



**GREEN PAPER**

# **NATIONAL ANIMATION POLICY**

**2026-2036**

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## Acronyms

AIWG	Animation Industry Working Group
AI	Artificial Intelligence
AR	Augmented reality
BOSS	Business of Sustainability of Studios
BCJ	Broadcasting Commission of Jamaica
CAGR	Compound Annual Growth Rate
CAPE	Caribbean Advanced Proficiency Examination
CGI	Computer-generated imagery
CIIF	Cultural and Creative Industries Innovation Fund
CIT	Corporate Income Tax
CNC	Centre National du Cinéma et de l'Image Animé
CPTC	Creative Production and Training Centre
CTOC	Counter Terrorism and Organized Crime Investigations Branch
ETC	Employment Tax Credit
GCT	Government Consumption Tax

GDP	Gross Domestic Product
GOJ	Government of Jamaica
HEART/NSTA Trust	Human Employment and Resource Training/National Service Training Agency Trust
IP	Intellectual Property
IBRD	International Bank for Reconstruction and Development
JAMBAR	Jamaica Bar Association
JAMPRO	Jamaica Promotions Corporation
JANN	Jamaica Animation Nation Network
JBDC	Jamaica Business Development Corporation
JCDP	Jamaica Council for Persons with Disabilities
JCF	Jamaica Constabulary Force
JIPO	Jamaica Intellectual Property Office
JIS	Jamaica Information Service
JSDI	Jamaica Screen Development Initiative
JSEZA	Jamaica Special Economic Zones Authority

KOCCA	Korea Creative Content Agency
MCGES	Ministry of Culture, Gender, Entertainment and Sport
MDAs	Ministries, Departments and Agencies
MFAFT	Ministry of Foreign Affairs and Foreign Trade
MIIC	Ministry of Industry, Investment and Commerce
MOFPS	Ministry of Finance and the Public Service
MOJ	Ministry of Justice
MOESYI	Ministry of Education, Skills, Youth & Information
MTET	Ministry of Transport, Energy and Telecommunications
NAP	National Animation Policy
NEET	Not in Education, Employment, or Training
NHT	National Housing Trust
NIS	National Insurance Scheme
OECD	Organization for Economic Co-operation and Development
PIOJ	Planning Institute of Jamaica
PSOJ	Private Sector Organisation of Jamaica

PTC	Promotional Tax Credit
2D	Two-dimensional
3D	Three-dimensional
SEZ	Special Economic Zones
STEAM	Science, Technology, Engineering, the Arts and Mathematics
ST & I	Science, Technology and Innovation
UCJ	University Council of Jamaica
UTech	University of Technology
UWI	University of the West Indies
YEDAI	Youth Employment in the Digital and Animation Industries
VCoP	Virtual Community of Practice
VFX	Visual Effects
VR	Virtual reality

## Preface

The motivation behind Jamaica's National Animation Policy (NAP) is rooted in the vision of fostering a vibrant and sustainable animation industry that contributes to the nation's economic growth, cultural expression, and global competitiveness. Recognizing the growing significance of animation within the creative industries, this policy provides a strategic framework for fostering the development and global recognition of Jamaica's animation sector. By leveraging the country's rich cultural heritage and creative talent, the NAP seeks to position Jamaica as a competitive player in the global animation market.

Aligned with Vision 2030 Jamaica-National Development Plan, the purpose of this policy is to outline the vision, goals, and strategies necessary to stimulate investment, enhance industry infrastructure, and support talent development. It is intended for policymakers, industry stakeholders, educators, and animators who are committed to advancing Jamaica's animation industry. This document sets the stage for detailed policy measures that will drive economic growth, create high-value jobs, and showcase Jamaica's unique storytelling abilities to the world.

The Government of Jamaica (GOJ) invites all stakeholders to join this transformative journey, ensuring that Jamaica's animation industry not only thrives but also contributes significantly to the nation's sustainable development goals. Together, we can make Jamaica the place of choice to live, work, raise families, and do business, in line with the aspirations of Vision 2030 Jamaica-National Development Plan.

## Executive Summary

The National Animation Policy (NAP) of Jamaica is designed to catalyse investment and growth in the animation sector, recognizing its interdisciplinary nature and significant potential for economic diversification and job creation. The animation market has experienced robust growth, expanding from USD\$355.83 billion in 2023 to USD\$379.83 billion in 2024, with projections to reach USD\$499.57 billion by 2028.<sup>1</sup> This growth is driven by increased demand for animated content across various platforms, advancements in animation technologies, and the expanding gaming industry.

Key trends shaping the market include innovations in virtual reality (VR), augmented reality (AR), computer-generated imagery (CGI), Artificial Intelligence (AI) and real-time animation tools. North America currently leads the market, while the Asia-Pacific region, particularly Japan and India, is the fastest-growing region.

The NAP is rooted in the National Development Plan of Jamaica, Vision 2030 Jamaica, which aims to make “Jamaica, the place of choice to live, work, raise families and do business.” The NAP supports Vision 2030 Jamaica’s national goals of empowering Jamaicans, ensuring a secure and cohesive society, and fostering a prosperous economy. It aligns with national outcomes such as world-class education and training, authentic and transformational culture, effective governance, an enabling business environment, technology-enabled society, and internationally competitive industry structures.

The vision statement of the NAP is to establish Jamaica as a vibrant and inclusive animation ecosystem of creativity and innovation where our rich cultural tapestry, talent, and cutting-edge technology converge to inspire, educate and entertain the world. The policy envisions a dynamic and inclusive environment for animators and industry stakeholders.

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<sup>1</sup> The Business Research Company. (2024). *Global Animation Market Size Forecast 2024 - 2033*. Retrieved July 23, 2025, from <https://www.thebusinessresearchcompany.com/market-insights/animation-global-market-report-2024>

The goals of the NAP include fostering collaboration among various stakeholders, promoting diversity and inclusivity within the industry, optimizing the allocation of resources to support growth, enhancing global competitiveness, and embracing technological advancements. These goals form a comprehensive strategy to nurture local talent and creativity, ultimately positioning Jamaica as a significant player in the global animation landscape.

The principles guiding the NAP emphasize partnership and collaboration, efficient resource allocation, competitiveness, innovation and technology, and inclusiveness. By fostering partnerships and collaboration within the industry, the NAP aims to create a thriving ecosystem that supports the development, production, and promotion of animated content. Efficient resource allocation involves strategically distributing financial, technological, and educational resources to areas that will have the most significant impact on fostering talent and innovation. Competitiveness focuses on enhancing the international and regional competitiveness of local animated content, studios, and professionals. Innovation and technology encourage the adoption of cutting-edge technologies and practices to enhance the quality and efficiency of animated productions.

The policy objectives outlined in the NAP include enhancing sector capacity through education and training, facilitating funding access for animators, protecting intellectual property rights, boosting global recognition, creating an enabling environment for growth, and promoting the use of local talent. These strategies aim to nurture local talent, foster innovation, and position Jamaica as a key player in the global animation industry. By implementing these strategies, the NAP reflects a commitment to harnessing the collective strengths of various stakeholders, advancing innovation, and ensuring the sustained growth and success of the Jamaican animation industry.

By nurturing local animators, promoting creativity, and fostering innovation, the NAP seeks to invigorate the economy and showcase Jamaica's unique storytelling abilities on the global stage. The GOJ is committed to making Jamaica the "Place to Toon," empowering animators and studios to thrive in a vibrant and culturally enriching environment.

## 1.0 Introduction

### 1.1 Background

Animation is an integral component of the broader creative industries while also serving as a dynamic force that bridges various artistic disciplines. Within the realm of entertainment and media, animation is a key player in film, television, and gaming, contributing to immersive storytelling and visual experiences. In advertising and marketing, animation adds a compelling dimension to brand promotion and messaging. It intersects with design and visual arts, enhancing graphic design and interactive experiences.

Animation can be described as *“the process of giving the illusion of movement or life to cinematographic drawings, models or inanimate objects. This is achieved with sets of drawings photographed in sequence on successive motion picture frames or images generated by computer software.”*<sup>2</sup> Animation includes several different types: two-dimensional (2D), three-dimensional (3D), stop motion, motion graphics and visual effects (VFX). Animation spans different sectors, including education, Science, Technology, Engineering, the Arts and Mathematics (STEAM), gaming, visual effects, merchandising and television programming. Animation is a gateway to many career options enabling an individual to utilise any level of artistic skill and to utilise many techniques in multimedia production.

Animation also plays a vital role in education through e-learning and training simulations, thereby contributing to skills development. Its integration into virtual and augmented reality experiences elevates technological innovation. Additionally, animation serves as a form of fine art, showcased at festivals and galleries, blurring boundaries between traditional and digital expressions. Through cross-industry collaboration, animation influences music videos, literature adaptations, and fashion. The collaborative and interdisciplinary nature of animation underscores its versatility and influence within the diverse landscape of the creative industries.

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<sup>2</sup> United Nations Conference on Trade and Development. (2010). *Integrating Developing Countries' SMEs into Global Value Chains*. [https://unctad.org/system/files/official-document/diaeed20095\\_en.pdf](https://unctad.org/system/files/official-document/diaeed20095_en.pdf)

The animation market has seen significant growth in recent years. It expanded from USD\$355.83 billion in 2023 to \$379.83 billion in 2024, with a compound annual growth rate (CAGR) of 6.9%<sup>3</sup>. This growth can be attributed to several factors, including an increased preference for visual storytelling, greater use in film and television productions, expanded integration into video games, heightened adoption in advertising and marketing campaigns, and enhanced application in education and training.

Looking ahead, the animation market is expected to continue its strong growth trajectory. It is projected to reach USD\$499.57 billion by 2028, growing at a CAGR of 7%.<sup>4</sup> This anticipated growth is driven by rising demand for animated content across various platforms, the growing popularity of streaming services, the dynamic expansion of the gaming industry, increasing interest in stop-motion animation techniques, and a growing appetite for 3D animation.

