



JAMPRO
TRADE & INVESTMENT JAMAICA

Jamaica Film Commission State of the Industry 2019/20

Sept 2019

Presenter – Renee Robinson, Film Commissioner of Jamaica



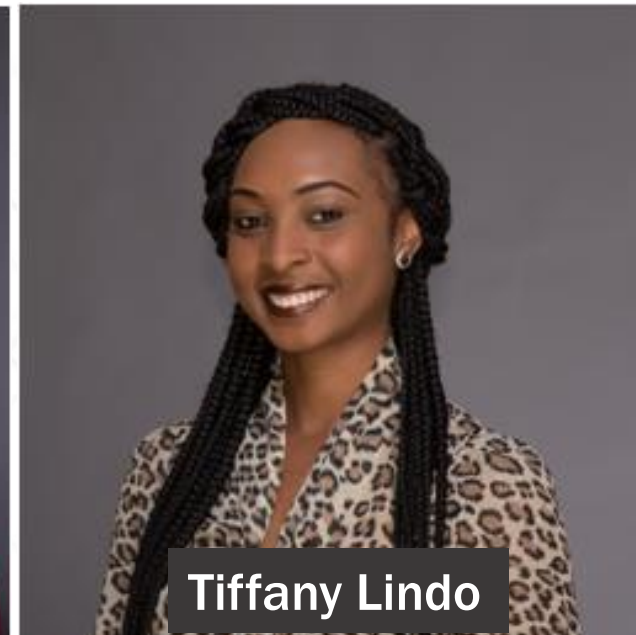
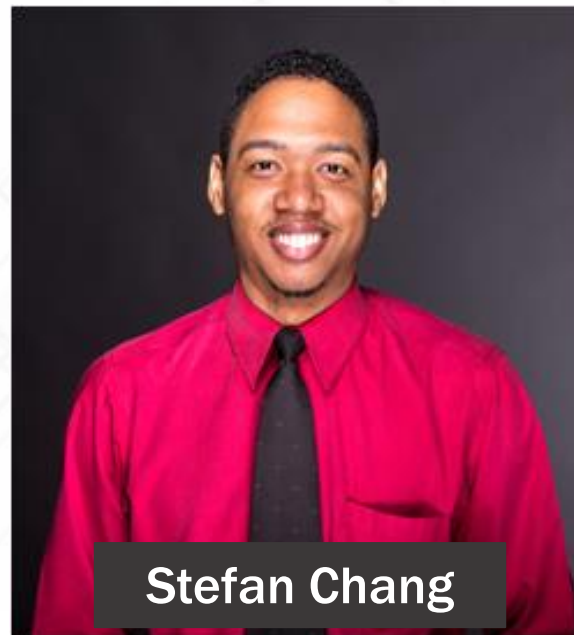
