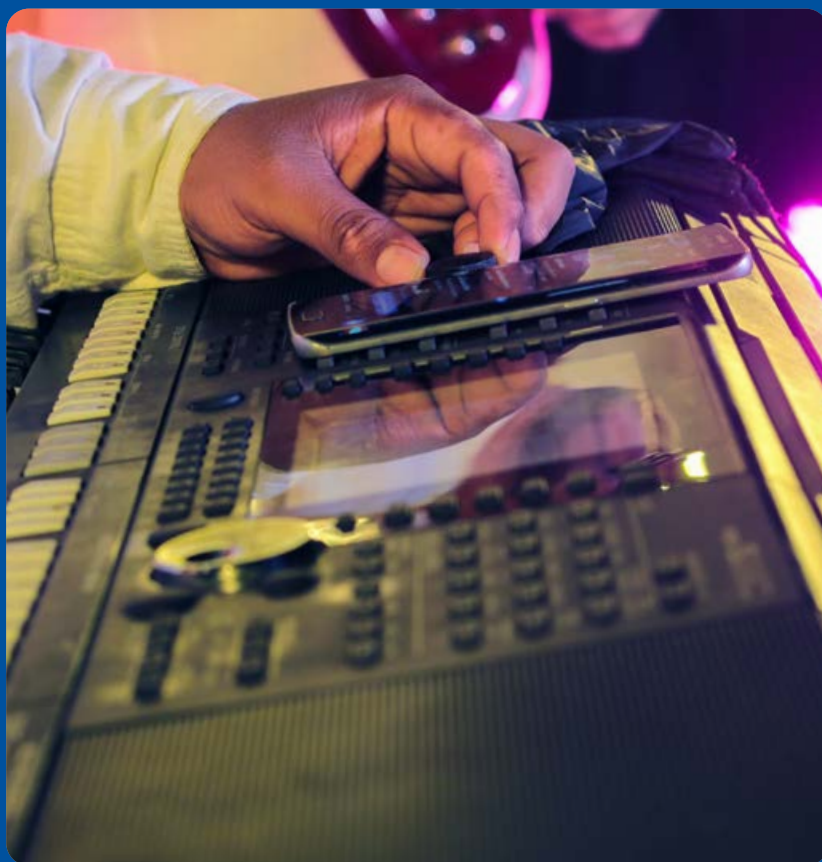


# CURAÇAO

## NATIONAL EXPORT STRATEGY

2022-2027



## CREATIVE INDUSTRIES SECTOR



MINISTRY OF  
ECONOMIC DEVELOPMENT OF CURAÇAO



International  
Trade  
Centre

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## About the strategy

The creative industries strategy is an official document of the Government of Curaçao. It was developed on the basis of the process, methodology and technical assistance of the International Trade Centre (ITC) within the framework of its Trade Development Strategies programme.

The findings in the creative industries strategy are based on extensive research and the result of several national and sector stakeholder consultations. This document summarizes the trade and competitiveness performance of Curaçao's creative industries and contains a detailed plan of action to guide its further development and future.

The views expressed herein do not reflect the official opinion of ITC. Mention of firms, products and product brands does not imply the endorsement of ITC. This document has not been formally edited by ITC.

For any queries about the NES, please contact:

### Ministry of Economic Development (MEO)

Street/postal address: 43 Pletterijweg, Willemstad, Curaçao

Website: <https://gobiernu.cw/nl>

E-mail: [Vanessa.Tore@gobiernu.cw](mailto:Vanessa.Tore@gobiernu.cw)

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## Acknowledgements

Vanessa Toré (MEO) led the NES process on behalf of the Government of Curaçao and Gonneke van den Kieboom acted as this strategy's team leader. The team at MEO was also composed of Sam Kruiner, Raynel Martis and Yanina Urbaez. Annex I lists the public and private sector stakeholders that participated in the consultations for this strategy.

This strategy was prepared with the technical support of ITC and the overall guidance of Anton J. Said, Jasmeer Virdee, Olga Khomula and Amelia Diaz.

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## International Trade Centre (ITC)

ITC is the joint agency of the World Trade Organization and the United Nations. As part of the ITC mandate of fostering sustainable development through increased trade opportunities, the Research and Strategies for Export (RSE) section offers a suite of trade-related strategy solutions to maximize the development payoffs from trade. ITC-facilitated trade development strategies and roadmaps are aligned to the trade objectives of a country or region and are oriented to the achievement of specific economic aims, development goals or competitiveness targets, according to the country's priorities.

Street address: ITC 54-56, rue de Montbrillant 1202 Geneva, Switzerland

Postal address: ITC Palais des Nations 1211 Geneva 10, Switzerland

Telephone: +41-22 730 0111

Fax: +41-22 733 4439

E-mail: [itcreg@intracen.org](mailto:itcreg@intracen.org)

Internet: <http://www.intracen.org>

Editing: Vanessa Finaughty – [shadowfire13@gmail.com](mailto:shadowfire13@gmail.com)

Layout: Jesús Alés – [www.sputnix.es](http://www.sputnix.es)

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ECONOMIC DEVELOPMENT OF CURAÇAO



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Photo: (cc0) Unsplash, Michelle Maria

## Acronyms and abbreviations

Unless otherwise specified, all references to dollars (\$) are to United States dollars, and all references to tons are to metric tons. The term 'billion' denotes 1 thousand million.

<b>AMAK</b>	Asosiasion di Musiko i Artista di Korsou	<b>CMA</b>	Curaçao Marketing Association
<b>BIP</b>	Bureau for Intellectual Property of Curaçao	<b>CoC</b>	Curaçao Chamber of Commerce & Industry
<b>CBS</b>	Central Bureau of Statistics	<b>GDP</b>	Gross domestic product
<b>CDI</b>	Curaçao Development Institute	<b>IADB</b>	Intern-American Development Bank
<b>CEC</b>	Curaçao Export Council	<b>ITC</b>	International Trade Centre
<b>CFO</b>	Curaçao Film Office	<b>LAC</b>	Latin Americana and the Caribbean
<b>CIDW</b>	Creative industries development week	<b>MEO</b>	Ministry of Economic Development
<b>CINEX</b>	Curaçao Investment & Export Promotion Agency	<b>NES</b>	National Export Strategy
<b>CISA</b>	Curaçao creative industries sector association	<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organization
<b>CITI</b>	Curaçao Innovation & Technology Institute	<b>UoC</b>	University of Curaçao



# Executive summary

*The Ministry of Economic Development (MEO) commissioned the design of the Creative Industries strategy under the National Export Strategy (NES) initiative. This strategy has been defined through a consultative process involving public and private stakeholders. The strategy's goal is to chart a path for Curaçao to become the centre of the creative industries in the Caribbean.*

The creative industries have great potential to generate economic value, foster innovation and contribute to happier and wealthier lives for people engaged in the sector. Film, music, digital design, new media, performing arts, software, heritage and arts are just a few of the wide range of subsectors that fall under the creative industries umbrella.

For small island developing States (SIDS) and other natural resource-constrained countries, the creative industries can play an important role in promoting economic growth, job creation, social well-being and national resilience. The sector can serve as a catalyst for social, technological and economic changes that leverage people's creative energy and resources. There are also many positive spillover effects deriving from the creative industries, including the flow of ideas across networks of entrepreneurs, supporting linkages with other sectors, and the promotion of national identity and culture.

For Curaçao, the creative industries' potential is evident. The sector's development is identified as a priority in Curaçao's National Development Plan 2015–2030. If supported by greater investment in entrepreneurship skills and small businesses, the creative industries can become a significant part of exports from the island.<sup>1</sup> The sector is also well aligned with Curaçao's strengths. Most creative industries subsectors rely on highly skilled, creative and motivated individuals. These individuals are often young people and, as such, developing these subsectors can help reduce youth unemployment. Furthermore, most subsectors within the creative industries are not capital intensive and are not reliant on economies of scale for their competitiveness. This makes it feasible for Curaçao to become internationally competitive in this sector within a relatively short period of time.

## Curaçao's creative industries ecosystem

Analysis of the sector's competitiveness constraints, market opportunities, inadequacies within the business ecosystem, institutional support limitations, and bottlenecks affecting entrepreneurship and export performance reveal several fundamental considerations. These are:

---

1.– Government of Curaçao and United Nations Development Programme (UNDP). 'Building on Strengths: National Development Plan Curaçao 2015-2030'.

- Graduating the sector from its nascent state into a well-defined and organized sector can improve its performance and attractiveness domestically and internationally.
- Given that freelancers and small businesses are the core of its production capacity, the sector's future depends on its ability to establish a collective approach to export growth.
- Higher-quality outputs and business development are needed to increase the sector's value proposition and comparative advantages against rivals producing at lower costs.
- There are talented and experienced individuals offering specialized services in a unique creative style. However, new skills, digital trade, materials and funding are needed for scalable growth.
- A well-organized sector with a range of bundled services for target markets and active engagement in promotional activities can boost demand from international clients.
- Public sector support and structured public–private dialogue is vital.
- Creative services in branding and marketing productions can support the promotion of other sectors and draw in more business linkages.

## The strategy focuses on the development of three key subsectors

Stakeholders identified three key subsectors with strong export potential. They are music, video and film, and marketing, communications and web design.

Music plays an important role in the country's cultural identity and unique offerings. Products stakeholders identified as having export potential in this sector include the production of radio commercials, sonic branding, and jingles and tunes. Key target markets include advertising agencies, radio stations, and broadcasters based in Europe, North America and Latin America.

Video production in Curaçao is a budding industry with motivated stakeholders. Products stakeholders identified as having export potential include the production of documentaries, corporate videos and providing services to international movie productions.

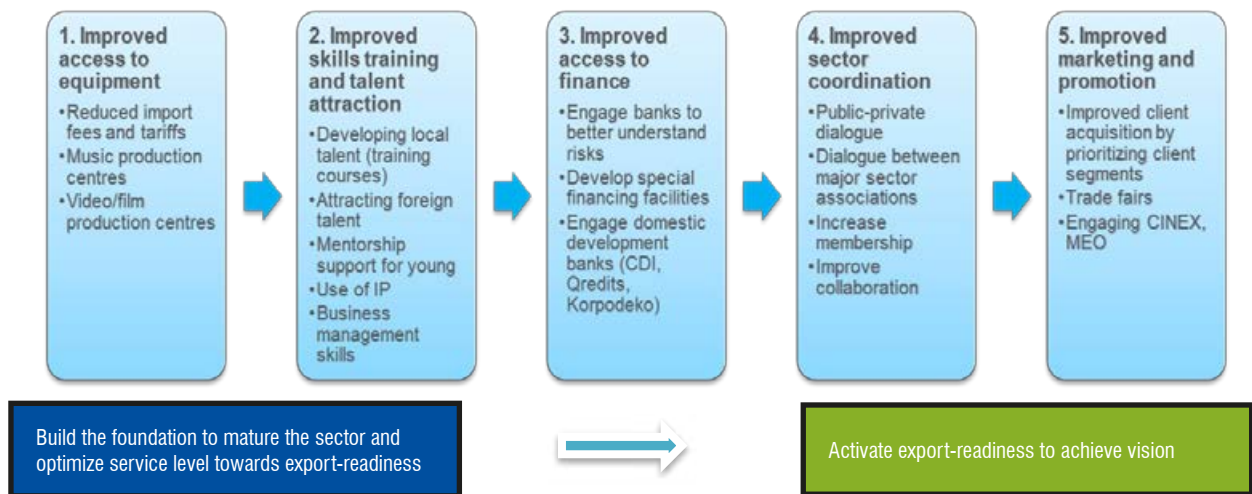
Marketing, communications and web design is a relatively established sector on the island. The majority of services offered by these firms include branding strategies and materials, translation services and website development. Key target markets include advertising agencies and marketing agencies based in Europe, North America and Latin America.

There is a potential to build strong linkages across these different subsectors. For example, the music industry can assist with the scoring of videos and films, and the marketing and communications sector can help promote creative products. Moreover, the value chains these different subsectors rely on are quite similar, which facilitates the building of linkages and networks across subsectors. This can help reinforce each subsector and help to retain value from international projects on the island.

## How to develop the creative industries

The development path for the creative industries sector is based on five steps of improvement.

## The five steps of improvement for the creative industries



The first step is improved access to the equipment and resources required to sustain the local supply chain's vitality. Currently, the quality, volume and diversity of production suffers from a lack of specialized equipment and professional working spaces. Specialized equipment tends to bear high import fees due information gaps between government and the sector on key resources needed to produce services. Generating a list of essential production resources for the creative industries is needed for government to conduct reviews of which products can benefit from reduced import fees. Collaboration and pooling of resources can also improve access to professional equipment. For example, exploring options for opening a co-producing space can facilitate access to a variety of services and resources, including mentorship, training, event spaces, hardware, software and specialist equipment. These initiatives can also support young people's exposure to creative activities and training opportunities.

The second step is centred on nurturing human capital by improving skills training and the mobility of talent. The sector's nascent state of development means that it is overlooked as a viable career path, which has made it even more vulnerable to the effects of brain drain. However, as a young sector, it has the potential to position itself as a breeding ground for entrepreneurs and foreign talent. Mentoring and counselling young people can also equip them to become active contributors to the sector. Peer-to-peer knowledge sharing and training on global standards can also help overcome hurdles related to quality and professionalism.

The third step seeks to improve access to finance. Funding remains one of the most pressing challenges for creative industries. It is often faced with high barriers when applying to commercial lenders, as it is generally deemed a high-risk investment sector. Raising awareness for lenders to better understand the risks and identify investment opportunities is a promising means of breaking the cycle.

The fourth step advocates for improved sector coordination and supports the development of creative industries as an independent sector. Currently, there is no umbrella association in the private sector that represents the interests of professionals working in diverse areas across the creative industries. Improving collaboration can be a way to facilitate the pooling of scarce resources such as equipment, business networks and specialist knowledge. Under a common direction for export growth, stakeholders will enable better representation of their interests and greater access to and acquisition of commercial opportunities.

The fifth step prepares the sector to increase acquisition of international clients by improving marketing and promotion, guided by a new component on market orientation of the value chain that matches products with target client profiles. This matching is captured in

the product–client combination of the future value chain for the sector. It also encourages participation in trade promotion activities such as trade fairs and the establishment of a working relationship with the Curaçao Investment & Export Promotion Agency (CINEX) and MEO for technical assistance on trade development and promotion.

## The strategic framework

Following a series of group discussions, stakeholders involved in developing the NES for the creative industries have articulated the following vision for the sector:

**“ Curaçao – creative centre in the Caribbean ”**

The vision statement emphasizes the ambition of stakeholders in the creative industries to develop into an independent sector of Curaçao’s economy and fill the role of becoming the creative centre in the Caribbean.

The fundamental ideas behind the statement emerged from two key characteristics of the creative industries sector:

- (i) Graduating the sector from its nascent state into a well-defined and organized sector can improve its performance and attractiveness domestically and internationally;
- (ii) Higher-quality outputs and business development are needed to increase the sector’s value proposition and comparative advantages against rivals producing at lower costs.

To fulfil this ambitious vision, three strategic objectives were defined during the consultations. These strategic objectives provide a framework for developing the strategy in the next five years.

### Strategic framework of the creative industries

<p><b>Strategic Objective 1:</b> Establish a favourable business environment for sector development</p>	<ul style="list-style-type: none"> <li>1.1 Adopt a common national definition, classification system and data collection approach for the creative industries to increase its prominence within policymaking</li> <li>1.2 Improve access to specialized industry equipment by adjusting import regulations and establishing production centres</li> <li>1.3 Improve access to finance conditions by establishing financing schemes tailored to the creative industries</li> </ul>
<p><b>Strategic Objective 2:</b> Improve the role and capacity of private sector associations</p>	<ul style="list-style-type: none"> <li>2.1 Strengthen dialogue with the public sector to create clear mechanisms through which industry needs are communicated</li> <li>2.2 Strengthen existing sector associations to enhance local collaboration and coordination, and expand international business networks</li> </ul>
<p><b>Strategic Objective 3:</b> Support skills development and pursue market development opportunities</p>	<ul style="list-style-type: none"> <li>3.1 Increase skills trainings and knowledge sharing to promote youth engagement and quality standards</li> <li>3.2 Promote priority product-client combinations by strengthening their value chains and pursuing export promotion activities</li> </ul>

**Source:** ITC, based on stakeholder consultations.

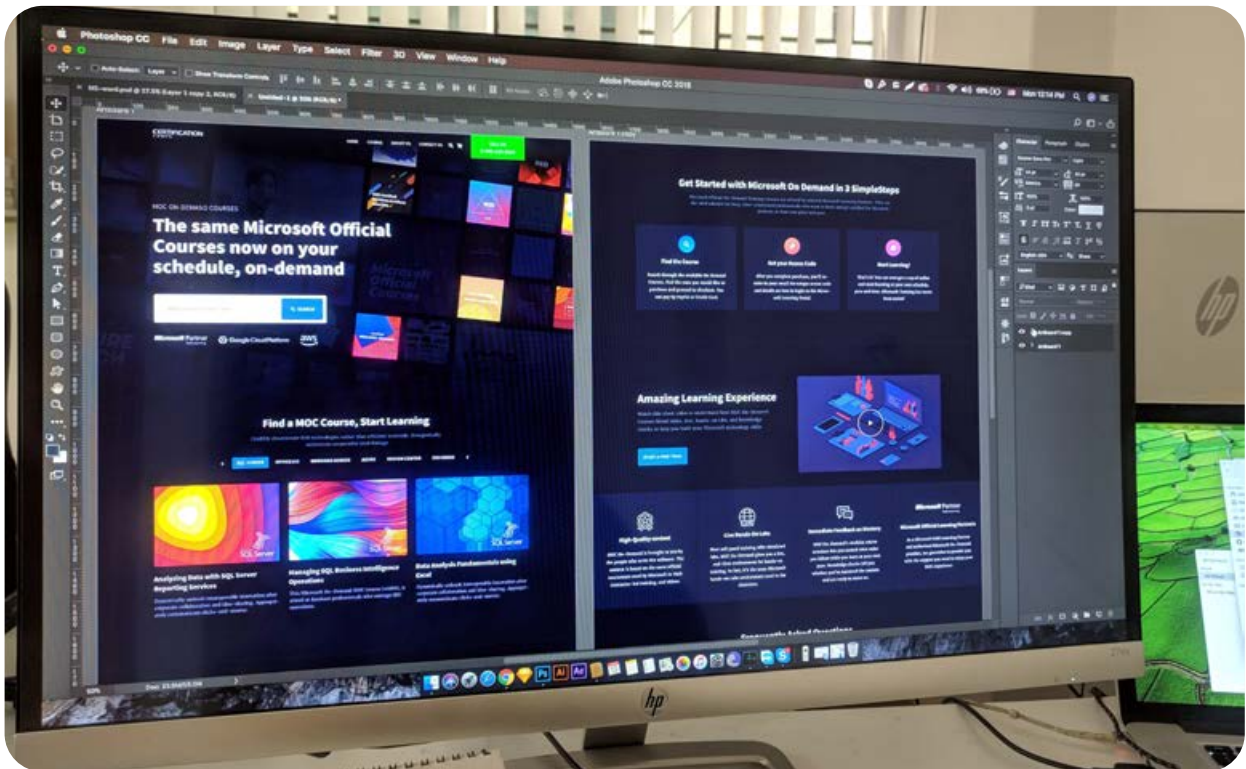


Photo: (cc0) Unsplash, eftakher-alam-i1VQZsU86ok-unsplash.jpg

1. **Establish a favourable business environment for sector development.** This objective is primarily directed at resolving constraints in the business environment and supply side. It emphasizes the stream of improvements needed to create an environment that is conducive for growth and for the stronger productive capacities that can sustain business development.
2. **Improve the role and capacity of private sector associations.** This objective lays the foundation for institutional strengthening that can empower the private sector to become more organized, export oriented and capable of retaining value in Curaçao. It targets forming strategic alliances. Tighter partnerships can also facilitate communication with other sector associations and industries, both within the country and abroad. As a young sector, stakeholders must work together to compete internationally.
3. **Support skills development and pursue market development opportunities.** This objective observes the need to overcome skills shortages, nurture human capital and raise the attractiveness and level of professionalism before tackling market entry constraints. Increased skills training is the baseline for transformative changes in business development. It builds on the momentum of an organized sector offering speciality bundles of selected products and services for target markets. It is also influenced by marketing statements set forth by stakeholders during consultations that position Curaçao as a centre for activating entrepreneurship and realizing creative potentials.