Moreover, several significant trends are expected to shape the market during the forecast period. These include advancements in animation technologies such as virtual reality (VR) and augmented reality (AR), innovations in computer-generated imagery (CGI), developments in motion capture technology, and improvements in real-time animation tools. These advancements are set to further enhance the capabilities and appeal of animation across industries, driving continued expansion and innovation.

In 2023, North America was the largest region in the animation market with an anticipated market size of \$36.73 billion by 2031, growing at a Compound Annual Growth Rate (CAGR) of 5.90% from 2024 to 2031, while the Asia-Pacific region is expected to be the fastest-growing region during the forecast period led by Japan and India, with Japan expecting an annual growth rate of approximately 12%.<sup>5</sup>

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<sup>3</sup> The Business Research Company. (2024). *Global Animation Market Size Forecast 2024 - 2033*. Retrieved July 23, 2025, from <https://www.thebusinessresearchcompany.com/market-insights/animation-global-market-report-2024>

<sup>4</sup> Ibid

<sup>5</sup> Chaves, L. (2024). *30+ Animation Industry Statistics, Facts, & Trends (2024)*. Retrieved May 23, 2025, from <https://vidico.com/news/animation-industry-statistics/>

Closer to home, Trinidad and Tobago’s animation sector generated One Million United States Dollars (USD\$1,000,000.00) in revenue over the past three (3) years.<sup>6</sup> Despite being in its early stages, the sector has shown significant potential, with 75% of its opportunities being foreign based. The Government of Trinidad and Tobago is actively working to position the country as a premier destination for animation through initiatives like the Anima Caribbean Festival and the Tamana Technology and Animation Production Factory.

It is clear that the animation industry presents significant potential for Jamaica specifically through diversification of our economy, creation of high-value jobs and showcasing of our rich cultural heritage. By leveraging local talent and fostering partnerships with international studios, Jamaica can position itself as a competitive player in this creative industry. Additionally, initiatives like animation festivals and training programs can help build a robust ecosystem, making Jamaica a vibrant hub for animation in the Caribbean.

## 1.2 Policy Rationale and Purpose

Given animation’s interdisciplinary nature and its potential for development, the Government of Jamaica (GOJ) has crafted the National Animation Policy (NAP) to influence greater investment and growth in the sector. The NAP will serve as a visionary and strategic framework for the growth, sustainability, and global recognition of Jamaica's animation industry.

It is envisioned that with the right partnerships and investments, the benefits of implementing the NAP will emerge. These include increasing the quality and quantity of animation products, claiming a share of a billion-dollar international market as well as creating new employment opportunities not only for the youth, but also for those looking to transition into a new field. In this way, the animation industry would have a significant impact on Jamaica’s Gross Domestic Product (GDP).

This NAP seeks to empower Jamaican animators, studios, and institutions by setting the stage for an animated future that is both prosperous and culturally enriching. With its rich cultural heritage

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<sup>6</sup> Trinidad Express Newspapers. (2024). *T&T’s Animation Sector Earns US\$1M in 3 years*. Retrieved from T&T’s animation sector earns US\$1m in 3 years | Local Business | trinidadexpress.com

and a pool of creative talent, Jamaica possesses the potential to become a significant player in the global animation arena. The GOJ is therefore keen to develop Jamaica as the “*Place to Toon*”.

To harness the potential of the sector, this policy provides a comprehensive roadmap that encompasses education, industry infrastructure, talent development, market expansion, and international collaboration. By nurturing local animators, promoting creativity, and fostering innovation, the Government seeks to not only invigorate the economy, but also to showcase Jamaica's unique storytelling abilities to the world through the captivating medium of animation.

## 2.0 Overall Situational Analysis

### 2.1 Animation – A Historical Context in Jamaica and the Caribbean

Animation predates the creation of the cinema. However, the use of various commercial devices facilitated the development of the industry as we know it today. Animation has morphed into different forms and has also influenced various segments of the entertainment landscape. From early hand-drawn animations to today's sophisticated computer-generated imagery (CGI), animation has left an indelible mark on art, storytelling, education, advertising, and even scientific visualization. Its impact extends beyond the screen, shaping our perception of reality and sparking creativity across generations.

Animation has been part of Jamaica's and the Caribbean's creative landscape since the 1970s, with Disney and Hanna Barbera. First black animators, Leo Sullivan and Floyd Norman, harboured ambitions of establishing an animation studio in Jamaica<sup>7</sup>, however, their endeavors were met with numerous obstacles. With the advent and advancement of digital animation making the industry more accessible, individual enthusiasts have explored and honed their craft to revitalize and expand the Caribbean and Jamaica's animation industry.

One of the first documented animation festivals in the Caribbean was the Anima Caribe Animation Festival held in 2001 in Trinidad and Tobago. Despite animation being a feature of the Caribbean since the 1970s, having only had its first documented event in 2001, the Caribbean can be viewed as a young adult of twenty-four (24) years still attempting to gain momentum and make a name in the animation industry.

Since 2001, there has been an emergence of small independent groups and companies spread across Jamaica, Barbados, Trinidad and Tobago, Guyana that have achieved noteworthy milestones for the Caribbean (see Box 1<sup>8</sup>).

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<sup>7</sup> Singer, C. (2016). *State of the Jamaican Animation Industry*. Retrieved from <https://www.siliconcaribe.com/2016/01/16/state-of-the-jamaican-animation-industry/>

<sup>8</sup> Information taken from: <https://www.farrcreative.com/post/4-steps-to-grow-the-caribbean-animation-industry>

## Box 1: Animation Milestones in the Caribbean

- Animae Caribe Festival celebrating 15 years (2001- 2016)
- Kina Sky Animated Short Film (Coretta Singer, Jamaica) — One of Thirty Finalists in the Nickelodeon Animation festival in 2009
- Several Animation Studios launched in and around the region (2010- 2016). These include Full Circle, Lab 206 and Second Floor Studios (Trinidad), CDMA (Barbados), Reel Rock (Jamaica), SkyRes and Alcyone (Jamaica), Matrix Animation Studios (Guyana)
- KingstOOOn Animation Festival Existence celebrating 2 years (2014- 2016)
- Asifa Caribbean Chapter is recognised as part of the international industry community, and electing a new chapter president (2016)
- Battledream Chronicles Alain Bidard (First Animated Feature film out of the Caribbean) (2016)
- Is Animation an option -Maritiza Bengochea and Designing new ideas for trade: The Creative Industries & Animation in the greater Caribbean, Cherise Trotman
- Caribbean Animation Professionals cited in the book Animation: A World History: Volume III: Contemporary Times
- UTT Animation Programme being the first animation programme to be taught at a diploma level in the Caribbean with approximately 50 Graduates between (2010–2016)
- Animation and Game Design as an elective at CAPE (2016)
- Jamaican delegation presented 23 local animated projects at MIPCOM in Cannes, France (2019)
- Launch of the Caribbean Animation Business Network as a central hub for animation studios (2022)
- Caribbean delegation participated in the Annecy International Animation Film Festival in France (2023)
- Caribbean digital creators participated in France's PIDS-Enghien International Visual Effects Festival (2024)

As it relates to milestones in the Jamaican animation industry, in 2009, the Jamaica Animation Nation was formed as a Facebook group, serving as a hub for animators and those in related and supportive fields. In 2010, Joan Vogelesang of Toon Boom, along with Phil Phillips, visited Jamaica and sparked interest among a new generation of investors to view animation as an untapped potential revenue source. With the animation industry valued at One Hundred Billion United States Dollars (US\$100,000,000,000) at the time, it sowed the initial seeds of a broader movement towards recognizing animation as an industry in Jamaica. By 2011, Toon Boom started collaborating with local talent and by 2012, “Cabbie Chronicles” was the first Jamaican animated series to be aired on local television with “Mek wi laugh” in 2013, being the second. There are also several functioning computer animation studios such as Reel Rock GSW, which was the first animation studio to secure major outsourcing deals from 2013 onward.

By 2012, with the rise of animation activities on the island, it became apparent that the Jamaica Animation Nation needed to evolve beyond just a Facebook page. With practicing animators boasting local, regional, and international contacts, the need for an association in Jamaica became evident. This neutral body would serve as a liaison and advocate for various animation interests,

including freelancers, employed animators, studios, festivals, training facilities, and government entities. The goal of the organization was to leverage collective knowledge and expertise to guide the direction of Jamaica's animation industry.

Since 2013, the thrust by the GOJ in partnership with animation stakeholders in the private sector has been to implement a structured framework for the growth and development of the animation industry, with an emphasis on jobs for youth, securing outsourced work, promoting Jamaica as the Caribbean's hub for animation and attracting investment generally. To this end, in 2014, the GOJ received a US\$20 Million Dollar loan from the International Bank for Reconstruction and Development (IBRD) to fund the Youth Employment in the Digital and Animation Industries (YEDAI) Project.

Also at that time, the animation industry, along with the online labour market and virtual economy, was seen as a potential source of significant employment opportunities for well-educated Jamaican youth who were either unemployed or underemployed. Despite global economic instability the animation industry continued to grow steadily worldwide and was considered a promising nontraditional source of youth employment in Jamaica. Skills in this field were transferable across various economic sectors. Large animation companies concentrated on the preproduction (scriptwriting, character development, storyboarding) and postproduction phases (music, final editing), outsourcing the production phase (animation) to countries like India, Korea, and the Philippines. As these countries began to demand more locally developed content (intellectual property [IP] content and products), they reduced their production work, creating an opportunity for countries like Jamaica to fill the gap and play a significant role in animation outsourcing.

The YEDAI Project supported youth employment in the digital and computer animation industries. It provided the opportunity to build the capacity and skills of Jamaican youth and improve their employability in the growing computer animation realm. It also provided critical skills to young entrepreneurs to bring ideas to the market. The YEDAI Project was to take advantage of Jamaica's perceived opportunities of (i) being close to major markets (ii) operating in the same time-zone of these markets (iii) sharing common language and (iv) possessing cultural norms and tastes that are aligned with those of consumers in the large outsourcing markets of the western hemisphere.

