Ibero-American Animation Quirino White Paper

ANNEX V
THE CARIBBEAN ANIMATION INDUSTRY

Jamaica

The local animation industry has 32 high schools, 6 tertiary institutions and 6 vocational training institutions offering animation training. There are 4 registered animation studios with an accomplished track record which includes Alcyone, Liquid Light Digital, Reel Rock GSW and Skyres Studio. There are 4 other studios that conduct animation activities that are on the rise as future animation studios namely Night Vision Media, Listen Mi Caribbean, Castle Productions and Esirom.

Jamaica, being a nearshore market for the North America, makes the country an ideal location for outsourcing of major animation productions. Initially, in 2011 onward the Animation Software Company Toonboom based in Canada was a major support and market liaison, however they have since lessened their support in the Caribbean to software provision. The reduced international guidance and connectivity has left a void in the industry's development.

Skilled labour has been a challenge over the years due to lack of industry professionals to provide in depth training with world class insight. Animation is an expensive and perishable skill set. The lack of an incubator space to continuously practice and develop quality content will be a setback since there is no other way to efficiently improve quality and foster the team work needed to service international contracts. This lack of growth in capacity has negatively impacted the confidence level of outsourcing groups interested in Jamaica and local investors. We have demonstrated excellent art based skills on a massive level but fail to demonstrate the same with animation skill and capacity. The necessary manpower is lacking not only due to scarcity of a large enough talent pool but also the funding to sustain employment of animators in studios long enough to manage a project at an international standard.

The Caribbean is said to be poised for 5,000 animation jobs, 500 of which could come to Jamaica (Development Bank of Jamaica Ltd. 2016, p.3). The aim therefore is to develop these animators by the year 2020. In an attempt to reach this goal quickly, short term training courses have churned out 100's of animators with very little useable skill. These efforts have further been thwarted by the low earning potential a career in animation currently provides locally and as such, many local animators hold supplementary jobs.

There have been a few forerunners in the animation industry locally, such as Alcyone's "Cabbie Chronicles". Once Jamaica's flagship animation, it was the first animated series to be aired on local television in 2012 and was featured in several festivals and markets internationally. A local comedian named Lady Rennae produced the second animation to air on local television in 2013 called *"Mek wi laugh"*. Reel Rock GSW was the first animation studio to secure major outsourcing deals from 2013 onward. The animations they have worked on aired on Disney Junior France and Netflix exposed to 165 territories. We have had our successes, however without capacity growth the challenge remains unchanged and the industry unsustainable locally.

Further compounding the problem is the lack of established Government Policies and tax incentives to further facilitate the industry. While there are transferable legislations, for example: The Fiscal Incentive Act, Special Economic Zones Act, and the UK-Jamaica Co-Production.

Treaty, Jamaica has still yet to sign the Madrid Protocol, a matter which has been circulating Parliament for over 5 years. There are no tax concessions or incentives to attract major productions to Jamaica and the country is still on the 501 international watch list for copyright infringement. These are issues which continue to inhibit the growth of the industry locally, especially when faced with increasing competition from lower cost labour markets within Latin America.

With the recent passing of the Security Interest in Personal Property Act (SIPPA) the country is stepping closer toward increasing access to finances by facilitation of movable property as collateral. However financial institutions are lagging behind in acceptance and implementation beyond the use of mortgage and newer motor vehicles as collateral.

Developmental Bank of Jamaica (DBJ), Inter-American Development Bank (IADB), World Bank, JAMPRO Trade and Investment Jamaica, Ministry of Science, Energy and Technology (MSET) and other industry partners should move towards implementing strategies that provide development of local incubator programmes. This should come in the form of providing funding for local content as well as outsourcing market research, grants and support to attend regional and international market events which can provide much needed networking opportunities and insight into landing contracts. There is also a strong belief in the Business of Sustainability for Studios (B.O.S.S.) project which is a business training program for studio heads created by JAMPRO and YEDAI. This they believe is the key to strengthening the studios ability to negotiate deals more effectively, without this project he believes the studios will remain stagnant.

