"The Harder They Cluster": The case of the Jamaican Film Industry

A qualitative study on advancing film production clusters in Small Island Developing States (SIDS)

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Abstract

This study investigates the Jamaican film industry to assess its potential as a film production cluster and identifies the characteristics that influence this development. The main research question guiding this inquiry is: *What is the process of creating a film production cluster in Jamaica?* A Small Island Developing State, this research on Jamaica provides a model for future cluster research in similar locations. The research employed a qualitative approach, conducting 19 in-depth interviews with experts in the Jamaican film industry, including freelance workers, writers, producers, directors, and managers of production companies. These interviews, combined with a seven-parameter framework of media clusters developed by Komorowski (2016), provided valuable insights into the conditions necessary for the advancement of a robust film production cluster. The framework identifies key cluster principles including the presence of media entities which include workers, institutions and communities; as well as the characteristics of seven parameters consisting of; *place, proximity, population, profile, path-dependency, policy* and *performance*. The analysis revealed a complex interplay between the parameters, in particular those to do with, policy, population, proximity, and profile. While there are strong collaborative networks, they are often limited by cliques and gatekeepers. Equally, the study highlights perceived policy inconsistencies and a lack of governmental and private sector support, which hinder growth. Jamaica has a skilled film workforce - although it is limited; and while there are concerns about the limited training opportunities, individual entrepreneurship in the film industry is evident. Despite examples of entrepreneurship, local film production at the time of this research does not have a consistent style aesthetic, due in part, to many fragments remaining informal in nature. Despite these challenges, there is significant potential for a film production cluster to benefit the economy and national culture. Specific metrics for success were developed in line with Jamaica's development goals in line and SIDS priority action areas to appropriately assess. This study provides key recommendations for policymakers and stakeholders in Jamaica. These suggestions specifically recommend strengthening existing collaborative networks, implementing local content quotas, advancing educational and skills training programs, incentivizing private sector investment and supporting further

research. It is argued through the integration of targeted support and strategic initiatives, Jamaica can cultivate a thriving film industry cluster that contributes to national pride, economic growth, and international awareness. This research contributes to the understanding of film production clusters in Small Island Developing States (SIDS) and presents structure suggestions and further research areas for future study.

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List of Abbreviations

Abbreviation	Meaning
CARIMAC	Caribbean School of Media and Communication [part of the University of the West Indies]
CEO	Chief Executive Officer
CI/CCI	Creative/Creative and Cultural Industries
COO	Chief Operational Officer
DP (DoP)	Director of Photography
HEART NSTA Trust	The Human Employment and Resource Training, National Service and Training Agency Trust
HOD	Head of Department
JAFTA	Jamaica Film and Television Association
JAMPRO	Jamaica Promotions Corporation
JSDI	Jamaica Screen Development Initiative
MCGES	Ministry of Culture, Gender, Entertainment and Sport, of the Government of Jamaica
PA	Production Assistant
SAMOA Pathway	Small Island Developing States Accelerated Modalities of Action Pathway
SIDS	Small Island Developing States
TVJ	Television Jamaica
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UTECH	The University of Technology, Jamaica
UWI	University of the West Indies
VP	Vice President
7-Ps	Seven parameters

Preface

In life, we rarely have an opportunity to reflect on our accomplishments. Often, we find ourselves occupied by the *what ifs?* and *what's next?* of life. This often means we forget to celebrate our successes in the moment. I will take this opportunity now to enjoy my achievements. I firstly must thank all the academic supervision I have received throughout my time at Erasmus University, I hope this work is a testament to the academic experience and teachings you all have been kind enough to impart.

This thesis was also written thanks (in part) to a brave decision made in 2019. At age 24 I decided to relocate to Jamaica with no plan and no contacts. I was quickly thrown into a new culture, place and language which challenged me but also helped me grow. Five years later I am able to present this thesis on the Jamaican Film Industry as a proud British-Jamaican with a life and career deeply embedded in the culture of the island. Why is film and more importantly creativity so important to me? In the context of Jamaica, it provides a gateway to development and nation-building that I believe has the potential to chart new territory beyond the systems and capitalistic frameworks we assume are set. I truly believe that creativity (however it is expressed/understood) can empower the powerless and give a voice to the voiceless. While this may be read as cliché, nevertheless this view influences my actions in the world and underpins my hope for greater collectivism, which was instilled early by my parents. Therefore, I dedicate this research to family; both to those given to me *and* those I have chosen. I hope that this research can lay the foundation for future enquiries - whether at the micro level of precarious creative worker's rights or to the macro level of developing Jamaica's presence in creative distribution in film (and other creative industries like music, dance, theatre and the visual arts too). While this feels a large feat for me, I know that in the wider academic community there is still much to explore and research, especially when focussing on Jamaica and the Caribbean. Either way, this research is for my family and for my Jamaica - may our development and pride never end. After all, *wi likkle, but wi tallawah*!

1   Introduction

Jamaica's first feature film was released in 1972; titled *"The Harder They Come"* it was directed by Jamaican filmmaker Perry Henzell and starred Jamaican reggae artiste Jimmy Cliff. It featured a Jamaican cast, location and crew and so was a milestone for the potential of cinema on the island. Despite the modest success and critical acclaim, Jamaica's local film industry saw slow development in the years after. Instead, Jamaica is a filming destination for international productions as detailed in the book "Jamaica, the land of film" (Polack, 2017). As an example, this has seen recent Hollywood blockbusters like the James Bond film "*No Time To Die*" (2021) and "*Bob Marley: One Love*" (2024) being filmed on the island. While it is true to say that film productions can be found in Jamaica, it has often been the case that these are not a reflection of Jamaican creativity or cultural heritage. Clearly stated, Jamaicans do not currently see themselves reflected on screen. The effects of globalization mean larger clusters from other more developed countries and film industries (e.g. Hollywood and Bollywood) dominate Jamaican cultural products on TV and at the cinema, as well as in filming productions.

Currently, the local film industry is under-developed, and over-shadowed by international activities and interests; this study is motivated in finding out whether this might be changed. 2024 saw the announcement of government measures that recognises and supports Jamaica's fledgling film industry and is potentially a critical moment for its future. Therefore, this study takes place during a time of much anticipation and optimism for the film production industry. The Minister of Culture, Gender, Entertainment, and Sport (MCGES) is quoted as saying

> "perhaps, now, we can join India's Bollywood, Nigeria's Nollywood and create Jamaica's own film industry – Jollywood," (Anderson-Gordon, 2024a).

This quote references popular film clusters, of which have been identified as beneficial for economic development as well as knowledge sharing (Scott, 2001). This study uses the framework developed by Komorowski (2016, p. 181) to identify unique parameters required in the establishment of a cluster. Specifically, the research questions that this study seeks to answer are:

What is the process of creating a film production cluster in Jamaica?

What conditions are needed to facilitate or impede its development?

1.1 Relevance of the research

This study is of great relevance as it takes place at the introduction of the JSDI – the Jamaica Screen Development Initiative. In January 2024 the Jamaican Prime Minister Andrew Holness formally announced this $1-billion Jamaican Dollar (approx. $6.4 million USD) screen fund that seeks to provide financing for the development and production of film and television on the island (Anderson-Gordon, 2024b; Patterson, 2023). The researcher was present on the island in April 2024 to explore the potential impact of this film fund on the Jamaican film industry. The research therefore charts the current industry dynamics but also its potential for change. A Small Island Developing State, Jamaica has unique characteristics recognised by the United Nations which mean that it has multi-dimensional vulnerabilities. These include and are not limited to climate, health, economics, nature and finance (United Nations, 2024b). Social, economic and environmental progress is thus top of mind for developing nations, and the creative economy has been identified to "hold the key" as a sustainable development path (UNCTAD, 2024). Creative clusters have developed cities and regions around the world through their creation and development (Medel & Gossel, 2015, p. 68). It is therefore unsurprising as Komorowski (2016, p. 181) notes, that the phenomenon of clusters has become an important topic not only in academia but also in policy.

Yet arguably both local and international film production in Jamaica "has performed inconsistently over time and remained marginal to the country's economy throughout the decades" (Martens, 2023, p. 20). This is, in part, due to inconsistent government audiovisual policy over the past 70 years (Martens, 2023, p. 21). However, Jamaica's creative industries continue to attract various academic research and NGO reports as the island's cultural richness is an untapped resource for national development (Hendrickson & Niaah, 2018). The Jamaica Screen Development Initiative (JSDI) may signal a departure from the inconsistencies charted over the past seven decades of "high expectations and low deliveries" in driving national development (Martens, 2023, p. 20). It should be noted that the JSDI focuses on the local production capabilities of Jamaica. While it includes a rebate provision for international productions using Jamaica as a location, much of the fund is for local creatives and filmmakers for the development, production, completion, film festival & market attendance, and marketing & distribution of short and feature length films. Only time will tell if this initiative shall be a critical moment for the film industry in Jamaica, or not. This research is the foundation for making this assessment.

The research will be approached by undertaking in-depth interviews with Jamaican film industry-related experts to have a greater insight into the current dynamics of the local industry. This will be applied to Komorowski's (2016, p171) media cluster framework to identify the unique parameters required for the establishment of a cluster. This study intends to be valuable not only as a case study in the application of Komorowski's (2016) framework but also provide a prototype for cluster research applied to Small Island Developing States (SIDS). It will therefore explore to what extent Jamaica presents a unique case.

1.2   Structure of the Thesis

This concludes the Introduction to the topic. The following chapter details the theoretical framework of this thesis: it includes a summary of Komorowski's media cluster framework as well as an investigation into other media cluster case studies from around the world to provide preliminary foci. Additionally, the unique characteristics of Small Island Developing States (SIDS) regarding film clusters will be introduced and presented in relation to the Jamaican film industry. Thereafter, the third chapter outlines the methodology used in this research, explaining and justifying the research design, data collection and analysis. Chapter 4 details the results, introducing 12 key themes that were identified in the research based on Komorowski's (2016, p171) seven-parameter framework. This thesis concludes by answering the research question *"What is the process of creating a film production cluster in Jamaica?"* and, after summarizing the key research findings, it provides analysis and policy recommendations. Finally, the research limitations will be identified, and further research interests will be proposed.

2 Theoretical Framework

To research the development of a film production cluster in Jamaica, the study hinges on the concept of (media) clusters. Media clustering has been studied through many different means and points of view including geography, strategic management, political economics, sociology and organisational behaviour (Komorowski, 2016, p. 172). The following theoretical framework will delineate what a media cluster is, introduce the integrative 7-parameter framework developed by Komorowski (2016, p. 176), and examine other established film production clusters. Finally, this research will introduce the unique characteristics of SIDS, and integrate it into the Jamaican context detailing its specific features.

2.1 Defining a (media) cluster

The first step in researching media clusters is defining what a media cluster is. Picard (2008) describes media clusters as "specialized form[s] of clusters designed to produce mediated content" (p. 4), unique in that they create primarily non-physical goods and services. It should be noted that the more generalised cluster theory is often attributed to Porter (1998, p. 77) whose main focus was competition. With this lens in mind, clusters are defined as "geographic concentrations of interconnected companies and institutions in a particular field" (Porter, 1998b, p. 78). However, the concept of clusters is not accepted by all. Other researchers argue that cluster definitions like Porter's lack clarity; the application of clusters is so elastic that it is neither universal nor deterministic as a model (Martin & Sunley, 2003, p. 28). A reason in part that clusters have received such attention is their adoption in policy, as they are expected to promote development and greater economic growth (Martin & Sunley, 2003, p. 27; Medel & Gossel, 2015, p. 68). Indeed, it has been noted that "poor countries lack well-developed clusters" and the development of clusters is essential when moving from a middle-income to an advanced economy (Porter, 1998b, p. 86). Despite academic contestation, the concept of clusters is persuasive especially in the creative industries and it would be remiss not to consider the potential of clusters for developing nations, such as Jamaica, as a competitive advantage on the route to development (Porter, 1998a, p. 38).

Yet the semantics of media clusters can at times be tangled and different concepts overlap and questions as to the differences between a *cluster, hub* and *ecosystem* need to be addressed. For many - even for experts working in the media or creative fields - these are

interchangeable terms or are barely distinguishable from each other. To accurately apply a concept, distinctions between them need to be understood: for example, T. E. Virani et al., (2020, p. 135) identifies hubs as nurturing connections and exchanges that lead to clustering. In turn, clusters are identified by their governance, and are an instrument of policy (Dovey et al., 2016, p. 10). This presumes that hubs are often more spontaneous in nature and typically focus on the localised activities and relationships of businesses (Dovey et al., 2016, p. 11). By contrast, creative ecosystems can be described as "spatial agglomerations of creative activities in which links/collaborations between creative actors take place" (Komorowski et al., 2021, p. 1). A creative ecosystem focuses on the creative production and consumption of media, in cluster theory this is typically separated or the economic imperative prioritised (T. Virani, 2023, p. 3). Given that clusters are often a preferred tool used by policy makers, this research seeks to assess film production in Jamaica and provide proposals for future growth.

There is variety between media clusters and their structures. This is in part thanks to the complex nature of media with its great diversity of production characteristics which in turn influences the formation of clusters (Karlsson & Picard, 2011, p. 379). Despite this range, Picard (2008, p. 6) has observed three primary types of clusters: *spontaneous, planned* and *real estate driven*. Spontaneous refers to the organic concentration of media talent and businesses as the presence of established entities reinforces this natural agglomeration. Planned clusters on the other hand are the results of public or private efforts to create a concentration of media communities and institutions. Real estate-driven clusters are primarily driven by the development of the physical space, often attracting media companies and workers thanks to the appeal of facilities and access. However, qualifying a case using these three distinctions provides only an initial context for cluster formation. There is a lack of precision with this approach, especially when analysing the dynamics of media production environments and their potential for clustering, thus a more comprehensive framework has been chosen.

To conclude, this research will use the following definition when answering what parameters influence the development of a film production industry: a dynamic arrangement in the global and local contexts that describes the fixed flows of goods, services and labour (Picone & Komorowski, 2020, p. 234).