At the close of the YEDAI Project, one hundred and fifty-five (155) animators were trained in five specialties of the 3D animation pipeline. Additionally, the Training of Trainers component saw seventy-four (74) animation instructors from secondary, vocational, and tertiary institutions trained over four (4) years in pedagogical techniques for animation training. KingstOOOn was also established as a brand in the global animation space. The event grew significantly, with competition entries and attendance increasing from one hundred and thirty-five (135) and nine hundred and seventy-three (973), respectively in 2013 to two thousand, one hundred and sixty-five (2,165) entries and four thousand, one hundred and forty-five (4,145) attendees in 2021. The Animation Scholarship Programme trained seventy-seven (77) animators, with thirty-six (36) achieving internationally recognized certification/credits in 2D and 3D animation.

The Business of Sustainability of Studios (BOSS) Programme facilitated linkages and networks during and after participation in seven (7) international animation trade shows by fifteen (15) selected companies and entrepreneurs. Participants also received six (6) modules of animation business training conducted by international and local experts and practitioners. The Virtual Community of Practice (VCoP) was handed over to the Jamaica Animation Nation Network (JANN) for completion, maintenance, and sustainability.

Hardware and software were procured and handed over to seven (7) animation training institutions and five (5) community centers. Although the establishment of StartUp Jamaica was discontinued, fifteen (15) startup businesses were nurtured during its two-plus years of implementation, with some companies still in operation.<sup>9</sup> The project also trained six thousand, eight hundred and forty-eight (6,848) NEET (Not in Education, Employment, or Training) youth in digitization and document management, with four thousand, two hundred and sixty-five (4,265) placed in four-month internships and three thousand, two hundred and sixteen (3,216) recommended for job certification.

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<sup>9</sup> World Bank. (2022). *Implementation Completion and Results Report on a Loan in the Amount of US\$20 Million to Jamaica for a Youth Employment in the Digital and Animation Industries Project*. Retrieved from [World Bank Document](#)

Two of the five community centers mentioned previously were refurbished, while the refurbishing of one is in progress and expected to be completed using Government of Jamaica (GOJ) funds. The remaining two centers are anticipated to be refurbished by another project. Desks, chairs, multifunction printers, and computers were delivered to all five (5) centers. Support to the ST&I Ecosystem included the execution of the National Innovation Awards 2018, the Young Innovators Awards/National Science Fair in 2019, and stakeholder consultations for the development of the Science, Technology and Innovation Policy.

Finally, twelve (12) local intellectual properties (IPs) were developed and entered the animation market, surpassing the target of five (5). Additionally, six (6) international animation productions/projects were outsourced to Jamaican production companies, exceeding the target of three (3).

Since the close out of the YEDAI Project, the animation industry has continued to grow rapidly internationally. Most recent projections anticipate that the global animation market size is expected to reach US\$642.5 Billion by 2030 and with a CAGR of 5.2% from 2021 to 2030. A recent study conducted by A-Z Information Limited on behalf of JAMPRO estimated that in the Jamaican animation industry, the overall economic impact was \$1.787 Billion while the indirect contribution was \$255.3 Million.<sup>10</sup>

Given the growth of the industry internationally, much of the focus in the Caribbean has been on entering international outsourcing markets in the area of 2D animation. It is now recognized, however, that there is much more scope for animators in the Caribbean for the creation of original content, its licensing and trade. Since the initial focus was outsourcing, as pushed by Caribbean Governments, sufficient attention was not placed on the creation of “functioning ecosystems, funding support structures, governmental tax incentives, ease of movement of human capital, IP creation, distribution, marketing and licensing” (JAMPRO, 2021).

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<sup>10</sup> A-Z Information Limited on behalf of JAMPRO. (2021). Final Draft Report - Economic Impact Study for Jamaica’s Film, Animation and Music Industries.

## 2.2 Current Programmes/Institutional Arrangements

Presently, the animation industry has not been designated to a specific Ministry, Department or Agency (MDA), however, the Ministry of Industry, Investment and Commerce (MIIC) was recommended to lead in attempts to develop the industry. Save for one (1) dissenting view, all stakeholders strongly agreed that the portfolio should remain at the Office of the Prime Minister (OPM) for the duration of the policy development/ strategic planning cycle. With the exception of two (2) stakeholders, there was consensus that the portfolio should ultimately be transferred to the MIIC for implementation.

The administration of the animation industry is spread across various MDAs in collaboration with representational industry bodies such as the JANN and an Animation Industry Working Group (AIWG) that was functional during the implementation of the YEDAI Project. The JAMPRO Film Commission promotes exhibition and access to trade for the industry. The National Registry of Entertainment Culture and Creative Industries practitioners (E-registry) is the largest repository of Entertainment Culture and Creative Industry practitioners in Jamaica, through which government provides benefits to the mentioned sectors and is managed by the Ministry of Culture, Gender, Entertainment and Sport (MCGES). Additionally, the intellectual property law framework which offers protection to the industry is managed by the Jamaica Intellectual Property Office (JIPO). As such, the institutional management of the animation portfolio has therefore been disjointed.

While the YEDAI Project was the greatest consolidated effort to support the animation industry, there were also other initiatives on a programmatic and project level. It was hoped that these private and public sector initiatives would continue to build on efforts to find pragmatic solutions to the challenges faced in the computer animation industry and capitalize on global opportunities that present themselves, as Jamaica's network of contacts and potential partners continued to expand. However, these efforts were uncoordinated having taken place in silos.

In 2019, the Jamaica Promotions Corporation (JAMPRO) was selected by the Cultural and Creative Industries Innovation Fund (CIIF) for an enabler grant award of One Hundred Thousand United States Dollars (US\$100,000) to develop a cooperation business model for the regional

animation sector, beginning initially with Jamaica, Barbados and Trinidad and Tobago with the intent to expand across the region.<sup>11</sup> The Caribbean Animation Business Model for Animation Studio Projects was launched on October 9, 2020 as a two-phase project which sought to test a framework which facilitates Caribbean studios working together over a virtual platform. The central aim of the model was to identify a method which Caribbean countries could utilize to increase their chances of attracting international contracts and having access to funding. This model led to the development of Caribbean Animation Business Network in January 2022. This network currently hosts an animation production directory, and information on the available incentives in the Caribbean for the sector. Through this hub, studios, freelancers, interns, and other support services can find each other, expand workforce capacity, and advance employment opportunities. Potential regional and international clients can also find resources to access the Caribbean animation industry.<sup>12</sup>

On January 31, 2024, the One Billion Dollars (\$1,000,000,000.00) Jamaica Screen Fund was launched under the Jamaica Screen Development Initiative (JSDI) to support and strengthen Jamaica's screen-based industries, which includes the animation industry. This Government initiative will fund a portion of production costs for local and foreign films shot in Jamaica over a two-year period, provided certain criteria are met. Through the JSDI, local creators can apply to benefit from grants or loans at various stages of production. At the launch, Minister of Industry, Investment and Commerce, Senator Aubyn Hill, highlighted the government's commitment to investing in the orange economy.<sup>13</sup>

### 2.3 Legislative and Policy Environment

The main legislation that currently impacts the sector is the Fiscal Incentives (Miscellaneous Provisions) Act, 2013. This Act was enacted as part of an omnibus fiscal reform initiative aimed at streamlining and modernizing Jamaica's incentive framework by consolidating and rationalizing

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<sup>11</sup> N.Luke, *The Caribbean Animation Business Model: Cooperation and Opportunity for Caribbean Animation Industry Professionals*, Jamaica, 2021, pg. 4.

<sup>12</sup> *AboutUS – Caribbean Animation Portal*. (n.d.). Retrieved from: <https://caribbeananimation.com/AboutUs/>

<sup>13</sup> Radio Jamaica News. *Local film industry boosted with \$1 billion Jamaica Screen Fund*. Retrieved from: Local Film Industry Boosted With \$1 Billion Jamaica Screen Fund | RJR News - Jamaican News Online.

various incentive regimes across sectors. It repealed outdated legislation including the Motion Picture Industry (Encouragement) Act<sup>14</sup> and introduced the following four (4) key measures:

- The Fiscal Incentives (Miscellaneous Provisions) Act, 2013
- The Income Tax Relief (Large -scale Projects and Pioneer Industries) Act, 2013
- The Customs Tariff (Revision) (Amendment) Resolution, 2013
- The Stamp Duty (Amendments of Schedule) Order, 2013

The Fiscal Incentives (Miscellaneous Provisions) Act, 2013 allows creative companies or individuals who are registered with the National Registry of Entertainment and Creative Industries Practitioners (E-Registry) and assessed for productivity relief, to import tools of their trade duty free. Registered Companies in the Animation Industry can benefit from the following national incentives:<sup>15</sup>

- Employment Tax Credit (ETC)- the amount of employment tax credit that may be claimed by an eligible person in respect of any year of assessment shall be limited to an amount of 30% of any tax payable (i.e., Education Tax, HEART/NSTA Trust, NIS, and NHT) by the eligible person in respect of the income, profits or gains of the eligible person for the relevant assessment period arising from the carrying of a trade, profession or vocation by the eligible person.<sup>16</sup>
- Capital Allowance – individuals and businesses can claim tax allowances on certain assets acquired and used in earning their income. These businesses can deduct the cost of certain capital expenditures from their taxable income, thereby reducing tax obligations.<sup>17</sup>
- Productive Input Relief- a duty relief on the importation of specific items/tools for productive use.<sup>18</sup>

Any request for fiscal relief must be supported by an appropriate cost-benefit analysis and is subject to the availability of fiscal space. Additionally, any tax incentives granted to the industry

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<sup>14</sup> Information taken from: [https://moj.gov.jm/sites/default/files/pdf/Repealed%20Acts%20Listing%20\(2013-2017\).pdf](https://moj.gov.jm/sites/default/files/pdf/Repealed%20Acts%20Listing%20(2013-2017).pdf)

<sup>15</sup> Information taken from: FAQ2019\_FAM\_LOCAL\_PRODUCTION.pdf

<sup>16</sup> Section 32A of the Income Tax Act, 1955 as amended by Section 3 of the Fiscal Incentives (Miscellaneous Provisions) Act, 2013.