Several initiatives were made to boost capacity through training and development programmes through CARIMAC and Human Employment and Resource Training (HEART) Trust National Training Agency (NTA) then soon after the University of Technology (UTech), University of the West Indies (UWI), Edna Manley College, Excelsior Community College, University College of the Caribbean (iCreate) and the Media Training Institute (MTI) joined the initiative.
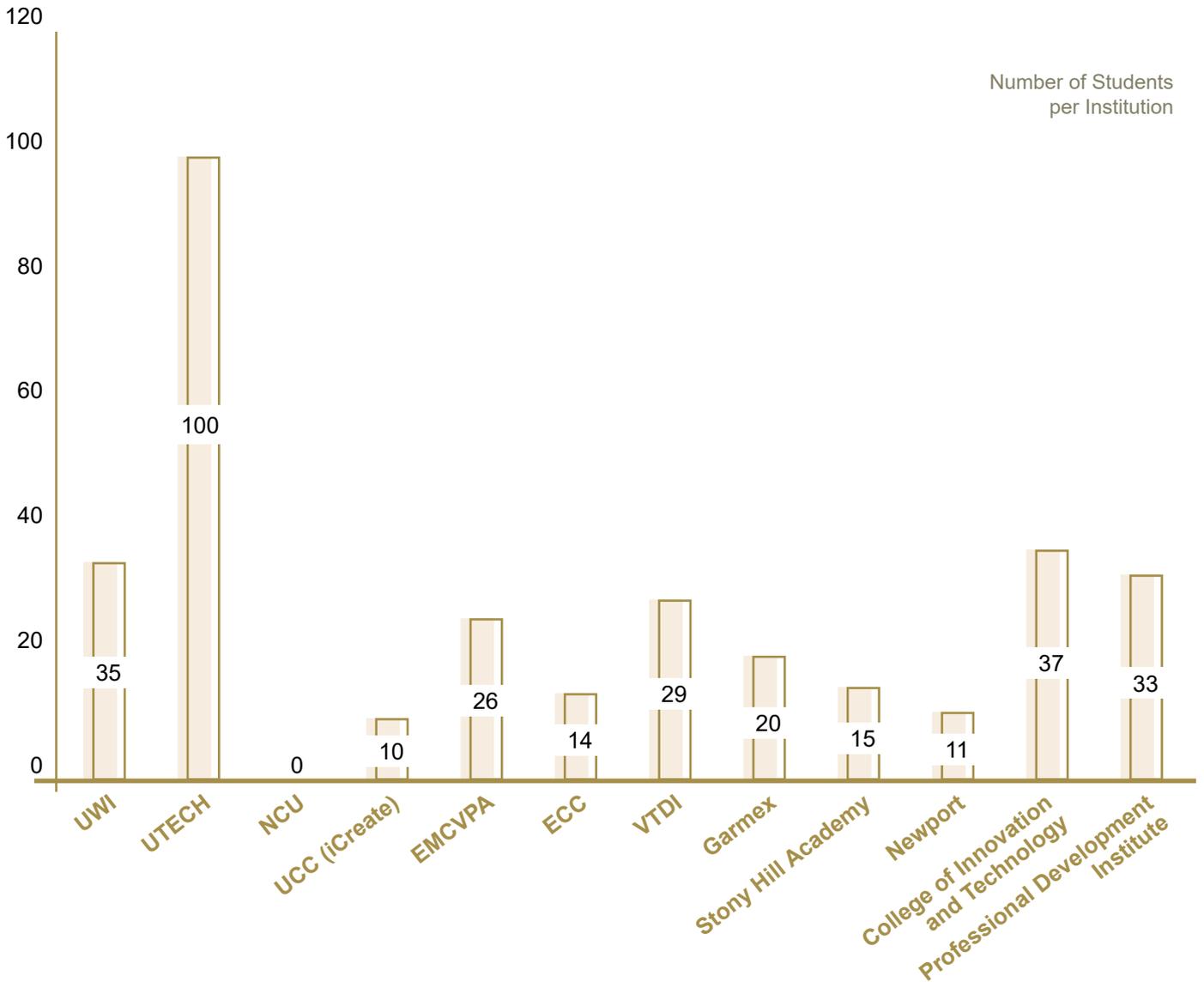
Training Institutions