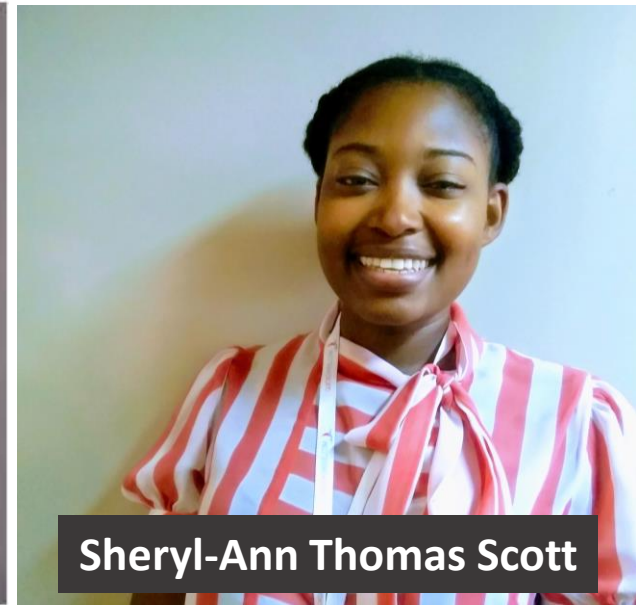
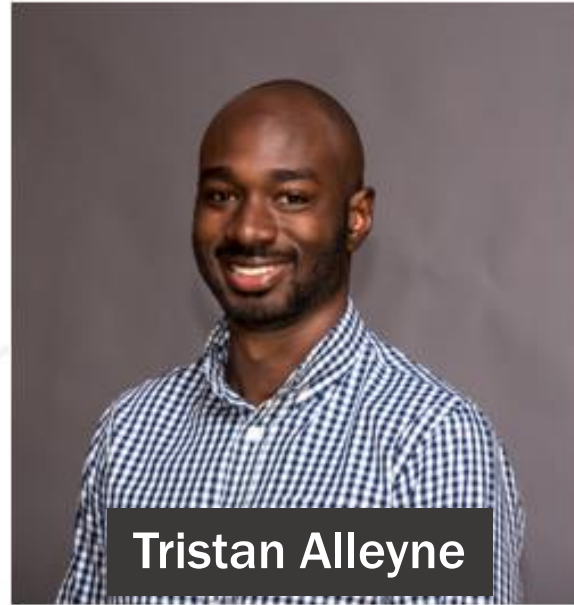
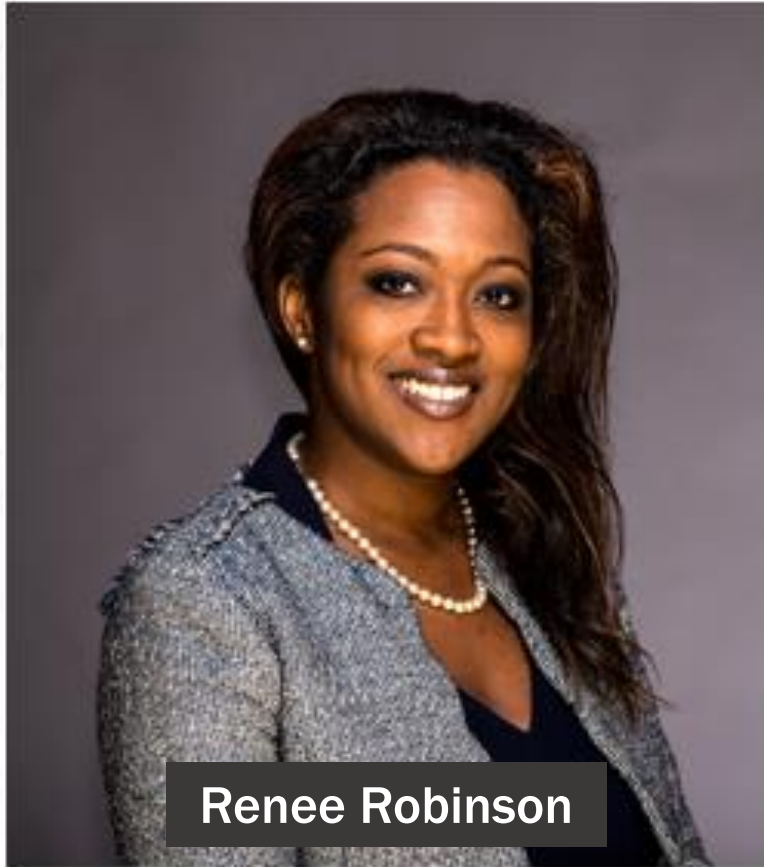
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ABOUT THE JAMAICA FILM COMMISSION