<sup>17</sup> Section 12 & Part 1, First Schedule of the Income Tax Act, 1955 as amended by Section 3 of the Fiscal Incentives (Miscellaneous Provisions) Act, 2013.

<sup>18</sup> The Customs Tariff (Revision)(Amendment)Resolution, 2013, Third Schedule Part 7.

will be limited to those currently provided for under existing legislation, including the Employment Tax Credit (ETC) and capital allowances.

The Special Economic Zones (SEZ) Act (2016) supports both local and international markets designating zones for economic activity with attractive incentives. Certain areas designated as zones of special economic activity, enable a developer to receive rent free facilities as well as duty waivers on importation into the SEZ.<sup>19</sup> Additionally, through the SEZ Act, companies can enjoy low Corporate Income Tax (CIT) rate of 12.5%, which is half of the standard rate, supported by 10% Promotional Tax Credit (PTC) for training and/or research and ETC.<sup>20</sup> It is important to note that while tax incentives such as, a reduced income tax rate and relief from property tax, transfer tax, GCT and customs duty are available to a developer or occupant under the SEZ Act, these incentives are unavailable to developers or occupants eligible for relief under several other enactments.

In 2022, the Government amended the Special Economic Zones Act to align with international standards set by the Organization for Economic Co-operation and Development (OECD).<sup>21</sup> This amendment prohibits entities within SEZs from engaging in IP-related activities, defined to include the use of copyrights, patents, trademarks, and related rights. Companies involved in such activities were required to cease operations within the SEZs by March 31, 2023.<sup>22</sup> These establishments were taken out of operation as they were deemed to create increased potential for harm since there are no special requirements to govern these activities within the zones.<sup>23</sup> The Animation Industry, which relies heavily on IP protections for creative content, is directly affected by these changes. The prohibition of IP activities within SEZs means that animation companies cannot currently benefit from the incentives offered in these zones. Recognizing the importance of IP-driven industries, the Jamaica Special Economic Zone Authority (JSEZA) is developing a framework to

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<sup>19</sup> Section 42

<sup>20</sup> Do Business Jamaica. *Incentives*. Retrieved November 6, 2024 from [Incentives - Do Business Jamaica](#)

<sup>21</sup> Section 41: The Special Economic Zones Act (2016) as amended by the Special Economic Zones (Amendment) Act, 2022

<sup>22</sup> The Gleaner. (2024). *Growth & Jobs | JSEZA creating framework to enable IP companies to benefit from incentives*. Retrieved April 1, 2025 from <https://jamaica-gleaner.com/article/news/20241119/growth-jobs-jseza-creating-framework-enable-ip-companies-benefit-incentives>

<sup>23</sup> Jamaica Observer. (2022). *Special Economic Zones Act amendments to ensure international obligations compliance*. Retrieved April 1, 2025 from [https://www.jamaicaobserver.com/2022/09/28/special-economic-zones-act-amendments-to-ensure-international-obligations-compliance/?utm\\_source](https://www.jamaicaobserver.com/2022/09/28/special-economic-zones-act-amendments-to-ensure-international-obligations-compliance/?utm_source)

enable IP companies to benefit from SEZ incentives. This initiative aims to attract investments in high-growth sectors, including film production, by creating an environment conducive to IP-related operations.<sup>24</sup>

Companies listed on the Junior Market of the Jamaica Stock Exchange can get full Corporate Income Tax exemption for the first five (5) years from the date of admission to the Junior Market and 50% for the following five (5) years.<sup>25</sup> Additionally, animators can benefit from the Urban Renewal (Tax Relief) Act with various tax incentives for undertaking development in Special Development Areas, including exemptions from income tax on rental income<sup>26</sup> and interest earned by investor in an Urban Renewal Bond.<sup>27</sup> There is also exemption from Stamp Duty and transfer tax on improved properties. A tax credit of 33.3% on capital sums invested, which is set-off against other income tax liability of the developer from any other source but limited to 50% of that liability in any one year of assessment.<sup>28</sup> International production companies benefit from bond waiver for temporary importation of equipment (subject to Jamaica Customs Agency's review), as well as the various permit facilitation including business friendly entry requirements and easy access to the necessary visas and work permits to facilitate projects in the industry. This not only attracts more international projects to Jamaica, boosting the local animation industry, but also stimulates economic growth by creating job opportunities, enhancing skill development, and fostering a vibrant creative ecosystem. The influx of foreign investment and collaboration can lead to increased revenue, improved infrastructure, and a stronger global presence for Jamaica's creative sectors.

In addition to the above-mentioned legislation, the MCGES is currently developing a National Policy on Culture and Creative Economy of Jamaica which is geared towards providing a framework within which the GOJ creates an enabling environment for the Culture and Creative Industries to thrive, as well as to enhance and safeguard the creative expression and innovation of

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<sup>24</sup> The Gleaner. (2024). *Growth & Jobs | JSEZA creating framework to enable IP companies to benefit from incentives*. Retrieved April 1, 2025 from <https://jamaica-gleaner.com/article/news/20241119/growth-jobs-jseza-creating-framework-enable-ip-companies-benefit-incentives>

<sup>25</sup> Do Business Jamaica. *Incentives*. Retrieved November 6, 2024 from [Incentives - Do Business Jamaica](#)

<sup>26</sup> Section 14- Urban Renewal (Tax Relief) Act

<sup>27</sup> Section 11- Urban Renewal (Tax Relief) Act

<sup>28</sup> Do Business Jamaica. *Incentives*. Retrieved November 6, 2024 from [Incentives - Do Business Jamaica](#)

the Jamaican people. Animation is a component of the Culture and Creative Industries. Notably, the interplay between the NAP and the National Policy on Culture and Creative Economy of Jamaica is profound, as the latter's emphasis on fostering a vibrant creative ecosystem directly informs the strategic direction and priorities outlined in the NAP. The goals of the National Policy on Culture and Creative Economy of Jamaica are to:

- Ensure the protection of Jamaica's cultural and traditional values, heritage, and identity, through appropriate uniformed interventions, which includes but not limited to, the provision of requisite training and educational programmes.
- Strengthen the role of culture, through structured capacity building programmes in creating a socially cohesive society and to leverage culture to drive equitable and sustainable development.
- Create a modern, enabling and viable environment through the creation and implementation of a legal, regulatory and institutional framework, that is adequately supported by research that will yield improved revenues to cultural and creative practitioners and the Jamaican economy.
- Increase and incrementally improve programmes, facilities and infrastructure for culture and creative practitioners through relevant and appropriate collaborations with other sectors and international partnerships.
- Integrate culture and creative industries in an economic growth and sustainable development framework through the creation of appropriate and relevant linkages with other economic sectors.

Through these goals, the National Policy on Culture and Creative Economy of Jamaica focuses on enhancing Brand Jamaica and increasing the presence of Jamaica's cultural and creative goods and services within the global arena. This can directly impact the animation industry by supporting its growth and sustainability and will further strengthen the NAP.

Another policy that will influence the NAP is the National Science, Technology and Innovation (ST & I) Policy (2022) with a vision of a dynamic ST& I culture, unleashing the creative potential of our people, catalysing economic development and sustainable prosperity, contributing to social transformation, empowering Jamaicans to excel in an evolving world. This policy will support the

NAP as it will aid in technological advancements and innovation in the animation industry, enhancing quality and competitiveness.

Additionally, there is the Intellectual Property Strategy (Draft) and the National Investment Policy (2022). The National Investment Policy will promote investment in the creative industries, including animation, by improving infrastructure and offering incentives. While the Intellectual Property Strategy will strengthen IP protection and enforcement, providing a robust framework for safeguarding creative works. It is important to highlight that the Intellectual Property Strategy combined with the Trade Marks (Amendment) Act (2021)<sup>29</sup>, Patents and Designs Act (2020)<sup>30</sup>, and the Copyright Act (1993)<sup>31</sup> will also be beneficial to the animation industry. The Copyright Act provides the necessary legal protection for original works of authorship, including animations, ensuring that creators have exclusive rights to their creations. This protection is crucial for Jamaican animators as it allows them to control the use, distribution, and reproduction of their works, thereby securing their revenue streams and encouraging further creative endeavours. Additionally, the Trade Marks (Amendment) Act (2021) enables international trademark protection, helping animators protect their brand identity globally. The Patents and Designs Act (2020) modernizes patent protection, encouraging innovation in animation techniques and designs. Together, these legislative measures create a robust framework that supports the growth and sustainability of the Jamaican animation industry by safeguarding intellectual property and fostering innovation.

## 2.4 Current Challenges in the Sector

Whilst Jamaica has a growing animation industry, there are various challenges that are impeding the rate of growth of the industry. Access to funding and investment opportunities remains an obstacle for many animators and studios, which has hindered the progression of many talented individuals and studios. The animation industry requires access to specialized software, hardware,

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<sup>29</sup> Sections 3 and 9

<sup>30</sup> Sections 11 and 31

<sup>31</sup> Sections 6, 7 and 22

and infrastructure, which can be limited in some areas and hinders the industry's capacity to produce quality content.

Additionally, while there is some level of training and certification of individuals, there is often a challenge with graduates gaining employment in the industry due to the lack of studios in Jamaica. As such, these graduates who leave animation programmes often end up finding employment in other non-related industries or migrating to find better career opportunities.

There are approximately fifteen (15) animation studios/companies in Jamaica with each having up to ten (10) full time employees.<sup>32</sup> These numbers aren't set numbers as most animators freelance and those employed from training institutions often require additional training which studios find costly and time consuming. Despite this, Jamaica has successfully secured outsourcing contracts due to its competitive labour costs. However, servicing these contracts often necessitates subcontracting to other countries, which incurs additional costs because large contracts frequently surpass the capabilities of local studios. Additionally, the extensive requirements for servicing outsourcing contracts leave studios with less time to develop local projects.<sup>33</sup> Therefore, studios in other countries are often employed to meet the labour demands of these contracts.