2.2   Introducing the 7-parameter framework

This study will use the media cluster framework devised by Komorowski (2016). It includes seven interconnected parameters and is advantageous in this research study as it specifies principles that are required for media clusters, enabling a common analytical framework. It is for that reason that Komorowski's research is particularly valuable in reflexively considering Jamaica as a media cluster, as it offers a structured lens through which the unique dynamics of Jamaica's media landscape can be understood (Komorowski 2016, 2017). Other research (e.g. Virta, 2020) has also made use of the seven parameters (7-ps) framework but the literature found was applied to more developed contexts in contrast to this study. By employing the framework in the environment of a Small Island Developing State (SIDS) it will likely present distinct challenges as well as opportunities that are influenced by this unique context.

The framework does not presume uniformity across clusters and nor does it facilitate direct comparisons; instead, it identifies two key principles. The first principle is the presence of three cluster entities - media institutions, media workers and media communities. (Komorowski, 2016, pp. 176–177). The second principle of the seven parameters will also be explored in my research. The parameters include *place*, *proximity*, *population*, *profile*, *path dependency*, *policy*, and *performance* (Komorowski, 2016). Each offers a unique perspective on the factors influencing cluster development.

- Place refers to the geographical location and local conditions that can influence dynamics (Komorowski, 2016, p. 182).

- Proximity involves the topographical or relational closeness of different entities within the cluster. Proximity can look like networking, collaboration and 'buzz' (Komorowski, 2016, p. 182).

- Population refers to the number of entities available within the cluster, encompassing the size and quantifiable characteristics of the workforce (Komorowski, 2016, p. 182).

- Profile is closely linked and pertains to the type and functions of entities within the cluster (Komorowski, 2016, p. 182).

- Path Dependency examines the historical and cultural factors that have shaped the current dynamics and future trajectories (Komorowski, 2016, p. 182). Path

dependency can reveal entrenched practices and mindsets that might either facilitate or hinder innovation and growth.

- Policy encompasses the governmental and institutional tools that support or constrain the cluster (Komorowski, 2016, p. 182). This includes legislation, funding programs, tax incentives, and educational policies.

- Performance involves measuring the outputs and outcomes of the cluster also described as endogenous and exogenous externalities (Komorowski, 2016, p. 182). This includes not only economic indicators but also qualitative measures such as innovation and knowledge spillovers. Performance metrics will help assess the effectiveness of the cluster and identify areas for improvement.

By examining these seven parameters, this research will provide a holistic understanding of the factors influencing the development of a film production cluster in Jamaica. This approach will allow for a detailed analysis of how these parameters interact and influence each other, providing insights into the strengths, weaknesses, opportunities, and threats facing the Jamaican film industry.

2.3   Insights from global film industry clusters

While successful examples of clusters like Hollywood and Bollywood are easy to identify as they are already formed, this thesis seeks to frame and analyse cluster cases so as to compare and in turn better understand the potential for film production clustering in Jamaica.

2.3.1   Exploring dominant film clusters

Hollywood is arguably one of the most successful examples of a creative/cultural cluster (Medel & Gossel, 2015, p. 70). Studied in depth by Scott (2002), Hollywood serves as a prime example of a mature and highly successful media cluster. Hollywood thrives due to its "bifurcated segments", a structure where large studios co-exist alongside a diverse range of independent production companies and media workers (Scott, 2002, p. 957). This presents the idea that a cluster can be made up of two relatively separate tiers that co-exist. Interestingly, Hollywood promotes the idea that creative promotion will generate economic benefits, a legitimacy that is less anticipated in Europe thus there is less public authority intervention in the United States (Le Blanc, 2010, p. 908). Hollywood is the basis in which processes are assumed can be generalised and copied to produce other "-like phenomena"

(Scott, 2005, p. 1). The UK presents an interesting alternative as it is not a 'first-mover' however especially in London, clusters have been governmentally encouraged (Bagwell, 2008, p. 43). Chapain & Comunian (2009, p. 729) in their research highlight the social element of clustering in the UK as creative industries are typically composed of self-employed individuals who rely on "personal attachments and social embeddedness" which in turn develops the industry further. These social and cultural exchanges are a by-product of these dense interconnections created via clustering (Spicer, 2023, p. 117). This case emphasizes the socio-economic factors within clusters and identifies possible bias that affects minorities (Bagwell, 2008, p. 44).

While Hollywood and the UK serves as a dominant example of a successful film cluster, Bollywood offers an additional, invaluable perspective as an established cluster that has emerged from a developing nation. Despite its vast scale, Bollywood has thrived by producing high-capacity and high-quality films, facilitated through extensive collaborations involving institutions and workers (Lorenzen, 2009, p. 4). The role of the diaspora community has been a help in Bollywood's success, particularly through the creation of global information pipelines (Lorenzen, 2009, p. 25). It's noted that film industry clusters exist within a wider context of globalization. While globalisation undoubtedly brings opportunities of talent and capital that facilitates development, it also introduces the opportunity for a homogenisation of cultural products (e.g. English-speaking and similar styles) (Lorenzen, 2009, pp. 6 & 27). It also explains Hollywood's tendency to outsource to cheaper film clusters around the world, and the focus has often been on these 'runaway productions' rather than indigenous growth (Lorenzen, 2009, p. 7). This research thus centres local production with the understanding that there are connections with the international industry.

Interestingly, despite strong agglomeration and powerful studios, it is policy that is described as crucial to the growth of prolific film clusters both in Bollywood and the US (Lorenzen, 2009, p. 27). Understanding and leveraging such insights can inform strategies to foster a robust and sustainable film production cluster in Jamaica.

2.3.2 The 7-ps framework in practice

Studies that utilise the 7P framework and/or investigate the creation of a film production cluster will be particularly useful sites of research (e.g. Achtenhagen, 2011a; T. E. Virani et al., 2020a). Virta's (2020, p180) research highlights how both internal and external factors affect the development of a new cluster. By focusing on the complications

within the Mediapolis cluster in Finland, new avenues for understanding and defining certain characteristics were possible (Virta, 2020, p. 180). This included that "both policy and management are crucial for [handling] tensions and thus enabling the development of a functioning and collaborative media cluster" (Virta, 2020, p. 182). Being aware of these factors and how they can inhibit innovation or creative performance in the current case study will provide insight, yet Virta (2020, p182) underlines that best practices in media cluster development do not predict future success and may not work when put into different organisational contexts and clusters. This must be kept in mind considering the vast differences with cases such as Tampere, Finland and Jamaica.

This perspective is equally reflected in research by Achtenhagen (2011), which underlines the importance of public-private partnerships in the formation of a film cluster. Similar to this study, the case of 'Trollywood' in Sweden charts the development of a film production cluster (Achtenhagen, 2011b, p. 355). Their findings suggest that effective collaboration between government entities, private sector players, and educational institutions can create a supportive ecosystem for film production. This collaboration can provide the necessary funding, infrastructure, and skills to overcome barriers and drive innovation. What's more, entrepreneurial vision and drive can support these policies to forward cluster development.

Whilst T. E. Virani et al. (2020b, p. 141), explored the importance of local production in Sao Paulo, Brazil. They concluded that local hubs that are embedded in the locality and possess existing cultural connections are essential to the development of creative clusters. Fundamentally, this cluster research must consider not only the film production industry agglomeration but also the symbolic goods that they create which is intertwined with the locale (T. E. Virani et al., 2020b, p. 136).

2.3.3   Examining small film clusters

Whilst the cluster cases presented so far provide interesting insights of general influences on film industry cluster formation, many underline the role of place. The proposed case of this research has specific characteristics that are not reflected in the literature so far. Smaller localities provide greater similarity with Jamaica and can thus potentially provide better theoretical bases. One research case that has made a concerted effort to document a smaller place film industry is Vang et al. (2018). With the investigation of Denmark's film cluster, they highlight the neglect of cluster research to investigate the specificities of film industries located in small countries. For example, they develop

different performance measures including home market shares, export performance and solvency (Vang et al., 2018, p. 646), yet even these measures are not appropriate to apply to SIDS, largely due to the nature of their economies being enormously less developed than Denmark - a modern high-income and highly developed mixed economy.

Yet their research did highlight the importance of *place branding*; the Dogma movement developed an international visibility that was rooted in the local and was specifically demonstrated through the film writing process (Vang et al., 2018, p. 653). This highlights the potential for strong place brand fostering visibility in the global film industry and in turn supporting cluster formation. This finding is particularly valuable for this research as the case of Jamaica has a renowned cultural currency internationally which could be integral to cluster development.

As a small island nation, Malta's efforts to develop a film production cluster offer valuable comparative lessons for Jamaica, given that both countries share a heavy reliance on tourism as a primary economic driver and they are both small in size and population. Malta has strategically invested in enhancing its skills and resources to transform itself into a "Mini-Hollywood of the Mediterranean"(Graziano, 2015, p.67). This transformation involved significant government support, the establishment of state-of-the-art production facilities, and the cultivation of a skilled workforce capable of meeting the demands of international film projects (Cauchi, 2013, p. 51; Graziano, 2015, p. 69). Equally, Singapore has introduced policies that have supported the development of a creative cluster (Gwee, 2009, p. 244). From knowledge and skills development to creation of infrastructure and institutions as well as promotion of a creative culture, the cluster has been cultivated with a serious commitment to the promotion of the creative industries and in turn the notion of arts and local culture more broadly (Gwee, 2009, p. 250). An important feature to note is that development of a creative industries cluster takes time, more so than traditional industrial areas (Gwee, 2009, p. 250).

2.3.4 Gaps in film cluster research

While the research presents salient factors that can help or hinder the development of film clusters, they all fail to capture specificities of smaller, less developed countries. While Hollywood, Bollywood, and the UK, present interesting features; including two-tier systems, reinforcing cluster through policy and the social connections of media workers, all these cases are warped by the sheer size of the cases' populations and geographical areas compared to Jamaica. Equally, while the small country examples are valuable for this

research as a starting point, they fail to incorporate the unique characteristics of SIDS, specifically their developing, and vulnerable economies. Thus, despite place branding, resource development, and policy support, all likely important factors in the development of a film cluster, it ignores and perhaps even hides the unique characteristics of SIDS. This research therefore seeks to build on the aforementioned examples and contribute theoretical elements specific to SIDS. Consequently, the rest of this chapter will present the characteristics and specificities of SIDS and overview Jamaica's film industry.

2.4   The characteristics of SIDS

The importance of geography and the unique traits of the Caribbean and developing nations more generally will need to be applied when employing Komorowski's framework. Specifically, Jamaica was formally defined as a Small Island Developing State in 1992 by the United Nations (2024a). SIDS have specific characteristics both geographically and socio-economically that cannot be changed (Rudge, 2021a, p. 149); these include small population size, marine ecosystems, remoteness, high transportation costs, high costs per-capita for healthcare, plus vulnerability to both economic shocks and climate change (United Nations, 2024a). Arguably, these factors have been systemically overlooked in other cluster cases studies.

While many focus on the challenges of these unique characteristics, SIDS also present distinct positives – in particular they have a unique culture thanks to their size and isolation (UNEP, 2024). This places SIDS in a unique position, considering UNCTAD see the creative economy as a prospect for developing countries to "leapfrog" into new diversified sectors (2021, para. 54). There is very little literature that has been written on clusters in SIDS in the Caribbean specifically. Many papers focus on Trinidad and Tobago (e.g. Burke, 2014; Francis, 2015), in part because of the creative cluster that has developed due to the Carnival industry. What seems evident from these cases is the distinct interplay of formal and informal aspects of the industry - a feature particularly pronounced in developing contexts (Francis, 2015, p. 31). For example, SIDS need the "right set of conditions" to see successful clustering (Burke, 2014, p. 92). This requires a rootedness in the locality as well as a "triad of infrastructure, connectivity and resources" supported by policy (Burke, 2014, p. 92).

Situated 90 miles south of Cuba and 600 miles south of the coast of Florida, Jamaica is the third largest (and the largest English-speaking) island in the Caribbean; these have

brought about its unique social, economic and environmental qualities. While the specifics of Jamaica's cluster conditions will be explored in this research, the unique cultural cachet that Jamaica holds must be explicitly acknowledged. Known as *Brand Jamaica*, this complex, multi-layered concept seeks to articulate the nation's identity - a version of the place branding aforementioned (Anderson & MacLeod, 2017, p. 98; Vang et al., 2018, p. 653). Brand Jamaica now permeates tourism and political broadcasts alike and attempts to encapsulate the island's national culture. It influences both nation branding – for external audiences, and nation building – for its internal citizens and their identity formation (Clancy, 2011, p. 290; H. Johnson & Gentles-Peart, 2019, p. xvi). This is relevant to a film production cluster, as film - the creative output - produces culture and equally influences the visibility and growth of a cluster (hooks, 1996, p. 12; Vang et al., 2018, p. 653). Jamaica's cultural identity has defined itself thanks to the creative industries (most famously Reggae music), and thus should not be undervalued (Paddington, 2000, p. 36). Despite Jamaica's small size, globalisation can provide a channel for talent and capital to enhance a cluster's economy, potentially facilitating new cultural outputs that can compete with Western-styled products (Lorenzen, 2009, p. 27). It presents a particularly salient example of the multiple effects a film cluster can have in this context, affecting the tourism industry via nation branding as well as domestic development.

One evident gap in the literature is appropriate performance metrics for SIDS contexts. The widely used economic indicators skew measures to favour larger and more developed places. By using specific priority areas established for SIDS as well as this specific case of Jamaica, one can begin to present more suitable metrics for success. This research will use the actions agreed upon by the United Nations during the SIDS Accelerated Modalities of Action (SAMOA) Pathway in 2014. The most relevant to the creative industries can be summarized as follows: Enhancing sustainable development through work, consumption, production and transport; preserving tangible and intangible cultural heritage; and increasing connectivity, information management and knowledge sharing (Daly, 2021; Rudge, 2021b, p. 28; United Nations, 2024a). This can be further strengthened by combining these with Jamaica's strategic development goals. The government set out in Vision 2030 the plans and process for the island's development (PIOJ, 2024). The strategic vision of the "Culture, Creative Industries and Values Sector" include contribution to national pride and identity, become a major driver of economic growth and employment, and finally enhanced training institutions and programmes producing a skilled, innovative, competitive and creative workforce (CCIV Task Force, 2009, p. 45). A novel

performance assessment for film clusters has thus been developed incorporating the priorities of SIDS and Jamaica's development goals:

- Drive sustainable economic growth through consumption and production
- Produce a skilled, innovative, knowledge sharing workforce
- Contribute to the preservation of national pride, identity and cultural heritage

These performance measures provide a more appropriate framework to assess the success of creative clustering in SIDS and can be altered as required for each new case.