- Established in 1984, the Jamaica Film Commission at JAMPRO serves a dual portfolio
 - production facilitation and industry development for screen-based projects
 - sales/promotion progression of business opportunities in the film, animation, and music sectors in Jamaica
- We are mandated to build global relationships and realise business opportunities for the Jamaican film/animation industry through the delivery of initiatives that increase investment, export, trade, and employment



THE TEAM



FUNCTION / SERVICES OFFERED

- **Promotion of Export & Investment Opportunities**

- Facilitate business opportunities between qualified international and local clients
- Progress investment and export opportunities that result in employment of Jamaicans, capital expenditure, and production expenditure

- **Sector Development Initiatives**

- Advance sector development through signature programs and ecosystem building
- Collaborate with the respective industry associations, partners, and stakeholders

- **Promoting Jamaica as a Film Business Location**

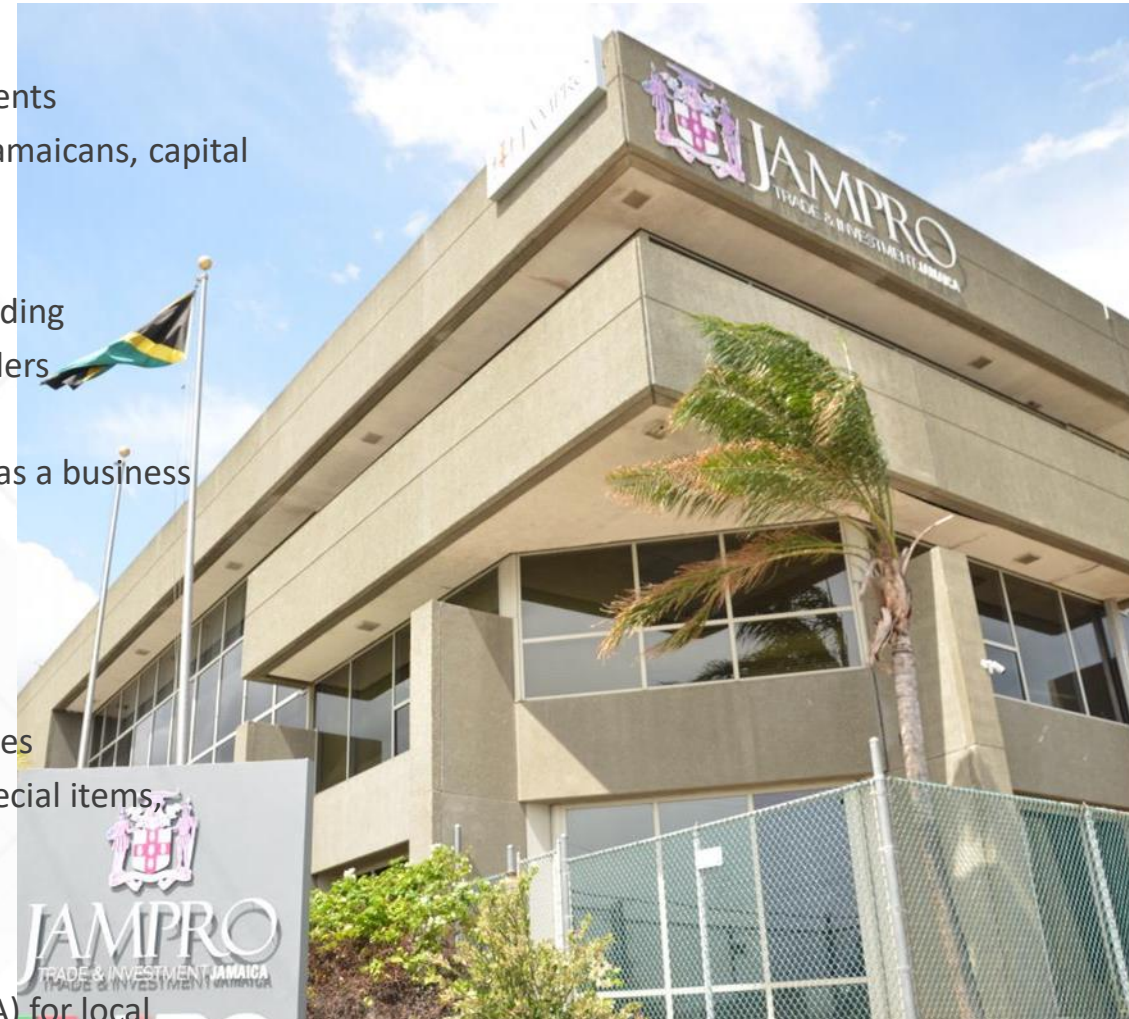
- Represent Jamaica at international festivals/markets to promote the country as a business location for film
- Promote databases of locations, content, talent, and resources / services

- **Film Production Advisory and Facilitation**

- Process film registration for all projects being filmed in Jamaica
- Liaise between government agencies, private sector, and production companies
- Facilitate standard and specialized permits eg: bond waivers, work permit, special items, public areas, and other specialized requests

- **Policy and Advocacy**

- Advocate for incentives, policies, research, and funding for portfolio sectors
- Facilitate the Productive Inputs Relief (PIR) under the Fiscal Incentives Act (FIA) for local entities to access eligible incentives



FC/FAM Sector Imperatives

Create more jobs for Jamaicans in screen-based industries

- Increase the quantity and scale of international productions shooting in Jamaica
- Increase the quantity and scale of local productions shooting in Jamaica
- Progress investment and export leads that result in employment

Stimulate financing and routes to market

- Implement the Jamaica Screen Fund
- Deliver market attendance opportunities
- Increase participation of private capital in the sector

Legitimize the ecosystem

- Institute global best practices, transparent procedures and standardization
- Support and empower the industry associations
- Contribute to economic impact data

Improve quality and quantity of local commercially viable content

- Support Signature Programs which develop local content and talent
- Publish national catalogues of local content and talent
- Pursue distribution and exhibition opportunities for local content and talent