To bolster Jamaican animation, training institutions must revise their courses/training syllabus to meet the needs of employers/clients and efforts should be made to develop partnerships/collaboration with other Caribbean countries to garner ideas in developing a successful and robust animation industry in Jamaica. These limitations can also be addressed through upskilling and certifying existing professionals in the animation space.

The animation industry, particularly for smaller studios, faces the critical challenge of gaining access to international markets and distribution networks. The global animation market is highly competitive, with established players dominating the industry. To overcome these challenges and gain market access, the following strategies need to be emphasized:

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<sup>32</sup> JAMPRO, Terms of Reference: Animation Services; Caribbean Cooperation Business Model Project Animated Explainer Video CDB/CIIF Enabling Environment Grant, Jamaica, (n.d.), pg. 2

<sup>33</sup> JAMPRO, Terms of Reference: Animation Services; Caribbean Cooperation Business Model Project Animated Explainer Video CDB/CIIF Enabling Environment Grant, Jamaica, (n.d.), pg. 2

1. **Market Development:** Implement detailed strategies for market development. This includes conducting market research, identifying distribution channels, and exploring new market opportunities. By doing so, Jamaican animators can effectively position their content in both domestic and international markets.
2. **Export Promotion:** Prioritize the promotion of Jamaican animated content for export. This can be achieved through participation in international film festivals, securing distribution deals with global platforms, and leveraging trade agreements. These strategies can help showcase Jamaican creativity and talent on a global stage, expanding the industry's reach beyond local borders.
3. **International Partnerships:** Place more emphasis on collaborating with international partners, studios, and distributors. Establishing strategic partnerships can provide access to new markets, resources, and expertise. This also fosters cross-cultural exchanges and co-productions, enriching the diversity and appeal of Jamaican animation.
4. **Visibility and Reach:** Increase the visibility and reach of Jamaican animated content by implementing detailed strategies for market. This includes marketing and communication strategies to attract international project managers, outsourcing professionals, and businesses seeking animation services. These strategies can lead to greater recognition, audience engagement, and commercial success for Jamaican animated productions, both domestically and internationally.
5. **Competitive Advantage:** By proactively engaging with markets, promoting exports, and forming international partnerships, Jamaican animators can position themselves as innovative, culturally rich, and commercially viable players in the industry.

By focusing on these strategies, the Jamaican animation industry can navigate the current challenges and establish a strong presence in the global animation market.

## 2.5 Case Studies

Countries worldwide have implemented national animation policies to strategically foster the growth and sustainability of their animation industries. The policy initiatives generally include funding support, tax support and quotas for the broadcasting of animated content. In Canada,

provinces such as British Columbia, Ontario, and Quebec offer competitive tax incentives<sup>34</sup> and government funding through organizations such as the Canada Media Fund<sup>35</sup>. Similarly, South Korea supports its animation industry through government funding in addition to the provision of initiatives for education and training facilitated by organizations like the Korea Creative Content Agency (KOCCA).<sup>36</sup> Animators in the Dominican Republic, Trinidad and Tobago, Mexico and Columbia also benefit from incentives, where there are tax rebates of up to 40%.<sup>37</sup> France, with the backing of the Centre National du Cinéma et de l'Image Animée (CNC), provides funding and enforces quotas for the broadcast of European animated content<sup>38</sup>.

Japan promotes its anime globally through initiatives such as the Anime Content Overseas Expansion Support Program and invests in training programs<sup>39</sup>. Ireland supports animation projects financially through the Irish Film Board and offers tax incentives akin to Canada.<sup>40</sup> China has significantly invested in its animation industry, backed by government initiatives, while also implementing content quotas for domestic broadcast. In the United States, some states, such as California and Georgia, offer tax incentives to encourage local animation production, alongside various educational initiatives aimed at supporting industry growth. These policies, ranging from financial incentives to education and international collaboration, reflect a concerted effort by countries to nurture their animation sectors.

While not as expansive and varied as the countries listed above, Jamaica has attempted to create an enabling environment for those in the film industry and by extension those in the animation industry. The Jamaica Screen Development Initiative (JSDI) is a financing initiative of the

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<sup>34</sup> Screen Global Production. (n.d.). *Tax Breaks and Incentives*. Retrieved from <https://www.screenglobalproduction.com/country/canada/guide/incentives>

<sup>35</sup> Canada Media Fund. (n.d.). *The CMF is Committing \$346M to Support Canada's Screen Industry in 2025-2026*. Retrieved from: <https://cmf-fmc.ca/>

<sup>36</sup> Hamel-Smith. (2023). *Recent Tax Incentives In Trinidad And Tobago – A Pre-Budget Consideration*. Retrieved July 3, 2024 from <https://trinidadlaw.com/recent-tax-incentives-in-trinidad-and-tobago-a-pre-budget-consideration/>

<sup>37</sup> Global Media Desk. (2021). *6 Filming Incentives in Latin America That Will Maximize Your Budget*. Retrieved from <https://globalmediadesk.com/blog/top-6-filming-incentives-in-latin-america/>

<sup>38</sup> Centre National du Cinéma et de l'Image Animée. (n.d.). *About Us*. Retrieved from <https://www.cnc.fr/web/en/about#:~:text=About%20us,digital%20creation%2C%20and%20video%20games>.

<sup>39</sup> Anime News Network. (n.d.). *Japan to Create Fund to Boost Anime & More Overseas*. Retrieved from <https://www.animenewsnetwork.com/news/2009-05-04/japan-to-create-fund-to-boost-anime-and-more-overseas#:~:text=The%20Japanese%20government%20is%20establishing,and%20similar%20areas%20of%20culture>.

<sup>40</sup> Information taken from: <https://www.screenireland.ie/filming/section-481>

Government of Jamaica (GOJ) that aims to support and strengthen the local screen-based industries<sup>41</sup>. The initiative provides a pool of funds accessible for the completion of eligible screen-based projects across various stages of development. The JSDI focuses on providing opportunities for new, emerging, and established talent behind the camera to create more high-quality, Jamaican content capable of competing in the global market. The initiative supports the development, production, and post-production (completion) phases, film festivals and market attendance, and applications for marketing and distribution, as well as production rebates.

The Jamaica Screen Fund is another significant initiative by the government. It is a billion-dollar fund aimed at providing financing for the development and production of film and television shows in the country<sup>42</sup>. The Fund enables creatives to devote time and sweat equity to developing their projects to the point where they can receive financing. This includes writing a feature script or a TV series pilot script, producing a short film as proof of concept, or producing a teaser video as proof of concept for animation.

From the case studies above Jamaica can further create an enabling environment by utilising the following to foster the growth of its animation industry:

1. **Government Support and Funding:** Like Canada, South Korea, France, and China, Jamaica could consider providing government funding and tax incentives to support the animation industry.
2. **Education and Training:** Following the examples of South Korea and Japan, Jamaica could invest in education and training initiatives to build a skilled workforce for the animation industry.
3. **Content Quotas:** Similar to France and China, Jamaica could implement content quotas for domestic broadcast to promote local animation.
4. **Global Promotion:** Taking a cue from Japan, Jamaica could initiate programs to promote its animation content globally.

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<sup>41</sup> Do Business Jamaica. (n.d.). *Guide to the Jamaican Screen Development Initiative*. Retrieved from <https://dobusinessjamaica.com/jamaica-screen-development-initiative/>

<sup>42</sup> Minister of Finance and the Public Service. *Opening Budget Presentation 2023/2024*. Retrieved from [https://www.mof.gov.jm/wp-content/uploads/HMFPS-BUDGET-PRESENTATION\\_March-7-\\_TO-PRINT-E.pdf](https://www.mof.gov.jm/wp-content/uploads/HMFPS-BUDGET-PRESENTATION_March-7-_TO-PRINT-E.pdf)

5. **Local Industry Support:** Following the U.S. model, Jamaica could encourage local animation production through tax incentives.
6. **Tax rebates:** Like Dominican Republic, Trinidad, Mexico and Columbia that benefit from tax rebates of up to 40%, the Jamaican animation industry can achieve content development through tax rebates as some small firms may not be eligible for benefits under the Fiscal Incentives (Miscellaneous Provisions) Act, and rebates can be useful to attract these and other firms in doing business.

## 3.0 Policy Framework

The NAP is rooted in the ambits of the National Development Plan of Jamaica, Vision 2030 Jamaica which is orchestrated as the driving tool to advance Jamaica and make it “the place of choice to live, work, raise families and do business.” The vision, principles, goals and strategies of the NAP are in support of achieving the following national goals and outcomes of Vision 2030 Jamaica-National Development Plan:

- National Goals
  - Goal 1: Jamaicans are empowered to achieve their fullest potential.
  - Goal 2: The Jamaican society is secure, cohesive and just.
  - Goal 3: Jamaica’s economy is prosperous.
- National Outcomes
  - Outcome 2: World-Class Education and Training
  - Outcome 4: Authentic and Transformational Culture
  - Outcome 6: Effective Governance
  - Outcome 8: An Enabling Business Environment
  - Outcome 11: A Technology-Enabled Society
  - Outcome 12: Internationally Competitive Industry Structures

### 3.1 Vision Statement

A vibrant and inclusive animation ecosystem of creativity and innovation where our rich cultural tapestry, talent, and cutting-edge technology converge to inspire, educate, and entertain the world... “Jamaica, the Place to Toon”.

### 3.2 Goals

The NAP for Jamaica is a visionary framework that outlines key principles and strategic goals to create a dynamic and inclusive animation industry that nurtures local talent and creativity ultimately transforming Jamaica into a leading animation centre. Guided by the fundamental

principles of partnership and collaboration, efficient resource allocation, competitiveness, innovation and technology adoption, and inclusiveness, the policy envisions a dynamic and inclusive environment for animators and industry stakeholders. The overarching goals include:

1. fostering collaborative efforts;
2. promoting diversity and inclusivity;
3. optimizing the allocation of resources;
4. enhancing global competitiveness; and
5. embracing technological advancements.