2.5   The history of Jamaica's film sector

While this research seeks to present a framework for the assessment of a film cluster in SIDS, much of the research underlines the importance of being a "unique place" (Comunian et al., 2010, p. 6; Scott, 2002, p. 964). To clarify, this can overlap all seven parameters outlined, as uniqueness is affected by many factors, which can change the course of history or the national psyche.

For this study, it is necessary to briefly chart the development of Jamaica's film industry. Although Jamaica gained independence in 1962, international productions predate this, going as far back as the early twentieth century in 1901 (Martens, 2023, p. 7). Nearly 70 international productions filmed in Jamaica are listed to have taken place between 1910 and 2010, not including local, TV or documentary productions (Polack, 2017, pp. 6–8). Yet despite this, research on Jamaica's film industry is scant. A predominant scholar on the Jamaican film industry is Emiel Martens. His article detailing seventy years of Jamaica's film policy (Martens, 2023) is one of the few academic texts that attempts to chart the changes over time. The earliest example of film policy in Jamaica dates back to the late 1940s with the enactment of the Motion Picture Industry Encouragement Act (Martens, 2023, p. 7). This policy was part of the Jamaican colonial authorities' efforts to encourage new industries and create opportunities for employment outside of agricultural pursuits. The Act aimed to attract foreign capital into Jamaica, and this was all in the pursuit of a "Hollywood" style model (Martens, 2023, p. 8). However, Martens concludes that the film industry's potential for national development should not be overstated, and arguably the celebratory discourse that surrounds film and the creative industries in Jamaica hides the fact that it will likely never "contribute a lion's share in the island's national development" in part because of inconsistent policy (Martens, 2023, p. 21). While no research has been

undertaken on the potential of a Jamaican film industry cluster specifically, reports have been published regarding the characteristics of clusters in the Caribbean more generally (Rabellotti et al., 2014, 2017; Rabellotti & Conz, 2023) and additional literature on Jamaica's film industry sector has been published by intergovernmental organisations like the UN (Hendrickson & Niaah, 2018). Often the focus of these reports is economic, comparing or relating it to tourism - which is little surprise considering that tourism is Jamaica's single largest contributor to GDP (Davis, 2023; Martens, 2018).

Thus, in light of these research gaps, this research will present for the first time an overview of the potential for a film production cluster in Jamaica and present ideal conditions for it to be formed. As outlined in the introduction, the Jamaica Screen and Development Initiative (JSDI) is a pivotal advancement for the Jamaican film industry. This initiative is particularly significant to this research as it represents a proactive policy measure aimed at addressing long-standing challenges within the industry, such as limited funding and lack of rebate initiatives. Equally, because the JSDI is so recent, it presents an opportunity for this study to consider the potential impact of this initiative and how it might transform the film industry in the next ten years – an opportunity not previously available to researchers.

Using the structure of the seven parameters of which this case study is based, four major areas of enquiry emerged. These were then used to structure the qualitative interviews that were conducted with a range of experts in the film industry in Jamaica. These topic areas were:

- Filmmaking in Jamaica (place, proximity)
- Film initiatives (policy)
- Skills and resources (population, profile)
- Jamaican creative heritage and identity (path-dependency, performance)

As Komorowski (2016) details there is a strong interlink between the parameters and therefore it can be anticipated that there will also be a number of linkages between these 4 simulated topic areas. This study aims to offer actionable insights and policy recommendations that are tailored to the realities of Jamaica's film industry, facilitating its growth and integration into the global film production landscape. Ultimately this thesis seeks to answer the following research question: *What parameters influence the development of a film production cluster in Jamaica?*

3   Method

This chapter provides a rationale for the chosen qualitative research method when investigating the development of a film production cluster in Jamaica. A paradigmatic case study has been chosen to establish an example for SIDS creative cluster development (Flyvbjerg, 2004, p. 128). The research design was influenced by the topic's need for exploration and discovery which qualitative inquiry is particularly orientated (Patton, 2002, p. 55). The choice to conduct semi-structured expert interviews and the process of sampling and data collection will be discussed; as well as the decision to undertake a thematic analysis on the collected data. Additionally, the validity and reliability, also known as research credibility, will be presented at the end of this chapter.

When considering my research question *What parameters influence the development of a film production cluster in Jamaica?*, a mixed-method approach has previously been recommended when identifying media industry clusters (Komorowski, 2020, p. 93). While a mixed-method approach was initially considered, limitations on the research time frame and scope meant that utilising one method was most feasible. Qualitative interviews were selected as an appropriate way to collect data. Specifically, semi-structured interviews were chosen as this form of data collection strives to understand the context and meanings of what is said by interviewees (Brennen, 2017, p. 29), enabling a holistic and dynamic approach to media clusters as encouraged by Komorowski (2016, p. 186). Equally, other media and creative industry cluster research (Lorenzen, 2009; Virta, 2020) had utilised interviews, setting a precedent for this type of data collection.

An advantage of undertaking interviews is that it allows for deep, descriptive data that allows for multiple views, perspectives and meanings (J. M. Johnson & Rowlands, 2012, p. 102). Every interview was based on a pre-established set of questions however the order and additional follow-up questions were flexible and based on the scenario with each respondent (Brennen, 2017, p. 29). This ensured that the seven parameters as well as the main principles from the framework (Komorowski, 2016) could be included in the data collection and thus analysed in the results.

3.1   Sampling

Interview participants are experts and were selected employing purposive sampling methods thanks to their perceived ability to answer specific questions that were important to the research (J. M. Johnson & Rowlands, 2012, p. 105). There is an academic debate over

who constitutes an expert as well as the semantics of being an 'elite' as Van Audenhove & Donders, (2019, p. 180) have outlined. In this case, an expert is defined as people who "are set apart from other actors in the social setting under investigation by their specific knowledge and skills" (Glaser & Laudel, 2009, p. 118). Interviewees were selected because of the role that they held within the Jamaican film industry, each holding professional knowledge including organizational procedures and interpretive knowledge of the film production field (Littig & Pöchhacker, 2014, p. 1088). Specifically, experts were identified by their employed role at a media institution, involvement in the production of a film, or membership of a film community like JAFTA (The Jamaica Film and Television Association). The choice to undertake expert interviews also influenced the design of the semi-structured interviews, opting for open-ended questions to allow room for longer answers (Van Audenhove & Donders, 2019, p. 188).

In order to build the qualitative data set, a total of 19 interviews were carried out, with the ratio of female/male being 12:7 [N=19]. This research investigation and related interviews explore phenomena of which the author has "prior or current member-based knowledge" (J. M. Johnson & Rowlands, 2012, p. 103). Two weeks of fieldwork in Jamaica during April 2024 were undertaken thanks to the researcher's access to the Jamaican film industry, resulting from their professional network developed as an employee and freelancer between 2019-2023. Similar to researchers in other developing country contexts (Lorenzen, 2009, p. 12), the author found that in-person social and business events were much more effective in recruiting respondents to the study. As Polack (2017) notes in the preface of his book, Jamaican governmental agencies are infamously known for their slow response, lack of assistance or complete unresponsiveness and so the fact that the author of this study was already known in the field was a vital component in ensuring respondents' participation. Even with this aforementioned affiliation, current employees of the government agency JAMPRO did not respond in ample time for this research study and are therefore not included.

One panel event in particular "Bob Marley: One Love – Filming in Jamaica & Building a Career in Entertainment" on Tuesday, 2 April 2024 - 5:00pm at The Neville Hall Lecture Theatre on the University of the West Indies (UWI) campus was the basis for building rapport with interviewees, as well as for highlighting topics for interviews and further research. The panellists included Jamaican and international team members involved in the Bob Marley Movie. Two of the panellists went on to become interviewees (Founder of

Cinecom Productions and VP of Paramount Pictures). Eight out of the 19 interviewees attended this event, and it facilitated the scheduling of most of those interviews. It should be noted that 12 out of the 19 had in-person contact before the interview took place, building the important 'rapport' valued in qualitative interviews that builds mutual trust (J. M. Johnson & Rowlands, 2012, p. 104). Ultimately, nine out of the 19 expert interviews were face-to-face, and the remaining interviews were undertaken online; the specific types of these interactions can be found in Appendix A. The sample was initially selected based on prior knowledge of the Jamaican film production industry. However, some interviewees identified other experts for the study which is known as 'snowballing' and was particularly valuable in finding experts beyond the capital of Kingston (Mergel et al., 2019, p. 5), ensuring that the research better represented the entire island.

The interviewees encompassed all three media entities; media institutions, media workers and media communities (as outlined by Komorowski, 2016, p. 176). A list of interviewees can be found in Appendix A, which includes a summary of cluster entity(ies) each belongs to. It should be noted that this identification of entity is not fixed, rather there are strong relations between them all (Komorowski, 2016, p. 184). They have been sorted in this way as an initial marker of their perspective; institutions provide a macro viewpoint, workers a micro, and communities (which are formed by workers) a meso perspective (Komorowski, 2016, p. 184). While all interviewees form part of a media community, I have identified those who are formally embedded in leadership or organisational roles.

3.2   Data collection

The data collection process occurred between the 2nd and 23rd of April 2024. All respondents bar one, were based in Jamaica, the exception was a VP at Paramount Pictures who is based in Los Angeles. The 19 interviews were between 30 minutes to 1 hour 35 minutes in duration, and these were recorded, transcribed, coded, and interpreted as described below. In one interview with a filmmaker/stunt coordinator, the recording was corrupted so only 19 minutes were available to transcribe. Thanks to notes taken during this interview, and the relevance of those final 19 minutes, it was not disregarded as the respondent had a particularly unique perspective that contradicted the majority. The in-person interviews were preferred and often allowed for greater flexibility in the conversation and gauging of social cues (Mergel et al., 2019, p. 5). However, public locations such as an outdoor café had more potential for interruptions from passers-by or overhearing of sensitive

information. As Herzog (2012) writes "interviews are social processes in themselves", where the space, place and questions all equally influence each other (p. 208). It was for this reason a private room was requested at The LAB's (Advertising and Production agency) office thanks to prior professional working relationships. However, the location was led by the preference of each interviewee, encouraging the researcher to remain flexible and adapt to each unique situation (Herzog, 2012, p. 210).

The online interviews all used the video calling platform Microsoft Teams; six out of the 10 had the camera on and the remaining left the camera off. This was often dictated by the interviewee but also by the internet connection which sometimes required cameras to be turned off and the remaining interview to be audio-only, in a bid to improve latency issues. Online interviews can be considered the closest in mirroring face-to-face interviews as they allow users to answer right away with spontaneity (James & Busher, 2012, p. 179). However, the reduction in video call quality can reduce the richness of the interaction which was experienced at times during this research (Weller, 2017, p. 623). Yet, the use of video calls allowed for the flexibility of interviewees' locations and so this approach was particularly valuable in collecting data from persons who were not based in Kingston, Jamaica – in particular this allowed for valuable interviews with a respondent in the United States and the continuation of data collection even after the researcher had returned to Europe. One particular concern in the literature on internet interviewing is building rapport (James & Busher, 2012, p. 183; Weller, 2017, p. 613). This was alleviated in two ways, firstly by having face-to-face interactions with half of the online respondents before the interviews and secondly, by using the technique of sharing personal information as an 'icebreaker' (James & Busher, 2012, p. 183; Weller, 2017, p. 613). For this study, the researcher mentioned their relationship with the case country, previous work experience and perceived importance of the research to build rapport.

The semi-structured interviews were designed in order "to achieve the same deep level of knowledge and understanding as the members or participants" (J. M. Johnson & Rowlands, 2012, p. 101). The structure was split into four scheduled steps based on Robson (2002, p. 278) which include: introductory comments, topic areas with some initial questions, associated prompts and closing comments. Whether online or offline, the introduction always included an informal overview of the interview process, the consent form and received oral consent to record and be included in the research. Rapport can be further advanced with active listening which includes eye contact, smiling and nodding

which can help motivate the interviewee to talk more (Van Audenhove & Donders, 2019, p. 192).

The topics were divided into four major areas as outlined in the theoretical framework: *filmmaking in Jamaica (place, proximity), film initiatives (policy), skills and resources (population, profile), Jamaican creative heritage and identity (path-dependency, performance)*. The final topic area was later changed to *Jamaican "film culture"* responding to comments made by respondents. "Film culture" was often a phrase that was repeated both positively and negatively, it therefore felt apt to incorporate it into a topic header. This follows a process espoused by Patton (2002, p. 55) for exploration and inductive logic. The initial topic of filmmaking in Jamaica was a topic that was interested in the parameters of place, and proximity. Questions included "How would you describe filmmaking in Jamaica?". Next was the topic of the government's film policy which covered the parameter of policy. This topic's questions centred on the JSDI or colloquially called the film fund, therefore encompassed the topics of film funding, international productions and distribution due to the scope of the initiative. Next was the topic of skills and resources that centred the parameters of population and profile. Questions primarily focussed on what was missing from the production industry at this time. Often the closing topic was Jamaican film culture which discussed path-dependency and performance. Predominantly focussed on the output of Jamaican cinema, asking respondents to consider if there is a Jamaican aesthetic or genre.

Similar to Mergel et al. (2019, p. 5), experts were asked if they would like to add any comments or insights that they had not been asked at the end of the interview. This is important in respecting the expert but also opening the field of inquiry to allow for any knowledge gaps to be filled. To close, respondents were thanked again for their participation in the research and that follow-ups would be sent as the research progressed. The complete interview schedule including the topic list with associated questions and prompts can be found in Appendix B. It should be noted that the interviewer ensured interviews were approached as an "unfolding story" as espoused by grounded theorists, allowing for new framings and foci depending on each unique interview situation (Charmaz & Belgrave, 2012, p. 362).