## Implementation management

Coordinating activities, tracking progress and mobilizing resources for implementation is critical for successful achievement of these targets. To that effect, industry representatives emphasized the importance of high-level support from the government and collaboration within the private sector to grow Curaçao's creative industries. Curaçao's National Export Council will serve as the platform for this collaboration and will be tasked with supervising the strategy's implementation.

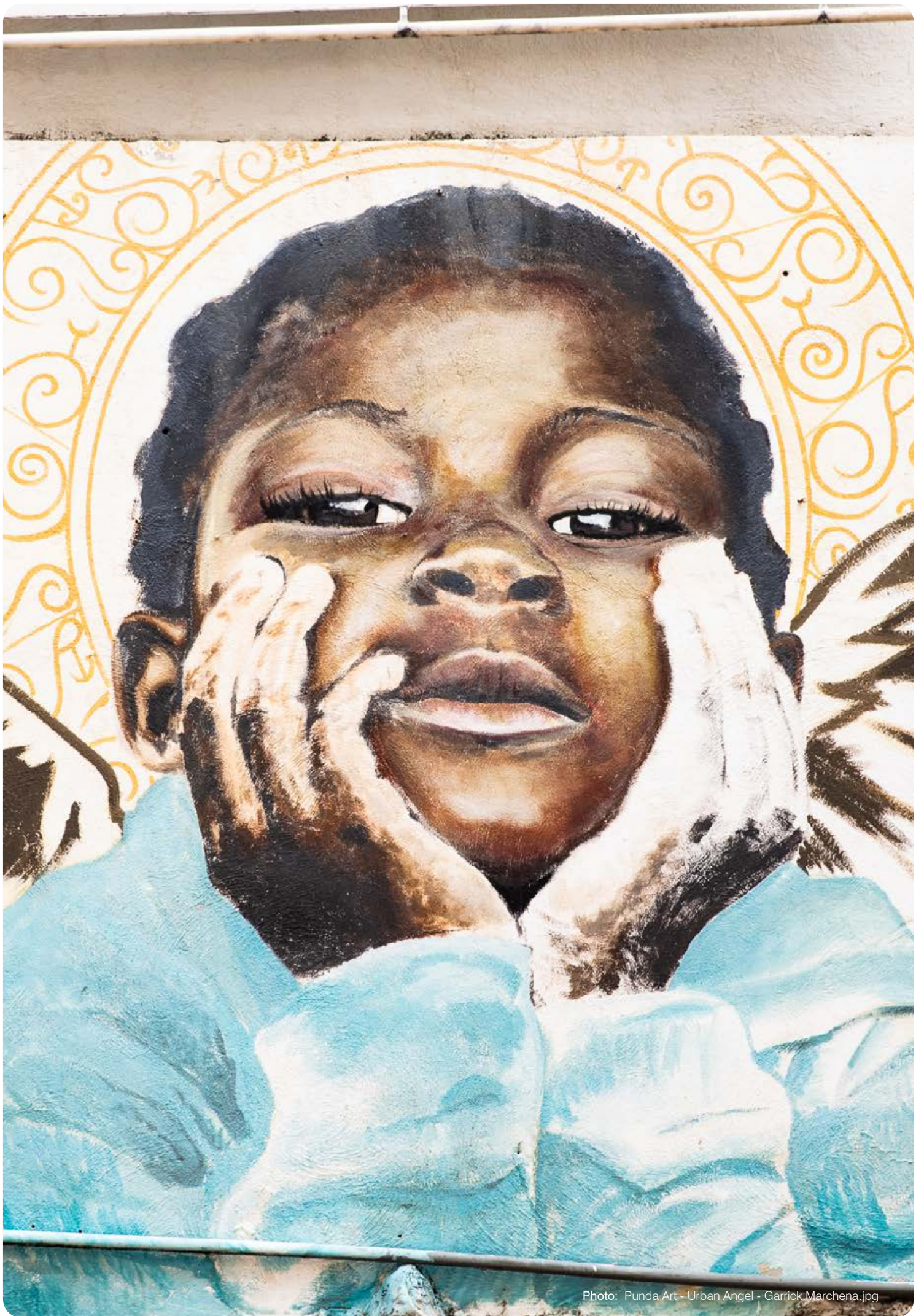


Photo: Punda Art - Urban Angel - Garrick Marchena.jpg

# Introduction

## Brief history of the creative industries

The roots of the creative industries as an economic sector emerged from the cultural industries, and dates back to the early twentieth century.<sup>2</sup> The notion that creativity is an asset with commercial value was first introduced through economic policies in Australia dating back to the 1990s.<sup>3</sup> In 2001, the publication *The Creative Economy: How People Make Money from Ideas* helped bring the sector into the scope of economic theories and popularized the term *creative economy*.<sup>4</sup> The publication also

widened the sector by including 15 new industries extending from the arts to science and technology.<sup>5</sup>

Similarly, in 2013, the Inter-American Development Bank (IADB) released *The Orange Economy: An Infinite Opportunity*, which redefined the concept of the creative industries as a motor of development and change, emphasizing the sector's entrepreneurial potential for Latin America and the Caribbean.<sup>6</sup>

## Defining the creative industries

Despite its potential, defining and measuring the economic performance of the creative industries is challenging. Like many of its outputs, the value of the creative industries is often tied up in hard-to-measure intangible assets. In Latin American and the Caribbean, the informality of the labour market in the sector makes it difficult to measure its economic and social benefits.<sup>7</sup> The large spillover effects and web of cross-sector linkages that characterize the sector often leads to systemic under-reporting. Data and performance indicators are spread across economies, making it difficult to gather and analyse sector-specific data. Furthermore, a lack of data feeds into poor monitoring and accountability of the sector. The lack of widely accepted measurement methods of the creative industries has resulted in the creation of multiple definitions based on the differing objectives of policymakers or institutions.

Considering the complex nature of the creative industries, it comes as no surprise that different countries and organizations define creative industries in different ways. Among them, some of the most widespread definitions include the United Nations Educational, Scientific and Cultural Organization (UNESCO) definition, which stresses the cultural and intangible value of the industries, and the United Nations Conference on Trade and Development (UNCTAD), which highlights creative aspects of the goods/service production founded on the exploitation of creativity and intellectual capital. The World Intellectual Property Organization (WIPO) emphasizes the value of copyright and relates creative industries directly to the subject of intellectual property. A summary of the common definitions of the creative industries is provided in Table 1.<sup>8,9</sup>

2.– University of Latvia (2014). 'Cultural and Creative Industries concept – a historical perspective'.

3.– Commonwealth of Australia (1994). *Creative Nation*. Canberra: AGPS.

4.– Howkins, John (2001). *Creative Economy: How people make money from ideas*.

5.– United Nations Development Programme (UNDP); United Nations Educational, Scientific and Cultural Organization, (UNESCO) (2013).

6.– Inter-American Development Bank (2013). 'Orange Economy: An Infinite Opportunity'.

7.– Inter-American Development Bank (2017). 'Future Landscapes of the Orange Economy'.

8.– Orange Economy, Inter-American Development Bank (IDB). 'The set of activities that in an interlocking way allow for ideas to be transformed into cultural goods and services'.

9.– Inter-American Development Bank (IDB) (2013). *The Orange Economy*.

**Table 1:** Common definitions of the creative industries

Organization	Definition
International Trade Centre (ITC)	A National Export Strategy (NES) identifies the creative industries as those economic activities that rely heavily on human creativity, knowledge and technology to produce products with a commercial orientation and that are directed towards international buyers.
United Nations Conference on Trade and Development (UNCTAD)	The creative industries are at the core of the creative economy, and are defined as cycles of production of goods and services that use creativity and intellectual capital as their main input. They are classified by their role as heritage, art, media and functional creations.
United Nations Educational, Scientific and Cultural Organization (UNESCO)	The cultural and creative industries are those that combine the creation, production and commercialization of creative contents that are intangible and of a cultural nature. These contents are usually protected by copyright and can take the form of a good or a service. Besides all artistic and cultural production, they include architecture and advertising.
World Intellectual Property Organization (WIPO)	The copyright-based industries are those that are dedicated, interdependent, or that are directly or indirectly related with the creation, production, representation, exhibition, communication, distribution or retail of copyright-protected material.
Department for Digital, Culture, Media & Sport (DCMS) of the United Kingdom	The creative industries are those activities based on creativity, individual talent and skill, and that have the potential to create jobs and wealth through the generation and exploitation of intellectual property.
Inter-American Development Bank (IDB)	The cultural industries include the goods and services that are traditionally associated with public cultural policy, creative services and sports. They are classified in three categories: conventional, other and new.

**Source:** ITC adaptation based on Inter-American Development Bank, *The Orange Economy*, 2013.

## DEFINITION OF THE CREATIVE INDUSTRIES WITHIN THE SCOPE OF THE NATIONAL EXPORT STRATEGY

For this strategy, the most relevant definition of the creative industries to adopt is the ITC definition (see Table 1). This definition was specifically designed for the development of an export strategy, and as such emphasizes the commercial orientation of the sector.

The National Export Strategy (NES) for Curaçao identifies the creative industries as those economic activities that rely heavily on human creativity, knowledge and technology to produce products with a commercial orientation and that are directed towards international buyers. Micro, small and medium-sized enterprises (MSMEs) are the backbone of every economy across the world. They make up more than 90% of all firms worldwide and account on average for up to 70% of total employment and half of gross domestic product (GDP).<sup>10</sup> Furthermore, within the context of a NES, this strategy is geared towards increasing the foreign exchange earnings of companies operating in the creative industries. Moreover, a competitive creative industries sector can help improve the quality of human capital, increase the adoption of digital technologies, and contribute to job creation and socioeconomic progress.

The core subsectors of the creative industries are common in most of the classification models, for example, music, arts, design, and film and video. In some classification systems, cultural subsectors are also highlighted. However, within the context of a NES, it is important to distinguish cultural activities and export-oriented activities.

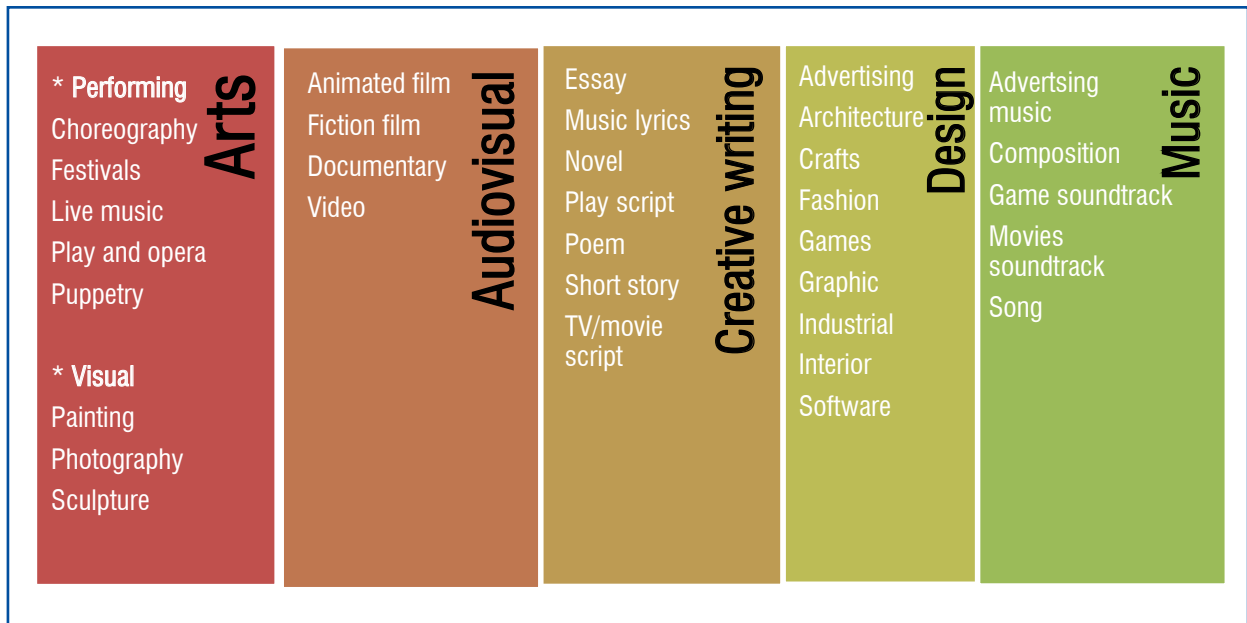
Perpetuating a national culture and keeping it vibrant requires substantial investment and creativity. However, it is more based on tradition and social behaviour, adapted to the national market, whereas the creative industries exploit creative talent directly oriented at commercial gains, targeting national and international markets.

Therefore, ITC classifies creative industries in five major categories as follows: arts, audiovisual, creative writing, design, and music. Each of the categories includes a variety of subsectors as illustrated in Figure 1. This export strategy will stand on ITC's classification to analyse and prioritize subsectors in Curaçao that have high export potential.

<sup>10</sup>– International Trade Centre.



**Figure 1:** ITC classification of the creative industries



Source: ITC.

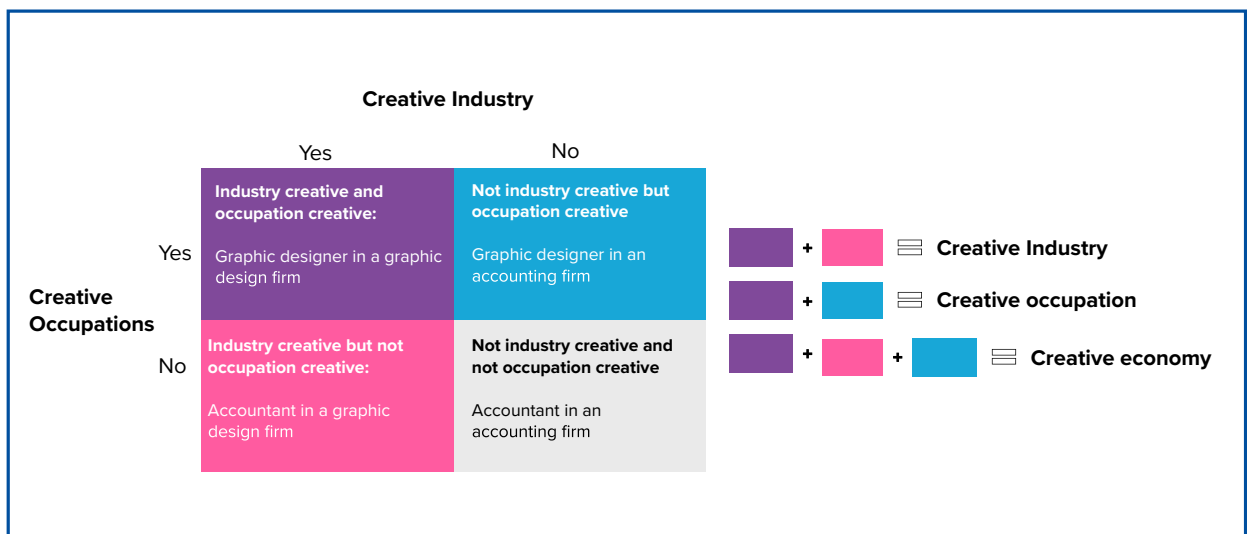
### THE RELATIONSHIP BETWEEN CREATIVE INDUSTRIES, CREATIVE OCCUPATIONS, AND THE CREATIVE ECONOMY

The creative economy includes many types of creative activities, both within creative industries and creative occupations. Figure 2 provides an example of the

classification of an accountant and graphic designer. The creative economy encompasses the following:

- Enterprises that produce goods and services ;
- People with creative occupations working in the creative industries ;
- Workers with creative occupations working in any other industry ;
- A non-creative job working in a creative industry.

**Figure 2:** Creative industries, creative occupations, and creative economy relationships



Source: 2019 Otis report on the creative economy, prepared by Beacon Economics.

## The impact of technology on the creative industries

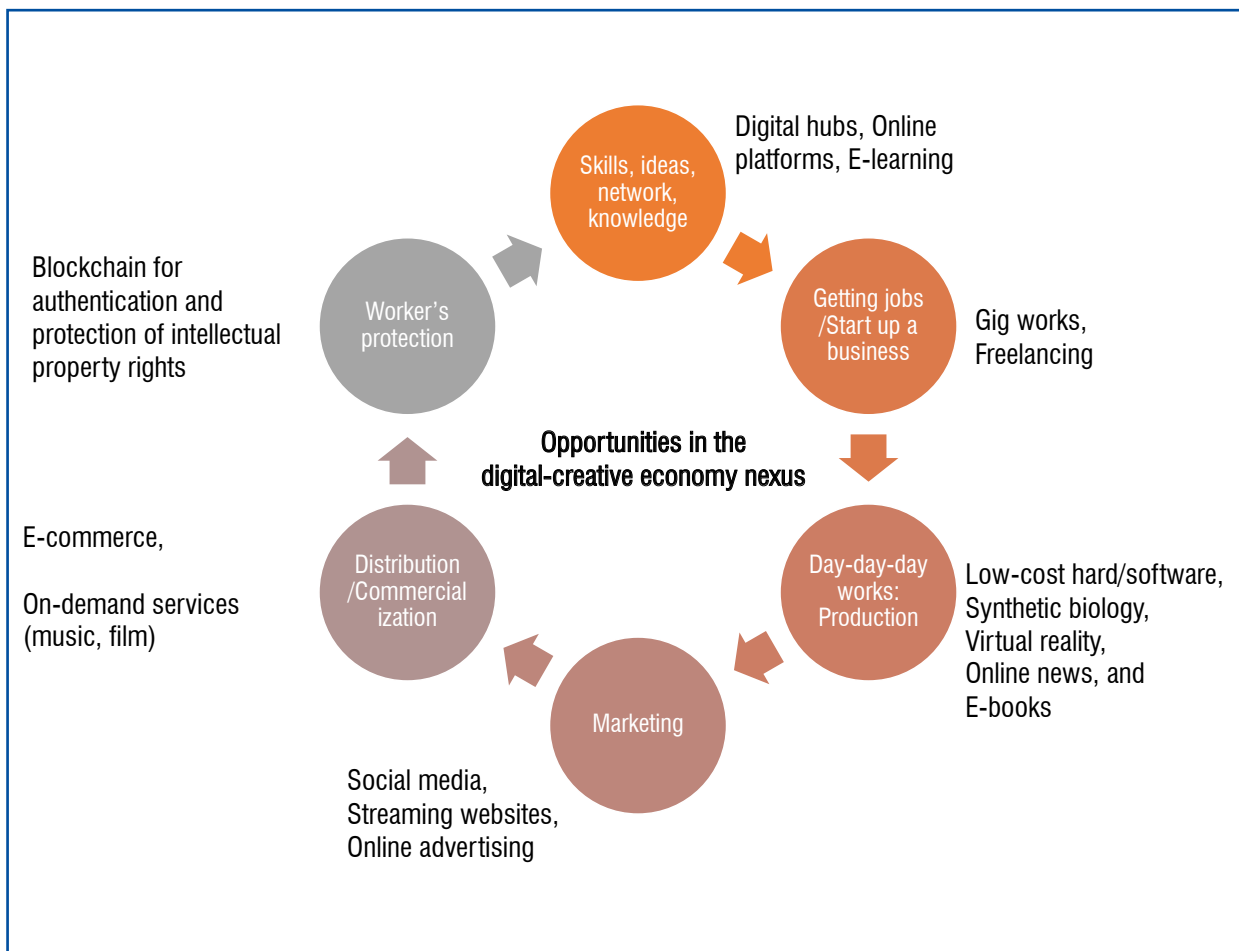
The sector is heavily influenced by digital technology and due to the growing size of the digital economy, the creative industries are increasingly linked to the internet, where creation and distribution between producers and consumers has reduced barriers.<sup>11</sup> Digitalization enables new forms of production and can lower the cost of distribution, making international trade of creative goods and services more accessible. As a result, it is becoming easier for new businesses to enter international marketplaces.