Together, these goals form a comprehensive strategy to not only nurture local talent and creativity but also position Jamaica as a significant player in the global animation landscape. The NAP reflects a commitment to harnessing the collective strengths of various stakeholders, advancing innovation, and ensuring the sustained growth and success of the Jamaican animation industry.

### 3.3 Principles

The NAP is guided by the following principles:

#### **1) Partnership and Collaboration**

The NAP emphasizes the importance of fostering partnerships and collaboration within the industry. This principle recognizes that a collaborative approach involving various stakeholders, including government bodies, private enterprises, educational institutions, and creative professionals, is essential for the growth and success of the animation sector. By working together, these entities can contribute to a thriving ecosystem that supports the development, production, and promotion of animated content.

#### **2) Efficient Allocation of Resources**

The NAP acknowledges the importance of strategic resource allocation to support the growth and sustainability of the animation sector. This principle involves efficiently distributing financial, technological, and educational resources to areas that will have the most significant impact on fostering talent, innovation, and overall industry development. Research in animation education,

distribution, marketing, cultural impact, audience and more, needs to be funded and resourced to ensure data driven decisions are made and activities are planned.

### **3) Competitiveness**

The NAP is guided by the principle of competitiveness, recognizing the global nature of the animation industry. This involves implementing strategies to enhance the international and regional competitiveness of local animated content, studios, and professionals. By fostering a competitive environment, the policy aims to position the country's animation sector as a formidable player on the global stage.

### **4) Innovation and Technology**

Embracing and leveraging technology is a core principle of the NAP. Recognizing the dynamic nature of the animation field, this principle encourages the adoption of cutting-edge technologies and practices. This involves investing in research and development, providing access to advanced tools, and supporting the integration of technological advancements to enhance the quality and efficiency of animated productions.

### **5) Inclusiveness**

The NAP recognizes the importance of inclusiveness and is committed to fostering an environment that promotes equal opportunities for women and persons with disabilities. This principle involves implementing strategies to ensure that women and persons with disabilities can fully participate in animation and benefit from equal opportunities for growth, through the provision of financial, educational, and technological resources.

## **3.4 Policies**

The policy areas, objectives, and strategies to be pursued by the GOJ, outlined below, are rooted in the imperative goal of fostering a vibrant animation industry. These strategies encompass enhancing capacity within the sector, securing financing mechanisms, safeguarding intellectual property rights, boosting global recognition, creating an enabling environment and use of local talent.

## 1) Enhancing Capacity within the Sector

To boost Jamaicans' skills, particularly in animation, the GOJ aims to address resource challenges in education and bridge the gap between job requirements and curricula. The strategies include:

- a) **Curricula Review:** Align secondary and tertiary curricula with industry needs.
- b) **Apprenticeships:** Promote structured apprenticeships through incentives.
- c) **Programmes & Incubation Centres:** Collaborate with the HEART/NSTA Trust to provide animation programmes and develop incubation centres.
- d) **Coordination:** Foster collaboration among academia, institutions, employers, and the Government.
- e) **Funding:** Allocate designated funds for animation resources.
- f) **Workshops:** Organize workshops in primary, secondary and tertiary schools.

These strategies aim to meet the growing demand for trained animators and positively impact other sectors.

## 2) Securing Financing Mechanisms

This policy aims to boost the animation industry by facilitating funding access. It targets both new and established creators, aiming to stimulate creativity and economic growth. The strategies include:

- a) **Grant Programmes:** Support script development, production costs, and creative content enhancement.
- b) **Tax Incentives:** Implement tax credits or deductions for animation-related expenditures.
- c) **Partnerships:** Collaborate with private investors, studios, and stakeholders for additional resources and expertise.
- d) **Investment Funds:** Establish dedicated funds for animation project financing.

### 3) Safeguarding Intellectual Property Rights

This policy emphasizes safeguarding animators' creative assets and innovations through a robust intellectual property framework. The strategies include:

- a) **Education:** Implement programmes to raise awareness about intellectual property rights and the importance of utilizing the Register of Copyright and Related Rights as well as the Register of Trademarks and Register of Designs to protect their brand and any other intellectual property rights that may arise from their creation at the JIPO.
- b) **Legal Frameworks:** Review of existing laws and enforcement, with a view to strengthening areas identified for improvement, to effectively deter and address infringement through the establishment of close relationship with the Counter Terrorism and Organized Crime Investigations Branch (CTOC) and Intellectual Property (IP) Unit of the Jamaica Constabulary Force (JCF), responsible for IP enforcement.
- c) **International Cooperation:** Foster adherence to international intellectual property standards.
- d) **Licensing Agreements:** Facilitate collaborations between animators, studios, and industry players.
- e) **Ethical Practice:** Foster the utilization of ethical practices to ensure animators create content that respects diverse perspectives, avoid harmful stereotypes and upholds intellectual property rights.

### 4) Boosting Global Recognition

This policy aims to position Jamaica's animation industry globally by enhancing quality, innovation, and market appeal. The strategies include:

- a) **Research and Development:** Allocate resources for research and technology development.
- b) **Infrastructure:** Direct resources towards supporting animation production in accordance with industry standards and best practices.

- c) **Collaborations:** Encourage partnerships with international entities and social media influencers.
- d) **Global Participation:** Promote Jamaican animators in global festivals.
- e) **Co-production:** Encourage agreements with international studios.
- f) **Marketing:** Implement campaigns, as well as marketing and communication strategies to promote Jamaican content globally.
- g) **Networking:** Foster local and international industry associations.

## 5) Creating an Enabling environment

This policy aims to create an enabling environment in Jamaica for the animation industry's growth and sustainability. The strategies include:

- a) **Simplify Procedures:** Streamline bureaucratic processes related to animation production.
- b) **Creativity and Innovation:** Support policies that encourage creativity and innovation.
- c) **Incentives:** Introduce incentives to stimulate entrepreneurship.
- d) **Local Narratives:** Promote narratives that resonate with local audiences and preserve Jamaican culture.
- e) **Content Quotas:** Implement quotas for local broadcasters and production studios to boost promotion of local animated content across the media landscape.

## 6) Use of Local Talent

The policy aims to contribute significantly to Jamaica's economic, cultural, and creative development through promoting the use of local animators. The strategies include:

- a) **Showcasing of Local Talent:** Organize festivals, exhibitions or showcases to highlight the work of local animators. This can help to build their reputation and attract attention from potential clients and investors.
- b) **Partnerships with Local Businesses:** Encourage local businesses and media to collaborate with local animators which can create a demand for local animation services and build a strong industry presence.

- c) **Subsidizing Local Projects:** Provide funding or subsidies for projects that are produced locally to help local animators compete with international companies.
- d) **Effective Advertising:** Implement effective advertising/communication channels that will reach a wide audience of local animators to promote projects and opportunities within Jamaica's animation community.

## 4.0 Policy Implementation

This section describes the proposed implementation action plan for the NAP. The action plan focuses on six (6) main policy areas, namely, enhancing capacity within the sector, securing financing mechanisms, safeguarding intellectual property rights, boosting global recognition, creating an enabling environment and use of local talent.

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
<b>Enhancing Capacity within the Sector</b>	Review of secondary and tertiary curricula in conjunction with employers and industry professionals to identify gaps.	<ul style="list-style-type: none"> <li>• Conduct a comprehensive review of secondary and tertiary curricula in collaboration with industry stakeholders.</li> <li>• Update secondary and tertiary curricula to align with industry needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of curricula reviewed and updated annually.</li> <li>• Number of newly developed or revised academic programmes that receive formal accreditation.</li> </ul>	2027-2028	MOESYI (coordinating entity)  HEART/NSTA Trust  JANN  UCJ  UWI  UTech	\$2,100,000.00
	The use of incentives to encourage structured apprenticeship agreements with employers.	Develop a framework for structured apprenticeship agreements with incentives for employers.	<ul style="list-style-type: none"> <li>• Number of apprenticeship agreements developed per programme cycle.</li> <li>• Number of employers participating in the apprenticeship programme annually.</li> <li>• Number of apprentices participating in the apprenticeship programme per programme cycle.</li> <li>• Satisfaction rate of employers with the apprenticeship agreements annually.</li> <li>• Number of apprentices employed by participating</li> </ul>	2027-2030	HEART/NSTA Trust  PSOJ  JANN	\$1,100,000,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
	In conjunction with the HEART/NSTA Trust, provide demand driven programmes for animation.	<ul style="list-style-type: none"> <li>• Establish demand driven programs for animation education, in partnership with HEART/NSTA Trust.</li> <li>• Establish mentorship and animation programs specially for persons with disabilities in partnership with HEART/NSTA Trust.</li> </ul>	<p>employers at the end of the apprenticeship programme.</p> <ul style="list-style-type: none"> <li>• Number of animation programs established annually.</li> <li>• Number of persons with disabilities enrolled annually in animation programmes.</li> <li>• Number of students enrolled annually in the animation programs.</li> <li>• Number of Incubation centre established.</li> <li>• Job placement rate of graduates from the animation programs annually.</li> <li>• Satisfaction rate from students and industry on the effectiveness of the programs.</li> <li>• Performance rate of persons with disabilities enrolled in animation programmes.</li> </ul>	2028-2033	HEART/NSTA Trust MOESYI JCPD	\$5,300,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
	Encouragement of greater coordination among academia, educational institutions, employers and the Government.	Foster coordination among academia, educational institutions, employers, and government agencies to advance goals and objectives.	<ul style="list-style-type: none"> <li>Number of coordination meetings held quarterly.</li> <li>Number of action plans developed from the coordination efforts annually.</li> <li>Satisfaction rate of participants with the coordination efforts.</li> <li>Number of successful initiatives resulting from coordination.</li> </ul>	2026-2031	JANN	\$3,001,000.00
	In partnership with GOJ entities, organize animation workshops in primary, secondary and tertiary schools.	Launch animation workshops in primary, secondary and tertiary schools to enhance individuals interests and knowledge of the industry.	<ul style="list-style-type: none"> <li>Number of workshops launched.</li> <li>Number of students participating/attending the workshops.</li> <li>Number of students benefiting from the workshops.</li> </ul>	2027-2029	CPTC JIS MOESYI JANN	\$2,004,000.00
	Ensure sustainable and effective allocation of funds designated to animation resources.	<ul style="list-style-type: none"> <li>Conduct a comprehensive assessment to identify the specific needs of the animation sector.</li> <li>Engage with industry stakeholders to gather insights on</li> </ul>	<ul style="list-style-type: none"> <li>Level of effectiveness of needs assessments in identifying the needs of the animation sector.</li> <li>Number of industry stakeholders engaged in the assessment process.</li> </ul>	2027-2030	JANN MOFPS MIIC MCGES	\$3,000,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
		<p>resource requirements.</p> <ul style="list-style-type: none"> <li>Develop a detailed budget plan outlining the allocation of funds for various animation resources (e.g., software, hardware, training, and development).</li> </ul>	<ul style="list-style-type: none"> <li>Measure of equitable distribution of funds across different priority areas/resources.</li> <li>Amount of funds allocated to support funding of resources.</li> </ul>			
<b>Securing Financing Mechanisms</b>	The establishment of grant programmes to support script development, production costs, and the overall enhancement of creative content in the sector	<ul style="list-style-type: none"> <li>Establish grant programs to support script development, production costs, and content enhancement.</li> <li>Provide grants/funding for animators who create positive or educational content.</li> </ul>	<ul style="list-style-type: none"> <li>Number of grant programs established.</li> <li>Amount of funds allocated to these grant programs per funding cycle.</li> <li>Number of projects supported by these grants.</li> <li>Impact of these grants on script development, production costs, and content enhancement (this could be measured through surveys or feedback from beneficiaries).</li> </ul>	2029-2035	MOFPS	\$8,020,000.00
		Provide grants/funding specially dedicated to	<ul style="list-style-type: none"> <li>Amount of funds allocated to these grant</li> </ul>	2028-2032	MOFPS JCPD	