Jamaica has seven tertiary level institutions offering animation, of which three are internationally accredited Universities. These schools are The University of the West Indies (UWI), The University of Technology (UTech), Northern Caribbean University (NCU), University College of the Caribbean (UCC), HEART Vocational Technology Development Institute (VTDI), Edna Manley College of the Visual and Performing Arts (EMCVPA), Excelsior Community College (ECC).

As of January 31 st , only the UWI and the UTech offer Degree programmes with VDTI and NCU intending to start their animation degree programmes next year. Currently VDTI and EMCVPA offer Associate Degrees. The remainder offer either certificate courses in animation or animation as a part of a Digital Media Degree. There are certification courses offered by HEART TRUST NTA as a national standard. These courses are offered across the island through various HEART authorized centres. The Media Training Institute (MTI) is planning to partner with North American Art College "Full Sail" to offer an animation degree programme but the logistics have not been finalized.

At the high school level, several High Schools are offering animation at the Caribbean Advance Proficiency Examination (CAPE) level through the CAPE curriculum which includes gaming.

Institution	Degree	#Students	Capacity	Duration	Graduates
UWI	Degree	35	51	3 years	10
UTECH	Degree	100	100	4 Years	0
NCU	-	-	-	-	-
UCC (iCreate)	Certification	10	15	3 mths	5
EMCVPA	Degree	26	120	4 years	0
ECC	Associate Degree	14	60	2 Years	0
VTDI	Associate Degree	29	40	2 years	0
Garmex	Certification	20	20	1 year	48
Stony Hill Academy	Certification	15	15	1 year	-
Newport	Certification	11	15	1 year	-
College of Innovation and Technology	Certification	37	20	15 mths FT 2 year PT	9
Professional Development Institute	Certification	33	-	6 mths L1 6 mths L2	-

Animation Training Institutions

Number of Students
per Institution

Institution	Number of Students
UWI	35
UTECH	100
NCU	0
UCC (iCreate)	10
EMCVPA	26
ECC	14
VTDI	29
Garmex	20
Stony Hill Academy	15
Newport	11
College of Innovation and Technology	37
Professional Development Institute	33

The Jamaica Animation Nation Network (JANN) is a local association for animators. Its members include students, trainers, independents and studio employees. Currently they have Thirty (30) active members, two hundred (200) signed up their mailing list and approximately fifteen hundred (1,500) followers on social media. The association's mission is to:

- Provide a platform for local animators to network and collaborate.

- Support training institutions in an advisory capacity.

- Promote animation content creation and development.

- Form linkages with local and international partners with the aim of advancing our exposure globally.

- Encourage best practices.

To date they have provided consultations to government stakeholders, training institutions and independent animators and various animation interests, including investors and studio prospects. The association hosted the second Animae Caribe Jamaica satellite event, sponsored Kingstoon in 2016, promoted several YEDAI initiatives to the animation community, hosted a character design competition and three workshops in 2017 and has given presentations at several High Schools and Universities.

The association is currently spearheading a collaboration between all Caribbean Networks to foster unity within the Caribbean. Currently each country within the region acts separately. JANN foresees the Caribbean having greater potential if its members act together to form a single region capable of working on large scale projects together, as well as sharing resources.

JANN has for years put forward an incubation project, however, lack of capital prevents them from moving forward with these plans. They are seeking alternative means of accomplishing a scaled down version.