Digital technology is becoming an important instrument supporting the growth of the sector. For example, musicians and creators of audiovisual services use digital tools such as recording equipment, cameras, and video

editing software. Furthermore, new technologies such as virtual reality, augmented reality, and 3D printing are enabling new forms of expression and consumption, and ultimately new business opportunities.

Online platforms and social networks enable artists and creative professionals to collaborate with one another, engage with consumers, gain access to new knowledge and increase their own visibility. Music streaming channels and e-commerce platforms lower intermediate costs and widen audiences while receiving direct feedback from consumers. Finally, advanced technologies such as blockchain can be used to protect intellectual property rights by tracking royalty payments.<sup>12</sup> Figure 3 demonstrates some of the opportunities created by digital technology.

**Figure 3: Opportunities created by digital technology**



**Source:** World Bank Group, 2020.

11.– Inter-American Development Bank (2018). 'Launching an Orange Future'.

12.– World Bank Group (2020). 'Orange Economy: As a Driver of Jobs for Youth'.

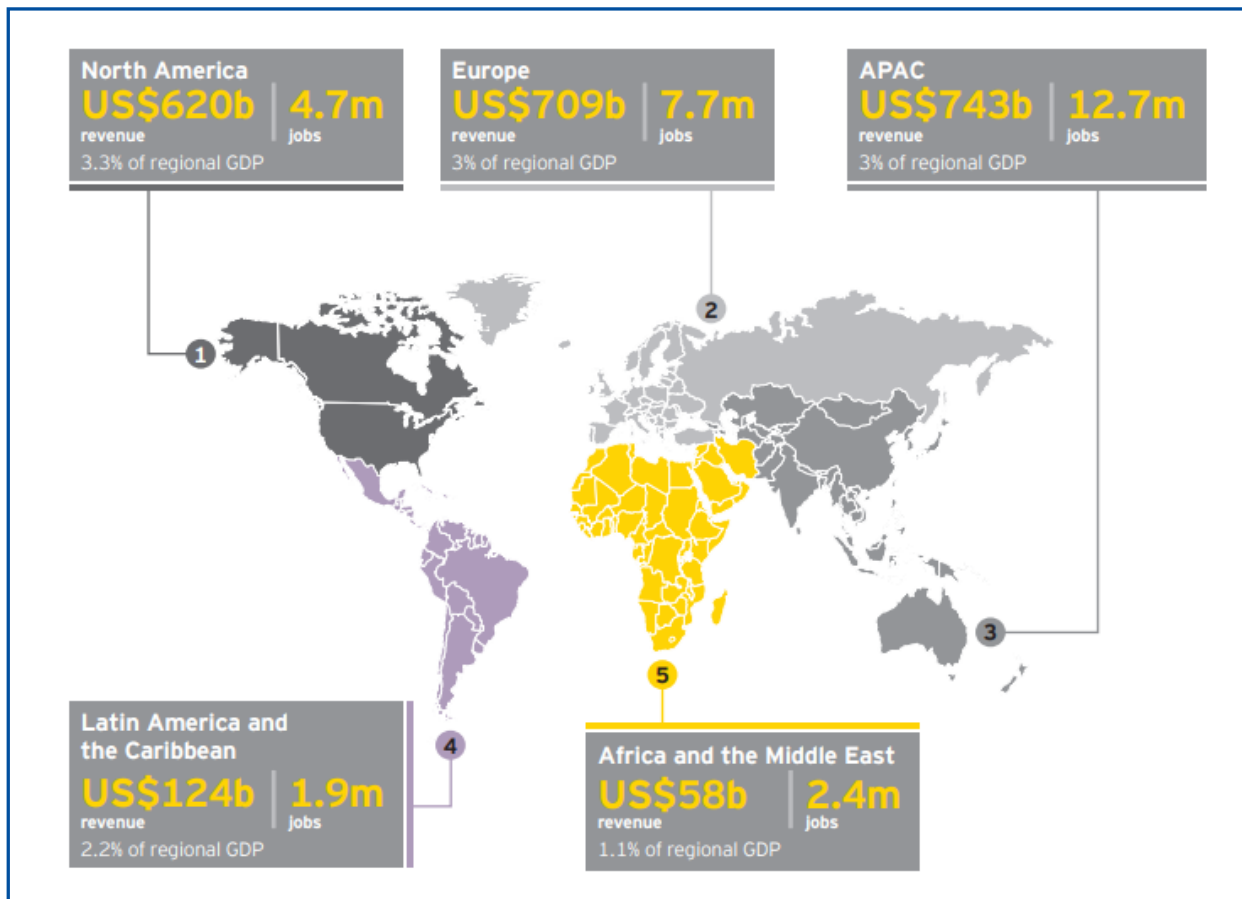
# Global and regional context

## Leading competitors

The latest and most comprehensive source of data on the global economic outputs of the creative industries is from 2013 and found in a report prepared by Ernst & Young.<sup>13</sup> The study found that, globally, the sector accounts for 29.5 million sustained jobs, and \$2,250 billion in revenue or approximately 3% of world GDP.<sup>14</sup> Asia-Pacific is the world's largest creative industries market, generating one-third of total revenues, followed closely by Europe and North America (Figure 4). Latin America,

and Africa and the Middle East, rank 4th and 5th respectively, but the potential and opportunities in these two regions is striking.<sup>15</sup> Visual arts and television are the biggest producers of economic value from the sector, generating more than 39% of trade and supporting 35% of jobs in 2013 (Table 2). Music, movies and the performing arts generate more jobs relative to revenue, indicating they are more labour intensive.

**Figure 4:** Global revenues of creative industries by region



**Note:** \*Rounded figures.

**Source:** Ernst & Young, and UNESCO (2015). Cultural times. The first global map of cultural and creative industries.

13.– Ernst & Young (2015). 'Cultural times: the first global map of cultural and creative industries'.

14.– Ibid.

15.– Ibid.

**Table 2:** Estimated revenues and employment from subsectors within the creative industries (2013)

Cultural and creative industries (CCI) sectors	Revenues (USD millions)	Employment (Number of jobs)
Television	477 000	3 527 000
Visual arts	391 000	6 732 000
Newspapers and magazines	354 000	2 865 000
Advertising	285 000	1 953 000
Architecture	222 000	1 668 000
Books	143 000	3 670 000
Performing arts	127 000	3 538 000
Gaming	99 000	605 000
Movies	77 000	2 484 000
Music	65 000	3 979 000
Radio	46 000	502 000
Total (before double counting)	2 285 000*	31 524 000*
Total (minus double counting)	2 253 000	29 507 000

**Note:** \*Rounded figures.

**Source:** Ernst & Young, and UNESCO (2015). Cultural times. The first global map of cultural and creative industries.

The European Union is a key market player within the creative industries in terms of size, employment and value addition. In 2016, the European Union (EU) sustained more than 6.7 million jobs and 2.45 million enterprises, and obtained €290 billion in total value added within the sector. The sector's GDP is approximately 4%, similar to the hospitality sector, but with a higher number of enterprises than both the information, communications and technology (ICT) and hospitality sectors. Interestingly,

the number of creative enterprises has steadily increased in 2008–16. The Kingdom of the Netherlands is among the top performing countries, with more than 10% growth and with the most creative enterprises, along with the Federal Republic of Germany, the United Kingdom of Great Britain and Northern Ireland, and the French Republic. Similarly, employment rates in the sector have been on the rise in 2008–16, with subsectors such as the visual arts and multimedia on the rise.

## The Creative Industries in Latin America and the Caribbean

In Latin America and the Caribbean (LAC), the creative industries sustained 1.9 million jobs in 2013. Regionally, it generated \$124 billion in revenues, making up 6% the sector's global market in 2013. Methodologies vary from country to country, but it is estimated that the average contribution of creative or cultural industries to the GDP of LAC countries hovers at approximately 2.2%. Developing countries contributed to 45% of international trade of cultural goods in 2014, compared to 25% in 2005.

In countries such as the Argentine Republic, the United Mexican States, the Federative Republic of Brazil, the Republic of Chile and the Republic of Colombia, governments have made efforts to facilitate an ecosystem of innovation for the creative industries. However, data of sector performance in the region suggests there are still vast opportunities for growth. In 2017, barely 1.8% of the world's exports of creative goods originate in LAC countries. Less than one-third of these exports go to other countries in the region, more than 64% are directed to developed economies, and less than 3% go to other

developing markets. This is consistent with the general trend that trade between countries in the region is largely unexplored. Although countries in the region are close geographically and culturally, many remain divided by legal, tariff and non-tariff barriers that hinder the flow of services in the region.

### ENTREPRENEURSHIP IN LATIN AMERICA AND THE CARIBBEAN

A survey of 250 entrepreneurs within the creative economy in Latin America and the Caribbean shed more light on the entrepreneurial composition of the sector in the region. Some of the key findings are:

- There is a strong focus on design. Twenty-three per cent of creative entrepreneurs are dedicated to various types of design. Other strong fields are tourism and heritage (14%), publicity (11%) and visual arts (10%).

- The majority are microenterprises or work alone or in very small teams. The average number of employees does not reach two.
- The majority of entrepreneurs are men (62%) and a minority are women (38%);
- The average age of the creative entrepreneur is 35.
- Most are well educated. From those surveyed, 90% completed a university education.
- Many are not professionally trained in business. Only approximately 14% of entrepreneurs had professional business training, while 23% were self-taught, 9% completed online courses and 30% learned by doing.
- The level of command of the English language is strong. Nearly half of respondents speak fluent English.
- Of those surveyed, 77% self-identify as businesspersons. For others, business is often not their focus, or they lack business knowledge.
- Financing for entrepreneurs is scarce and the majority are self-financed. Nearly half indicated that most of the initial source of investment into their business came from their own funds.
- The majority had intellectual property registered.
- Most of their income derived from other sources, with only 38% from their creative business income.
- Less than half were able to cover their living expenses with their business.
- More than 60% did not know about the creative economy and its impact.

## Characteristics of the labour market in the creative industries

The sector is driven by small businesses. Most creative workers tend to be young, operate their own business or are informal workers. In 2013, in the LAC region, more than 40% were self-employed and 24% were freelancers. Self-employment in the LAC region is higher than the global average of 30%. Moreover, in many countries, the sector tends to favour the participation of women more than in other traditional industries. A 2015 survey by UNESCO among 35 low- and middle-income countries found more than half those countries had more women than men in the sector.

Estimates from the informal creative economy in emerging countries add up to 1.2 million jobs and \$33 billion

in revenues in 2013. These figures are an indicator of the reservoir of jobs and the widely untapped source of income that the sector can be for developing economies. Because marginalized groups are more likely to be engaged in the informal sector, this also shows that the sector employs people from disadvantaged populations, such as women, minority groups and youth. For example, in some countries such as the Republic of Peru, the Republic of Paraguay and the Republic of Honduras, young workers accounted for nearly 20% of sector occupations in 2015. At a global level, the share of youth in low-income countries is larger than advanced economies.

## Economic resilience of the creative industries

The creative industries can increase economic resilience of national economies, because creative trade is less volatile than trade in commodities and manufacturing. This was the case during the recession of 2008 where the sector maintained stable trade performance with an average growth rate of 7% in 2002–15, compared to a decline of 40% in oil exports. Since the start of the COVID-19 pandemic crisis in 2020, over-the-top media consumer demand and services have increased substantially, creating new growth opportunities for the creative industries.

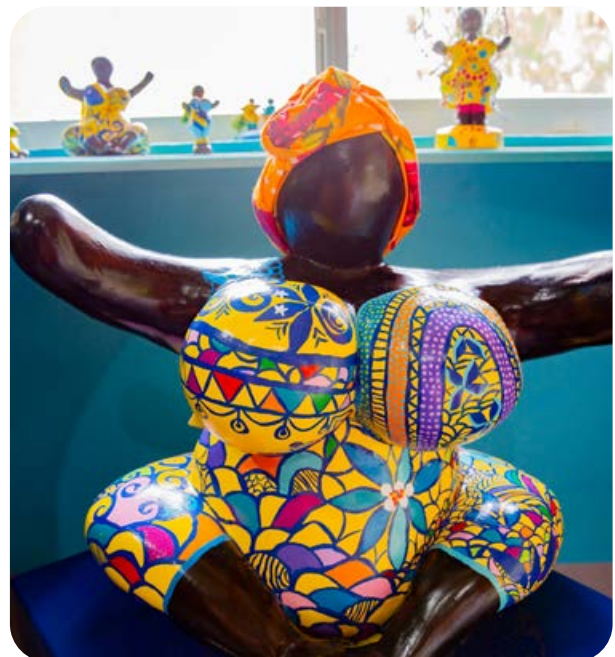


Photo: ©ITC

# Sector overview: Curaçao

The creative industries in Curaçao are a vibrant close-knit community made up mostly of small enterprises and self-employed individuals. The country's cultural diversity and valuable human capital are the sector's bedrock. However, throughout the consultative process, stakeholders have consistently indicated that the creative industries are not formally recognized as an economic sector by government and trade support institutions. Therefore, The Ministry of Economic Development, and public and private stakeholders have strongly supported the inclusion of the creative industries as a priority sector within the NES.

Although there is minimal industry data available to assess the economic impact from business activities in the sector, a business performance audit across the sector has been possible due to the small number of stakeholders involved. The audit revealed a wide range of low productive capacities as root causes preventing the sector from developing. During interviews with firms, many indicate they are aware of their economic potential, but lack access to internal and external resources to grow domestically, let alone internationally. As a result,

most productions are for domestic consumption and the sector lacks a unified strategic approach for industry development.

An ITC diagnosis of trade performance indicates creative productions are mostly catered to the domestic market, with a strong dependency on tourism for indirect exports from international consumers and the hospitality sector for business development. However, direct exports are minimal, confined to niche pockets within the Caribbean region or to diaspora in the Netherlands. Firms operate on a small scale and do not have enough staff to scale up operations. Job creation along the value chain is minimal, although there are many untapped value-addition activities capable of generating new employment opportunities.

Additionally, as part of the consultative process of the NES, a series of surveys to gather more information on the sector were launched in March 2021. The survey revealed information consistent with findings from desk research and interviews done earlier in the process. These survey findings support the overview of the sector below.

## Sector identity, scope and scale of business activity

The sector is not well recognized as an economic sector. As a result, it has very limited power to influence and benefit from government policy. Furthermore, due to the operational capacity of firms and the informality of the sector, exporting is sometimes not perceived as feasible. Weak export performance is primarily attributed to the sector's small-scale productive capacities, leading to very weak economies of scale. At the managerial level, business growth is interrupted by inefficient division of labour between business management, operations, and technical production due to a lack of personnel within the firm. Additionally, few components of the value chains of subsectors are captured by the domestic market. In film, most foreign productions import skills, services and equipment rather than hiring local crew.

The majority of professionals involved in the creative industries only work part-time and as a result, enterprises tend to be small. Based on a survey ran by ITC, the largest firm in the sector has about 20 employees, and

a high number of professionals are working as freelancers. Despite the entrepreneurial ambitions of many, many describe the labour market they are engaged in as part of the 'gig economy' resulting in unstable employment. Stakeholders also felt that creative outputs are sometimes undervalued, resulting in low wages and even low morale with the community. At the financial level, firms report unfavourable access to credit and are therefore less capable of investing resources to support growth, specialization of the workforce, and marketing.

Although export activities are reported on surveys, most international trade activities are on a small scale and an ad hoc basis. Largely, there is a low capacity to develop and implement export-oriented business models and marketing strategies that can enable efficient growth. Without these, the creative community has not been well equipped to leverage its competitive or comparative advantages. Generally, the low labour cost comparative advantage has declined. Although many

services are well priced to compete in the European market, Curaçao's pricing is generally not competitive in other regions. In the case of Europe, clients perceive services offered by professionals in Curaçao as good value for money, mainly because they tend to be of similar quality to European producers, but are offered at lower prices. For clients in North America, the prices in other Latin American countries tend to be lower than that offered by Curaçao's firms, partly due to the lower cost of living in those competing markets. Moreover, multi-language and time zone advantages are not commonly integrated as unique value propositions in marketing strategies.

Operating under a gig economy ecosystem, the sector relies heavily on the spending capacity of international tourism, leaving it increasingly exposed to travel disruptions. Business-to-business development primarily occurs with local hospitality and banking enterprises, mostly by a small cluster of firms in digital design services for marketing, telecommunications and entertainment projects. Market linkages across the industries and economy are not well activated. Each market specialty tends to remain isolated, not yet capable of collaborating with others to improve the quality, volume and value chain fragmentation. Creative outputs generally include graphic design for branding campaigns and video productions for corporate promotion.

## Subsectors

The sector is characterized by its diversity of creative professionals, including graphic designers, art directors, marketing and communication specialists, architects, illustrators, copywriters, photographers, web designers, social media experts, painters, sculptors, new media artists, app designers, game developers, fashion designers, composers and musicians, singers, film makers, interior designers, publishers, stage actors, and more.

Because most creative professionals work independently, informally or in small firms, their respective creative business activities are organized or large enough to be considered a full-fledged subsector. Given the lack of scale, the classification of subsectors for this strategy is based on stakeholder consultations and the identification of clusters of creative entrepreneurs with the strongest potential for export growth.

Three subsectors were identified as part of the consultation process. They are music, video and film, and marketing, communications and web design.

The sector is highly affected by brain drain. Valuable human capital is credited to the island's cultural richness, as well as access to professional training in the Netherlands. Skills acquired abroad are predominantly in technical areas such as audiovisual production, graphic design and music editing. Many opt to build their careers abroad, and it tends to be where they develop their business network. If professionals return to the island, many depend on the business networks they built abroad to subsist, and often return to those countries when opportunities to scale up arise.

The creative industries are an untapped market, with low levels of competition on the island. Despite this, the creative industries in the country are not yet sufficiently appealing as a breeding ground for young professionals or entrepreneurs to build success. The country's multicultural richness supports valuable soft skills, particularly in cross-border communication with North America, Latin America and Europe. These are massive advantages for business development across borders. However, most lack professional skills in business development. Most firms do not have enough personnel available to source different areas of business management. As a result, most firms or entrepreneurs are not able to implement adequate business strategies that can sustain long-term growth.

## MUSIC

Music plays an important role in the country's cultural identity and unique offerings – so much so that there are ongoing discussions for the establishment of a music commissioner that can spearhead the development of the music subsector. Music events and performances are also a staple of the Curaçao tourism experience. Festivals during the internationally recognized carnival season and speciality events such as the North Sea Jazz Festival have attracted many visitors and foreign revenue for years. However, music events and performances capitalize on only a small segment of the music industry's export potential. Additionally, this segment of the industry tends to be dependent on seasonal demand. It competes heavily with other islands offering similar experiences and has been widely impacted by the decline of tourism in the wake of the COVID-19 pandemic.

Due to these limiting factors, this strategy has centred on identifying other segments of the subsector that can drive export growth and diversify the country's music industry offerings beyond events and performances. As a result, the NES stakeholder consultation process found signs of export potential for music production services.

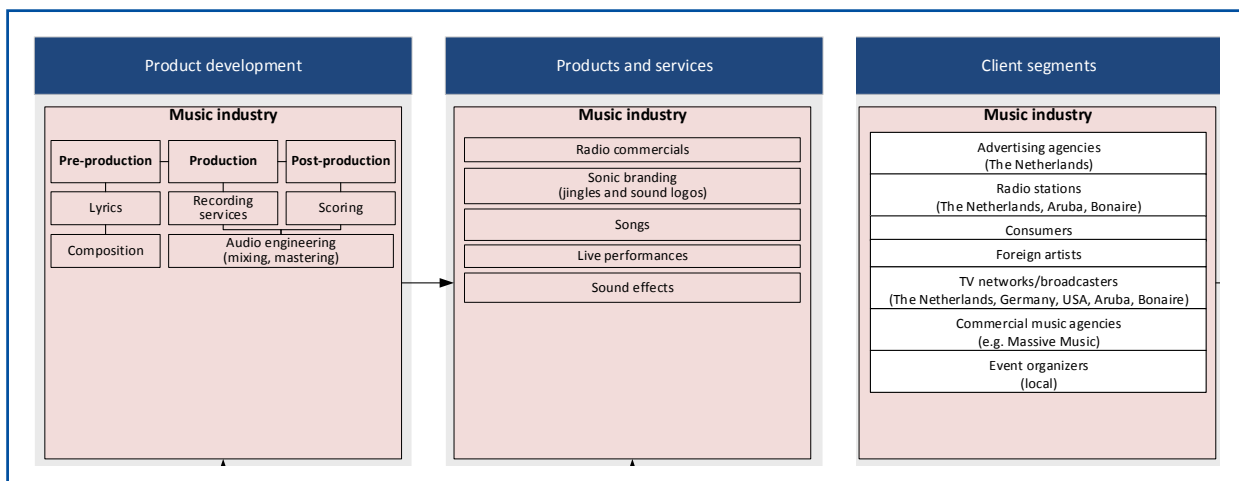
The baseline for growth lies within strong technical skills found in the country and a global market for audio productions with a Latin American (LATAM) flavour. In recent years, music producers from Curaçao have been increasing cross-over collaborations with international producers interested in LATAM sounds mixed with European music styles. Collaboration has been primarily with Germany and the Netherlands, countries where many local producers have built business networks while completing their foreign studies or are able to tap into diaspora communities. There is potential to grow if producers can cast a wider international network.