3.3   Data analysis

Following data collection, a thematic analysis was conducted, which is a "method for identifying, analysing and reporting patterns (themes) within data" (Braun & Clarke, 2006,

p. 79). Thematic analysis can be considered a grounded theory "lite" approach as the procedure for coding is very much akin (Braun & Clarke, 2006, p. 81). Interview data is particularly useful in studies that "address organizations, social worlds, discourses, communications, and policy questions as well as individual experience" (Charmaz & Belgrave, 2012, p. 351). Thematic analysis presents the themes found across the data sets and allows for the research question to be answered. There are multiple benefits to using this form of analysis which include flexibility, generation of unanticipated insights and can summarize key features of a large body of data (Braun & Clarke, 2006, p. 97). Considering nearly 20 interviews were collected, this method seemed the most useful for constructing qualitative analyses appropriate to informing policy development.

Once all interviews were completed, all the audio recordings were transcribed. This was made easier thanks to Teams and Microsoft text-to-speech which provided an initial transcript for all 19 interviews. The automatic transcriptions were then edited by the researcher ensuring an accurate transcription. During this editing of the transcripts, the researcher simultaneously noted, or highlighted codes or quotes that emerged from the data. On completion, the researcher continued to familiarize herself with the transcripts, reading and re-reading. This process, encouraged by Braun & Clarke (2006, p. 87) provided initial ideas that then led to initial codes. It became clear during this process that despite an inductive approach to this initial coding many of the initial codes could be derived from the theoretical framework presented earlier in this paper. Despite this deductive style, the creation of the codebook (see Appendix C) was inductive, allowing for new patterns to emerge (Boeije, 2010, p. 89). Once the themes were checked with the original data set and each other, ensuring coherency and distinctness they were applied to the four prior topic areas (Braun & Clarke, 2006, p. 96). From the raw data to coding, 12 themes were identified overall, two to three for each topic area. These include:

- *Collaboration versus. cliques*,
- *Gatekeepers*,
- *Value of networks*,
- *Hopes for the JSDI*,
- *Local and international productions: A two-tiered system*?,
- *Local content quotas*,
- *Limited skills training*,
- *Limited resources*,

- *Entrepreneurship and identity,*
- *Creative output,*
- *Brand Jamaica,*
- *Support and success.*

The themes are introduced and analysed in detail in the fourth chapter of this thesis which discusses the results.

3.4   Research credibility: validity and reliability

The research study was undertaken with academic rigour keeping the validity and reliability of the research top of mind. The perspective and background of the researcher were reflected upon throughout the research, especially during data collection and analysis as these factors are likely to influence. Self-reflexivity is an important practice to continually question biases and motivations (Tracy, 2010, p. 842). While proximity to the case made data collection a relatively smooth process, it also potentially influenced this qualitative research. It should be noted that this is not a unique issue to this study and is the reality for many researchers in small locales. Rather than a disadvantage of the study, this can be used as a strategic benefit when conducting interviews, often allowing a connection based on the expert's "professional system of relevance" (Littig & Pöchhacker, 2014, p. 1088). It should be noted that Internal Validity (IV) is the extent to which "research findings correctly represent the phenomenon that was studied " (Van Selm & Helberger, 2019, p. 168). Equally, 'members checks' were undertaken which involved the reporting back to experts so they can comment on the analysis and in particular quotes used which also helped to signal bias (Van Selm & Helberger, 2019, p. 169). Additionally, the anonymity of participants was respected if requested, and all respondents were described by their position during this thesis to help alleviate identification.

In pursuing the reliability of the study, consistency was pursued. This saw all participants discussing all four topic areas. Equally, all participants were provided with a consent form before the interview. These consistent steps for all interviews seek to reduce the bias of the researcher. The perspectives of the interviewees were fairly balanced across the three media entities. Future research should interview and investigate additional freelance media workers as they often have a unique perspective on industry dynamics. It should be noted that "Reliability is a necessary but not a sufficient condition for validity " (Dorussen et al., 2005, p. 318). Triangulation was also endeavoured by including the

ethnographic observations from the Paramount Film Panel, these findings will be collated and help establish validity (Silverman, 2011, p. 369).

To ensure consistency in the data analysis portion of this study, coding was undertaken in two rounds. Allowing approximately 12 days to pass between this first round and second round of coding ensured that there were no major discrepancies, although over 14 days is preferred (Schreier, 2012, p. 198). Often qualitative inquiries are criticised due to their limitations in scale and focus on one setting (Van Selm & Helberger, 2019, p. 168). In this case, the research study is applying an academic framework that has already been applied to numerous other locations or clusters and therefore transferability has been intrinsically embedded in this research allowing for replication.

4   Results

To explore what conditions are needed for a film production cluster to form in Jamaica, 19 interviews were conducted. The interviews were transcribed, and then, a thematic analysis was applied to organize, categorise, and interpret the gathered data. After segmenting, categorizing and systemically analysing all interviews, themes emerged from the four subject areas that led the interviews. The most prominent themes relevant to each subject area will be presented in this chapter. Then the results and a discussion of the research findings are given in the same thematic order as the semi-structured questions. The code book with the main themes and sub-themes, in which the results were based and analysed, can be found in Appendix C. This research seeks to answer the question: *What parameters influence the development of a film production cluster in Jamaica?* To do so it describes how the framework's parameters interact to either facilitate or impede film production cluster growth.

As set out in the theoretical framework, Komorowski (2016, p176) has identified guidelines to help conduct media cluster research. These include the three entities of media clusters as Principle One and the seven parameters which are Principle Two. From initial reading and fieldwork, Jamaica achieves the first principle of the integrative framework. Media institutions, media workers and media communities can all be identified within the capital of Kingston alone (Komorowski, 2016). The second principle - the seven parameters (Population, Proximity, Place, Profile, Policy, Performance, Path-dependency) will be investigated in relation to the case study Jamaica. As detailed in the theoretical framework, the parameters have been grouped to reflect subjects of inquiry that were pursued in the expert interviews. They can be found below titled as follows: Filmmaking in Jamaica, Financing films, Skills and resources and finally Film and culture.

4.1   Filmmaking in Jamaica (Place, Proximity)

The topic of filmmaking in Jamaica was created to encompass the parameters of proximity and place. It should be noted that 'place' in the context of Jamaica includes not only the natural landscape, which has historically attracted foreign film productions, but also the availability of infrastructure such as production facilities, technologies and infrastructure. 'Proximity' in the context of Jamaica involves comprehending how entities share values and common challenges as well as traditional distance measures that can reveal the strengths and gaps in the current environment.

Typically, after the initial introductory questions, interviewees were asked a broad, open-ended question about the nature of filmmaking in Jamaica. This was to ascertain their perceptions of filmmaking and encourage the expert to lead with factors they felt were most important. This helped to identify positive or negative forces that affected film production in Jamaica that, may or may not, differ from other locations globally. Often the answers highlighted the paradoxical situation of both physical proximity and a sense of disconnection within the industry. Despite Jamaica being a relatively small island nation, interviewees consistently described a perception of "cliques" and a lack of collaboration between different filmmaking entities and actors. This was often attributed to the industry being built around influential gatekeepers, which on analysis raised concerns regarding the potential for social exclusivity whether gender or class. However, there were also multiple examples of networks providing value for media workers and institutions alike that highlighted strong proximity within communities.

4.1.1   Collaboration versus cliques

As literature on film production highlights, the industry can be characterised by project-based work that lends itself to freelance work and favours existing relationships (Achtenhagen, 2011b, p. 356). This suggests a critical role for the place parameter, as geographical flows of people and resources could be assumed to favour shorter distances and time to travel. Despite an apparent physical closeness in Jamaica, especially within the capital Kingston, respondents spoke about "silos" of film communities.

These rifts between groups were spoken about by several interviewees, yet what these distinctions were, differed between respondents. It was often media workers that spoke about the divide between crew types:

> "People who work on movies, don't work on commercials…The persons that work on commercials? They're not getting on music videos…. they don't get called for movies."(Director/editor)

This exclusion based on working connections was referenced by a production assistant that had experience working on foreign feature films in Jamaica. She explained that since the last big project many have struggled financially:

> "I've been very lucky because you have a lot of people that have not worked entirely …. And it's because of the nepotism and it's because people only want to work with certain sets of people, and you have your team."(PA)

Yet arguably this is the nature of filmmaking internationally, with successful media workers often characterised by project-based careers. Their success is built via reputation and maintenance of a personal network, thus becoming team members that can be relied upon for future productions (Jones, 1996, p. 69). Indeed, these project networks aren't always negative for media entities and can facilitate smoother film production:

> "if you find a circle of people being 100%, [that] deliver all the time, you'll find yourself sticking to that group…..I think a part of film requires you to be bold because people tend to work with who they're familiar with and trust." (COO production agency)

> "The cliques to me aren't really that serious because if I'm employed long enough in the film industry, I don't need to be jumping over to a next crew… If you go to America … they just want to work with the people that they know 'cause you have a relationship." (Director/editor)

Thus, arguably a cliquish network can provide benefits and is a natural element of film industries.

Despite the global cultural trend of cliques within the film production industry (Jones, 1996, p. 69), many respondents reported trust, and collaboration in the film community that was not limited within these same confines. In fact, there were often examples given of film entities offering skills and resources for free to help support projects. A DP detailed how institutions like production agencies and esteemed film workers assisted her early film projects, even if they did not know her personally:

> "They supported my film. Equipment wise. Lighting equipment wise. So, you know, all of these people did help in terms of how I developed." (DP)

Despite this apparent segmentation in the film industry which relies on personal connections and reputation, the industry's collaborative spirit prevails. As one worker noted:

> "I've generally found that people in the industry...they're pretty keen on collaboration." (Writer/producer)

This openness to collaboration, even beyond established networks, underscores the potential for fostering a more inclusive and supportive film production environment. It highlights the inherent value of community and shared goals within the Jamaican film industry, suggesting

that despite challenges, there is a foundation of mutual support that can be built upon to strengthen the industry's overall cohesion and productivity.

Yet what became clear throughout the interviews, is that most local projects are reliant on these collaborations and require Jamaican film crew to provide their skills and resources with limited or no renumeration so that a project can be completed. One respondent described crew members as "embarrassingly giving". Even a senior leader within a media institution noted that:

> "a lot of how we get through is through communities, through persons chipping in, giving of resources, of time, of equipment, of money to make things possible. I don't think I have ever…. given anybody their full rate unless it's a commercial paid job."(COO, production agency)

This indicates that the film industry is still existing between a formal and informal structure that not only is reliant on freelancers but equally free labour a factor often seen in SIDS creative clusters (Francis, 2015, p. 31). In its current state that is not attractive nor a reliable career for prospective workers, especially within in a developing country in which resources are already under stress (Schultz & Van Gelder, 2008, p. 113).

> "Film crews that I've worked with here …. will work for you even though you don't have a lot of money because they're trying to support your vision." (Writer/producer)

While Jamaica is not unique in this free labour that often characterizes creative industries (Siebert & Wilson, 2013, p. 711), it often assumes this involves young persons or those unskilled in this industry. However, in this research, asking for free or reduced pay for production work is a regular custom. This places pressure on cluster development and longevity. The performance parameter, as set out by Komorowski, (2016, p. 183) as well as the metrics developed for this research, speaks to an increase of formal transactions and sustainable economic growth. Thus, Jamaica's reliance on informal employment arrangements is not conducive to cluster formation. Equally this system of free resources prioritises those that can afford to give which raises concerns of access and social exclusion which will be touched on later in this section. While the strong collaborative ties and trust seem to be evident in Jamaica, continued informal practices will hinder cluster development and embeddedness.

4.1.2 Gatekeepers

Other rifts commented on by respondents were between young and old in the industry. This was sometimes identified explicitly as a "disparity between the older generation and the younger generation" (DP) or other times as a reliance on individuals;

> "we don't have physical infrastructure. We have people infrastructure in Jamaica, people are institutions" (Writer/producer).

This dependency on individuals identifies the importance of gatekeepers which has been recognised in film production network research previously (Jones, 1996, p. 68). Yet specifically in this case, these gatekeepers exemplify an issue of continuity within the industry:

> "There are a couple of people in film …. they are the main touchstones and I'm not sure that we are building up another set of people to replace them, and we're certainly not creating the institutions that would replace them" (Writer/producer).

One of these gatekeepers acknowledged the issue:

> "We are all getting old. All the HODs [Head of Department] in Jamaica are getting there. The young people need a chance to move up." (Production company owner/founder)

Jamaica has developed an interconnected system of companies, workers and communities yet a handful of gatekeepers control key entries and resources of the industry. This sentiment was echoed by many of the interviewees:

> "It's always been a very small group of persons that control the getting of the jobs."(Director/editor)

This can create more insidious relationships between gatekeepers and workers where a respondent spoke of blacklisting because they refused sexual advances. This disclosure during an interview raised worries for the development and safety of workers especially women in this industry. Jamaica still exhibits the traditional markers of workers success in a cluster as reputation and status (Jones, 1996, p. 58). Whether young or old many spoke of their success thanks to their status built on personal projects:

> "It's like once you have a reputation or once you have a significant amount of work out there, things get much easier for you… I've been able to build a network across

different industries." (Documentary filmmaker)

While it assumes a level of meritocracy, Jamaica's small size emphasises and reinforces the effect of individuals in an industry. This highlights how influence within the industry can remain with a select few.

Beyond employment, gatekeepers also hold valuable international connections that provide access and opportunities. Yet for Jamaica to develop and grow as a cluster these connections will need to change:

"It has to be industrial, industrially held relationships and not individually held relationships." (Former film commissioner)

The industry is being built on top of a handful of people who have built careers through networks, experience and training. However, the roadmap for succession is not clear. This has knock-on effects for individuals and their prospects for work but also creates difficulty in mapping the scale of the industry.

One answer to diversifying the media workers of the industry and removing some influence of these gatekeepers is the formalization of the industry:

"Without active crew databases, how do you become the next in line to get that phone call when productions are crewing up? There has to be some kind of bridging program or career pathway program for emerging professionals to get on set, build experience, and develop that network." (Former film commissioner)

While many interviewees argued that the Jamaican film industry had been around for years, the formalization of people and systems has not always advanced with its growth. The prominent dependence on individuals is a factor that is not novel in creative cluster research but is particularly significant for Jamaica, and likely SIDS, due to their small size and relative isolation. Individual personalities therefore have dictated for many years the outlook of the industry. For a cluster to truly succeed, these networks need to be formalized to allow for widespread and equitable growth. By institutionalizing these relationships and creating clear pathways for new talent, Jamaica's film industry can overcome some of the limitations gatekeepers pose and foster a more inclusive and dynamic creative environment.