Projects Underway: Youth Employment in Digital Animation Industries (YEDAI)

Developed by the Ministry of Science Energy and Technology, the YEDAI project provides professional level training for trainers and animators with studio experienced partners as well as developing employment opportunities for members of the animation industry. Involved in this process is fostering networks through events like Kingstoon and facilitating delegations to market events like Kidscreen, Animae Caribe and MIPCOM.

Business of Sustainability for Studios (BOSS)

Designed by JAMPRO to answer the need for studios to push for their own opportunities. The programme acts like a mini Masters in Business Administration (MBA) for studio heads. It instills business skills for creative executives to make the business more sustainable and profitable. Still in the design phase as at the writing of this report, it is hoped that by April 2018 the project will be implemented. The launch is dependent on the hireage of a coordinator to implement the vision.

Festival approach

The Government of Jamaica, in collaboration with the World Bank launched **KingstOOn (3rd edition) Animation Conference** and **Afrodescendant Film Festival** held in Kingston, Jamaica **April 5-7, 2019** at the University of Technology, Jamaica.

KingstOOn 3 hosted the biennial display of Afro-descendant culture through storytelling and animated media. This will be executed under three core themes: **LEARN**, **EARN** and **DISPLAY**.

KINGSTOON 3
Animation Festival
Conference · Film Festival · Expo
APRIL 5-7, 2019
UNIVERSITY OF TECHNOLOGY, JAMAICA

To operationalise these themes, KingstOOn 3:

- Facilitates the exposure of participants to more granular business topics and content specific workshops.

- Creates a space for the exchange of knowledge and experiences, via panel discussions and networking events.

- Encourages the interaction between producers of content, buyers of content and consumers of content, via speed meetings and networking events.

- Catalyses the exchange of ideas within the community of practice between Afrodescendant animators, via an Afro-descendant Animation Film Festival.

- Showcases Jamaica as a rich source of Afro-descendant stories, academic exploration and ultimately animation production.

- Demonstrates animation as a viable career through its many manifestations (games, nonentertainment, feature films, etc.).

General objectives

1. To provide participants, and in particular Caribbean animators and associated professionals, with the avenues to continue to **LEARN** the nuances of the global animation pipeline, by engaging directly with global industry leaders in various aspects of the business of animation, including education.

2. To create opportunities for participants to **EARN** from their engagement in animation at any level, by facilitating the creation of pitch decks and pairing pre-qualified individuals with potential content.

3. To **DISPLAY** Afro-descendant animated content in the Animation Film Festival, by showcasing content developed by studios from around the world that speak to the afrodescendant reality (stories, images, music, customs…).

Specific objectives

The specific objectives of KingstOOn are to:

1. Generate Employment Leads for graduate of Animation Programmes.

2. Generate co-production and outsourced leads.

3. Promote 'Brand Jamaica' in the animation and film industry.

4. Create learning opportunities in current and future trends.

5. Generate broadcasting lead.

6. Stakeholders input for animation policy development.

References:

■ Animation Industry Report 2018 Jamaica – Commisioned by World Bank, Youth Employment in the Digital and Animation Industries Project (Office of the Prime Minister), Jampro.

Trinidad and Tobago

Trinidad and Tobago's animation industry is at an embryonic state in its development with a small talent pool from which to draw, and is characterized by a small number of independent full-time studios, which employ on average 8 persons at each studio, with an average age of 7 years from date of registration. These studios are complemented by a larger number of freelance animators. Due to the small size of the industry, as well as the strong relationships between practitioners therein, studios engage in collaborative partnering arrangements and co-opt the services of freelance animators, as the need arises, especially when involved in larger and more demanding projects.

Older and more established studios in the local industry were founded by individuals who were trained in animation at highly-reputed international institutions such as Goldsmiths, University of London, Savannah College of Art and Design (SCAD) in Savannah, Georgia, USA and Sheridan College in Ontario, Canada. In more recent times, new studios have emerged from the entrepreneurial efforts of UTT Animation graduates, e.g. Start Motion Studios, Coded Arts, and Second Floor Studios to name a few.