Make Jamaica the Regional Knowledge Leader

- Lead on regional collaboration projects
- Represent the nation and the region in international fora
- Demonstrate ease of doing business in Jamaica

JAMPRO Corporate Imperatives

1

Actively promote and enable exports and investments

- *Grow exports*
- *Grow investments*
- *Maximize linkage opportunities*
- *Conduct proactive research to guide decision/strategies*

Corporate Imperative

2

Build global business relationships through effective management

- *Increase engagement with key and strategic stakeholders*
- *Increase awareness of JAMPRO*

Corporate Imperative

3

Foster an enabling business environment

- *Drive policy change and development*
- *Deliver effective services that add value to our customers*
- *Accelerate business facilitation*

Corporate Imperative

4

Nurture an engaged, high performing, collaborative team

- *Foster a satisfied team*
- *Strengthen the technical competencies to improve productivity*

Corporate Imperative

FULL LIST OF ACTIVATIONS 2020/2024

Signature Programs, Events, Initiatives	Industry Development	Policy / Advocacy	Inv / Exp Promotion	Research
JAFTA Propella (Screen development)	Jamaica Screen Fund (Screen development)	Film Licensing Regime (Screen development)	Leads progression	Distribution Strategies
FilmLab JA (Screen development)	Production offset and umbrella distribution agreements (Screen development)	Culture Policy, Film Policy, Animation Policy	National delegations (Screen development)	Guide to UK Co-Production
ExportMax	Investor Preparedness	CDB / CIIF	National Export Strategy	Baseline Study / Mapping of CCIs
Enterprise Program TBD?	Working groups		FAM Investor Forum	Double Taxation
Open House	International Talent Programs (Screen development)			





Focus Sectors and Sub-Sectors

Sectors and Subsectors

Differentiators for Each Sector



Film	Animation	Music
Develop & Promote	Develop & Promote	React
Production facilitation – local and international	Production facilitation – local and international	Investment in physical and digital infrastructure
Talent and enterprise development through signature programs	Talent and enterprise development through signature programs	
Investment in physical and digital infrastructure	Investment in physical and digital infrastructure	
Export (distribution) of content, and talent	Export (distribution) of content, and talent	

Why Film? (Develop & Promote)

Established Labour Force and Ecosystem (Film/TV)

- Approx. 150 foreign productions facilitated per year
- Over 2 billion JMD in film production expenditure (18/19) contributed to GDP
- Approx 65-70% local crew hired on most international productions, only Heads of Dept required on location
- Recent high-profile productions shot on island include BOND25, the Idris Elba directed YARDIE, SPRINTER executive produced by Will and Jada Smith and directed by Storm Saulter, KING OF THE DANCEHALL directed by Nick Cannon, Beyonce and Jay-Z's "OTR2", TOP BOY, 60 MINS, Netflix's LIKE FATHER and SYN, among others
- Multiple equipment rental and production service provider outlets including outside broadcast trucks, green screens, and production back offices





Why Animation? (Develop & Promote)

Growing Labour Force and Ecosystem (Animation)

- US \$20 million Youth Employment in the Digital and Animation Industries (YEDAI) World Bank Loan facilitated by the Office of the Prime Minister for the development of the Animation Industry.
- Low cost labour when compared to North America and Europe. Cost per second range of \$10USD-\$50 USD with \$25USD as the typical average.
- Over 8 registered full-service animation studios including Liquid Light Digital, ListenMi Caribbean, Reel Rock GSW, Skyres Studio, Night Vision Media, Listen Mi Caribbean, Esirom, George Hay Designs, AnimeBee, Alcyone.
- 6 tertiary institutions offering animation training, graduating approx. 200 trainees per annum
- Multiple staging of KingstOOon animation festival locally

Why JAMAICA?

Liberal and welcoming business climate

- No restrictions on repatriation of profit or foreign exchange controls
- No restrictions on foreign ownership
- Pro-investment parliamentary democracy
- Open and transparent investment regime
- Stable telecommunications infrastructure

Growing recognition for investment climate

- Fitch Ratings Agency upgraded default rating to 'B+' from 'B' and outlook to "Stable" from "Positive" (2019)
- Competitive budgets and comparatively low cost of labour
- Growing private investment
- Kingston was recognized as the City of the Year 2018 by Nearshore Americas for the BPO sector

Cultural affinity with US, Canada, UK

- Largest English speaking island in the Caribbean
- Third largest English speaking country in the Western Hemisphere
- 400 International flights weekly
- 40 million population Caribbean diaspora, Jamaican culture equals viewership

Why JAMPRO?