4.1.3   Value of networks

Conversely, despite complaints about cliques and individuals gate-keeping areas of

the film production industry in Jamaica, several interviewees emphasized the importance of their personal networks in initiating and completing projects. This underscores the potential of a network-based approach to bridge gaps and facilitate collaboration within the industry. Many interviewees highlighted how leveraging personal and professional networks is essential for overcoming barriers and advancing film projects. One filmmaker encapsulated this sentiment when asked how films get made despite significant challenges. She responded:

> "Friends. Friends who have skills, who share your creative vision, and share your passion." (Filmmaker/lawyer)

Nearly every other interviewee echoed this message, reinforcing the idea that connections are crucial in bringing film projects to fruition.

> "I've kinda got a pretty good idea of how to do a film with little to no resources, by just banking on your network and building out your network."(Founder/filmmaker)

While many of these networks are individually held, some have been formalised. This can be best seen in the creation of JAFTA (Jamaica Film and Television Association) in 2015 which was described by the ex-president as an active community-driven body since its inception:

> "JAFTA was seen maybe at that time [2015/16] as more of an administrative body. Only the people who actually attended meetings or were super involved knew that it was very, very practical." (DP)

Yet, some film workers feel even in the present, that JAFTA still wasn't doing enough to facilitate networks amongst members:

> "We say the film community, but at the end of the day, the community aspects is heavily missing. A lot of people feel this way, more people than the higher ups even know. Because I'm in the streets. " (PA)

As already highlighted this distinction between gatekeepers and regular media workers is identified by this respondent. The responsibility for the industry's development lies in their hands, but from her perspective not enough is being done.

Many respondents made a distinction when talking about JAFTA. While it had created a tight knit community, many didn't feel accepted or part of it. This points to a social

exclusivity that has occurred as the dependence on networks has increased, which as they are formalised further divides between those that are 'in' and those that are 'out'. These distinctions emerged in several interviews sometimes due to location and other times more veiled dynamics like class. While the capital Kingston attracts and promotes connectivity, other areas of the island are left behind, despite the island's relatively small size. Montego Bay is less than a 3-hour drive from Kingston, and a founder/filmmaker's experiences seemed to illustrate an isolation from the capital. It wasn't physical distance that was his primary concern but rather closed groups like associations that favoured members for opportunities.

> "It's a lot of cliquing that happens. I don't think that it's unbiased. I think that if it is that you're not a part of JAFTA. You don't get their support." (Founder/filmmaker)

This was echoed by a director of a film festival who made a distinction between the festival and 'JAFTA people'. She explicitly referenced class and socio-economic background:

> "They're from different worlds.... I find that JAFTA people are like uptown, kind of middle class. They study overseas. They come back and they hustle. Some of them, get big projects with a local big brand or something." (Film festival director)

These distinctions are important as they highlight a similar divide as to the "class ceiling" (O'Brien et al., 2016, p. 126) as seen in the UK film and creative industries. As is so often the case, the distinctions were only made by those in the 'outsider' group, with those integrated or embedded in JAFTA less forthcoming on the perception that the association is regarded as exclusive.

This points to previous case studies by Virta (2020, p. 179) in Finland where the spatial density of mediated entities does not substitute for networked interactions, for value creation to take place "the exchange is what is really important" (Allee, 2000, p. 38). This is perhaps typified best by the Film Festival Director who despite her distinctions from JAFTA had previously facilitated the committee to host their meetings within her offices for free. Underlining that closeness is not the sole prerequisite for community or network building. Mostly researched by British researchers the exclusion in the creative industries has been explored along class and gender lines (Brook et al., 2018; Grugulis & Stoyanova, 2012; O'Brien et al., 2016). In this research, these socially exclusive practices manifest two-fold. The first is access, whether that be biases to the location of Kingston or resources to attend and tap into a community:

"Unfortunately, not a lot of people drive. Not a lot of people have resources like money to go to Kingston and spend the night." (Founder/filmmaker)

A possibility for mitigating this social exclusion, put forward by a respondent is expanding JAFTA's presence beyond Kingston:

"That community that we're talking about has to be inclusive of all the parishes, like, there has to be a JAFTA West, JAFTA North and JAFTA East." (Director/editor)

This network-based approach suggests a pathway to overcoming the issues of gatekeeping and exclusivity that some filmmakers experience. The examples of collaborative relationships within the Jamaican film industry are invaluable to the progress that has been made so far. However, these networks - often comprising friends, colleagues, and industry contacts - are reliant on the nature of the individuals within them as their formalisation favours an already established in-group. However, JAFTA and similar organisations, do foster a sense of community and shared result that is critical for the survival and growth of the industry. By building and nurturing these smaller networks, filmmakers can create more inclusive and dynamic collaborations that, in time, benefit the entire industry.

Despite these apparent gaps, the formalisation of film workers beyond JAFTA is not undisputed by those in the industry. With an unsurprising split between older and younger media workers, the topic of unions was pushed by those arguably most at the perils of certain industry influences:

"We need to become more united…. There needs to be more of a community feel in Jamaica instead of thinking that you're on your own because the industry is hard enough…. I do think if there was one community the money issue would be lessened." (PA)

While this proposal would alleviate some of the other problems arising from the research, it was not supported by a prominent gatekeeper who cited issues of training, paying tax and once again highlighted the distinctions between production work for film rather than commercials or music videos:

"We want a Union. Why? Because we want to control our salaries? We have to learn to know what we're doing. Also, people are asking for unions and are not trained. …They do the jobs on those music videos and commercials and small things…. They have not yet reached the level where they can say I can work on a feature film."

(Production company owner/founder)

This identifies two key issues in the film industry. One - it is not boundless, the size and current capacity of opportunities is small, so it cannot sustain unlimited media workers on project work without the threat of financial strain; second - powerful individuals can set the standards of the film industry, including the working conditions of those employed by them. While the reasons given are logical, it does leave the door open for more nefarious working patterns, whether hours, or pay, as workers have no protections.

Ultimately there needs to be balance between the informal, network-based approaches that have historically supported the film industry and the need for formalization and institutionalization to ensure sustainable growth and equitable opportunities. There must be a shift toward more formal employment practices to ensure fair compensation and create a more attractive and reliable career path for prospective workers. Policymakers should recognize that the film industry can become a site of class ceilings and, even worse, that this perpetuates a culture of silence if not addressed.

Addressing these challenges includes creating active crew databases and career pathway programs. While Jamaica's film industry has a strong foundation of interconnected networks and a collaborative spirit, tackling the issues of gatekeeping, and informal labour practices is crucial. By fostering a more inclusive and structured environment, the industry can build on its strengths to develop a robust and equitable film industry cluster. Further research into how these networks operate and how they can be supported and expanded could provide valuable insights into strengthening Jamaica's film production cluster.

4.2   Financing Films: Government Incentives and support (Policy)

The following section will explore and present a policy analysis based on respondents' perceptions of recent film policies. Therefore, the focus is primarily on the introduction of the Jamaica Screen Development Initiative (JSDI) which was formally announced in 2024 as detailed in the introduction. As well as local grants focussed on development, production, marketing and distribution the JSDI includes a rebate component that will influence future international productions being shot on the island. This relationship between international and local productions will be explored and the implications they have on each other. Finally, what emerged through interviews was the importance of policy changes like the introduction of local television screen quotas that could support the local industry indirectly rather than directly through funding grants. This final policy

recommendation will be presented, and conclusions taken in regard to cluster formation.

4.2.1   Hopes for the Jamaica Screen Development Initiative

The JSDI sparked a palpable sense of optimism and anticipation among interviewees, representing a significant milestone for the industry. This much-awaited funding initiative was almost universally perceived as a positive opportunity for filmmakers, with only a minority of respondents (2) sharing that they have no intention of engaging with it. While the JSDI holds promise for catalysing the development of a robust film production cluster, this research is unable to delve into its immediate outcomes as it is ongoing. Instead, the JSDI allowed for conversations around governmental support, film financing and Jamaica as an international film production location. The JSDI is notable as there has been policy stop-start for many years (Martens, 2023, p. 1). It is recognized that a thorough assessment of the initiative's impact will need to be carried out in several years' time and require careful analysis.

Many respondents referenced the lack of supportive governmental policy before JSDI, calling filmmaking a "struggle" (CEO production company 2). A respondent who helped facilitate the passing of the initiative described the fund as:

> "An important step forward, and it will need to become a critical building block in the development of the local ecosystem. It is the basis of the precedent for public support of local content." (Former Film Commissioner)

Many of the interviewees were very positive about the fund expressing excitement and high hopes for the outcome:

> "I personally believe it's one of the best things that they could have come up with. I think it's something that gives filmmakers this beautiful asset that we all need, called hope." (Founder/filmmaker)

While met with enthusiasm there was still a reticence regarding the fund's scope:

> "In the context of film making money, it is not a lot of money. Not to seem ungrateful. People are talking about it like it's a lot of money. It's not."(Writer/producer)

Many of the respondents are hoping to be recipients of the fund. Yet one interviewee spoke of the collaborative nature of the initiative that sought advice from filmmakers:

"The government came with a draft and said, hey, film community, animation community, come look at this. What do you like? What do you not like. Here's what can change. …. And it was being tweaked up until the day before it was announced and released. So, the filmmakers had a lot of input in it." (Animator)

This collaboration between industry and government was reiterated by a respondent who spoke of the education that would be needed for both filmmakers and policy makers:

"This is a learning process, not just for us as filmmakers, but also for the folks dispersing the funds" (CEO production company 2)

While many were optimistic about the fund, there was still recognition that the government could do more. None were more open about this than the former film commissioner who had helped push the initiative to parliament:

"But if I must be honest, it is not yet the full scope of what was envisioned. Hopefully there will be a Phase 2 roll out of all the elements." (Former Film Commissioner)

As previously mentioned, government film policy has not been consistent over the years. This was recognised by a former commissioner and there is hope that this understanding will see a more stable policy. However, political election cycles, by nature, see persons and policies change every four years.

"The direct correlation between the cyclical booms in the film industry and …. [when] we were actually putting certain policy measures in place…. Whenever those measures were changed or adjusted or diminished, or if there were external factors like politics or violence - you could see the resulting slump and then another industry cycle would happen." (Former Film Commissioner)

Often these changes have been charted in relation to Jamaica's ability to attract foreign film productions (Martens, 2018, p. 193). The following section will explore these ramifications in relation to the JSDI, underscoring the critical need for consistent and supportive government policy to sustain and grow Jamaica's film industry.

4.2.2 Local and international productions: A two-tiered system?

"The Fund was initially designed for local stimulation, as a mechanism for the development of the local film economy. The international rebates stream came in

after the Government truly realized the full potential of having a vibrant guest production …. major productions all facilitated within a 5-year span of 2018-2022 resulted in stream adjustments that were not per se in the initial Fund design, but an important addition." (Former Film Commissioner)

Despite the majority of the JSDI focussed on local grant funding there was the introduction of a film rebate, a significant step which garnered widespread approval among industry stakeholders. However, a VP from Hollywood provided a tempered perspective on the current offerings. He underscored the critical role of budget and financial planning in studios' decisions when choosing locations for filming. He detailed that comparatively, the attractiveness of incentives offered by other countries, such as the Dominican Republic's 25% rebate, poses a formidable challenge to Jamaica's newly introduced rebate, capped at 10% of the total budget spend or up to US$1.5 million (whichever is less).

> "I think the funding of the JSDI is a small initial seed and I think where that becomes more attractive to any of the major studios is if the funding for the programme can grow and if there's either not a cap or a high enough cap." (U.S. Film Studio VP)

The inclusion of this rebate facility in the JSDI gives the prospective Jamaican film cluster more of a competitive advantage than without. As a representative of a global studio, the VP made the most comparisons when speaking about the potential for location-based film productions. This reflects the arguments put forward regarding competitive advantage of clusters, as discussed by Porter (1998a, p. 13), that clusters can be economic drivers for countries or regions. It is therefore imperative to recognize the symbiotic relationship between international film productions and the local industry. Beyond financial incentives, international collaborations play a pivotal role in supporting local film production by providing essential training opportunities and employment prospects for local talent. A writer/director emphasised the value of her time spent on international film productions:

> "I cannot tell you how much I learned just doing that…. And for me that is invaluable…..Yes, the money is phenomenal. We're not doing it for free, but there is so much more than the money that we gain when these international productions come in." (Writer/Director)
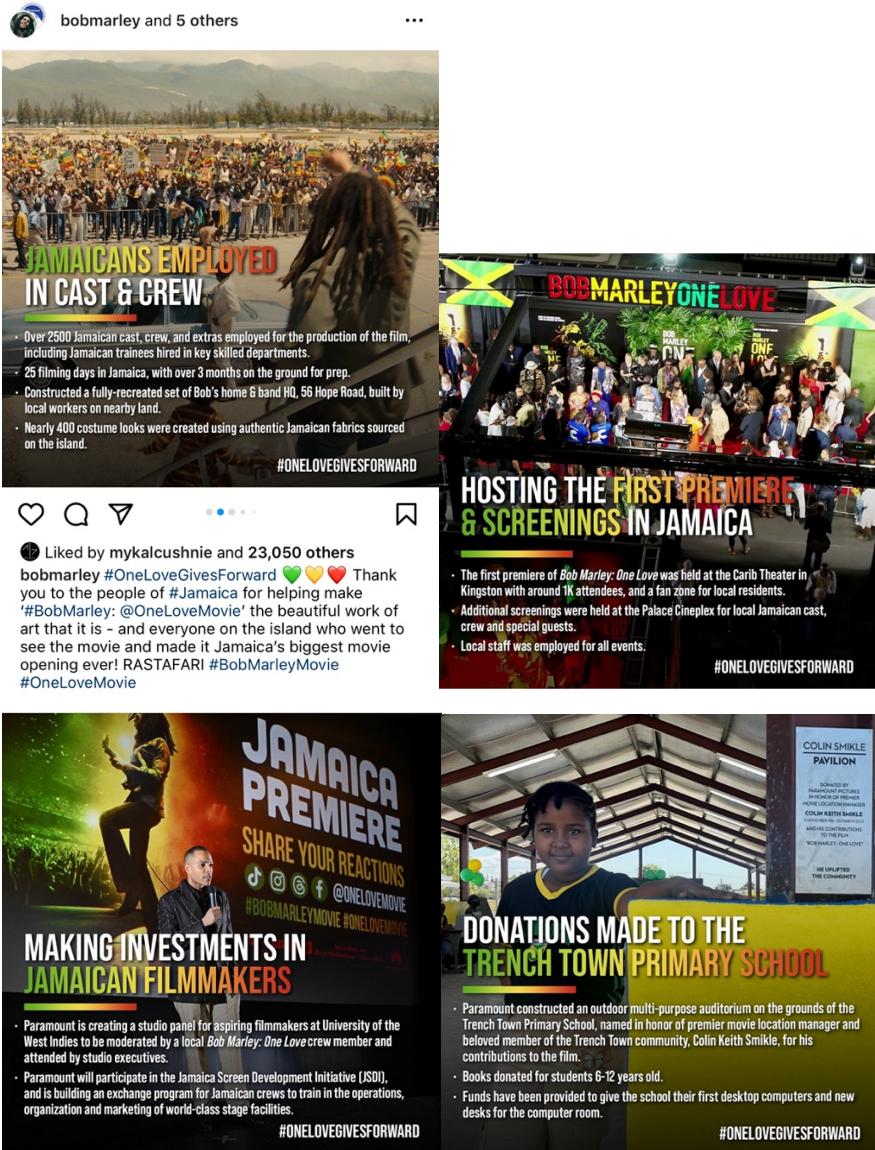
Fig. 1 – Bob Marley Instagram carousel post from March 30th 2024[1]

The value beyond financial reward can be seen in the recent Bob Marley feature film that was released globally in February 2024. It has publicised the investment and development to 'give back' to the island. In Fig 1, some of the projects that Paramount supported before, during and postproduction in Jamaica are shown. Taken from social media (Instagram), this PR and marketing on the part of Paramount is still a useful source to demonstrate the role of film in the development of Jamaica. As a developing island nation, as referenced in the theoretical framework, nation building is a vital marker of success.