<b>Policy Objective</b>	<b>Strategy</b>	<b>Key Activities</b>	<b>Performance Indicators</b>	<b>Timelines</b>	<b>Responsible Agency</b>	<b>Estimated Cost (JMD)</b>
		projects led by women and persons with disabilities.	<p>programs per funding cycle.</p> <ul style="list-style-type: none"> <li>• Number of projects supported by these grants.</li> <li>• Number of women and disabled persons benefitting from these grants per funding cycle.</li> </ul>			
	The implementation of tax incentives to include tax credits or deductions for expenditures related to animation production.	Implement tax incentives such as credits or deductions for animation production expenditures.	<ul style="list-style-type: none"> <li>• Number of tax incentives implemented.</li> <li>• Amount of money saved annually by animation companies due to these tax incentives.</li> <li>• Feedback from animation companies on the effectiveness of these tax incentives.</li> </ul>	2026-2031	MOFPS	\$4,000,000.00
	Facilitating partnerships with private investors, studios, and industry stakeholders to provide additional financial resources and expertise, promoting a mutually beneficial relationship.	Facilitate public-private partnerships to attract investment and expertise into the animation sector.	<ul style="list-style-type: none"> <li>• Number of public-private partnerships established.</li> <li>• Amount of investment attracted into the animation sector through these partnerships.</li> </ul>	2029-2035	MIIC	\$3,100,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
			<ul style="list-style-type: none"> <li>• Number of experts attracted into the animation sector through these partnerships.</li> <li>• Impact of these partnerships on the growth and development of the animation sector.</li> <li>• Total investment as a percentage of GDP.</li> </ul>			
	The provision of funding to existing animation training institutions for the development of accessible classrooms and facilities for persons with disabilities.	Provide for existing animation training institutions that teach animation skills to persons with disabilities.	<ul style="list-style-type: none"> <li>• Amount of funds allocated to these existing training programmes.</li> <li>• Number of existing training institutions supported by this fund.</li> <li>• Impact of the funding on the development of accessible and inclusive classrooms and facilities for disabled persons.</li> </ul>	2030-2036	MOFPS JCDP	\$30,000,900.00
	The establishment of dedicated investment funds for animation to create a pool of resources available for project financing.	Establish a dedicated investment fund for animation projects to provide financial support.	<ul style="list-style-type: none"> <li>• Investment fund established.</li> <li>• Number of animation projects supported by this fund.</li> <li>• Impact of this fund on the success and</li> </ul>	2026-2031	MOFPS	\$7,201,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
			<p>sustainability of supported animation projects.</p> <ul style="list-style-type: none"> <li>Return on investment from the supported animation projects.</li> </ul>			
<b>Safeguarding Intellectual Property Rights</b>	Implement educational programmes to raise awareness among animators about their intellectual property rights.	<ul style="list-style-type: none"> <li>Share online courses on intellectual property rights which will be beneficial for animators.</li> <li>Organize workshops and seminars with legal experts in the field of intellectual property.</li> </ul>	<ul style="list-style-type: none"> <li>Number of animators enrolled in the educational programs per enrolment period.</li> <li>Feedback from participants on their increased understanding of intellectual property rights per programme cycle.</li> <li>Number of workshops and seminars held.</li> <li>Number of participants in educational programmes.</li> </ul>	2028-2036	Through JIPO MOJ JAMBAR JANN	\$6,200,000.00
	Foster international cooperation and adherence to international intellectual property standards.	<ul style="list-style-type: none"> <li>Participate in international forums and discussions on intellectual property rights.</li> <li>Advocate for the adoption of international intellectual</li> </ul>	<ul style="list-style-type: none"> <li>Number of international collaborations or partnerships established.</li> <li>Degree of alignment of local laws with international intellectual property standards.</li> </ul>	2028-2034	JIPO	\$5,000,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
		property standards in local laws.				
	Foster effective legal frameworks and enforcement mechanisms to deter and address intellectual property infringement.	Review and Update (if necessary) existing intellectual property laws to better protect animators.	<ul style="list-style-type: none"> <li>Number of legal cases successfully addressed.</li> <li>Feedback from animators on the effectiveness of the enforcement mechanisms.</li> <li>Number of legislations developed and/or updated.</li> </ul>	2031-2036	MIIC JIPO JCF	\$5,004,000.00
	Establish industry networking between animators, studios, and other industry players.	Organize networking events to foster collaborations between animators, studios, and other industry players.	<ul style="list-style-type: none"> <li>Number of networking events held on an annual basis.</li> <li>Feedback from animators and studios on the ease and effectiveness of collaborations.</li> </ul>	2026-2031	MCGES JAMPRO	\$4,300,000.00
	Foster ethical practices to ensure animators create content that respects diverse perspectives, avoid harmful stereotypes and upholds intellectual property rights.	<ul style="list-style-type: none"> <li>Encourage and support the use of ethical practices in creating content.</li> <li>Revise syllabus for existing animation programmes to ensure lessons on ethical practices are included.</li> </ul>	<ul style="list-style-type: none"> <li>Degree of awareness and understanding of ethical practices in content creation.</li> <li>Number of animation programs that include ethical practices.</li> <li>Feedback from students on the effectiveness and relevance of the lessons regarding ethical practices</li> </ul>	2027-2031	BCJ MOESYI HEART/NSTA Trust JANN UCJ UWI UTech	\$1,000,100.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
			included in the syllabus.			
<b>Boosting Global Recognition</b>	Allocation of resources for research and development in technology, ensuring animators have access to cutting-edge tools.	<ul style="list-style-type: none"> <li>Establish a dedicated research and development fund for animation technology.</li> <li>Organize technology training sessions for animators.</li> <li>Establish a dedicated fund to equip studios with animation technology that is inclusive and accessible to persons with disabilities.</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of dedicated research and development fund.</li> <li>Amount of funds allocated for research and development.</li> <li>Number of animators trained in new technologies.</li> <li>Amount of funds allocated for animation technology suitable for persons with disabilities.</li> </ul>	2029-2036	MIIC MTET JAMPRO JBDC MOFPS	\$7,000,200.00
	Direct resources towards building and upgrading infrastructure that supports animation production in accordance with industry standards and best practices.	<ul style="list-style-type: none"> <li>Invest in state-of-the-art animation studios.</li> <li>Upgrade existing animation production facilities.</li> </ul>	<ul style="list-style-type: none"> <li>Amount of funds invested in infrastructure.</li> <li>Number of upgraded animation production facilities biennially.</li> </ul>	2026-2034	MIIC MOFPS	\$30,000,300.00
	Facilitate and encourage collaborations with international partners, studios, social media influencers, and	<ul style="list-style-type: none"> <li>Organize international animation conferences and networking events. (KINGSTOON)</li> </ul>	<ul style="list-style-type: none"> <li>Number of international collaborations established.</li> </ul>	2032-2036	MFAFT MCGES MIIC	\$9,034,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
	animation professionals.	<ul style="list-style-type: none"> <li>• Establish a platform for collaboration between local and international animation professionals.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of conferences and networking events held.</li> <li>• Feedback from participants on the effectiveness of the collaborations.</li> </ul>			
		Collaborate with influencers to host animation events and promote animated content and events on their social media platforms.	<ul style="list-style-type: none"> <li>• Number of attendees at animation events, per event hosted and promoted by influencers, in comparison with events not hosted/promoted by influencers.</li> <li>• Number of partnerships or collaborations with local and international influencers.</li> <li>• Annual growth rate in local and international visibility of animated content.</li> <li>• Annual percentage change in the reach of animated content across local and international markets.</li> </ul>	2027-2036		