Music production services include sounds for radio commercials sold to advertisement agencies and radio stations. One type of sound production is sonic branding, which refers to the sounds or songs associated with a brand, product or service. Several Curaçao microenterprises that specialize in producing jingles and tunes sold

to international clients for these services are based in the Netherlands, Europe, the United States of America, and neighbouring countries in South America and the Caribbean.

Despite these clusters of microenterprises exporting services, client demand is sporadic and on an ad hoc basis without clearly defined markets for Curaçao’s firms to offer these services competitively. Access to equipment and a professional recording studio is a barrier to increasing production at scale and quality for international demand. For example, Curaçao producers are currently unable to offer services such as music recording for record labels. Therefore, short-term contract services in sonic branding are more common because they are less dependent on professional equipment and recording studios. Figure 5 shows the value chain components of the music industry.

**Figure 5: Value chain components of the music industry**



**Source:** ITC.

## VIDEO AND FILM

Video production in Curaçao is a budding industry with highly motivated stakeholders. It is an industry looking for an opportunity to elevate its export capacity through the support of the Curaçao Film Commissioner, launched in 2017 under the Ministry of Economic Development. In the same year, the Commissioner established the Curaçao Film Office (CFO) as part of its mandate to promote Curaçao as a film, video and multimedia destination and facilitate business development with foreign markets. In February 2019, CFO, together with MEO, published the Policy Document for the Film Industry in Curaçao. The policy described the film industry as having the potential to make substantive contributions to the country in generating foreign exchange

income and job creation. Unfortunately, the COVID-19 pandemic has negatively impacted the industry’s ability to attract foreign film productions due to travel restrictions and budget cuts across the global film industry.

While there is significant room for growth, CFO has played a key role for the sector as it is one of the few institutions working towards export development for the creative industries. CFO is confined in its operational capacity due to a limited budget provided by MEO and only one staff assigned to develop services and implement policy. Since its launch, the CFO has brought the industry closer together by increasing dialogue between the public and private sectors, as well as delivering meaningful outcomes in export promotion. This includes new activities at international trade events and a website with



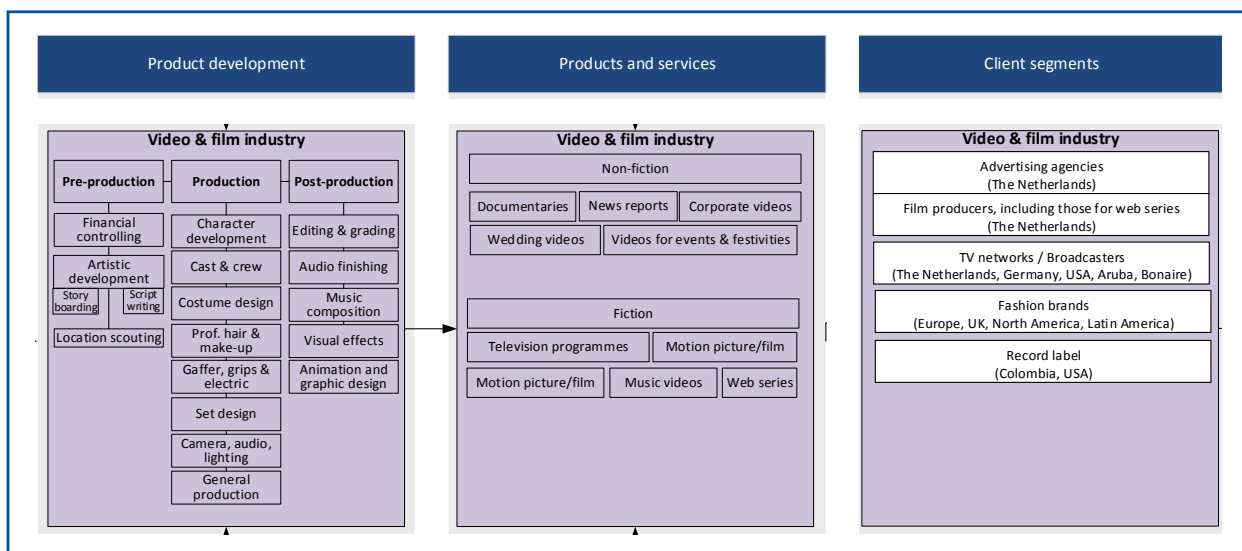
a directory of more than 35 companies, ranging from casting agencies to make-up artists and stunt coordinators. The Commissioner has also worked closely with the Curaçao Tourist Board in building business partnerships. As a result, international productions such as reality television programmes have found their way to the island. Despite the faltering momentum due to the COVID-19 pandemic, the office is working towards a vision for establishing a film academy and gathering more financial resources to operate more independently.

Although the CFO plays an important role in the industry, there is need for a private sector association to align stakeholder interests and collaboration towards export-oriented growth. Most doing business in video production are freelancers and small enterprises, occasionally working together in ad hoc projects involving foreign clients. There is a wide range of expertise across the subsector that can be pooled to increase capacity and competitiveness for the international market. Expanding

the market to key foreign destinations would help to boost exports and foreign exchange earnings.

Most companies offer services for the domestic market and only occasionally to international clients. Services commonly offered to international clients include productions for television commercials, documentaries, corporate branding, news reports, and short films for music promotion. There are also some companies highly specialized in marine videography and wedding shoots for the tourist market. These videographers have the technical capacity to diversify into other types of video productions if they were to build better linkages with others in the sector, such as directors and producers. Since Curaçao firms do not own sufficient professional equipment and facilities to produce motion picture films, most focus on service production contracts with foreign film productions. Service production includes scriptwriting, hair and make-up, and crew and sound. Figure 6 shows the value chain components of the video industry.

**Figure 6:** Value chain components of the video and film industry



Source: ITC.

## MARKETING, COMMUNICATIONS, AND WEB DESIGN

Creative services are an important arm of marketing, communications and web design. An enterprise offering these types of services is often referred to as a creative agency that falls under the umbrella of marketing and advertising. Traditionally, a marketing agency is a business that researches, strategizes, brands and promotes a company’s products or services. Marketing agencies can partner with other companies, such as a specialized creative agency, to develop, manage and execute their

marketing strategy to achieve defined business goals. Together, creative services illuminate a company’s advertising and marketing strategy execution through appealing designs and other forms of imaginative creative solutions that can help businesses increase their brand awareness and profits.

In practice, firms can operate as both marketing and creative agencies. Therefore, creative agencies are sometimes called marketing agencies. There are also different types of marketing and creative agencies, which include specialized services in advertising, digital, design, and

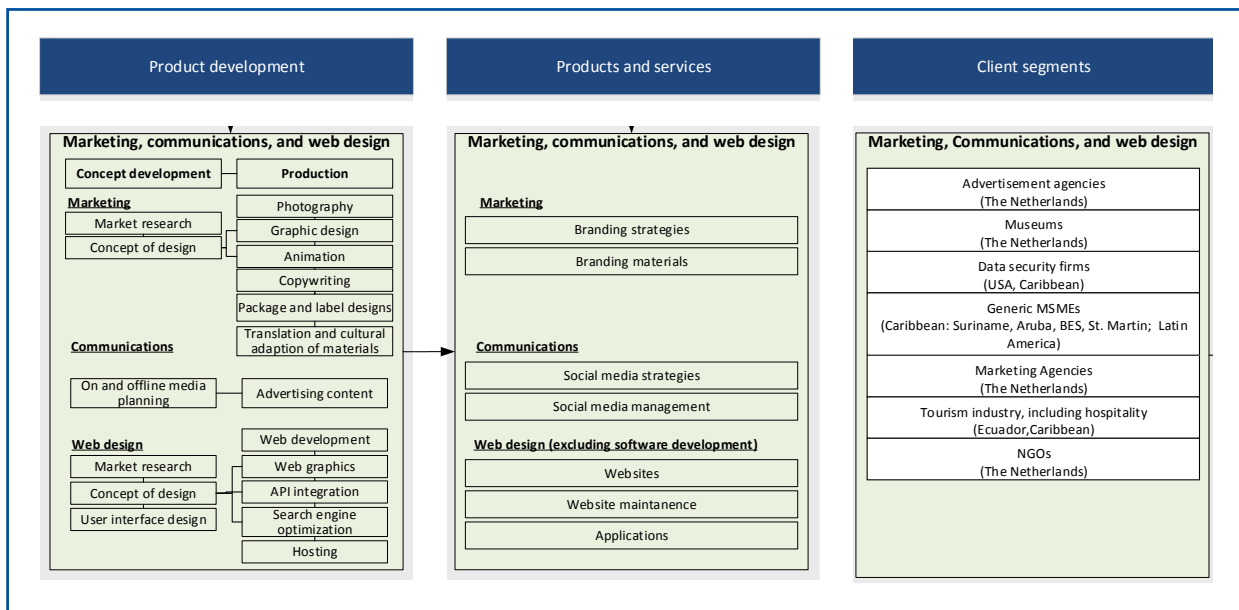
interactive solutions. Based on the type of focus areas, these firms can provide services that include developing a business strategy, the branding design of the business and its products, integrating technological solutions, and advertising. Communication, social media, graphic design, and copywriting are often by-products of marketing services.

In Curaçao, there is a cluster of micro and small enterprises specialized as marketing and creative agencies. This cluster of approximately 30 firms has organized as the Curaçao Marketing Association (CMA). The majority of services offered by these firms are for small-scale marketing, telecommunications, and entertainment projects on the island or with neighbouring countries. The largest marketing firm has approximately 20 employees, which is considered a small enterprise by global standards. However, there is great potential for these firms to play a bigger role in the sector’s export growth. Many of these businesses already cater to larger international marketing agencies located in South America, namely Colombia and the Bolivarian Republic of Venezuela. Other types of clients include tourism organizations on neighbouring islands. However, like other subsectors, the client base is sporadic and confined to small business networks acquired by professionals while living in the Netherlands, personal business networks or through diaspora communities. Additionally, many of the

marketing agencies located in Curaçao are subsidiaries of marketing firms located in the Netherlands. In these cases, the Curaçao branch tends to focus on business development, such as acquiring clients in the Caribbean region. The production of a service, such as the graphic design component of a branding strategy, is delivered by employees or freelancers located in the Netherlands. The Curaçao branch can also provide services in language translation and cultural interpretation of marketing content. While not all Curaçao firms function in this manner, there is a strong tendency to hire foreign workers.

In addition to the challenges in accessing other markets and maintaining a consistent client base, according to some stakeholders, the quality of most outputs has been substandard for some international clients, as most of the production experience is at the level of small-scale projects. Most firms are not offering competitive pricing or sufficient value-added services for international clients, particularly as there are many market rivals in the region. However, the subsectors are well prepared to attract niche segments of the international market that are culturally closer, such as clients from North America and Western Europe. Language, location, and ability to adapt content for multicultural audiences is a competitive advantage firms on the island have over their regional rivals. Figure 7 shows the value chain components of the marketing, communications and web design industry.

**Figure 7: Value chain components of the marketing, communications, and web design industry**



Source: ITC.

# Value chain of Curaçao's creative industries

A value chain provides a detailed overview of where value is added in any given industry. As such, it provides a solid foundation for analysing and developing the sector's competitiveness.

## The current value chain

Figure 8 maps the current value chain for the sector as well as the key trade and investment support institutions for the sector. It comprises the following activities.

**Inputs:** The basic materials and competencies needed to be able to produce a product or a service. Equivalent to raw materials, inputs are comprised of critical resources needed to start producing creative industries products or rendering services, including human resources, equipment and materials, backbone infrastructure, finance and investment, certification, and trade regulations. They represent the enabling environment and support activities for the industry. They largely determine the cost structure of services and are the drivers of business performance.

**Product development:** Core components of a product and activities related to creating a product or service. The product development stage can involve the development of a product vision, as well as research and development. Core components are procured, technologies and subsystems are selected and, if applicable, prototypes are developed and tested. This activity also comprises the actual development of the new products or services and their compilation and packaging to an executable format.

**Product and services:** This stage lays out the final products and services offered for sale to customers. Examples are sound engineering, corporate designs such as logos, user interface designs, propriety software, audio mixing, costume and design for video productions, video shooting and script writing.

**Marketing and distribution:** Encapsulates the process of acquiring clients, selling to them, and distributing the



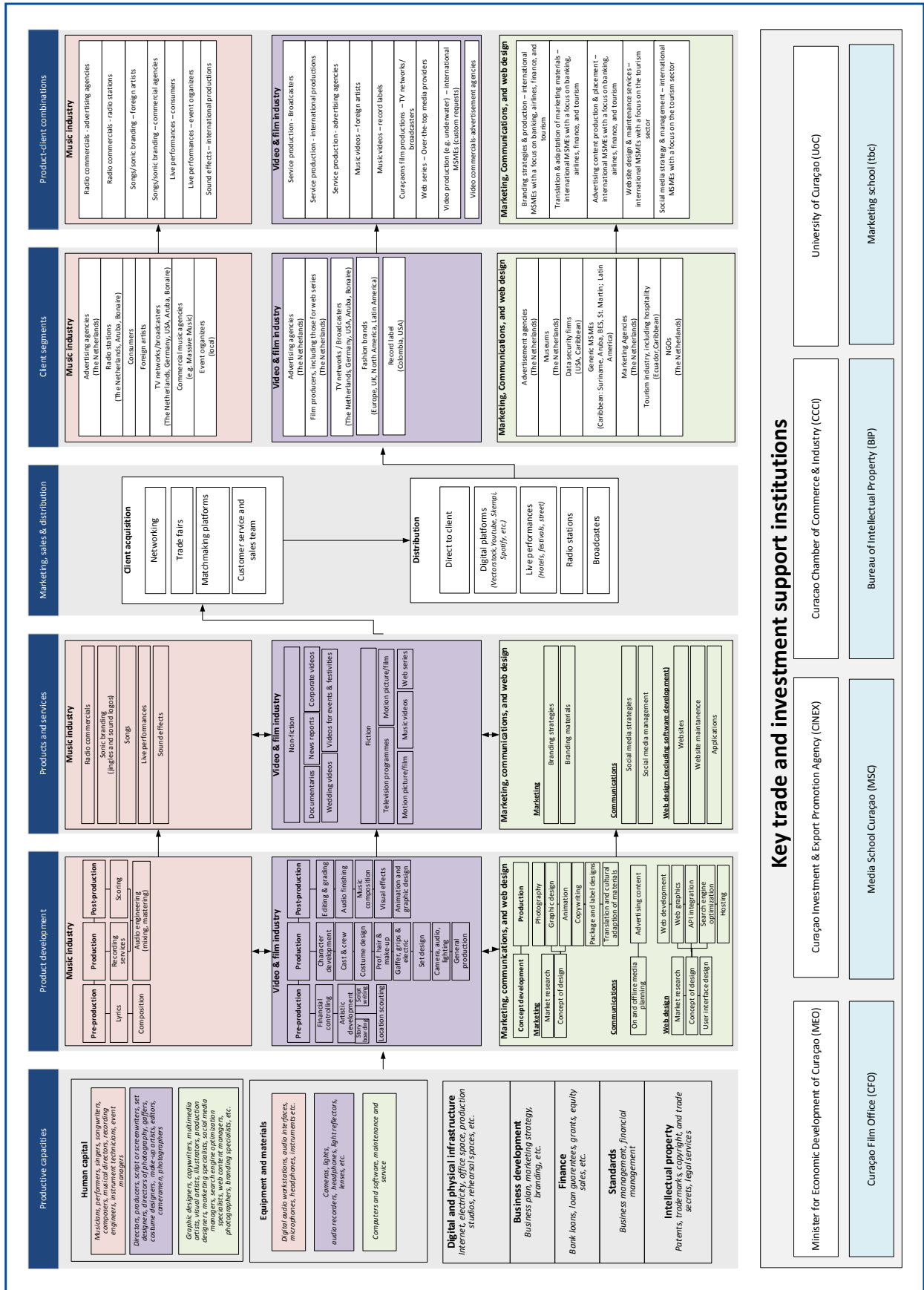
Photo: ©ITC

product or service. This activity involves the launching of the products/services and their transmission to customers through sales and promotion. Offerings are made available on the market so that potential customers are aware of them and are able to purchase them. Products or services are either directly sold to end customers through physical or digital means, or indirectly through intermediaries such as retailers and brokers.

**Client segments:** This describes to whom the product is being sold both in terms of the type of client and where they are based. They are the final users of the services and products offered by creative industries companies.

**Key trade support institutions:** Trade support institutions are those trade and investment support institutions that have an interest in, or a bearing on, the development and competitiveness of the sector. They comprise ministries, government agencies and associations responsible for influencing and implementing policies at the national level or that provide a range of technical services for creative industries firms across the value chain.

Figure 8: Current value chain map of the creative industries



Source: ITC.

# Competitiveness constraints

## Overview of constraints

This chapter presents the main constraints affecting the supply-side, business environment, market entry and development aspects of export competitiveness. Below is a summary of the main competitiveness constraints facing the creative industries in Curaçao.

## Supply-side issues

- Lack of affordable and reliable internet;
- Import regulations and high cost of materials;
- Shortage of high-quality human capital;
- Lack of access to finance;
- Insufficient business management skills.

## Business environment issues

- Lack of national recognition of the sector;
- Lack of sector coordination;
- Lack of institutional capacity;
- Barriers to e-commerce;
- Weak links with intellectual property protection.

## Market entry issues

- Challenges acquiring international clients;
- Lack of a client-oriented sector identity;
- Insufficient representation at international trade fairs.

## Development issues

- Employment instability.

## Supply-side issues

### LACK OF AFFORDABLE AND RELIABLE INTERNET

The cost of acquiring a high-quality internet connection is high. This limits the types of production or collaboration that can be done within the sector, as many digital files are several gigabytes in size (or bigger).

Severity: ●●●●●

### IMPORT REGULATIONS AND HIGH COST OF MATERIALS

Due to the lack of local suppliers, specialized equipment and materials for production are regularly imported and are subject to high tariffs. There is also an absence of local service providers such as maintenance professionals for hardware and raw materials. A lack of professional equipment prevents enterprises from delivering at

high-quality standards and at the volumes required for market diversification.

The sector is disadvantaged by not being able to offer a full range of high-quality services due to the lack of supplies or the high cost of production. A high dependency on imported goods and services along the value chain minimizes the economic impact and spillover effects of the sector into the local economy. Long processing times and customs procedures affect the ease, cost and efficiency of export transactions. Reducing the cost of importing supplies can reduce the business cost of bringing foreign productions to the island. For example, the Curaçao Film Office has been able to establish agreements for filming equipment and materials for visiting foreign productions, which in turn hire the production services of local suppliers.

Severity: ●●●●○

## SHORTAGE OF HIGH-QUALITY HUMAN CAPITAL

The sector is heavily reliant on foreign education to acquire professional skills, leaving it vulnerable to the effects of brain drain. Breaking the cycle is challenging, since there are not enough quality training programmes for developing creative industry professions directly on the island. Although the country's small population is a contributing factor, the principal human resources challenge in this context is the low level of experienced and educated professionals available to work along the value chains of production. This supply problem is mostly due to brain drain and overall attractiveness of the sector to new entrants. As a result, enterprises and start-ups regularly fail to grow and stay in business. There are not enough professionals with the education and experience available to support firms with the productive capacities needed to manage big projects or deliver at the volume and quality standards required to compete internationally.