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[1] Posted by accounts @bobmarley, @paramountpicscc, @ziggymarley, @paramountpics, @onelovemovie, @tuffgongworldwide. Screenshots show the 2nd, 8th, 7th, 4th, images from the carousel post. https://www.instagram.com/p/C5KBU31PkiQ/?img_index=10

While these schemes may be atypical, they do provide a convincing example of the potential of such international film partnerships. They bolster not only the economic viability of the Jamaican film industry but also foster skill development and cultural exchange, contributing to long-term sustainability and global competitiveness.

International productions have undoubtedly brought economic benefits to the Jamaican film industry, but it has also introduced complexities regarding workforce dynamics. One notable repercussion is the displacement of local workers from domestic projects, such as commercials or short films, in favour of crew members hired exclusively for international productions. This pattern of workforce substitution often leads to a lack of continuity in employment opportunities for local talent once international projects conclude. Similar phenomena have been observed in film industries worldwide, where the presence of international productions creates a two-tiered system within the workforce. This system delineates between those primarily engaged in international productions and those relegated to local projects, resulting in limited interaction and little collaboration between the two groups (Szczepanik, 2016, p. 88). This was said implicitly during an interview,

> "The production funding is low, but we can make low budget films here and then people who make the big money on the big pictures have to understand that they have to cut down their rate. Because they will need to help with smaller producers here" (Production company Owner/Founder).

Furthermore, globalization has facilitated Hollywood's practice of outsourcing labour-intensive production phases to cheaper film clusters across the globe which allows major studios to capitalize on cost efficiencies by leveraging labour markets with lower wage rates and production costs (Lorenzen, 2009, p. 7). This draws on the multiple comments that despite well paid roles with foreign productions, many workers find themselves out of work until the next production arrives which can go into months or even years (PA, Director/editor).

4.2.3   Local content quotas

In addition to the discussions surrounding financing and workforce dynamics, the interviews highlighted the potential impact of government policy on distribution channels within the Jamaican film industry. Several interviewees emphasized the pivotal role that government intervention could play in bolstering the visibility and accessibility of locally produced content. Lack of governmental support was often named as the number one barrier

for the film industry, even with the announcement of the JSDI. Specifically, there were suggestions that mandates requiring local television stations to prioritize Jamaican-made films could serve as a catalyst for enhancing distribution opportunities. The Film Festival Director admitted that money was important, but it went beyond that:

> "I think support from the government …. I mean, they've provided the money. But we'll see how that goes, but I've always thought …it didn't even have to be money, because in Colombia they have a local content quota. Where they've mandated that a certain amount of content on local TV has to be locally made. If the government was to put that into practice instead of TVJ buying these cheap Indian films…. that would help to fix that problem." (Film festival director)

By implementing policies that promote the showcasing of Jamaican-produced content on television platforms, policymakers have the potential to amplify the reach and exposure of local films to wider audiences. This, in turn, could contribute to the cultivation of a vibrant domestic market for Jamaican cinema, fostering greater appreciation and recognition of indigenous filmmaking talent:

> "Our television stations have to become more open to taking the risks. Going to their marketing people and say advertise on this show because it's a Jamaican show and people will watch it" (Production company owner/founder)

Beyond television, respondents also looked to cinematic distribution not just island-wide but regionally too:

> "In order to become a Hollywood…. We need to think more Caribbean at every phase of filmmaking…. The problem that we're having is we're only doing 3 phases pre-production, production and postproduction. That's it. There's no distribution, there's no marketing of those… We don't have control of that because we don't control the cinemas. And I'm talking Caribbean wide in my opinion. Our films could work if there was a central network." (Animator)

This policy wouldn't have to be costly. As the previous respondent emphasised, appreciation for governmental support can have knock on effects for private investment. The former film commissioner was able to detail her vision:

> "Ideally…our broadcasters, as a part of the condition of their license, they should be required to support and programme local content…. if the quality of local content is

considered to be low, then the licensing fees that are paid to the broadcasting commission should go towards capacity building for local content. If it's too expensive airtime, what about mechanisms to discount airtime costs during the local programming slots." (Former film commissioner)

While there is much hope for the financing of film in Jamaica, the outcome of current initiatives is yet to be seen. However, the JSDI does signify a formal acknowledgment of the film industry as a sector and its potential. Therefore, the effects of a tiered production system and the prioritisation of local content should be taken seriously. By prioritizing Jamaican narratives and perspectives, such policies not only stimulate economic growth within the film industry but also serve as a means of preserving and celebrating the country's cultural heritage. Further research may explore the feasibility and impact of specific policy interventions in enhancing distribution channels and supporting the development of a thriving local film ecosystem.

4.3   Skills and Resources (Population, Profile)

The interviews provided valuable insights into the multifaceted challenges confronting the Jamaican filmmaking community, particularly in the realm of skills and resources. The parameters of 'population' and 'profile' are the best to explore these hurdles as they chiefly outline the concentration and type of media entities in a cluster. 'Population' in Jamaica includes filmmakers, technicians, actors, and other creative professionals, while 'profile' considers the level of professionalism, potential for talent development and the availability of training programs. A recurring theme that emerged from the discussions was the pervasive impact of limited resources, which presented obstacles to the professionalization and expansion of the industry. While this is evidently a barrier for cluster development, it encouraged an attitude of entrepreneurship that often saw high levels of individualism and distinctive identity conceptions that were particularly unique. This will be explored to further understand the current profile of Jamaica's film industry. Identifying ways to enhance not only the concentration but skills of film workers will be crucial for the expansion and long-term sustainability of a cluster.

4.3.1   Limited skills training

One of the primary factors contributing to these challenges is the demographic and economic context of Jamaica itself. The country's relatively small population size inherently limits the pool of available talent and resources within the filmmaking ecosystem. This scarcity is further compounded by the associated costs of equipment acquisition, and

production expenses that can strain already tight budgets. When asked about the hurdles for film production in Jamaica, a filmmaker/lawyer answered: "Location, crew and talent pool, those are the three major issues". All three fit into the parameters of population and profile.

In fact, most respondents stated that the crew that were working in the film industry were highly skilled and were able to compete with crews globally:

> "We are very hard on ourselves….We are probably our biggest critics and I've worked with crews locally and overseas…I would rather work with them [Jamaicans] because sometimes I feel like they're more anal than you know, let's say somebody on the foreign crew" (DP)

While skills were present on the island, many expressed concerns over the extent and availability of crew members, leading to discussions around the capacity of the industry if more than 3 or 4 productions were happening concurrently:

> "The persons that we do have, they are skilled enough to carry out their task. We just don't have enough of these skilled persons." (Filmmaker/lawyer)

Moreover, the reported absence of robust training and support mechanisms exacerbates the population constraints facing Jamaican filmmakers. Unlike more established film industries, such as those in Hollywood or Bollywood, Jamaica lacks the extensive network of studios, production facilities, and training institutions necessary to nurture talent and foster industry growth. This shortage of institutional support further restricts opportunities for skills development, mentorship, and collaboration within the filmmaking community. However, the thirst for more trained crew members was tempered by capacity concerns – for when there are no international productions on the island, many will be out of work:

> "We would need to have the amount of work that requires 4 crews on the ground at the same time, or else one crew will be sitting without work." (Production company owner/founder).

Despite the lack of a formal film school in Jamaica, many of the respondents were aware of the media and film aligned courses provided by CARIMAC - Caribbean School of Media and Communication part of the University of the West Indies. Yet there was a distinct lack of knowledge surrounding these courses unless they had experienced them themselves:

> "When I attended CARIMAC it was heavily theory. You don't get that external

practical sense of training unless you can afford it which is an obstacle in itself for a developing country." (COO production agency)

When attending the Paramount Panel as mentioned in the methodology, an interesting interaction took place between a panellist and the audience. A prominent producer and founder of production company shared her intention to set up a film training school as there was not one existent on the island, many young audience members shouted in reply that this was in fact untrue, as CARIMAC provides a film course. This is a direct example of the segmentation that was referenced by multiple respondents - silos of media entities that mean different parts of the film industry are not communicating with each other, and who are reliant on gatekeepers to facilitate these ties.

This perceived lack of training opportunities meant that many respondents had plans to develop their own training programmes for film crews with a notable example being the emergence of grassroots initiatives aimed at addressing the skills gap within the industry. A founder/filmmaker recounted his plans to establish training workshops and eventually a film school, that would provide aspiring filmmakers with access to essential knowledge and expertise. Yet there was a lack of cohesion in that many educational offerings were spoken about or there was an intention to launch without the initiator first considering the training that was already on offer. During the conversation with a Writer/producer, this observation was discussed in regard to the Panel interaction previously described. She explained that industry professionals proposed to build a school for film as opposed to supporting an existing training institution like HEART:

> "A training institution can have a stigma. There are lots of vestiges of the society, of how we are structured, of the ways in which we think that can hamper it."
> (Writer/producer)

This comment begins to highlight socio-economic issues that are spoken about in film industries (Brook et al., 2018; Grugulis & Stoyanova, 2012): that the creative industries attract a certain class of people as a result of access requirements whether financial, training or social connections. Consequently, the challenges associated with skills development not only impedes individual career advancement but also inhibits the broader industry's capacity for innovation and competitiveness on the global stage. Many of the respondents that I spoke to had been trained abroad and had returned to Jamaica, implying that success in Jamaica's film industry could partly be attributed to foreign education that the majority cannot afford.

Without adequate investment, the Jamaican film industry risks stagnation and marginalization within the international marketplace.

Finally, the existence and skill of Jamaican production crew while still room to grow, is well regarded by those in Jamaica and internationally:

> "I think I was more surprised by the fact that there were crew in every department that we could employ." (US studio VP)

As touched on previously, the training and upskilling of Jamaican crew is still in progress. Yet there are gaps that need to be addressed. The main one brought up in interviews is the creative side, which arguably is the foundation of a local film production sector:

> "Creative people. Directors. Writers. Art directors. That's where we are missing…..I find the technical side easy to train in Jamaica." (Production company owner/founder)

This was repeated by several other filmmakers:

> "We have to learn to be better writers. We have to learn to tell better stories" (Filmmaker/lawyer)

Thus, a film production workforce that can manage the entire production of a film from development, production and post-production is not yet fully established. Although this is not to say that the seeds for this development have not been planted, with multiple examples of training found during fieldwork and research, including feature film labs, crew training days and short film grants.

Overall, the skills shortage in Jamaica is mixed. While Jamaica can successfully support and produce short and feature length films, the capacity and longevity of it still needs to be explored. Connections between training institutions, school and universities need to be formalised to create pathways into the industry. Coupled with an effort to train film workers to fit into every part of the film production lifecycle, from development to production to post-production and beyond. This would ensure that the film industry continues to grow a skilled, innovative workforce.

4.3.2   Limited resources

While most respondents spoke of the lack of skills present in Jamaica, a smaller portion also mentioned of physical resources and whether these were adequate. When

spoken about, this was often in comparison with other local film clusters like the Dominican Republic that offers more by means of physical production opportunities:

> "Dom Rep have all the studios over there that Hollywood is renting to use, you know, Jamaica has so much potential, and it is really about getting in front of the right people to have the right conversations." (CEO of production company 2)

This specialization is an aspect of 'profile' that is identified by Komoroski (2016, p9). Henceforth, the expansion of studios and production facilities will rely on either public or private investment. However, at present, it remains uncertain which sector will shoulder much of the initial financial burden:

> "Jamaica needs to have a production studio……Jamaica needs to have at least three sound stages."(Founder/filmmaker)

> "We need studios, we need some stages." (CEO production company 1).

Yet Jamaica is not completely bereft of attractive resources. It is geographically very close to America which was referenced as a positive:

> "We are relatively close to like a Miami or very central hubs, so bringing in things is not hard, and we do have ports which is also a USP for us." (COO production agency)

> However, despite this assertion, other respondents (and fieldwork experiences) disagreed with this assessment of importation. Bringing equipment into Jamaica is not straightforward, as there are strict customs checks and fees:

> "It's a huge challenge not being able to get the equipment I want with ease. I have to wait a year until I'm going to the US or somebody's coming down from the US" (Documentary filmmaker)

While creatives can be exempt via the entertainment registry held by the Ministry of Entertainment, Culture, Gender and Sport, one filmmaker explained that it was a difficult system to negotiate:

> "Importation is very funny because they will say to you. 'If you're on the entertainment registry, you can bring things in free.' And that is true. The problem is it's a very onerous process…. I'm just like, why do we have to have these three steps?