The structure of the sector in Trinidad and Tobago bears some similarity to the animation industries that exist in other small island states around the world, including developing countries such as Jamaica and Mauritius, and other renowned locations for animation such as the Republic of Ireland.

The domestic market for animation services is very limited in a number of ways. Trinidad and Tobago has a small population, and few local channels are able and willing to broadcast local animated content. Internationally, video sharing platforms such as YouTube and Vimeo, as well as, streaming video-on-demand (SVOD) services such as Netflix, Amazon Prime Video and Hulu have indeed created new opportunities for animated content to be distributed to global audiences. However, animation producers from Trinidad and Tobago (and the Caribbean region altogether), have not yet built a brand, nor established networks and linkages to successfully produce and market local and regional animated content on SVOD platforms.

In the case of Trinidad and Tobago, there are no subsidies provided to assist local animators. The Trinidad and Tobago Film Company administers an investment incentive: a 150% tax deduction for sponsorship of a film. Broadcasters in Trinidad and Tobago have not been as active in funding animated content development (either through commissioning or co-production). Instead, if a studio seeks to have its content exhibited on local television, it must pay the broadcaster for airtime to do so. This model is known as 'pay to play' or brokered programming.

In the absence of a robust network of funding sources, local animators need to demonstrate a strong ability and capacity to seek out external financing. Assistance is necessary in their knowing what facilities are available and how to access them. By way of example, under Protocol III, Article 5 of the EU-CARIFORUM Economic Partnership Agreement 2007 (EPA) provisions are included to incentivise the co-production of audio-visual works between producers from signatory EU and CARIFORUM states; however, not much traction has happened in this area. Albeit, the local private sector is slow to invest, gradually firms are becoming aware of the gains to be had in partnering with local animators e.g. The Beacon Insurance Company partnered with Pepper Advertising in the production of *"Bim and Bam Adventures"*. At Animae Caribe 2016, crowdfunding was attempted, with the intention of financing pilot episodes of animated television series successfully pitched at the Animated Ideas Boot Camp. In this instance, while some funds were raised, the crowdfunding round fell short of generating the targeted amount, due to limited audience reach.