Severity: ●●●●◎

## LACK OF ACCESS TO FINANCE

The small sizes of most businesses combined with a 'gig economy' business model leads to negative perceptions of the sector in the assessments of potential financiers. As a result, many people lack access to financial instruments, which in turn hinders access to resources needed for business growth. There is little communication between the sector and financiers that might help bridge the gap between the perceived risks and the actual risks of investing in the sector.

Severity: ●●●●◎

## INSUFFICIENT COOPERATION AND BUSINESS MANAGEMENT SKILLS

Low levels of professional training in businesses have an adverse effect on the business acumen and skills needed to manage commercial growth. In general, the business culture is not very conducive to collaboration. Most often, cooperative structures degrade quickly under power struggles. Nepotism sometimes compromises the product's quality. Local businesses are accustomed to informal transactions and unreliable payment habits. All of these aspects of the business mentality can affect the quality and professionalism of services, creating challenges when collaborating with and delivering outputs to international clients.

Severity: ●●●●◎

## Business environment issues

### LACK OF NATIONAL RECOGNITION OF THE SECTOR

There is no national definition or national classification system for the sector. At the policy level, the creative industries are treated inconsistently and are generally not viewed as a sector that contributes or can contribute to Curaçao's economy. There are few laws, policies, rules and regulations that cover the development of the creative industries and its subsectors. While there is a film industry policy, it is not a framework for the entire sector. Some aspects of the sector are also framed by policies on tourism and culture, but are not specific to the sector's development as an export sector.

Severity: ●●●●●

### LACK OF SECTOR COORDINATION

The lack of a national definition for the sector creates a barrier that prevents the various subsector stakeholders in creative industries from working together. This reduces the sector's export potential and has a direct influence on existing perceptions of its economic value and risk status by lenders. Specific challenges faced by the sector and opportunities for growth have not been addressed and the sector, therefore, remains on the outskirts of economic development priorities.

There is no sector-wide association with the capacity to mobilize stakeholders to organize as an independent sector so that they can participate in activities such as public-private discourse and international trade fairs. There is no interlocutor with the government that allows for more cooperation and business support specific to the sector's needs. As a result, the creative industries have remained nascent and uncoordinated, with minimal institutional support geared towards sector development or advocacy on market opportunities. Without an association or an equivalent organization, the sector has also not been able to engage with other industry associations either locally or internationally. Although the CFO has made good efforts on international outreach for the film industry, the film industry is just one of the subsectors making up the creative industries.

Severity: ●●●●●

### LACK OF INSTITUTIONAL CAPACITY

Most of the existing institutions focus on fostering talent, but are not equipped as business support organizations with sufficient knowledge of the ins and outs of

the sector. Most are not able to provide tailored support to enable growth and address sector-specific challenges. Some institutions have the potential to influence sector development, but lack tailored services such as business planning and marketing strategies for the creative industries. There is also a shortage of market knowledge on the sector, specifically on opportunities for export growth. Firms and individuals do not have sufficient market intelligence to make well-informed business decisions to become competitive in international markets.

Severity: ●●●●●

## BARRIERS TO E-COMMERCE

Stakeholders in the sector cited challenges doing business with foreign clients related to the difficulty of accepting foreign payments. Widely used payments platforms such as PayPal are not available in Curaçao and, although alternative options exist, awareness and support for these options are limited. The inability to make online payments is harmful, as it ultimately prevents firms and individuals from making low-cost international payments. Overall, this renders the creative industries and island unprepared to increase exports through digital trade.

Severity: ●●●●●

## WEAK LINKS WITH INTELLECTUAL PROPERTY PROTECTION

The sector has not been targeted by specific and dedicated policies on intellectual property. The Bureau for Intellectual Property of Curaçao (BIP) represents the intellectual property interests of creators, innovators and the public. There is a need to increase the regularity and awareness raising of tailored support and services to the creative industries. Poor sector coordination also plays a role in the degree of support directed at the sector, because there is no focal point to facilitate coordinated efforts.

Severity: ●●●●○

## Market entry issues

### CHALLENGES ACQUIRING INTERNATIONAL CLIENTS

Without an organized group of stakeholders representing the sector through an institution like an association, the

sector has not been able to engage with foreign associations and institutions that can help build international presence and networks. Client acquisition is mainly done through an informal referral system.

Severity: ●●●●●

### LACK OF A CLIENT-ORIENTED SECTOR IDENTITY

Destination branding and promotion efforts are mainly conducted in the context of tourism promotion. There is no common strategy or entity for building and reinforcing the country's profile, national brand and image on an international level, which might boost exports and attract investment for the creative industries. The brand and value proposition of the creative industries in Curaçao have not been developed. Sector associations and firms do not have a marketing portfolio of products and services to use in promotional events.

Severity: ●●●●○

### INSUFFICIENT REPRESENTATION AT INTERNATIONAL TRADE FAIRS

Business support organizations, the private sector and public sector entities do not participate in industry trade fairs in a coordinated manner. Missed opportunities for sector promotion at prominent industry events prevents visibility of the sector on the global stage and limits opportunities for access to new business networks.

Severity: ●●●●○

## Development issues

### EMPLOYMENT INSTABILITY

Employment in the creative industries is unstable and does not always provide a sustainable source of income for individuals in the sector. Young people interested in the field are particularly vulnerable, as a profession in the sector is often perceived as a hobby without a prospect to gain productive employment. Many young people opt to migrate in order to seek professional training and obtain gainful employment abroad, contributing to the cycle of brain drain and a shortage of qualified professionals in the country.

Severity: ●●●●○

# The way forward

## Overview of the sector's future orientation

Fundamental considerations have been taken into account when elaborating a way forward for the creative industries sector. In summary:

- Graduating the sector from its nascent state into a well-defined and organized sector can improve its performance and attractiveness domestically and internationally.
- Given that freelancers and small businesses are the core of its production capacity, the sector's future depends on its ability to establish a collective approach to export growth.
- Higher-quality outputs and business development are needed to increase the sector's value proposition and comparative advantages against rivals producing at lower costs.
- There are talented and experienced individuals offering specialized services in a unique creative style. However, new skills, digital trade, materials and funding are needed for scalable growth.
- A well-organized sector with a range of bundled services for target markets and active engagement in promotional activities can boost demand from international clients.
- Public sector support and structured public-private dialogue is vital.
- Creative services in branding and marketing productions can support the promotion of other sectors and draw in more business linkages.

The creative industries can become an independent sector contributing to Curaçao's economy. Although currently mostly restricted to the domestic market, many businesses already offer their services to international clients. This budding success is something to build on, and digital trade is the bridge to increase foreign exchange earnings.

Underlying problems for export growth include the uncoordinated approach to sector development and barriers to digital trade. This sector export strategy addresses the key competitiveness constraints facing the sector and has a strong focus on the improvements within the private sector's reach. For example, mentoring young professionals can help attract new talent and jobs, and



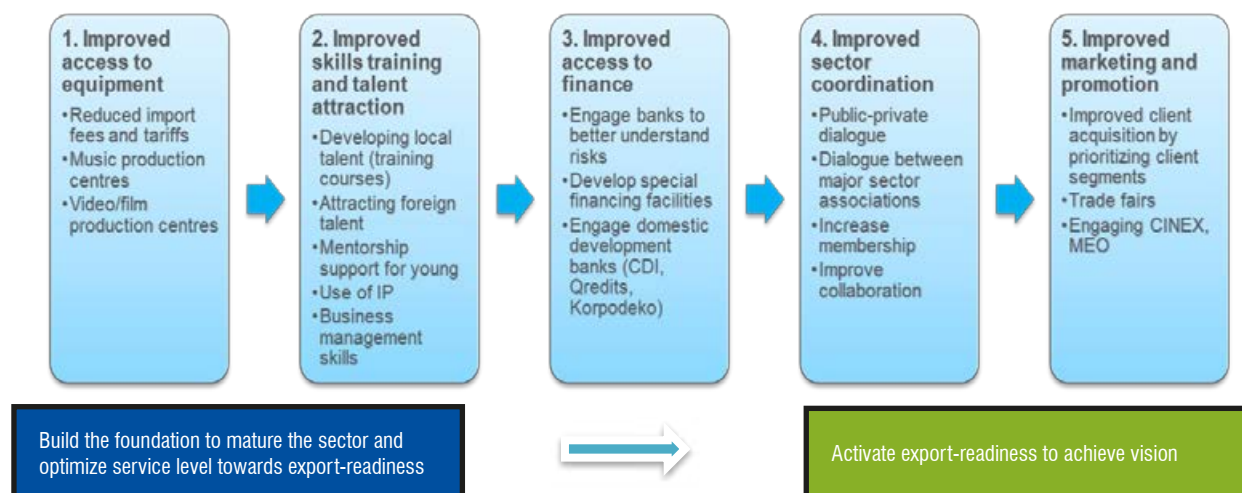
Photo: ©ITC

establishing a sector brand and marketing strategy can also attract more clients. The resolution of some of the competitiveness constraints affecting the sector, such as the lack of reliable access to the internet and online banking for e-commerce, are also addressed in the Master Strategy (a companion strategy within the NES framework).

This strategy's design process has afforded one of the first opportunities for the sector to organize under common interests. Through the NES consultative process, stakeholders demonstrated a strong willingness to press ahead.

The following development pipeline and strategic framework focuses on building the foundation to mature the sector and optimize services for export readiness to achieve this vision. Figure 9 demonstrates the stream of improvements needed for export development of Curaçao's creative industries. The framework to make these improvements operational is outlined in the strategic and operational section. Subsequent activities for implementation are outlined in the plan of action.



**Figure 9:** Creative industries development pipeline

**Improved access to equipment:** The first step is improved access to the equipment and resources required to sustain the local supply chain's vitality. Currently, the quality, volume and diversity of production suffers from a lack of specialized equipment and professional working spaces. Tariffs and import fees add another layer of cost to already expensive specialist equipment. Thus, limited supply and high costs pose a barrier to many domestic businesses, which capture only a few components of the supply chain. For example, commercial printing of branding material is outsourced to international providers. A community hub or co-producing space can promote collaboration, innovation and social integration among creative workers while achieving economies of scale and scope. These community spaces can provide not only a workspace, but also access to a variety of services and resources, including mentorship, training, event spaces, hardware, software and specialist equipment. These initiatives can also support young people's exposure to creative activities and training opportunities. Investment in and access to production facilities and equipment can increase value addition and production capacity, and foster spillover effects.

**Improved skills training and talent attraction:** The second step in the pipeline involves nurturing human capital by improving skills training and talent mobility. The sector's nascent state of development means that it is overlooked as a viable career path, which has made it even more vulnerable to the effects of brain drain. However, as a young sector, it has the potential to position itself as a breeding ground for entrepreneurs and foreign talent. Mentoring and counselling young people can also equip them to become active contributors to the sector. Training opportunities in business development and management are lacking for creative workers. The provision of such courses can help to translate their creative talent into commercially viable endeavours. Peer-to-peer knowledge sharing and training on global standards can

also help overcome hurdles related to quality and professionalism. Securing a strong local supply chain in resources and human capital sets the scene for the third pillar.

**Improved access to finance:** The third step prepares the sector for business expansion by improving access to finance. Funding remains one of the most pressing challenges for creative industries. It is often faced with high barriers when applying to commercial lenders, as it is generally deemed as a high-risk investment sector. Raising awareness for lenders to better understand the risks and identify investment opportunities is a promising means of breaking the cycle. Developing special financing activities and even taking a cooperative approach to financing are also possible solutions. A collaborative movement to achieve this strategy's objectives can also leverage support from domestic development banks.

**Improved sector coordination:** The fourth step advocates for improved sector coordination and supports the development of creative industries as an independent sector. This stream emphasizes the need to create mechanisms for dialogue between the sector, public institutions and other major sector associations. It recognizes that, as a nascent sector, stakeholders are often working independently, but without a common vision and orientation for export growth. Currently, there is no umbrella association in the private sector that represents the interests of professionals working in diverse areas across the creative industries. Improving collaboration can be a way to facilitate the pooling of scarce resources such as equipment, business networks and specialist knowledge. Increasing stakeholder membership in private sector associations will enable better representation of their interests and greater access to and acquisition of commercial opportunities. This step prepares the sector to tackle market entry issues and acts as a vehicle into the final step.



Photo: ©Curaçao Tourist Board,

**Improved marketing and promotion:** The fifth step prepares the sector to increase acquisition of international clients by improving marketing and promotion, guided by a new component on market orientation of the value chain that matches products with target client profiles. This matching is captured in the product-client

combination of the sector's future value chain. It also encourages participation in trade promotion activities such as trade fairs and the establishment of a working relationship with CINEX and MEO for technical assistance on trade development and promotion.

## Future value chain map for the creative industries

The future value chain presents the selection of products and services to prioritize for export growth, along with the target market for each product and service. The future value chain is an outcome of a series of consultations held to evaluate the export potential of existing products and services using the NES development criteria. The criteria include a strong demand in target markets, high-value addition potential, job creation potential and intersectoral linkages.

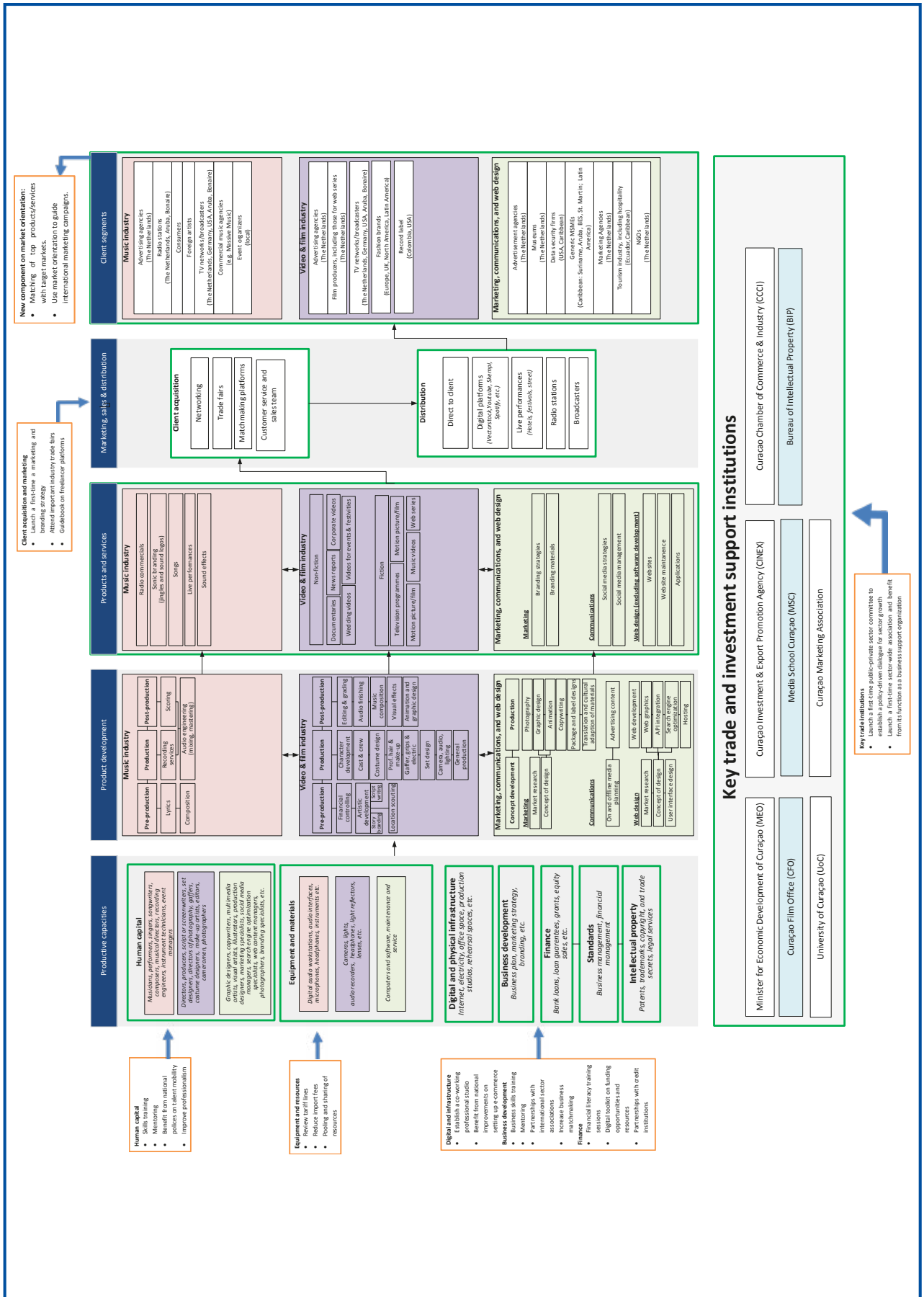
As a result, the creative industries' future value chain map includes the product–client combination column, broken down by subsector. The product–client combination includes a new component on market orientation that matches products with target client profiles. These product–client matchings are based on stakeholder consultations set around identifying the products with the most potential to meet the quality, value proposition and

overall demand of target clients. Target clients were selected based on existing demand and/or potential new markets segments, but with the ambition to continue to increase the volume of clients.

Secondly, the future value chain presents upgrades to product development activities aimed at increasing value addition, as well as market development and penetration activities set on increasing the volume of international clients and sales.

Upgrades to the sector's product and market development activities complement the strategic and operational objectives, which provide more specific improvements to productive capacities. All areas of improvements in the value chain are included in the plan of action. Figure 10 provides an overview of the value chain upgrades included in the plan of action.

Figure 10: Value chain upgrades for the creative industries sector



## The strategic framework

The strategic framework is composed of three elements: (i) vision; (ii) strategic objectives and operational objectives; and (iii) plan of action. Together, these elements define the strategy’s way forward objectives, and how those objectives will be met.

## VISION

This vision statement was agreed on by all stakeholders that participated in the consultations in Curaçao.

The vision statement serves as a rallying call to unite and motivate all stakeholders around a shared vision for the sector’s future. Following consideration of the competitiveness constraints and market opportunities and a series of group discussions, stakeholders involved in developing the NES for the creative industries have articulated the following vision for the sector:

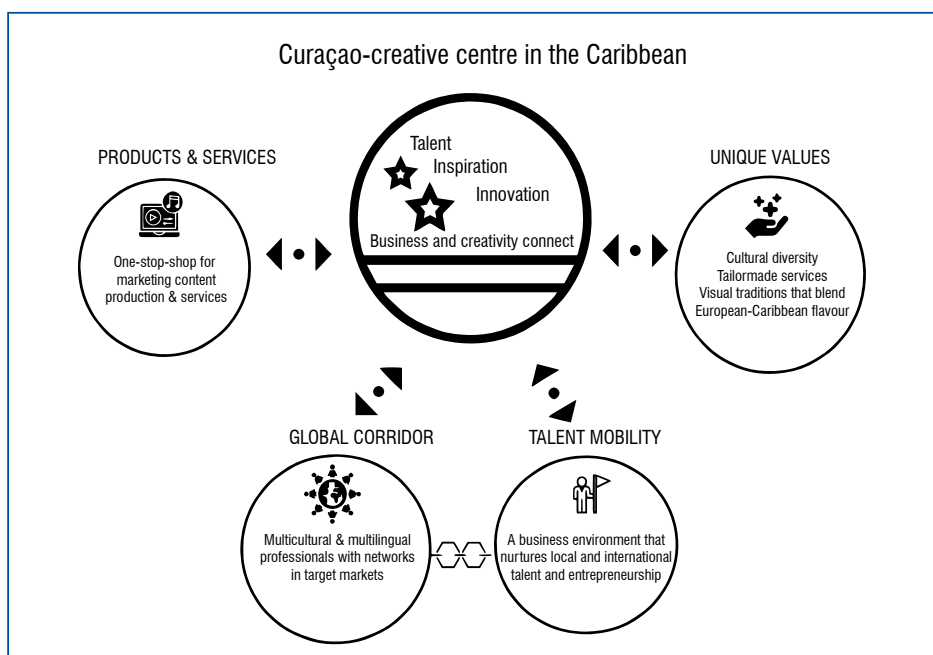
### “ Curaçao – creative centre in the Caribbean ”

The vision acts also as a signal to both foreign and domestic audiences that the creative industries and the country as a whole are looking to take a major leap in nurturing and exporting creative talent. The creative centre and key principles supporting the vision are outlined below.