Why do I have to go to you, then go there, then come back to you? That doesn't make any sense." (Animator)

In summary, while Jamaica possesses significant potential as a film production hub due to its proximity to the United States and existing ports, the industry is hindered by a lack of physical resources such as studios and sound stages. Comparisons with more developed local film clusters, like the Dominican Republic, underscore the need for substantial investment in infrastructure. The bureaucratic complexities of importing equipment further complicate production processes, despite available exemptions for registered creatives. Addressing these logistical and infrastructural challenges through strategic investment and streamlined procedures is essential for unlocking Jamaica's full potential as a competitive film production location.

4.3.3   Entrepreneurship and identity

While many highlighted the challenges within the Jamaican filmmaking community, the interviews also unveiled a commendable demonstration of entrepreneurial ingenuity and resourcefulness among filmmakers. Despite facing daunting obstacles, several individuals showcased remarkable initiative and creativity in overcoming resource limitations and fostering industry growth. While calling on networks to ensure projects are started and completed, some filmmakers revealed strategic partnerships with local businesses and organizations that were likely built on personal charisma and social capital. These skills were often seen as unique:

"I've had to exist on a lot of faith and a lot of self-belief and a lot of prayer. But the average person is not willing to take that kind of risk." (CEO production company 2)

This individualism which can be defined as a focus on "the independent self, achievement, uniqueness, personal control and attitudes" (Farrukh et al., 2019, p. 988). The self-perception of Jamaican filmmakers as 'different' and 'willing to go beyond the average person' was held by many of the respondents. This entrepreneurial spirit was reflected in their determination to make things happen despite challenges:

"If it's not happening. Why not try to make it happen, since nobody else is doing it? Why not? You know, just do it." (Animator)

"I eventually just kind of did it myself with a few of my friends. We learned film together and we started doing some films." (Founder/filmmaker)

This supports research that identifies entrepreneurs as holding an "outgroup" identity conception that sets them apart from others (McGrath & MacMillan, 1992, p. 420). Despite the precarity involved in the filmmaking, especially in the Jamaican context, respondents invariably expressed their own uniqueness, thus developing an identity of the cultural entrepreneur which is both a "source of distinction and inner confidence" (Bilton, 2010, p. 7). This reliance on individualism and entrepreneurial spirit could be identified both as a negative and positive trait of the industry.

> "They're not stopping you. Either go under, go over, go through, right around if you have to… Find a way, I think that's the key Jamaican spirit." (Writer/producer)

Research has found that creative clusters reinforce creative entrepreneurs' identity (Hitters et al., 2020, p. 108), suggesting that the advancement of a Jamaican film cluster will support and develop these individuals.

> "I think we need a mindset shift to focus on entrepreneurship, as well as creativity. If you want to be in a successful production company that lands all the work the way Cinecom does, then go out there and set it up. There are so many gaps in our local value chain that are calling for entrepreneurial opportunity." (Former film commissioner)

While entrepreneurship should be encouraged and can provide a valuable way to fill gaps in the filmmaking industry it should also be noted that it can require exclusionary conditions. Despite the collaborative and inclusive spirit that characterizes many grassroots initiatives within the Jamaican filmmaking community, there exists an unspoken assumption that not all individuals are equally positioned to benefit from these endeavours. Individuals from marginalized or underprivileged backgrounds may face systemic barriers, such as limited access to education, financial resources, or social networks that hinder their ability to fully engage with and benefit from community-based initiatives. Placing an onus on individuals to 'do it for themselves' could foster this disparity even further.

Therefore, while these homegrown solutions demonstrate resilience and adaptability within the industry, their long-term sustainability and scalability warrant further investigation. There is a need for further research to identify areas where government or industry intervention could complement and support these grassroots efforts, thereby enhancing their impact and ensuring equitable access to opportunities for all stakeholders. By addressing these underlying inequities, the Jamaican film industry can build a more

inclusive and sustainable future.

4.4   Film and Culture (Performance, Path-dependency)

The concept of a Jamaican film culture was a prominent theme in the
interviews. This was often linked to the general public's acceptance of filmmaking activity
on the island and ease of production. The parameters that lead this final segment are path-
dependency and performance. Path-dependency in Jamaica involves looking at the legacy of
past film productions, cultural heritage, and the historical development of media institutions
(Komorowski, 2016, p. 179). This parameter will help in understanding the unique historical
context of Jamaica's film industry and how it influences contemporary practices. In the case
of film production this can be regarded as the creative output of the industry, in this case
films. Nearly every respondent admitted that Jamaican film output currently lacks a distinct
stylistic identity, or that existing styles are not fully representative of the island's cinematic
potential. Secondly, the performance parameter denotes an increase in economic transaction
yet development, knowledge spillovers and innovation are also success indicators
(Komorowski, 2016, p. 179). In this research case, performance outcomes will be led by
those developed specifically for this research based on the SIDS actions and Vision 2030
strategic development goals.

4.4.1   Creative output

During the interviews, there was a distinct divide when respondents characterised the
industry, it either focusses on the film industry's viability and identified challenges, or the
projected growth and the optimism around specific projects. One term that was used by
several respondents regarding film production on the island and that has been adopted in this
chapter is the concept of a 'culture' of film which was expressed in terms of a presence or an
absence of this 'film culture':

"We don't have a film culture." (Filmmaker/lawyer)

Vs.

"We have always had a filmmaking culture in Jamaica." (CEO production company
2)

Discussions surrounding film culture in Jamaica revealed a multifaceted narrative
encompassing both opportunities and challenges that had far reaching effects beyond the
industry itself. Respondents recounted their experiences with the public who are

unaccommodating when it comes to filmmaking practices while other communities are welcoming. Equally, the historical legacy of over a hundred years of productions being undertaken on the island was also often referenced.

These discussions around 'culture' naturally led to discussions around styles and aesthetics. A feature of well-known film clusters (like Bollywood or Hollywood) is that their movies are distinguishable from others - whether in story, structure or visual style. Many of the respondents seemed to think Jamaica had yet to develop anything original that could be identified as Jamaican:

> "It's gonna be an attempt to replicate avant-garde. They want to make, based on what they see in Europe. Or they're going to replicate Hollywood. And that's just because those are the standards that we get judged by." (Stunt coordinator)

Or commented that the style that is currently recognizable is one that is not particularly positive:

> "I think we accidentally ended up with something that I don't want us to keep……Guns, ghettos and gang signs, which is what our signature has become." (Writer/producer)

Others instead focussed on the geographically recognisable elements of Jamaica and argued this was what made Jamaican films so special – the sheer fact that they were made on the island:

> "There is something about the aesthetic of filming in Jamaica that the country itself becomes the character" (Editor/filmmaker)

Further research could chart the development of a distinct Jamaican film style and how such a style could be nurtured and promoted. Additionally, a more comprehensive understanding of the film industry's impact on various sectors of the Jamaican economy would be valuable. In particular, it could be argued that there is a need for a more reflexive approach towards local productions, and one that considers their broader impact on sectors such as tourism and nation-building; this will now be addressed in the section following.

4.4.2 Brand Jamaica

An interesting, recurrent theme across all interviews was the strength and value of Jamaican culture, both for national development and as a cultural product to market globally.

Many respondents acknowledged the historical appeal of Jamaican landscapes, which has attracted foreign productions in the past:

> "Our country is a global icon for the process of creativity and the determination of talent. We are culture trendsetters. We are tastemakers. When it comes to what is culturally astute or what is culturally desirable, the world looks to Jamaica." (Former Film Commissioner)

Positioning Jamaica in competition with other nations, similar to Porter's (1998a, p. 4) conception of clusters, then draws comparison of the film industry with other sectors. Tourism is an important sector for the Jamaican economy, contributing over 30% of the nation's GDP and employing over a third of Jamaica's population. It's little surprise that tourism was a particular focus for one respondent and seen as a means to create feasible film projects. He introduced the term "Film Induced Tourism" (Founder/CEO production company) into our conversation. This concept of "film tourism" (Martens, 2018, p. 200) was touched on in the theoretical framework as an additional quality that the film industry brings to Jamaica's shores:

> "When I make my movies, I ensure that my locations are tourist friendly…..we can take visitors to see where this was shot." (Founder/CEO production company)

Beyond this evident causal effect that film production can have, others also spoke to the concept of 'Brand Jamaica'. As detailed in the theoretical framework, it can denote the collective marketing strategy of Jamaican products, intellectual property initiative, promotion for trade and investment, and finally the global "share of mind" (CCIV Task Force, 2009, p. 32). Despite its broad and perhaps all-encompassing idea, film holds much potential for this performance indicator:

> "There's so much romance internationally for this country that I don't feel like we spend enough time to harness them and harvest them." (Director/editor)

By focussing on this attribute of cultural facilitation and nation building, film production could provide a valuable tool for policymakers that would not only positively affect culture within Jamaica but also expose its culture to those internationally. The importance of place branding in providing success of cluster development and growth, that was identified by Vang et al. (2018) can be identified within this study also.

4.4.3   Support and success

Performance is important as it has knock on effects on policy and industry recognition. Creative output as a tool for national pride and identity has previously been touched upon in this section. Respondents were acutely aware of the considerable influence and power filmmaking can have as reproduction of symbols to communicate cultural meaning (Hall, 1997, p. 11). Economic growth and employment are the typical signifier for film industry success. Thus, when asked on their perceptions of the JSDI, several respondents spoke of its outcomes. Films that were given grant funding would need to be deemed 'successful' - typically defined using commercial performance indicators like 'highest grossing':

> "1% of Hollywood pays for the 99% of the losses. So, we really just need to hope that we have one breakout project"(Director/editor)

Many respondents seemed to see the JSDI as the advent for financially successful projects; while others also identified the need for sensitisation of politicians and stakeholders:

> "A big obstacle is just that support and backing from government, from other organizations, private sector which is a big driver outside of government, just realizing that creativity and film making production, the arts, the creative industry and orange economy is also a viable means of income and a valid career path." (COO, production agency)

In relation to film, there is a need to educate those outside the industry on timelines, as the completion of projects can be far longer or harder to track than other industries. This is true for the creative sector as a whole, that takes longer to mature compared to other industries (Gwee, 2009, p. 250).

Using the metrics developed for this research the current film industry is not yet a successful cluster, but it presents great potential, particularly if efforts are put into driving sustainable economic growth and upskilling a knowledge sharing workforce for the long-term. Arguably the factor that needs to be focussed on is the preservation of national pride, identity and cultural heritage. The lack of a Jamaican aesthetic is because it has not been developed yet. While the industry lacks a distinct stylistic identity, there is a palpable sense of potential and optimism fuelled by strategic initiatives like the JSDI and the unique cultural cachet of Jamaica. The path to developing a robust film cluster involves enhancing training programs and fostering a supportive policy environment. The interplay of creative

output and performance, guided by location-tailored development goals, underscores the multifaceted impact of that film can have on economic growth, national identity, and international perception. As said by a respondent:

> "It's not just about business, but it's also about our identity as a people and what that means for the development of our country, for nation-building, because …. that is the tandem role of the entertainment industry, and it's different from every other industry in that sense." (Former film commissioner)

By leveraging these research insights and addressing existing gaps, Jamaica can cultivate a thriving and inclusive film industry that harnesses its rich cultural heritage and creative talent. Despite the strong place branding that Jamaica has embedded via Brand Jamaica, the lack of a distinctive creative style has meant Jamaica has not yet broken out in the international film industry as a viable cluster. As referenced in the theoretical framework, creative industries clusters do take time to develop (Gwee, 2009, p. 250) but there is also the risk that development will stall - as Martens has documented the 'stop start' of film policy for the past 70 years. However, if there is sufficient momentum, it would be hoped that the JSDI can herald the growth of a Jamaican film production cluster in the near future.

5   Conclusion

This study sought to investigate the Jamaican film industry and to assess its potential as a film production cluster. Specifically, it has investigated the current characteristics that positively and negatively affected its development which would in turn dictate its formation i.e. whether a cluster emerges, or it does not. In this chapter, the research question *What is the process of creating a film production cluster in Jamaica?* is addressed. Finally, policy recommendations, limitations and further research will be proposed.

5.1   Key findings and theoretical implications

The analysis of the interviews revealed 12 themes that were connected to the previously apportioned topic areas that led the interviews. These findings have been presented and discussed in the results section of this thesis. Through in-depth analysis framed by a comprehensive theoretical literature review, valuable insights were gathered to answer the proposed research question. All respondents were experts in the Jamaican film industry, fulfilling roles as freelance workers; writers, producers, directors and/or managers of production companies and/or heads of film communities. Therefore, the research was expressly concerned with the question *what conditions are needed to facilitate or impede the development of a film production cluster?* So as to help formulate policy recommendations to bring such a Jamaican film production cluster about. The conclusions are discussed in the sections below.

5.1.1   The power of key players in place and proximity

The research findings found a complex interplay between proximity, collaboration, and exclusivity within the Jamaican film industry. While there are strong collaborative networks, these are often limited by cliques and gatekeepers. This facilitates a reliance on informal labour practices and allows for disconnected offerings of training and support structures. These findings of disconnect are reminiscent of the case study in Finland (Virta 2020, p179) where it was noted that place and proximity are not substitutes for collaborative "exchange" (Allee, 2000, p. 38). Furthermore, as found in other studies, a small number of powerful gatekeepers in the industry dictate job prospects for the many as discussed by (Jones, 1996, p. 68). However, in the case of Jamaica, this research found that gatekeepers also threatened the stability of the growing industry, as any relationships and know-how that developed disappear as soon as these individuals retired or moved away. Indeed, Jamaica - due to its SIDS status - is arguably affected much more by key individuals than a larger,

more developed country would be. An attribute of the current production industry is the networked support that interviewees reported was available to them, both formally and informally. However, this also revealed the role of social exclusion practices within the film industry which have also been documented in the UK (Brook et al., 2018; Grugulis & Stoyanova, 2012; O'Brien et al., 2016).