Maps the Innovation System (IS) of Trinidad and Tobago's Animation Industry.
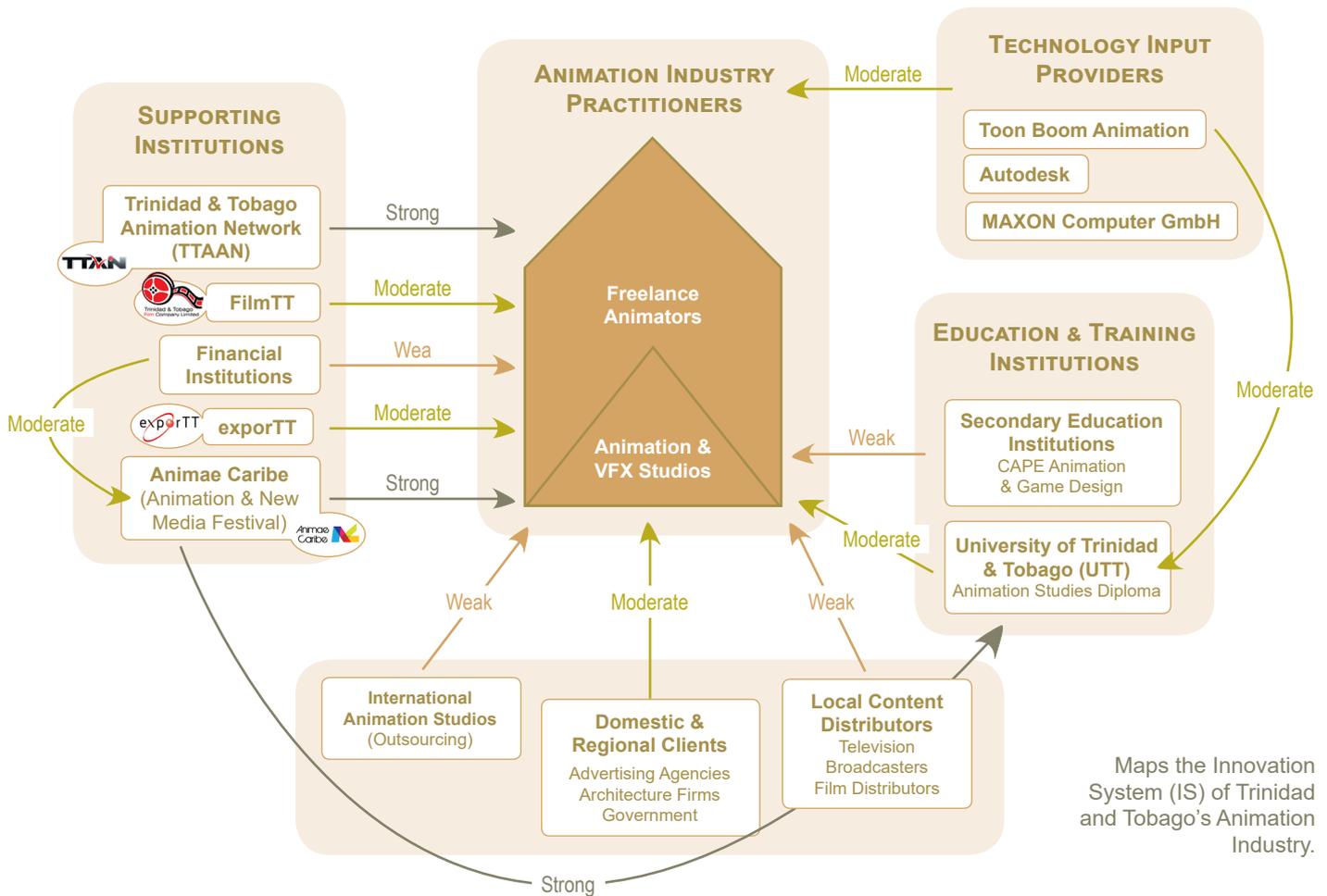
Actors and Linkages

At a glance, the system comprises a network of 5 categories of actors:

- **Local Industry Practitioners:** As of November 2017, there were 10 registered full-time animation studios and a relatively larger pool of free-lance animators. These MSEs drive innovation for the local animation industry.

- **Educational and Training Institutions:** Government and Government- Assisted Secondary schools, the University of Trinidad and Tobago **(UTT)** and the Youth Training and Employment Partnership Programme **(YTEPP)** build absorptive capacity, the human capital and science and technology **(S&T)** infrastructure which are of significant relevance and value to sustaining the digital economy.

- **Technology Input Providers:** *Toon Boom Animation, Autodesk, MAXON, Adobe* are leading suppliers of animation software and storyboard software. The software packages developed by these companies are critical tools used by animators around the world and in T&T.

- **Consumers:** Demand for local animation services is generated primarily by domestic and regional clients e.g. local advertising agencies, architectural firms, government, and soca artistes. Other consumers include local content distributors such as television broadcasters and film distribution agents, and international animation studios.

- **Supporting Institutions:** Private and public sector actors who offer an array of business and financial support services to industry practitioners.

The research reveals a continuum of strong to weak linkages between industry actors.

Strong Linkages

Strong linkages exist between Private Industry Support Institutions and Industry Practitioners. The Trinidad and Tobago Animation Network (TTAN) an industry association founded in 2014, is managed and operated by industry practitioners. Membership comprises young animation stakeholders – including animators, illustrators, writers, photographers, producers, filmmakers, advertising agencies, corporate entities, government and educational institutions – resident in T&T. Active engagement entails a continuous dialogue among these professionals sensitizing them to training, networking and partnering opportunities.