Figure 11 provides a visual representation of the vision.

- **Description of the creative centre:** Curaçao becomes a place where business and creativity connect.
- **Products and services:** A one-stop shop for the production of marketing content and services, based on the value chain linkages and full-service packages between the priority subsectors.
- **Unique values:** Fosters the island’s competitive advantages set around its cultural diversity. The cultural elements influence the production of visual designs that blend into a European–Caribbean flavour. Value addition is also generated through language and cultural interpretation of creative content. The small island ambiance translates into a tailor-made approach to delivering services.
- **Global corridor:** Multicultural and multilingual professionals with networks in target markets are the gateway for tapping into international market segments.
- **Talent mobility:** The business environment nurtures local and international talent and entrepreneurship. Networks built in foreign markets helps attract high-skilled workers to Curaçao.

Figure 11: Vision of the creative industries



Source: ITC.

## STRATEGIC AND OPERATIONAL OBJECTIVES

The vision defined by the industry will be transformed into concrete results through the achievement of three strategic objectives. These objectives begin the process of focusing and prioritizing the vision. They respond to the constraints and major themes identified in the analytical section. More concretely, the strategic objectives should answer the question: *what do we want to achieve?*

Strategic objectives are subdivided into operational objectives. Operational objectives are more specific, have a smaller scope, and answer the question: *how do we achieve the strategic objectives?* Finally, the operational objectives are also broken down into activities called a plan of action. The plan of action will respond to the vision by addressing the constraints and exploiting opportunities in a comprehensive manner. To this end, efforts will be deployed along the following strategic and operational objectives (Figure 12).

**Figure 12:** Strategic and operational objectives



**Source:** ITC, based on stakeholder consultations.

### Strategic Objective 1: Establish a favourable business environment for sector development

Strategic Objective 1 is primarily directed at resolving constraints in the business environment and supply side. It emphasizes the stream of improvements needed to create an environment that is conducive for growth and for the stronger productive capacities that can sustain business development. Based on this, the strategic objective is split into the three operational objectives:

1.1. This operational objective deals with increasing the sector's prominence on policymaking by aligning views at country level to adopt a national definition of the sector and a commercial code classification system for creative outputs. It seeks to legitimize

the sector by formalizing its scope, relevance within policymaking and setting a system for determining its economic value. From this, it formulates a data collection system that can adequately evaluate sector performance on the island. Performance studies can measure foreign exchange earnings, job creation and other trade findings that can be used to inform policy, business plans and marketing strategies.

1.2. This operational objective draws in closer to resolve supply-side issues by adjusting import regulations and establishing production centres that can improve access to industry equipment. Given the existing small-scale conditions in which services and goods are produced, it aims to trigger stronger productive capacities that can enable an increase in quality, volume and product diversification.



Photo: ITC

Improving customs procedures can also effect positive changes in the availability of equipment, as well as smooth the procedures of foreign productions.

- 1.3. Establish financing schemes tailored to the sector's needs by improving access to capital. Industry-tailored schemes factor in small business constraints, a shortage of business development skills and lenders' risk aversion due to information gaps on its economic value and potential.

### Strategic Objective 2: Improve the role and capacity of private sector associations

Strategic Objective 2 lays the foundation for institutional strengthening that can empower the private sector to become more organized, export oriented and capable of retaining value in Curaçao. It targets forming strategic alliances. Tighter partnerships can also facilitate communication with other sector associations and industries, both within the country and abroad. As a young sector, its stakeholders must effectively work together to compete internationally. Based on this, the strategic objective is split into two operational objectives:

- 2.1. This operational objective aims to strengthen dialogue with the public sector to create clear mechanisms through which industry needs are communicated. This operational objective opens a seat at the table for industry to present the sector's interests in public discourse. Through this strategy, the sector can have an informed dialogue on its interests and constraints. Under a common strategic direction, it can advocate, engage and monitor solutions affecting its performance, such as cross-cutting issues addressed through the National Export Council.
- 2.2. Strengthen existing sector associations to enhance local collaboration and coordination and expand international business networks. This objective

confronts the need for a sector-wide association or associations with the capacity to mobilize stakeholders to organize as an independent sector that can participate in activities such as public-private discourse and international trade fairs.

### Strategic Objective 3: Support skills development and pursue market development opportunities

Strategic Objective 3 observes the need to overcome skills shortages, nurture human capital and raise the attractiveness and level of professionalism before tackling market entry constraints. Increased skills trainings are the baseline for transformative changes in business development. It builds on the momentum of an organized sector offering speciality bundles of selected products and services for target markets. It is also influenced by marketing statements set forth by stakeholders during consultations that position Curaçao as centre to activate entrepreneurship and realize creative potentials. This strategic objective is achievable through two operational objectives:

- 3.1. Increase skills trainings and knowledge sharing to promote youth engagement and quality standards. This objective provides solutions to improve the quality of skills and professionals in the sector, as well as how they are perceived both locally and internationally. Youth engagement is designed to address development issues related to unsustainable jobs and planting the seed for future growth.
- 3.2. Promote priority product-client combinations by strengthening their value chains and pursuing export promotion activities. This objective counts on the development of a sector brand and marketing strategy for the creative industries that can be used for trade promotion in various channels, including trade fairs and CINEX programmes.

# Implementation framework

Implementation of the strategy is essential. The NES was developed as a comprehensive framework for Curaçao's export development. The benefits deriving from this strategy will depend entirely on the ability of Curaçao's government, institutions, and enterprises to implement the strategy's prioritized activities defined in the plan of action. Therefore, only with a strong and credible commitment, and coordinated and synchronized interventions from the top of government down, can export development drive positive change in the country.

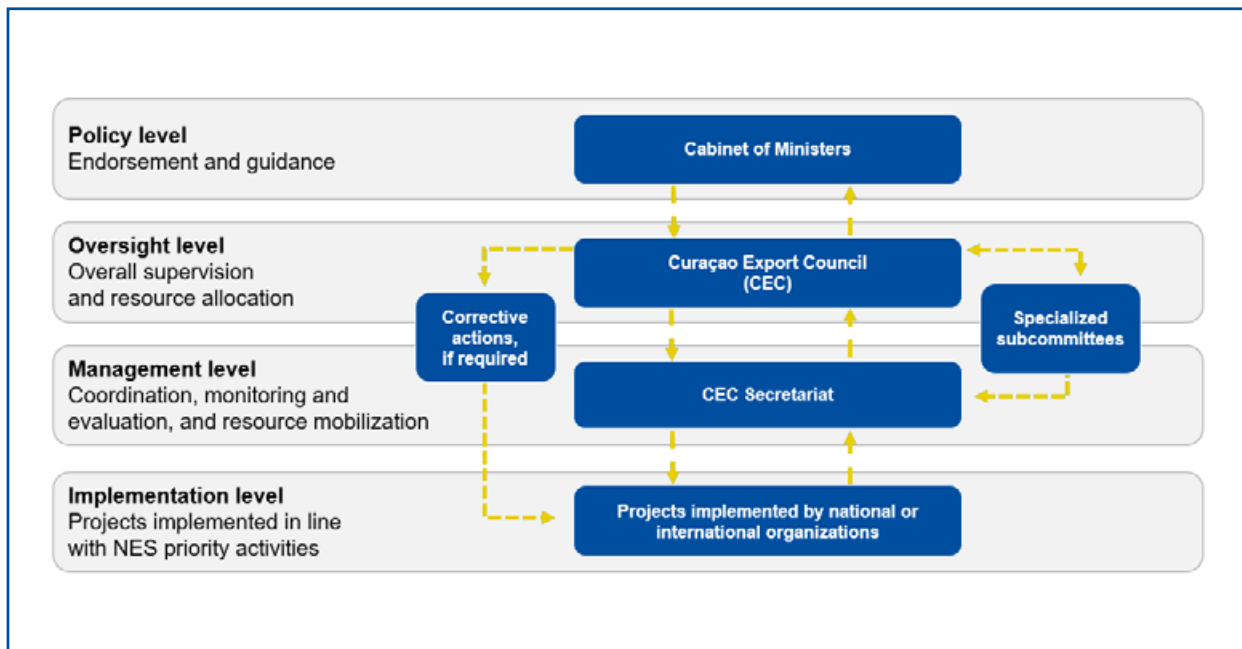
To achieve the vision and objectives laid out in the NES, it is essential that Curaçao establishes an adequate governance mechanism to coordinate NES implementation. This should include thoughtful use of limited resources, clearly assigned responsibilities for key implementing agencies, and transparency on the progress of

implementation from both public institutions and private sector organizations. Therefore, the key essential elements for strategic export development include:

- Planning and coordinated support of key implementing agencies, especially from national planning and budget departments;
- Organizing public–private dialogues on emerging challenges and opportunities for sectoral growth;
- Engaging the private sector to support priority interventions;
- Tracking and reporting on implementation progress.

Figure 13 is a visual representation of the governance structure for the implementation management of the NES.

**Figure 13:** The governance structure for implementation



**Source:** ITC.

## Curaçao Export Council and Secretariat

The Curaçao Export Council (CEC) is an independent council tasked with supporting the implementation of the NES. It provides the leadership and guidance necessary to implement the strategy. The Curaçao Export Council acts in an advisory capacity to the Cabinet of Ministers on matters relating to trade and competitiveness. Legislation establishing the CEC was passed in June 2020, and the Council was launched in March 2021. The CEC has a number of critical roles, including:

- Coordinating implementation of the NES by the government, private sector organizations or other implementing partners;
- Identifying and recommending allocation of required resources;
- Recommending to the Cabinet of Ministers policies that support the implementation of the NES;
- Monitoring and measuring implementation to ensure that targets are being achieved, informing decision makers regarding successes and challenges, and taking corrective action where necessary; and
- Revising and updating the NES so that it continues to respond to the needs and long-term interests of the business community.

For effective implementation, it is crucial that the CEC secures broad and extensive political support. Such support incentivizes collaboration and ensures that implementation continues despite potential changes of government. The CEC has legal backbone through legislation, which ensures its stability, independence and autonomy. Furthermore, the CEC has an official mandate to coordinate, monitor and mobilize resources across governmental institutions and agencies and private sector institutions.

The CEC is composed of an equal number of public and private sector/civil society representatives. In effect, it brings together all decision makers who have a bearing on international trade and competitiveness. It is co-chaired by the Minister of Economic Development and a rotating elected representative of the private sector, who jointly report to the Cabinet of Ministers twice a year. It meets on a frequent and regular basis, at least quarterly (but it is recommended to meet monthly until it starts running smoothly). The CEC can set up ad hoc task forces or specialized subcommittees to assist it in its work.

To support the work of the Curaçao Export Council, a secretariat has been established within MEO. It is strongly recommended that staff assigned to the secretariat work on implementation management on a full-time basis. The success of the NES will depend heavily on the coordination and communication emanating from the secretariat. The core responsibilities of the CEC secretariat are to:

- Prepare the CEC's meetings and agenda, as well as relevant supporting materials to allow effective debate and decision-making;
- Follow up on CEC resolutions and develop work plans for their achievement;
- Prepare proposals, including budgets and plans of action, for the implementation of NES activities; and
- Collect information from implementing agencies, track the progress of the strategy implementation, and prepare regular reports for review by the CEC.

## Private sector support and participation

The NES is ultimately designed to support the growth and success of the private sector. The private sector should benefit from implementation through, for example, improved productive capacities, reduced costs of doing business and facilitated administrative procedures. Therefore, it is essential that the private sector support and advocate for the implementation of this strategy.

The establishment of a Curaçao creative industries sector association (CISA) is central to the success of this strategy. The government and the private sector should work closely together to ensure such an association is created and that it represents as many creative industry professionals as possible. Such an association has

been given a leading role in many of the activities in the plan of action, and thus a large part of this strategy is dependent on the creation of a CISA.

During consultations, the private sector clearly expressed its willingness to contribute to implementation, directly or in partnership with public institutions. These commitments must be translated into tangible action. The private sector's practical knowledge of business operations is essential to ensuring that the strategy's activities are effectively targeted and implemented.



## Sensitization of implementing institutions to build ownership

The key implementing institutions detailed in the PoA need to be informed of the strategy's content and the implications for their own programming. This sensitization is essential to building further ownership for the strategy. Moreover, a thorough programming approach will permit better resource allocation within the responsible agencies. This allocation can be formalized by integrating the strategy's activity into the institution's programme planning. Additionally, the funds should be allocated from the national budget to support the activities assigned to various responsible government agencies, which range from capacity building to regulatory reform. Successful NES implementation will rely on an annual planning and budgeting exercise to assign resources.



Photo: ITCCTB\_2019\_Visuals\_Curaçao, Nena Sanchez Art Gallery - 2.jpg

## Building awareness

The NES can only succeed with broad support from both the government and the wider public. Therefore, implementers should focus on engaging the media and social networks to keep the wider public informed with regards to implementation. Media interviews, round-table discussions, and short talks can be a way to show progress

and success stories throughout the five-year implementation period.

The private sector should also take an active role promoting and supporting the NES through its many interactions with industry stakeholders.

## Financial resource mobilization for implementation

While resource mobilization is only part of the solution, it plays a crucial and indispensable role in supporting strategy implementation. An integrated resource mobilization plan should be elaborated as soon as the NES is adopted. Resource mobilization involves drafting project proposals and then getting these projects funded. Resource mobilization should leverage diverse sources of finance to support implementation, including the use of national budgeting, the private sector, and development aid.

- National budgeting: The government will need to validate a defined minimum budget support towards the implementation of the different strategy components of the NES, including the sector and function strategies. This support for the strategy's activities will demonstrate the government's commitment to the initiatives.
- Private sector contributions and investments: The strategy will only succeed with tangible private sector support. Just as the government will need to support

implementation through national budgeting, sector associations and individual businesses will also need to contribute financial resources to implementation.

- Development aid: Public-private platforms, together with the authorities, will have to capitalize on the significant momentum gained as part of the strategy design process and leverage it for smooth and efficient implementation. International development agencies can use the strategy as the logical framework for their programmes, as they will surely benefit from its favourable conditions for operation (i.e. political endorsement, private sector buy-in and improved collaboration with national institutions). The strategy's plan of action should serve the public-private platforms as well as national institutions to improve communication and facilitate the negotiation, planning, coordination and evaluation of commitments made in the context of development aid, in particular through the development of programmes and project proposals aligned with the strategy's priorities.



Photo: ITC

## Efficient planning and reporting

In order to obtain the results and achieve the targets prioritized in the NES and sectoral strategies, it is crucial to effectively plan, track and mobilize resources for export development. An established secretariat within MEO, responsible for data collection from implementing agencies and tracking the progress of the strategy implementation, is only part of this. Each ministry should not only be sensitized about the NES activities, but they should also include relevant activities in their annual programming and request funds from the national budget

for their implementation. Following this, they should report to MEO on a regular basis regarding the progress of the implementation of their NES activities. The secretariat, in turn, should prepare regular reports for review by the CEC. An annual budget-planning cycle should be in place to get funds to support NES implementation. Ideally, in each agency, there should be a focal point nominated to report on NES progress and challenges, and the officer from the planning department should work closely with them and MEO.

# Plan of action

The plan of action, structured according to the strategic and operational objectives, contains the activities which will need to be executed in order to achieve the strategy's vision. For each activity, the plan of action specifies the following:

- **Priority level:** Priority 1 represents the highest level of importance and priority 3 the lowest.
- **Start/end dates:** The expected time frame within which the activity will be achieved (note: timeframes may be adjusted during implementation).
- **Targets:** Quantifiable targets that allow monitoring of the activity during implementation.
- **Lead implementing partner:** A single institution assigned primary responsibility for implementation in order to increase accountability.
- **Supporting implementing partners:** Any institution involved at any stage of the activity's implementation.
- **Possible funding sources:** Financial or technical support identified during the beginning of the implementation phase of the strategy.

Strategic Objective 1: Establish a favourable business environment for sector development					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementa- tion period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 1.1: Adopt a common national definition, classification system and data collection approach for the creative industries to increase its prominence within policymaking</b>					
<p><b>CI 1.1.1. Adopt a national definition and classification system for the sector</b></p> <p>Agree on a single national definition and classification system for the creative industries sector in Curaçao.</p> <ol style="list-style-type: none"> <li>1. Review commonly used international definitions and organize a mechanism for stakeholders to select a relevant definition.</li> <li>2. Adopt a statistical classification system for the sector. Using Creative Europe's classification system, which is based on the Statistical Classification of Economic Activities in the European Community (NACE), is recommended. See 2019 United Nations Conference on Trade and Development (UNCTAD) report, Creative Europe: Measuring the Culture and Creative Industries in the European Union.</li> <li>3. Prepare a list of professions and job descriptions for different subsectors that is based on the agreed classification system of subsectors. The list should be prepared in consultation with the private sector and included as part of the official document defining the sector.</li> <li>4. Produce and distribute an official document containing the definition, classification, and a general policy statement on sector developments to ensure the common definition and classification system is implemented.</li> </ol>	1	<ul style="list-style-type: none"> <li>Official document with definition, subsector classification system and policy statement published</li> </ul>	2021–22	MEO (L), CISA	N/A
<p><b>CI 1.1.2. Adopt modern methodologies for accurate tracking and measurement of the sector</b></p> <p>Establish a data collection mechanism that gathers high-quality data on the sector's performance by:</p> <ul style="list-style-type: none"> <li>• Modernizing the Curaçao Chamber of Commerce &amp; Industry's (CoC) commercial registry by adopting creative industry-specific categories for business registration based on International Standard Industrial Classification (ISIC) Rev. 4 and Statistical Classification of Economic Activities in the European Community (NACE).</li> <li>• Establish a mechanism, such as a memorandum of understanding, with the CoC to produce an annual creative industry statistics database that can be used for analysis and evaluation reports.</li> <li>• Use data to develop an official registry of Curaçao creative industries subsectors and companies to share with relevant institutions and to be maintained by the CoC.</li> </ul>	1	<ul style="list-style-type: none"> <li>Business registration system updated with creative industries categories/codes</li> <li>Production of a self-reporting survey</li> </ul>	2022	CoC (L), CISA, MEO	CoC
<p><b>CI 1.1.3. Publish an annual sector performance report</b></p> <p>Use data obtained from Activity 1.1.2 to produce an annual sector performance report. Activity implementation includes:</p> <ol style="list-style-type: none"> <li>1. Conduct an annual survey of the sector to collect key sector performance information (e.g. business sentiment, skills in demand, business growth constraints, sales and export trends, and size of companies, etc.). Include the latest data from the CoC's business registry broken down by the new classification system adopted for the creative industries. Work with CBS on the survey design and implementation.</li> <li>2. Publish report on an annual basis.</li> <li>3. Solicit feedback from stakeholders to assess the relevance and quality of each report.</li> </ol>	2	<ul style="list-style-type: none"> <li>First report produced</li> <li>Second report produced</li> <li>Report institutionalized</li> </ul>	2023–26	CISA (L), CBS, MEO, CoC	Membership fees to CISA and fundraising

Strategic Objective 1: Establish a favourable business environment for sector development					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 1.2: Improve access to specialized industry equipment by adjusting import regulations and establishing production centres</b>					
<p>CI 1.2.1. Conduct a review of the tariff line schedule to identify production inputs that could benefit from tariff exemptions</p> <p>Review Curaçao's National Tariff Line Schedule Consolidated to identify products for which tariffs can be lowered. These products should be essential components in the export process and, therefore, support the export sector of the creative industries. Key points include:</p> <ol style="list-style-type: none"> <li>1. Request to the sector committee to provide a list and justification of priority equipment/resources needed to produce content within key sectors of the creative industries, shortly described as 'production inputs'.</li> <li>2. Search the shortlist of production inputs on the Tariff Analysis Online facility provided by the World Trade Organization (WTO) to identify how those inputs are currently labelled, the average tariff applied, and the source countries and frequency of those products.</li> <li>3. Coordinate a request for the Ministry of Finance (MoF) to perform an assessment of which production inputs could benefit from tariff reductions or exemptions. Consider creating national tariff lines for specific types of equipment to increase specificity.</li> <li>4. Host event and/or social media communication to raise awareness to private sector stakeholders on ATA Carnet and O-Form options to import equipment and resources.</li> <li>5. Prepare a short report with recommendations of changes needed to streamline the ATA Carnet and O-Form process for customs to evaluate potential solutions. Consider dropping the O-Form deposit requirements for the film industry.</li> </ol> <p>Initial suggestions include:</p> <ul style="list-style-type: none"> <li>• Film equipment (e.g. cameras and lights) ;</li> <li>• Audio recording equipment (e.g. sound mixers) ;</li> <li>• Other equipment or resources (i.e. large commercial printers).</li> </ul>	2	<ul style="list-style-type: none"> <li>• Brief report with a list of priority production inputs</li> <li>• Ministry of Finance performs assessment of tariffs impacting creative industries</li> <li>• Customs reviews request to improve ATA Carnet and O-Form process for creative industries</li> </ul>	2022–24	MEO (L), CISA, customs, Ministry of Finance	N/A