5.1.2 Promising policy initiatives require development

The topic of the JSDI encouraged interviewees to express their optimism that this governmental initiative would have on the local industry and how it would bolster it. These shared insights of the respondents highlighted the pre-existing tensions that a lack of policy consistency regarding financing, rebates and local content support had created. These reports of policy inconsistency affecting the film industry's growth were consistent with Martens' research (2023, p. 21). This finding then further revealed the distinct lack of support from not only government but other media entities or aligned institutions including private sector players and educational organisations, which are in fact needed to create better functioning and supported clusters (Achtenhagen, 2011b, p. 355). Despite the JSDI including a rebate to attract international productions to film in Jamaica, that was tentatively applauded despite the cap, the increase in foreign productions alongside a burgeoning local scene could potentially develop a two-tier system for film workers. This issue has previously been seen in other locations (e.g. Szczepanik, 2016) and presents a counterargument in embracing international production involvement as positive (Martens, 2018, p. 211). Furthermore, the lack of local content promotion through quotas was consistently lamented by respondents as it was recognised as policy that has been implemented successfully in other countries (Hendrickson & Niaah, 2018, p. 8). This underscores a significant oversight in the current policy initiatives of the Jamaican government despite previous research recommendations from 2018 by Hendrickson & Niaah (p. 8).

5.1.3 Shortages and underdevelopment in population and profile

The exploration of skills and resources within the Jamaican film industry revealed distinct shortages. These included limited workers in certain departments, and production infrastructure like studios or sound stages. These limits are in direct contrast to the case study of Malta presented by Cauchi (2013, p.51) and Graziano (2015, p.69) who underscored the importance of production facilities and the cultivation of a skilled workforce in enhancing the capabilities of the island's film production. However, despite these challenges described in Jamaica there were countless examples of resourcefulness and

entrepreneurial spirit. This is arguably reminiscent of production clusters where the "locality functions as the spatial and social context" enabling creative entrepreneurs to work and innovate (Hitters et al., 2020, p. 99). Yet, this individualistic approach, while fostering innovation, also underscores the necessity for more systemic support to avoid overreliance on individuals which have greater influence in SIDS clusters.

5.1.4 Distinctive identity strengthens performance and path-dependency

The examination of film culture in Jamaica, particularly through the lenses of path-dependency and performance, reveals a lack of a distinct stylistic identity in the film industries creative output and performance measures: i.e. existing styles are currently not fully capturing the island's cinematic potential whether via writing or visual storytelling. Respondents expressed mixed views on the existence of a filmmaking culture in Jamaica, highlighting both the historical appeal of Jamaican landscapes for foreign productions and the challenges of developing a local film culture (Polack, 2017, p. 10). The performance of the Jamaican film production cluster is measured by its economic growth, employment, and how it contributes to national pride and identity, as developed specifically for this research using the Vision 2030 strategic development goals and SIDS actions (PIOJ, 2024; United Nations, 2021). While the film industry presents much potential for economic benefits and national development, its success is contingent on achieving commercial viability, developing skilled creatives and gaining support from government and private sector stakeholders.

5.1.5 Key findings from Jamaica and considerations for SIDS

Based on these key findings it can be concluded that the process of creating a film production cluster demonstrate significant potential, yet its growth and development will continue to be impeded by substantial challenges. In particular, the parameter of policy has been notably inconsistent. This has led to a lack of support structure in many other parameters including 'population', 'proximity' and 'profile'. However, it is argued that with considerable determination, Jamaica can create a thriving film industry cluster that capitalizes on its rich cultural heritage and contributes to national development and economic growth. The following policy recommendations show how a collaborative cluster and community can be cultivated; by building on the JSDI and focusing on developing structural capabilities, whether skills, networks or further film project support.

Specifically for future SIDS research, this study has highlighted the need for specific performance metrics to appropriately assess a cluster. Equally the role of individuals was

heightened in such a small and developing context. A recommendation for future researchers would be to consider adding an 8th parameter - that is *People,* this parameter would go beyond the first principle of the presence of media entities or the parameter of profile or population. The parameter of 'people' would identify the key individuals that are present in a SIDS environment. It would allow for the mapping of their influence and focus research on the effects and implications gatekeepers can have on small clusters. For example, labour norms, global industry contacts, and entrepreneurial innovations. This research thus proposes an additional parameter for future research on creative clusters when specifically investigating SIDS.

5.2   Policy implications

Therefore, as denoted from the introduction of this thesis, creative cluster theory is important not only for academic research but can also provide real world policy recommendations. Clusters "should be seen as dynamic arrangements in their global and local contexts" and thus the following policy recommendations cannot be assumed to guarantee success in other locations as the uniqueness and specific characteristics of a particular locale needs to be understood (Picone & Komorowski, 2020, p. 234). The following recommendations are based on the key findings from this research and intentionally build on the recommendations put forward by Hendrickson & Niaah, (2018, p. 8):

- *Strengthen existing collaborative networks.* While formal networks amongst film workers exist, these can be further strengthened via funding, organisational support and community outreach programmes.
- *Implement local content quotas.* Jamaica needs to ensure a market for locally produced films by requiring local broadcasters and cinemas are mandated to show homegrown content. This policy has been successful in other countries and will help nurture the Jamaican 'film culture' in both audience and style.
- *Advance educational and skills training programs.* Gaps in creative and technical skills should be filled with a comprehensive approach that incorporates both formal and informal offerings. Production companies should seek to partner with educational institutions to ensure a steady stream of trained professionals.
- *Incentivise private sector investment.* Government should develop policies that include tax incentives to encourage businesses to invest in film production projects

and related infrastructure including state-of-the-art production facilities that will contribute to overall development of the industry.

- *Support further film industry research.* Informed research can guide policymakers in creating effective strategies and policies that support the growth of the local film industry. This includes continually addressing issues such as funding, training, infrastructure, and regulatory frameworks.

By implementing these policy recommendations, Jamaica can leverage its unique geographical and cultural assets to build a robust and dynamic film production cluster. Enhancing the seven parameters through collaboration, education, strategic investments and supportive measures will not only strengthen the local film industry but also contribute to broader economic and cultural development goals.

5.3   Limitations and further research

The majority of the limitations experienced during data collection have been detailed in Chapter 3. While this research introduces a sample of experts within the Jamaican film industry, future research can explore an even more extensive sample. Equally, expert interviews provide important insight into perceptions, individual impact and lived experiences, however self-reported data can be subject to bias or inaccuracies. Further research can consider mixed methods to combat this. Suggestions include a study on audience reception to locally produced films as well as geographical mapping of film and media entities across SIDS. There is an opportunity for further research as the author of this study has identified further respondents who would be willing to take part in a follow-up to the case of Jamaica. Equally, future research can consider apply a similar adjusted framework to other SIDS cases.

This thesis research captures a snapshot in time, in that it took place just before the submission of the first ever JSDI deadline for development, and production grants. Considering the effect the JSDI is projected to have on the industry, an extension of this research is proposed to monitor its effect. A follow up study would offer valuable insights into the effectiveness of policies and evolutions of culture. By utilising this research's performance metrics again, an additional study could identify trends occurring over the next five or even ten years in the future.

While this research has identified key barriers and opportunities in the development of a robust film production cluster, a mixed-methods approach, as previously mentioned,

that combines a survey or policy analysis, or other more qualitative data approaches – would make conclusions even more significant for industry stakeholders, policy makers, and investors. Thus, this research underlines that film cluster research in SIDS is possible. This thesis acts as the foundation for future research to consider policy, profile and people when undertaking similar studies.

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Appendix A – Participants

Table 1

Overview of 19 interviewees

Name	Position	In-Person or Online	Media Entity
Tanya Batson-Savage	Writer/Producer, Have a Bawl Productions	In-Person: Private room (LAB)	Worker
Kevin Jackson	Animator/filmmaker/ writer/lecturer (JANN President)	In-Person: Outdoor Café	Worker/ communities
Lesley Wanliss	Writer (JAFTA)	In-Person: Outdoor Café	Worker/ communities
Saeed Thomas	CEO - M-One Productions Company Ltd. (JAFTA President)	In-Person: Private Office at M1	Institution/ communities
Dario Shields	Founder – Movie Nites Ltd, Filmmaker	Online: Teams (No Video)	Worker/ communities
Ashley Belinfante	Production Assistant/Coordinator	In-Person: Apartment	Worker
Savannah Peridot	Director, GattFest Film Festival	In-Person: Private room at UWI	Institution
Renee Robinson	Former Film Commissioner (2016-2023)	In-Person: Private room (LAB)	Institution/ communities
Tashara-Lee Johnson	COO - The LAB (JAFTA Vice	In-Person:	Institution/

	President)	Private room (LAB)	communities
Sherando Ferril	CEO - YaadBridge Entertainment, Actress	Online: Teams (No Video)	Institution
Sosiessia Nixon	Filmmaker/Lawyer	Online: Teams (No Video)	Worker
Kyle Chin	Filmmaker/Stunt Coordinator, AfroAsian Productions	In-Person: Outside Hotel	Worker
Gabrielle Blackwood	DP, Script writer (Former JAFTA President)	Online: Teams Video	Worker/ communities
Natalie Thompson	Owner/Managing director of Cinecom Productions Ltd, Producer	Online: Teams Video	Institution
Matthew Ferrante	VP of Physical Production at Paramount Pictures	Online: Teams Video [Los Angeles]	Institution
N/A (F)	Documentary Filmmaker	Online: Teams Video	Worker
Natasha Griffiths	Writer/Director/Lecturer	Online: Teams Video	Worker
Kanhai Condison	Founder & CEO - Jollywood Jamaica Productions	Online: Teams (No Video)	Worker
Mykal Cushnie	Director/Editor, DSE Media	Online: Teams Video	Worker

Appendix B – Interview Script Outline

Introduction / warm up

The interview starts with a thank you to the participant and a reminder of the research topic and main sites of inquiry. This follows an introduction of the interview including name, student status and personal association with the research topic. (Cleo, Master's student in Media and Creative Industries. I am also a writer and aspiring producer who has worked in Jamaica for the previous 5 years).

The interviewee is then asked to introduce themselves and define themselves within the film industry and how they started in the film industry.

Subject Area 1: Filmmaking in Jamaica

- How would you describe filmmaking in Jamaica?

- Do you know how it differs from other locations

- What are the biggest hurdles for filmmakers(/you) currently?

Subject Area 2: Role of Government

- What are your perceptions of the new Jamaica Screen Development Fund (JSDI)? (Colloquially known as the Film Fund)

- Will you be applying?

- If you/others are not successful with the JSDI grant funding, what other options exist for filmmakers?

Subject Area c 3: Skills and Resources

- What skills or resources are missing in Jamaica?

- What options do filmmakers have when it comes to distributing their film?

Subject Area 4: Creative Heritage and Jamaican Film

- Is there a Jamaican film genre/style/aesthetic?

Please explain your answer

- What potential does Jamaica have to be a hub for film in CARICOM?

What's needed for Jamaica to fulfil this role?

Conclusion

Thank you very much for answering my questions! Is there anything that I haven't asked you that you'd like to say before we end this interview?

Appendix C – Coding frame of Thematic Analysis

The coding frame serves as a reference guide, defining all the main themes, sub-themes (if present), and their associated codes. It's organized by topic area, with the main themes listed and their corresponding definition and example quote.

Topic Area Title

	Code/Theme	Definition	Example Quote

1: Filmmaking in Jamaica (place, proximity) Participants often reflected on their personal experiences of filmmaking. This topic refers to the present conditions for film production in Jamaica including, geography, relational closeness, networking and collaboration.

	Code/Theme	Definition	Example Quote
	Collaboration vs. Cliques	This code refers to participants' conflicting experiences of generosity and teamwork as well as closed groups in the film industry.	*"Productions are so clique, that the people who work on movies, don't work on commercials..."*
	Gatekeepers	This code refers to individuals holding power (jobs, relationships) in the film industry.	*"We have 'people infrastructure' in Jamaica, people are institutions"*
	Value of Networks	This code refers to the informal and formal networks that facilitate film projects.	*"Friends who have skills who share your creative vision and passion"*

2: Role of Government (policy) This topic encompasses governmental tools that support the

Jamaican film industry. Specifically, it relates to the lack of legislation, tax incentives and funding but it predominantly focusses on the on-going Jamaican Screen Development initiative (JSDI).

	Hopes for JSDI	This code refers respondents' restrained optimism surrounding the JSDI – both its implementation and possible effects.	*"I personally believe it's one of the best things…beautiful asset called hope"*
	Local and International Productions	This code refers to the complex relationship between foreign productions and local productions. Attracting more international projects may or may not support the local film industry.	*"I think the funding of the JSDI is a small initial seed… more attractive if there's not a cap"*
	Local Content Quotas	Participants identified the lack of policy initiatives that support the distribution and airing of locally produced content on television and in cinemas (locally and regionally)	*"They would have to buy our local content, that would help to fix that problem."*

3: Skills and Resources (population, profile) This topic is closely linked with the entities in the film industry. This includes number of skilled workers, the existence (or lack) of media institutions/facilities and how they function within Jamaica.

	Limited Skills (People)	This code refers to the perceived lack of skilled workers for film production and mishmash of	*"The talent pool is not so big"*

	training programs.	
Limited Resources	All respondents admitted that Jamaica still needed to develop/attain greater film facilities and technology.	*"Jamaica needs to have a production studio…"*
Entrepreneurship	This code refers to most respondents displaying entrepreneurial qualities and ingenuity.	*"I eventually just kind of did it myself…"*

4: Film and Culture (Path-dependency, performance) This topic summarizes the strong cultural output of Jamaica and considers it in regard to film. It considers measurements of success for the film industry. This encompasses traditional economic indicators, but also nation-building which includes evanescent measures like outlook, which are traditionally affected by historical and cultural factors.

Creative Output	This code refers to the existence (or not) of Jamaican film style or aesthetic. An important factor, when considering the development and growth of a nation, is its perception.	*"You have to learn how it's done first and then you add your own style to it."*
Brand Jamaica	This code refers to the role Jamaican film can play in nation building and branding.	*"People come to us because we have a very, very strong cultural brand "*
Support and Success	This code refers to the economic growth a film production cluster can (or is projected to) produce and the additional support to	*"The nature of the[film] industry makes it a little*

other important sectors of the Jamaican economy.

incompatible with the expectations..."