Animae Caribe is a somewhat different type of private industry support institution. During its 16 year existence, the annual animation and digital media festival provides a platform for sharing knowledge and introducing new technologies to local industry thereby developing and expanding the reach of Caribbean animated content. Similar to TTAN, the festival engages in several project-based activities to help sharpen competencies, and showcase the work of local practitioners before prospective investors.

The mapping illustrates a third strong linkage between UTT and Animae Caribe. The intensity of the linkage is best explained through the efforts of one individual who *wears many hats* in the industry. This key individual is not only the current programme administrator and lead lecturer in animation at *UTT*, but also the founder and creative director of *Animae Caribe* as well as, the founder of an animation studio – the *Full Circle Animation Studio*. As the lead in all these activities, this actor has successfully created opportunities of engagement, collaboration and effective targeting of skills and knowledge in animation and multi-media production. UTT's students and graduates benefit from active participation at *Animae Caribe's* workshops where they exchange ideas and learn new knowledge and technologies from industry practitioners. At the festival, supporting institutions also market the business and financial support services available to industry.

The current Animation industryof Trinidad and Tobago has been established in the country for around 10 years with local animation studios These animation studios have been steadily growing in both capacity and experience due to domestic engagements with diverse clients ranging from government, advertising, and education sectors.

There has been a noticeable increase in pilots for animated television series, six such series having been completed through 2011, and there has also been a noted increase of animation from the advertising industry. With this domestic experience, local animation studios have begun to developed service delivery capabilities increasing the ecosystem. This may indicate the readiness of the industry to begin exploring foreign creative services outsourcing markets.

Trinidad and Tobago animation studios have consistently proven their capabilities by showcasing works such as short animated films in premiere animation festival, the Animae Caribe Animation and New Media Festival. The Animae Caribe is a yearly festival which exhibits animated work from both the Caribbean and international locations such as Hong Kong, Egypt, US, and Spain. Moreover, it is an opportunity for local animators and professionals to learn from international industry experts in the field of Animation.

International animation studios have also animation capabilities. Toon Boom, a global provider of digital content and animation creation software, has made significant headway in the country, establishing a partnership with local animation provider, Full Circle Animation,. In this partnership, Toon Boom will be providing software and equipment to Full Circle Animation, enabling local animators to create digital animation in formats required by international clients.

Moreover, Toon Boom will guide Full Circle Animation in its first outsourcing engagement. Trainers will be made available to Full Circle Animation for the first 2-3 months of the project, transferring knowledge to local animators and hand-holding Full Circle Animation through their first outsourcing engagement.

Another advantage for Trinidad and Tobago is its current stock of local animators, supported by a capable tertiary platform. UTT currently offers a 2-year Digital Media Studies diploma course aimed at training students for employment in the Animation industry. Graduates from this program are typically able to be integrated into the Animation industry, provided they are given short training and immersion programs of specific animation processes. The creation of a Bachelor of Arts and Science in Animation is also being pursued. In addition, YTEPP holds a re-training program aimed at unemployed people between the ages of 25-45 who wish to re-enter the animation industry. In total, approximately 220 animators graduate yearly comprised of 40 animation graduates and 180 YTEPP graduates. Both these programs employ a two-pronged approach in ensuring the labor supply of the animation outsourcing sector as talent is sourced from both the fresh graduate and re-skilled trainee segments of the labor pool. With regard to cost, Trinidad and Tobago also provides an advantage in comparison to even a more mature destination such as India. Full Circle Animation proposes a production cost of US$45,000 per half hour animated television episode - 15% cheaper than rates in India.

References:

■ The Animation Industry of Trinidad and Tobago. Policy, Research and Intelligence Department National Institute of Higher Education, Research, Science and Technology (NIHERST).

■ THOLONS. Trinidad and Tobago. Exploring opportunities for the Global IT Services Market.