Strategic Objective 1: Establish a favourable business environment for sector development					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementa- tion period	Lead (L) and supporting implementing partners	Possible funding sources
<p><b>CI 1.2.2. Coordinate efforts for the establishment of a professional studio</b></p> <p>Mobilize stakeholders to raise awareness for and support existing plans to establish a professional studio that would house equipment and resources needed for audiovisual production and possibly other types of functions. Recommended process to follow:</p> <ol style="list-style-type: none"> <li>1. Hold an event to inform stakeholders on the current efforts and plans led by the CFO to build a studio.</li> <li>2. Present the business case for the studio, which includes reasons, benefits, risks, feasibility, and the type of business model options and key findings from a completed MEO macro analysis on the concept.</li> <li>3. Discuss and agree on whether to move forward with the proposal.</li> <li>4. If stakeholders agree to move forward, follow the next steps:</li> <li>5. Harness support on applying and obtaining land space based on current efforts led by the CFO.</li> <li>6. Draft and/or finalize an investment proposal for the set-up of a cutting-edge production studio designed for music and video recording as a priority.</li> <li>7. Prepare a business plan and investment proposal for the professional studio.</li> <li>8. Survey and pool available in-kind support (i.e., services and equipment) across stakeholders to activate cooperation and reduce start-up costs.</li> <li>9. Prepare a comprehensive work plan for implementation.</li> </ol> <p>Recommendations for the business model and function of the studio are the following:</p> <ul style="list-style-type: none"> <li>• Consider turning the investment proposal into a public-private partnership, possibly financed through blended finance instruments.</li> <li>• Consider using a cooperative business model to benefit from shared ownership costs and risks, distribution of profits, financing and tax status, etc.</li> <li>• Offer creative hub services such as classes for youth, trainings and events, etc. at the studio or pop-up locations in the interim by relaunching the concept of the Creative Lab Caribbean aimed at building a collaborative network of creative talent that co-works and co-creates to become a sustainable and self-sustaining economic pillar of artistic and commercial creativity, business innovation, and personal and professional development and growth.</li> <li>• Work with CINEC to pitch the investment idea to investors, particularly impact investment firms.</li> <li>• Explore joint venture opportunities with Aruba and Bonaire and other neighbours to share resources that can increase productive capacities and mutual benefits.</li> <li>• Participate in crowdfunding activities offered under the implementation of the NES Skills and Entrepreneurship Strategy.</li> </ul>	1	<ul style="list-style-type: none"> <li>• Event to inform stakeholders of plans, proposal and support needed</li> <li>• Production of investment proposal and work plan</li> <li>• Established professional studio</li> </ul>	2021–26	CFO & MEO (L), CISA, Asosiasion di Musiko i Artista di Korsou (AMAK)	To be confirmed (TBC) (i.e. foreign investors; local investors; solicit in-kind contributions or donations)
<b>Operational Objective 1.3: Improve access to finance conditions by establishing financing schemes tailored to the creative industries</b>					
<p><b>CI.1.3.1. Deliver information sessions on financing schemes specific to the creative industries</b></p> <p>Raise awareness among industry stakeholders on available training through the NES Skills and Entrepreneurship Strategy's track of activities, followed by organizing sector activities to increase knowledge of industry specific financing schemes:</p> <ol style="list-style-type: none"> <li>1. The MEO to hold twice yearly information sessions on available public financing schemes and application process directed to the creative industries.</li> <li>2. Include sessions specific to Creative Europe financing programmes. Creative Europe is the European Commission's programme for providing support to the culture and audiovisual sectors.</li> <li>3. Participate in activities related to the Overseas Countries and Territories Association (OCTA) and EU Desk aimed for micro, small and medium-sized enterprise (MSME) support under the NES Skills and Entrepreneurship Strategy.</li> </ol>	1	<ul style="list-style-type: none"> <li>• Communication materials produced and disseminated</li> <li>• Regular information sessions held</li> </ul>	2022–26	MEO (L), CISA	National budget

Strategic Objective 1 - Establish a favourable business environment for sector development					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<p>CI 1.3.2. Launch a digital toolkit with resources on financing options</p> <p>Gather all available information and resources on financing schemes from Activity 1.3.1 for the creative industries in one place in the form of a toolkit to help firms and entrepreneurs have accessible information. This can be completed in the following steps:</p> <ol style="list-style-type: none"> <li>1. Organize and catalogue resources and templates with information on access to finance topics such as loan types and lender options, etc.</li> <li>2. Include a curated list of subsidy possibilities and grants, etc. and guidelines for creative sector-specific loans.</li> <li>3. Ensure the digital format of the toolkit has capabilities for regular updates. Recommendation is to develop as a web page, hosted on the sector website.</li> </ol>	1	<ul style="list-style-type: none"> <li>Digital toolkit with resources</li> </ul>	2022–23	MEO (L), CISA	National budget
<p>CI 1.3.3 Develop tailored financial instruments with Curacao's national development banks and commercial banks</p> <p>Explore possibilities to introduce special financial instruments such as grants, loans, lines of credit and loan guarantee, etc., which can reduce constraints on access to finance. Some steps included in the process are:</p> <ol style="list-style-type: none"> <li>1. Conduct a review to determine the key types of financing required by businesses in the creative industries. This review should include the type of financing instrument (e.g. loan, grant or equity), the amounts of financing, and the terms and conditions of financing (e.g. interest rates).</li> <li>2. Determine which blended finance options are best suited to the sector (e.g. loan guarantees, first-loss loans, or loans combined with business development assistance).</li> <li>3. Conduct a trial of any new financing instruments developed and adapt the conditions-based loan performance.</li> <li>4. Scale up successful financing instruments.</li> <li>5. Target commercial banks to attend relevant industry events and/or obtain relevant marketing material to increase information available to banks to use in making assessments of the value and credit risk of industry applicants.</li> </ol>	2	<ul style="list-style-type: none"> <li>Special grants and financing schemes</li> <li>Attract capital investments</li> <li>Initiatives to inform banks on the value and credit risks of the sector</li> </ul>	2022–26	MEO (L), CDI, Korpodeko, Ministry of Finance, commercial banks	TBC; options include existing development funds, capital from CDI, and capital from Korpodeko
<p>CI 1.3.4 Production and dissemination of a sector-specific investment promotion brochure</p> <p>Collaborate with CINEX and other trade investment support institutions to develop a professionally designed investment brochure specific to the sector. The objective of preparing the investment brochure is to:</p> <ul style="list-style-type: none"> <li>Exhibit products and services to give basic knowledge of the sector;</li> <li>Engage stakeholders across the sector to produce a list of investment ready opportunities. These can be either in terms of projects or in terms of firms;</li> <li>Include guidelines for investment and business contact information;</li> <li>Use in trade promotion events.</li> </ul>	3	<ul style="list-style-type: none"> <li>Investment brochure specific to the sector</li> </ul>		CINEX (L), CISA, MEO, CFO	TBC

Strategic Objective 2: Improve the role and capacity of private sector associations					
Description and breakdown of activities	Priority 1= high 2= med 3= low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 2.1 : Strengthen dialogue with the public sector to create clear mechanisms through which industry needs are communicated</b>					
<p><b>CI 2.1.1 Create a creative industries sector committee made up of leading public and private sector actors</b></p> <p>A committee made up of key public and private sector players that represent the creative industries is needed to help represent the sector's interests to the government. Namely:</p> <ul style="list-style-type: none"> <li>The committee should be made up of focal points from key institutions from the sector as well as influential private sector players, with oversight by MEO.</li> <li>The committee should report to the Curaçao Export Council.</li> <li>The committee should focus on sector development to discuss export policy, report on barriers, conduct strategic planning, advise on legislative updates, and identify strategic export opportunities, as they pertain to sector development.</li> <li>Prioritize and support establishing an industry association by providing a small grant to set up and run events for a recommended period of two years.</li> <li>Invite representatives from the education and vocational training sector to join the committee to build a strong partnership between academia and industry.</li> </ul> <p>Some steps to follow in setting up the committee include:</p> <ol style="list-style-type: none"> <li>Assign a focal point within MEO commissioned to support the sector's development.</li> <li>Provide a budget for implementation of activities.</li> <li>Assign focal point(s) from private sector and public sector institutions.</li> <li>Provide terms of reference (ToR) for each focal point to provide direction on the purpose of the role as focal points, responsibilities, and specific tasks.</li> <li>Prepare ToR detailing the role, responsibilities and governance of the committee, including:                             <ul style="list-style-type: none"> <li>» Hosting regular public-private meetings with policymakers to have a better understanding of sectoral gaps, performance, potentials and development needs.</li> <li>» Organizing sensitization seminars for policymakers to promote knowledge and awareness of the sector ; i.e. a creative industries development week (CIDW).</li> </ul> </li> <li>The committee should meet at least once a quarter. During the first year, the committee should consider meeting once every two months.</li> </ol> <p><b>CI 2.1.2. Organize an annual creative industries development week (CIDW) to highlight government and institutional support for the development of the creative industries</b></p> <p>Run the CIDW as an awareness-raising initiative:</p> <ul style="list-style-type: none"> <li>Communicate the new national definition and classification system.</li> <li>Highlight the economic contribution the sector can make to Curaçao's development.</li> <li>Highlight upcoming policy changes and other support deriving from the NES.</li> <li>Establish a regular event that promotes the development of the sector.</li> </ul> <p>Event programme can include:</p> <ol style="list-style-type: none"> <li>Information sessions on industry topics, innovations, success stories, portfolio exhibits, and related activities aimed at raising awareness of the sector.</li> <li>In the first year of the CIDW, include an official launch event to announce the new definition, classification system and any other relevant information related to the process of defining the sector.</li> <li>Provide social media coverage on CIDW, on local and international platforms.</li> </ol>	1	<ul style="list-style-type: none"> <li>Draft committee TORs</li> <li>Invite committee members</li> <li>Sector committee established and first meeting held</li> </ul>	2021–22	MEO (L)	N/A
	1	<ul style="list-style-type: none"> <li>First CIDW held</li> <li>Second CIDW held</li> <li>Third CIDW held</li> <li>CIDW now a permanent fixture</li> </ul>	2022–26	CISA (L), MEO, CMA, AMAK, CFO	TBC



Strategic Objective 2: Improve the role and capacity of private sector associations					
Description and breakdown of activities	Priority 1=high 2=med 3=low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 2.2: Strengthen existing sector associations to enhance local collaboration and coordination, and expand international business networks</b>					
<p>CI 2.2.1 Set up a new industry association representing the entire sector</p> <p>Establish an industry association to increase coordination and communication across all of the creative industries subsectors.</p> <p>Recommended functions of the association include to:</p> <ul style="list-style-type: none"> <li>• Provide an inclusive membership open to individuals and enterprises to encourage trust among stakeholders on mutual benefits of organizing.</li> <li>• Define the industry's business standards, professionalism and objectives.</li> <li>• Manage business-government relations to help government identify sector needs, prioritize reforms, and direct policy and regulatory reforms that can benefit the sector, particularly those that can level the playing field.</li> <li>• Offer member services such as training, market information, industry promotion, coordination among stakeholders, career services and organized events, etc.</li> <li>• Fundraise and offer demand-driven programmes to ensure sustainability.</li> <li>• Prioritize adding programming for export growth.</li> <li>• Include special membership package for youth and start-ups.</li> </ul> <p>Some modalities to set up the industry include:</p> <ol style="list-style-type: none"> <li>1. Select a steering committee in charge of setting up the association.</li> <li>2. Discuss and agree on the objectives and management structure.</li> <li>3. Determine how it will be financed by requesting grant support from the sector. Committee to cover a programme of activities for at least the first two years (possibly more).</li> <li>4. Draft a constitution outlining the objectives, subscription model, procedure for meetings and the roles of the executive committee, etc.</li> <li>5. Elect executive committee and validate a six-month programme of activities.</li> <li>6. Organize a launch event and membership campaign open to all subsectors.</li> </ol>	1	<ul style="list-style-type: none"> <li>• Steering committee established</li> <li>• Association mandate agreed</li> <li>• Association constitution drafted</li> <li>• Sector association legally established</li> <li>• Sector association management appointed</li> </ul>	2021–22	MEO (L)	National budget
<p>CI 2.2.2 Capacity building of the newly established industry association</p> <p>Provide new association with training, tools and resources to be able to operate as a business support organization that will be able to deliver member services such as training, market information, industry promotion, career services and organized events, etc.</p> <p>Capacity building for the association should include training on:</p> <ul style="list-style-type: none"> <li>• Leadership, management and administration (for executive committee);</li> <li>• Sustainability, relevance and effectiveness of the services by using the business model and business planning approach;</li> <li>• How to articulate the unique value proposition of their organization;</li> <li>• Understand how to build a revenue-supported business model;</li> <li>• Evaluate demand for new services, and conduct a situation analysis, needs assessment and feasibility study;</li> <li>• Developing business support organization (BSO) products and services pyramid;</li> <li>• Conducting a political, economic, social and technological (PEST) analysis and strengths, weaknesses, opportunities and threats (SWOT) analysis;</li> <li>• Creating a basic business plan for the organization.</li> </ul>	3	<ul style="list-style-type: none"> <li>• CISA completes at least three relevant trainings</li> <li>• CISA prepares management plans</li> </ul>	2022–26	CISA (L), MEO, CoC	Membership fees to CISA and fundraising

Strategic Objective 2: Improve the role and capacity of private sector associations					
Description and breakdown of activities	Priority 1=high 2=med 3=low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<p><b>CI 2.2.3. Host regular business networking and fundraising events</b>                      Increase the visibility of the creative ecosystem on the island to improve the sector's reputation and social influence, and spark cross-industry synergies. Events should include a small fee and/or specific fundraising for the industry association.                      Encouraging interaction between the creative industry and the public can include:</p> <ul style="list-style-type: none"> <li>• Hosting monthly social events and festivals: exhibition, music festivals, dance shows, graphic fairs, talks and debates, etc.</li> <li>• Host quarterly local social events with other sector associations for networking and facilitate integration of the sector in the business ecosystem.</li> <li>• Set up an online social network group for creative industries firms to interact and increase generation of new ideas and creation.</li> <li>• Include schools and training centres to join events and networking to support with presentations aimed at developing a mindset for creativity, creative industries entrepreneurship and creative occupations as a career path.</li> <li>• Launch a quarterly programme to deliver in-kind services to other sectors to showcase and promote the value of available services.</li> </ul>	2	<ul style="list-style-type: none"> <li>• Production of a work plan and calendar of activities</li> <li>• Monthly events are regularly held and institutionalized</li> <li>• Social network group organized and monitored</li> </ul>	2022–26	CISA (L), CoC	Membership fees to CISA and fundraising
<p><b>CI 2.2.4. Establish formal linkages with sector associations in key target markets</b>                      Develop a creative sector network digital resource that includes key associations, networks and trade fair events in target market countries. The kit should be shared on important sector platforms and the future sector website. Ensure the resource kit has capacity for updating regularly.</p> <ul style="list-style-type: none"> <li>• Joint seminars, discussion of industry trends, export or import opportunities.</li> <li>• Partner with the foreign associations to organize knowledge exchange and networking events (i.e. study tours and joint ventures on regional sector development).</li> <li>• Develop a programme with diaspora to facilitate presence in key markets.</li> </ul>	3	<ul style="list-style-type: none"> <li>• Production and publishing of a creative sector network digital resource</li> <li>• Partner with at least two foreign associations</li> </ul>	2022–26	CISA (L)	Membership fees to CISA and fundraising
<p><b>CI 2.2.5 Produce an export guidebook for creative industries enterprises to use in international marketing</b>                      Collaborate with CINEX on preparing content material specific for creative industries products and services that includes information and guidance on:</p> <ul style="list-style-type: none"> <li>• Preparing to export outline of steps to conduct aimed at expanding a business internationally.</li> <li>• How to do a market research and country analysis to find new target markets.</li> <li>• Practical knowledge sharing on market entry and potential of new target markets.</li> <li>• How to find business partners and clients in new target markets.</li> <li>• How to reinforce or initiate international presence in existing or new markets.</li> <li>• How to prepare a professional portfolio(s) of services and products.</li> </ul>	2	<ul style="list-style-type: none"> <li>• Production and publishing of an export guidebook for creative industries enterprises</li> </ul>	2023	CINEX (L), CISA	National budget

Strategic Objective 3 - Support skills development and pursue market development opportunities					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 3.1: Increase skills trainings and knowledge sharing to promote youth engagement and quality standards</b>					
<p>CI 3.1.1. Offer short courses on industry specific entrepreneurial, technical and soft skills</p> <p>Design training programmes based on priority skills areas needing strengthening. Some of the training subjects should include the below suggestions. Entrepreneurship in the creative industries:</p> <ul style="list-style-type: none"> <li>Business planning;</li> <li>Business management, marketing, and branding.</li> </ul> <p>Technical skills:</p> <ul style="list-style-type: none"> <li>Enhancing general and International Organization for Standardization (ISO) quality management, and production planning skills;</li> <li>Special focus on the ISO 9000 family of quality management standards that helps businesses ensure they meet customer and other stakeholder needs within statutory and regulatory requirements related to a product or service;</li> <li>Optimizing use of digital technology to increase efficiency of business administration, marketing, customer service, and sales tracking;</li> <li>Knowledge and practical actions to take related to environment protection, health, safety and sustainability based on the type of subsector and its outputs, i.e. types of paint used.</li> </ul> <p>Soft skills:</p> <ul style="list-style-type: none"> <li>Professional communication;</li> <li>Time management, resource planning and problem solving;</li> <li>Leadership and conflict resolution;</li> <li>Inclusiveness and teamwork in the workplace.</li> </ul>	2	<ul style="list-style-type: none"> <li>The pre-agreed number of training programmes developed</li> <li>Training programmes deployed on a regular basis</li> </ul>	2023–26	CISA (L), Curaçao Innovation & Technology Institute (CITI), MEO, CINEX	TBC
<p>CI 3.1.2. Roll out a mentoring programmes to promote knowledge transfer</p> <p>Design a mentorship programme in partnership with influential industry players and alumni network aimed for both new and existing entrepreneurs. Recommended activities and objectives on mentoring can include:</p> <ul style="list-style-type: none"> <li>Peer-to-peer learning workshops to share practical industry knowledge and how to acquire or expand business networks;</li> <li>Support entrepreneurs completing training or recent graduates on how to apply classroom knowledge;</li> <li>Sharing of success stories with open-table discussions on challenges.</li> </ul> <p>Modalities of implementation include:</p> <ol style="list-style-type: none"> <li>Pair mentors with mentees finishing training programmes;</li> <li>Duration of three months with a social event after completion;</li> <li>Provide social media visibility on the outcomes of mentoring to ensure there is accountability, impact and ongoing demand.</li> </ol>	2	<ul style="list-style-type: none"> <li>Mentoring programme established for one year</li> <li>Mentoring programme established for two years</li> <li>Mentoring programme now permanent</li> </ul>	2023–26	CITI (L), MEO	National budget Membership fees to CISA and fundraising Volunteering by stakeholders