Government Support

- Fiscal Incentives Act - Customs duty waivers on temporary and permanent imports of production equipment
- Special Economic Zones Act - Customs duty relief, GCT relief, Employment tax credit, promotional tax credit, corporate income tax headline rate of 12.5% (as low as 7.75%), capital allowance.
- Double Taxation Avoidance Agreements with most foreign jurisdictions
- UK-Jamaica Co-Production Treaty – UK/Jamaican, Third party minimum contribution – 20%; maximum – 60% of production costs
- Film Fund - Public/Private film fund currently being developed for implementation in 2020.



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Trends and Successes


Key trends

Highlights and Successes to date

Investor
interest in
local
companies
and talent

Pop up
exhibitions
of local
content

Markets
being
explored
outside
of
JAMPRO



Interest in
undiscovered
Caribbean
content and
talent

Afrocentric
content and
issues
entering
mainstream

Commissioning is on the rise, as opposed to acquisition

Successes 2018/19

- US\$ 3,424,842.32 recorded in CAPEX from 218 Productive Inputs Relief (PIR) requests, reflecting a 77% increase from 2017/18
- Film production expenditure (FPE) contributed over J\$2 Billion to the local economy in 2018/19, up 97% from 2017-18. This is the second year FPE has topped J\$1B
- 104 international film productions created 2677 jobs, on par with 2017-18
- Television productions and documentaries led the genres in 2018-19, with 23 TV productions and 21 documentaries
- 4 feature films were filmed in Jamaica in 2018-19 - James Bond B25, THE SWING OF THINGS, SYN (Release title ASAGAYA), and RUNING BULLS
- The following high-profile non-feature productions were filmed in Jamaica: TOP BOY (TV Series), 60 MINUTES (TV Series), GEEJAM music video for Stefflonson (Music Video)



Successes 2018/19 cont'd

- **JAFTA Propella:** Kia Moses' FLIGHT won 3 awards including Best in Festival, at the Black Women Film Summit, and scoring a meeting with HBO. FLIGHT also won Best Short Film Fiction at the Pan African Film Festival in Cannes, was exhibited as part of the Diversity in Cannes Program, and was selected for the Short Film Corner at the Cannes Film Festival in May 2019
- **Film Lab:** Two feature film projects coming out of the Film Lab program implemented with the British Council, also advanced this year – receiving local seed funding of \$500,000 JMD each – Tony Hendriks' SHOOT THE GIRL (which was a Propella 2017 short) and Letay Williams' TRAYTOWN.
- **BOSS Program:** Two (2) international animation productions outsourced to local production companies, including one (1) full scale 44-episode project with Liquid Light for a Jamaican animation series with renowned Indian studio, Toonz Media;



Successes 2018/19 cont'd

- **Local Content:** *SPRINTER* won the Best Narrative Feature award, the Audience award and the Best Director award at the American Black Film Festival (ABFF) in June 2018, and continued on to collect awards at the Trinidad and Tobago Film Festival and the Nouveau Regards in Guadeloupe. The film release in the U.S. in April 2019 via US distributor FilmRise using the innovative theatre on demand model Gathr.
- **International Production:** One of the most significant developments in 2018-19 is the selection of Jamaica as a filming location for 25th anniversary film of the James Bond franchise, by Eon Productions.
- **Market attendance:** The Film Commission increased international visibility through market attendance at Toronto International Film Festival (TIFF), Trinidad + Tobago Film Festival (TTFF), MIPCOM, FOROMIC, Clermont Ferrand International Shorts Film Festival, Berlinale Film Festival / European Film Market (EFM) and Kidscreen Summit.



Successes 2018/19 cont'd

- **Investment:** the first Film, Animation and Music Investor Forum was successfully staged in March with 63 local projects represented and 22 investors in attendance. The Investor Forum developed in part out of the Investor track mission to Los Angeles, conducted under the BOSS program which brought 10 local investors and financiers on a study tour for peer knowledge exchange with financiers in LA
- **Investment:** Catalogue of local investment opportunities developed and published and is now available in digital format to be disseminated to international and local potential investors and exporters
- **Policy:** The Film Fund Consultancy was completed, with the submission of the final Business Case and Operational Guidelines, which are used as supporting documentation for the cabinet note which has been submitted.
- **Policy:** The Guide to Filming was completed and published, after almost 2 years under development





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QUESTIONS? THANK YOU!



FILM JAMAICA

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