Strategic Objective 3: Support skills development and pursue market development opportunities					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<p><b>CI 3.1.3 Develop occupational standards of competence, quality and professionalism</b></p> <p>Improve the quality of creative goods and services through establishment of quality standards and professionalism, namely by:</p> <ol style="list-style-type: none"> <li>1. Assigning a task force of industry senior experts to develop Curaçao's own occupational standards of competence for the sector guided by relevant international standards, such as the ISO 9001 on quality management, and other code of conduct guidelines to improve professional etiquette and client satisfaction across the different subsectors.</li> <li>2. Use the occupational standards content to develop a training course that can be offered on a quarterly basis and awards a certificate of completion that is used to qualify for participants to have a quality badge endorsed by CISA.</li> <li>3. Carrying out training programmes on concept making, production planning and value engineering.</li> <li>4. Promoting standards through radio, press, and television discussions in order to raise awareness about the importance of quality and sensitize the industry to the new technical requirements and standards.</li> <li>5. Hold a consultation with the education sector to determine needs and initiatives that can improve standards of professionalism, soft skills, and quality standards in the academic setting.</li> </ol>	1	<ul style="list-style-type: none"> <li>Increased quality standards and professionalism</li> <li>Consultation with education sector</li> </ul>	2022–26	CISA (L), MEO, Institute for Professional Excellence	<ul style="list-style-type: none"> <li>Membership fees to CISA and fundraising</li> <li>Volunteering by stakeholders</li> </ul>
<p><b>CI 3.1.4 Establish partnerships with local training institutions</b></p> <p>Strengthen links with academia to inform the education sector of knowledge areas required by industry by establishing partnerships with relevant technical and vocational education and training (TVET) institutions to:</p> <ul style="list-style-type: none"> <li>• Create a guest lecturer and/or internship programme to improve the quality of teaching at relevant TVET institutions.</li> <li>• Institute a seminar series to disseminate best practices from the field and exchange training resources based on new training programmes.</li> <li>• Collaborate with the skills and entrepreneurship NES strategy team to explore opportunities for support.</li> <li>• Organize a mentoring programme with diaspora and industry leaders.</li> </ul>	2	<ul style="list-style-type: none"> <li>Partnerships with TVETs</li> <li>New training content and programmes</li> </ul>	2022–26	Sector committee (L), CISA, MEO, University of Curaçao (UoC)	Volunteering by stakeholders
<p><b>CI 3.1.5. Organize an annual business plan competition designed as a platform to promote creativity and youth entrepreneurship</b></p> <p>Organize the competition to be open to youth across all subsectors to present their creative and innovative ideas as a business pitch for new products and services. Key considerations for implementation include:</p> <ol style="list-style-type: none"> <li>1. Define the rules, terms and conditions of the competition.</li> <li>2. Include a panel of industry experts to provide feedback that can serve as an opportunity to mentor youth in turning their talent into business ventures.</li> <li>3. Seek sponsorship for the prize money (either a wealthy individual or a business) to use for seed money to pilot the business idea.</li> <li>4. Organize a launch event with press coverage.</li> <li>5. Create a physical trophy for the winner(s).</li> </ol>	2	<ul style="list-style-type: none"> <li>Annual business plan competition held</li> </ul>	2023–26	CISA (L), CITI, MEO	<ul style="list-style-type: none"> <li>Membership fees to CISA and fundraising</li> <li>Volunteering by stakeholders</li> </ul>
<p><b>CI 3.1.6 Conduct information awareness campaigns on intellectual property (IP) protection and registration</b></p> <p>Hold activities to increase access and clarity of information about IP and how to register. Some activities include:</p> <ol style="list-style-type: none"> <li>1. Collaborating with BIP and other institutions leading on adapting a national IP system.</li> <li>2. Exploring option of developing a collective trademark for creative industries Curaçao brand.</li> <li>3. Organizing on-site information sessions to present information and hold interactive discussions on options for IP registration.</li> </ol>	1	<ul style="list-style-type: none"> <li>Events and initiatives held to inform on (IP)</li> </ul>	2022–26	CISA (L), BIP	<ul style="list-style-type: none"> <li>Membership fees to CISA and fundraising</li> </ul>

Strategic Objective 3: Support skills development and pursue market development opportunities					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<b>Operational Objective 3.2: Promote priority product–client combinations by strengthening their value chains and pursuing export promotion activities</b>					
<p><b>CI 3.2.1. Select and develop new service bundles/packages for all of the sector to benefit</b>                      Select up to three new service packages that require several suppliers across the sector to contribute in the production and delivery of the service. The purpose of the service bundle is to:</p> <ul style="list-style-type: none"> <li>• Encourage sector-wide inputs to the value chain of a package/service;</li> <li>• Facilitate backward and forward linkages across the sector;</li> <li>• Provide opportunities for cross-sector collaboration;</li> <li>• Use the value chain map and product–client combinations identified in this strategy as a guide for options and linkages;</li> <li>• Agree on the pricing schedule;</li> <li>• Introduce a referral system to determine who will market and subcontract;</li> <li>• Include service bundles in the marketing strategy.</li> </ul> <p>Recommendations for new service package/bundle include:</p> <ul style="list-style-type: none"> <li>• Productions for online learning platforms that provide a full package of audio, video, web design and marketing services;</li> <li>• Video productions (e.g. documentary filmmaking).</li> </ul>	1	<ul style="list-style-type: none"> <li>• Events/meetings held to collaborate, discuss and brainstorm</li> <li>• Pilot at least two service bundles for a year</li> </ul>	2022–26	CFO (L), CMA, CISA	CFO budget Volunteering by stakeholders
<p><b>CI 3.2.2. Launch a Curaçao creative industries brand and marketing strategy</b>                      Develop marketing campaigns for priority subsectors and product–client combinations aimed at promoting the sector in target markets, imagine building, increasing presence in existing markets and indirectly promoting high-skill professionals.</p> <p>Complete Activity 3.2.1 before developing marketing plan to ensure the services bundles are included as a value proposition component of the marketing strategy. Marketing content to produce includes:</p> <ul style="list-style-type: none"> <li>• Marketing brochure;</li> <li>• Service bundle brochure and promotion;</li> <li>• Promotional videos;</li> <li>• Logo and templates for promotion; i.e. business cards.</li> </ul>	1	<ul style="list-style-type: none"> <li>• New brand and marketing plan launched</li> </ul>	2022–26	CMA (L), CISA	Membership fees to CMA Membership fees to CISA and fundraising Volunteering by stakeholders

Strategic Objective 3: Support skills development and pursue market development opportunities					
Description and breakdown of activities	Priority 1 = high 2 = med 3 = low	Targets	Implementation period	Lead (L) and supporting implementing partners	Possible funding sources
<p><b>CI 3.2.3. Creation of a website and platform for the sector</b></p> <p>Launch a website with information on the creative industry in Curaçao per subsector, with an overview of the players, representatives, quality standards if any, rules and authorities, offerings, calls, publications news and upcoming events, and general support services for the creative industry on the island and a yearly creative events calendar.</p> <p>The target group for the website are creatives, students, policymakers, potential investors, and supporting organizations for the creative industry.</p> <p>Build an online platform for creatives that stimulates, for example:</p> <ul style="list-style-type: none"> <li>• Visibility of the creative businesses per subsector (registry/search engine/database);</li> <li>• Linkages between stakeholders;</li> <li>• Collaboration (unification) and knowledge sharing within subsectors and across;</li> <li>• Subsectors/among creatives; co-creation;</li> <li>• Awareness of creative services, products and businesses on the island;</li> <li>• Client bookings ('gigs') and other external collaborations or exchanges;</li> <li>• Rating of services (reviews and testimonials);</li> <li>• Promotion of activities, information sharing (direct mailing or post event on events calendar);</li> <li>• Generation of statistics and other information on the industry (surveys and polls);</li> <li>• The website and platform should be the 'go to' for creatives and those who want to connect with creative entrepreneurs from the island;</li> <li>• Consider adding e-commerce functionality to the website.</li> </ul>	1	<ul style="list-style-type: none"> <li>• New website and platform</li> </ul>	2022–26	MEO (L), CISA	National budget Volunteering by stakeholders
<p><b>CI 3.2.4. Target and support enterprises to attend international industry trade fairs and promotional events</b></p> <p>Work with the MEO, CINEX, the Chamber of Commerce &amp; Industry (CCC) and sector stakeholders to mobilize support for participation in key trade fairs.</p> <ul style="list-style-type: none"> <li>• Agree with stakeholders on which trade fairs will be targeted on an annual basis.</li> <li>• Ensure participation of the targeted trade fairs on an annual basis.</li> <li>• Identify the list of industry trade fairs the sector should target for export development. A full list of trade fair recommendations was prepared by the sector team leader during the design process of this strategy. Some recommendations include:                             <ul style="list-style-type: none"> <li>» Grauzone festival in the Netherlands;</li> <li>» BAM and El Bogota Music Market in Colombia;</li> <li>» Hayah International Short Film Festival in Panama/Central America.</li> </ul> </li> </ul>	1	<ul style="list-style-type: none"> <li>• Sector association and/or MSMEs regularly attend key industry trade fairs</li> </ul>	2020–2026	CINEX (L), CISA, CFO	National budget
<p><b>CI 3.2.5. Develop a guide on freelancing success and joining international marketplaces</b></p> <p>Prepare a guide aimed at recent graduates, young entrepreneurs and existing freelancers seeking to enter or improve participation in freelancing platforms. The guide can include:</p> <ul style="list-style-type: none"> <li>• Guidance on how freelancing platforms function, benefits and fees, etc.;</li> <li>• Top platforms for different market destinations;</li> <li>• How to create a professional profile;</li> <li>• How to create a portfolio to upload;</li> <li>» Features on the advantages, similarities and differences between platforms and e-commerce platforms based on subsector output.</li> </ul>	1	<ul style="list-style-type: none"> <li>• Production of a guide on freelancing and joining international marketplaces</li> </ul>	2023	CISA (L)	Membership fees to CISA and fundraising Volunteering by stakeholders

# ANNEXES

## Annex I: List of participants in the public-private consultations

Name	Designation	Company or institution
Bas Nuissl	Art director, business developer	Independent
Dave Mourion	Music producer	The Jingle Planet
David de Bruijne	Owner	David de Bruijne animations
Dennis Jilisen	Marketing consultant	Independent
Derek Durgaram	Owner/web designer	Green Media
Dopie Keys	Music producer	Independent
Egon Sybrandy	Marketing expert	Independent
Eloise van Wickeren	Film commissioner	MEO
Emly Francisca	Artist, researcher	Independent
Evert Jan Boon	Graphic designer	Ejpeg
Fiona Curie	Policymaker	MEO
Franklin Salgado	Unknown	Arawak Teatro
Gonneke van den Kieboom	Creative strategist/team leader	WOW! Innovation, marketing & communication/Creative Industries Strategy
Hans Hogenboom	Art director	Westontwerp
Hester Jonkhout	Director and cinematographer	CamRock
Joeri Oltheten	Literary publisher	Wintertuin
Joost Schrier	Owner/web designer	Blinq Web Studio
Liz van de Laar	Online marketing creative director	Profound
Louis Martina	Business manager	Six & Ten Group
Luis Abreu Ladeira de	Dean, Faculty of Engineering	UoC, Faculty of Engineering
Monique Rafaela	Director	CITI
Monique Rosalina	Art director	Passaat design
Nathania Engelhardt	Business manager	Six & Ten Group
Niels Boven	Film director	Caribbean Legacy
Oscar Bor	Music producer	Independent
Randal Corsen	Music producer	Independent
Raygen Zuiverloon	Event director	Kaya Kaya
Raynel Martis	Policy advisor	MEO
Rowendy Arion	Unknown	Unknown
Samari Bariato	Marketing manager	TAO
Samuel Kruiner	Export development consultant	CINEX
Vanessa Toré	Director, Foreign Economic Cooperation/Navigator	MEO/NES
Yanina Urbaz	Policy advisor	MEO



## Annex II: Inventory of sector support network

### Policy support network

**The Ministry of Economic Development (MEO):** MEO gives direction to the sustainable economic development of Curaçao to achieve a higher level of prosperity for Curaçao's society. It plays an important role in creating a stimulating business environment and high-quality production by providing optimum services, working on strengthening economic structure and responding effectively to social and international developments. Effectively, MEO has a leading role in establishing the economic integrity of the creative industries sector, as well introducing its export potential to international and local audiences. Through its governmental directive, it has the authority to initiate cross-sector collaboration and provide specialized services for subsectors, as it has done by setting up the Curaçao Film Commissioner. There are also existing plans exploring the launch of a creative office and a music commissioner aimed at priority subsector growth. However, MEO is limited in its operational capacity, as there are only a few staff members and resources available for sector development.

**The Ministry of Education, Science, Culture and Sport (OWCS):** OWCS is the government ministry responsible for determining the policies and direction of the education system in Curaçao. It is committed to guaranteeing facilities to ensure that all residents of Curaçao have equal opportunities to fully develop and grow into fully-fledged persons who can constructively build on their potential and participate in and contribute to the community's economic and general social development. Although it is short in staff and resources appointed directly for the development of the creative industries as an economic sector, the OWCS is influential in fostering creative talent by offering after-school skills training programmes for youth and subsidizing cultural institutions. Following its mandate, the OWCS can play an important role in liaising creative industries curriculum development between private sector and academia, creating a bridge between creative talent and entrepreneurship, and integrating Curaçao's culture into the branding of the sector.

### Trade support network

**Bureau for Intellectual Property (BIP):** BIP registers trademarks and patents in Curaçao for private persons and domestic and foreign companies. It gives information on copyright protection, takes care of trademark registration, files for patent protection and promotes the importance of protecting intellectual property. Despite its potential to influence sector development, it lacks tailored support and services to effectively raise awareness of training and services in intellectual property protection for the creative industries. Due to a low operational capacity, it is not able to offer more quality services and mostly offers registration services without sufficient support of other types of procedures and information.

**Curaçao Chamber of Commerce & Industry (CoC):** The CoC represents the interests of the Curaçao business community, registers new businesses, and provides information and services to local and international companies with an interest in doing business in Curaçao. CoC lacks tailored services to support creative sector development, but has the potential to enhance the business mentality of the creative sector by providing an inclusive outreach to creative industries microenterprises and entrepreneurs.

**Curaçao Film Office (CFO):** The CFO is a mechanism for promoting Curaçao's film industry. In its function as a platform for the promotion and business growth of international film productions, the CFO is a driving force behind the sector's development. It is a member of the Association of Film Commissioners International (AFCI) and serves as a contact point for all productions that take place on Curaçao. It is also an intermediary between foreign producers and government. It has been influential in facilitating international business exchange, such as enabling special procedures with the customs office and maintaining a database on economic and cultural contributions to Curaçao's development. Participation in trade fairs and events has also led to increased exposure of locally produced films in international festivals. The CFO maintains a high level of commitment to its mandate, with plans to establish a high-level training facility and remain actively engaged in sector development. However, its operational capacity is fairly weak, as it only has a one staff member available to develop services and implement policy. It is financed by MEO, without an independent budget and low levels of financial resources available.

**Curaçao Innovation & Technology Institute (CITI):** CITI encourages innovation and promotes the use of new technologies for businesses in Curaçao. It also supports start-ups and runs incubation programmes. CITI does not have tailored services designed for the needs of creative start-ups, but remains an influential player with the potential to lead in e-commerce development and entrepreneurship support for the creative industries. Its scope of work can enable more synergies between technology and the creative industries, particularly in digital media. As it is largely known to have a good level of operational capacity and financial resources, it has the ability to upgrade its programming to provide tailored services for the sector. Lagging at the foreground of successful incubation of businesses, it is an institution that stands to benefit from more cross-sector collaboration.

**Curaçao Investment & Export Promotion Agency (CINEX):** CINEX is Curaçao's trade and investment promotion body. It seeks to attract foreign direct investment, as well as to promote and encourage the export of local products and services in order to boost economic development. Its focus is mainly on national large-scale investments and it is not at the forefront of promoting the creative industries. Although it has been responsible for organizing the widely popular Smart Investment Summit, it has not delivered any direct outcomes to increase international trade from the creative industries. Largely due to its limited operational capacity, CINEX is not an influential player to lead in the development of the creative industries. However, it remains an important partner to engage with as the sector levels into export readiness.

**Curaçao Tourist Board (CTB):** CTB is responsible for marketing Curaçao as a leisure and business destination. It seeks to coordinate planning, promotion and management of tourism-related activities in Curaçao. The CTB plays a strong role in building Curaçao's national brand through destination marketing campaigns such as 'Feel it For Yourself', which showcases cultural and creative experiences. As the national authority for destination marketing, it has the influence and network to promote the creative sector. However, its promotion of the creative industries has been mostly focused on the cultural offer and will, therefore, need to be involved in the process of building a sector identity and marketing strategy that captures more subsectors of the creative industries. It can also improve on the hiring of local design services for its own marketing production. Generally, CBT is regarded as a well-organized representative of Curaçao in international events, with successful outcomes in boosting awareness of the country. With a stable flow of financial resources and a strong operational capacity, CBT has been attracting high-potential markets for the creative industries, including the meeting incentives, conferences and events (MICE) segment, and effectively bringing in large film productions through cross-over collaborations with the CFO. More public-private sector collaboration can have an influential impact on export growth for the creative industries, as well as in rehabilitating tourism from the COVID-19 collapse.

## Business support network

**Association of Musicians and Artists of Curaçao (Asosiashon di Musiko i Artista di Korsou, AMAK):** AMAK represents the interests of all musicians and artists of Curaçao. It is one of the few institutions with a high level of influence in sector performance, mainly due to its long-standing history as actively engaged advocates in the music industry. The association is also well known for organizing the largest festival of local music during carnival season. AMAK can continue to play an influential role in sector development based on its strong management capacity to mobilize and maintain an actively engaged membership, plan large-scale events and provide effective industry representation. However, the association can play a bigger role in sector development by strengthening its capacity as a business support organization that can offer new services that extend from the local context into export-oriented programming.

**Software Industry Making Impact Abroad (SIMIA):** SIMIA is a new collaboration bringing tech industry players under an association focused on export

development of local technology applications and services. It is mainly focused on the tech industry and has not yet achieved successful export-oriented synergies with the creative sector. Despite a low level of influence on sector development, it remains as a potential partner to foster industry collaborations between design and technology.

**UniArte:** UniArte is a creative platform with a physical space for local and international artists to collaborate, complete a cultural exchange residency and build a professional network. Its founder is a filmmaker, but has acquired a diverse group of high-skilled professionals with international experience to join the institution. It is not focused on the creative sector's economic or export development. Although it ranks low as an influential player, UniArte has a valuable network of professionals that can transmit technical knowledge of international trends in the arts and business development in other markets. Due to unreliable sources of revenue, mainly donations and grants, it struggles to maintain physical space and operational capacity.



Photo: ITC

## Civil society network

**Instituto Buena Vista (IBB):** IBB is a preliminary training institute focused on painting and graphic arts skills training for youth, with a focus on preparing students to develop portfolios for admission into higher education, which are mostly abroad. The IBB occasionally collaborates with audiovisual media projects, such as student-led productions of short films for the Curaçao International Film Festival Rotterdam. In the community, it is recognized as a breeding ground for young talent. In spite of being a small-scale operation without a direct influence in the economic or export development of the creative industries, it does have a valuable professional network and access to training opportunities that can bring benefits to the sector's development process.

**Mediaschool:** Mediaschool is a foundation-level skills training institution for students seeking to enter the field of media production. The school mainly offers short-term courses at a certificate level in order to prepare

students to study abroad and/or enter into higher-level training. It also offers some specialty training in photography. Because the school is not yet able to offer higher skills training, it ranks low as an influential player for the sector.

**University of Curaçao (UoC):** The UoC is the state university of Curaçao. It is charged with providing students with world-class education in a broad set of fields, including engineering, business management, law and economics. The university is a fundamental player for the sector, as it is able to develop the technical and business skills for some subsectors, mainly in architecture and graphic design. It also has the capacity to prepare students to present portfolios and skills for business communication. However, there is a need to increase its capacity to support more subsector specialties and retain more students from needing to seek higher education abroad.

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## Curaçao

### Ministry of Economic Development (MEO)

Street/postal address: 43 Pletterijweg, Willemstad, Curaçao  
Website: <https://gobiernu.cw/nl>  
E-mail: [Vanessa.Tore@gobiernu.cw](mailto:Vanessa.Tore@gobiernu.cw)