<b>Policy Objective</b>	<b>Strategy</b>	<b>Key Activities</b>	<b>Performance Indicators</b>	<b>Timelines</b>	<b>Responsible Agency</b>	<b>Estimated Cost (JMD)</b>
	Actively promote the participation of Jamaican animators and their works in global animation festivals.	<ul style="list-style-type: none"> <li>• Sponsor Jamaican animators to participate in international animation festivals.</li> <li>• Organize promotional events to showcase Jamaican animation works.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of Jamaican animators participating in international festivals annually.</li> <li>• Number of awards won by Jamaican animators in international festivals annually.</li> <li>• Number of promotional events held.</li> </ul>	2026-2031	MFAFT MCGES JAMPRO	\$6,285,000.00
	Facilitate and encourage co-production agreements with international studios.	<ul style="list-style-type: none"> <li>• Organize business matchmaking events between local animators and international studios.</li> <li>• Provide legal support for drafting and negotiating co-production agreements.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of co-production agreements signed.</li> <li>• Feedback from animators and studios on the effectiveness of the co-productions.</li> <li>• Number of business matchmaking events held.</li> </ul>	2032-2036	MIIC MFAFT JAMPRO	\$1,655,000.00
<b>Enabling Environment</b>	Introduction of incentives to stimulate entrepreneurship within the animation sector.	<ul style="list-style-type: none"> <li>• Implement a grant program for animation startups.</li> <li>• Provide business training and mentorship for animation entrepreneurs.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of animation startups benefiting from the incentives.</li> <li>• Number of reviews conducted annually.</li> <li>• Number of animation entrepreneurs benefitting from</li> </ul>	2031-2036	JBDC MOFPS	\$5,650,000.00

<b>Policy Objective</b>	<b>Strategy</b>	<b>Key Activities</b>	<b>Performance Indicators</b>	<b>Timelines</b>	<b>Responsible Agency</b>	<b>Estimated Cost (JMD)</b>
		<ul style="list-style-type: none"> <li>• Ongoing review of the tools of trade and items to be zero rated for registered industry professionals.</li> </ul>	training and mentorship.			
	Promotion of narratives that resonate with local audiences and contribute to the preservation and appreciation of Jamaican culture.	<ul style="list-style-type: none"> <li>• Organize workshops on storytelling and cultural representation for animators.</li> <li>• Sponsor animation projects that promote Jamaican culture.</li> </ul>	<ul style="list-style-type: none"> <li>• Number of animation projects promoting Jamaican culture annually.</li> <li>• Number of workshops held annually.</li> <li>• A minimum of 25% of animated content on GOJ operated stations are locally produced.</li> </ul>	2030-2034	MCGES	\$4,000,200.00
<b>Use of Local Talent</b>	The establishment of festivals and exhibitions to showcase the works of local animators to increase reputability and attract the attention of potential clients and investors.	Organize festivals and exhibitions to showcase the works of local animators.	<ul style="list-style-type: none"> <li>• Success and growth of the Jamaican animators per annum.</li> <li>• Number of festivals and exhibitions held.</li> <li>• 10% increase in animation investors per annum.</li> </ul>	2031-2033	MIIC MCGES	\$4,070,000.00
	Facilitate and encourage collaboration between local businesses and local animators to	Organize business matchmaking events between local animators and local businesses.	<ul style="list-style-type: none"> <li>• Feedback from animators on the effectiveness of the partnership.</li> </ul>	2031-2036		\$1,070,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
	increase the demand for local animation services and build strong industry presence.		<ul style="list-style-type: none"> <li>• Number of business matchmaking events held.</li> </ul>			
	The establishment of funding programmes for projects that are produced locally to help local animators compete with international companies.	Provide funding or subsidies to local animators.	<ul style="list-style-type: none"> <li>• Number of funding programs established.</li> <li>• Amount of funds allocated to these programs per funding cycle.</li> <li>• Number of projects supported by these funds.</li> <li>• Impact of these funds in enhancing animators' capabilities of executing and completing projects.</li> <li>• Number of projects successfully completed following provision of funds.</li> </ul>	2029-2036		\$6,700,000.00

Policy Objective	Strategy	Key Activities	Performance Indicators	Timelines	Responsible Agency	Estimated Cost (JMD)
	Foster effective advertising/communication in promoting projects and opportunities within the Jamaican animation community that can reach a wide audience of local animators.	Implement effective advertising/communication channels to increase local animators' awareness of local and international project opportunities.	<ul style="list-style-type: none"> <li>• Number/percentage of animators aware of potential projects annually.</li> <li>• Impact of the channel on enhancing animators' awareness of locally advertised projects.</li> <li>• Percentage of local animators reached annually.</li> <li>• Number of clicks, views, shares or interactions with project advertisements annually.</li> <li>• Percentage of surveyed animators confirmed to have increased awareness of opportunities.</li> </ul>	2029-2034		\$2,001,000.00

#### 4.1 Key Sector Indicators and Targets

The indicators presented in the table below will be used to assess progress in the implementation of the NAP during the period 2026-2036, as well as assist in facilitating reporting to Vision 2030 Jamaica- National Development Plan on the country’s overall development results. The indicators will therefore measure progress in achieving annual targets that will be set by the implementing Ministry. Each indicator is also tied to the NAP Policy goals for which it measures progress and are the building blocks of the monitoring and evaluation process.

Key Sector Indicators	Baseline*	Targets											Policy Goals				
	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	1	2	3	4	5
Number of apprenticeship agreements developed to support training of animation practitioners.													■				
Number of employers actively engaged in apprenticeship programmes for animation practitioners.													■				
Number of individuals enrolled as apprentices in animation apprenticeship programmes													■				
Employment rate of apprentices employed by participating													■				

\* Baseline data will be established.

Key Sector Indicators	Baseline*	Targets											Policy Goals				
	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	1	2	3	4	5
employers upon completion of the apprenticeship programme.																	
Number of animation training programs established															■		
Percentage of total animation programme participants who are persons with disabilities														■			
Enrolment counts of students in certified animation training programmes															■		
Number of animation incubation centres established to support industry development.															■		
Employment rate of graduates from certified animation training programmes															■		
Number of animation-related workshops initiated													■		■	■	
Number of workshops attendees													■				
Amount of funding programmes launched to support the animation sector.													■		■		
Number of animation-related projects													■		■		

Key Sector Indicators	Baseline*	Targets											Policy Goals				
	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	1	2	3	4	5
funded through established grant schemes/ funding programmes																	
Count of women and persons with disabilities within the industry receiving grant support														■			
Number of public-private partnership agreements initiated to advance animation industry development													■			■	
Amount of students registered/enrolled in animation education programmes																■	
Number of animation-related workshops and seminars conducted													■			■	
Number of formal international partnerships supporting animation sector development.													■			■	
Number of animation production facilities upgraded to date.																	■
Percentage increase in reach and visibility of Jamaican animated content across local and international platforms																■	

Key Sector Indicators	Baseline*	Targets											Policy Goals					
	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	1	2	3	4	5	
Number of local and international awards received by Jamaican animators																	■	
Percentage of animated content showcased on Government of Jamaica (GOJ)-operated stations													■				■	
Proportion/percentage of total broadcast content on GOJ operated stations that features local animated content													■				■	
Growth rate in the number of investors in the animation sector.													■				■	
Proportion of animators, based on survey data, who indicate awareness of available local and international project opportunities.																		■
Percentage increase in total revenue generated within the animation industry.																	■	■
Average project value for locally produced animated content.																	■	

## 4.2 Risk Analysis, Risk Matrix and Mitigation Strategies

The successful implementation of the National Animation Policy (NAP) depends on effective coordination, sustainable financing, strong stakeholder engagement, and resilience to external shocks. Several risks may impact the timely and effective achievement of the policy's objectives, particularly given the evolving nature of the animation industry, fiscal constraints, and emerging global dynamics.

These risks are:

- a) **Financial and Human Resource Constraints** – Limited funding and a shortage of qualified animators, trainers, and educators could hinder programme delivery.
- b) **Policy Discontinuity** – Shifts in government or changes in national priorities may lead to delays or deprioritization of the animation agenda.
- c) **Coordination Challenges** – Fragmented implementation due to weak collaboration among Ministries, Departments, Agencies (MDAs), academia, and industry stakeholders.
- d) **Lack of Stakeholder Engagement / Industry Resistance** – Insufficient engagement or resistance from key industry players and institutions may reduce policy effectiveness.
- e) **Skills Gap and Talent Shortage** – A lack of qualified professionals could limit local content production and competitiveness in the global animation industry.
- f) **External Shocks** – Economic downturns, global supply chain issues, or climate-related disruptions may affect access to technology, financing, and international market participation.
- g) **Market Access Limitations** – Barriers to entry in international markets may reduce the ability of Jamaican studios to distribute and monetize their work globally.
- h) **Weak Intellectual Property (IP) Protection** – Piracy, weak enforcement, and low awareness of IP laws could discourage investment and stifle innovation.
- i) **Equity and Inclusion Risks** – Women and persons with disabilities may face barriers to participation, undermining inclusivity.
- j) **Low Training Uptake** – Weak demand for training and education programmes may slow the growth of a qualified animation workforce.
- k) **Institutional Resistance** – Hesitancy from schools and universities to adopt curriculum reforms could limit the integration of animation into formal education.

l) **Stakeholder Disengagement** – Extended timelines may weaken industry and community buy-in over the long term.

m) **Global Market Volatility** – Fluctuations in global demand and risks in co-productions may impact the sustainability of the animation sector.

To mitigate these risks, the following actions will be undertaken:

a) **Resource Mobilization and Capacity Building** – The Government will prioritize budgetary support, seek donor and private sector investment, and strengthen institutional capacity for training and production.

b) **Policy Alignment and Institutionalization** – Core policy actions will be embedded within national development frameworks (e.g. Vision 2030 Jamaica – National Development Plan) to ensure continuity across administrations.

c) **Stakeholder Engagement Strategy** – Regular consultations, feedback mechanisms, and targeted outreach will be used to secure and maintain stakeholder participation.

d) **Sustained Stakeholder Engagement** – Regular forums, annual progress updates, and pilot projects will keep stakeholders engaged throughout implementation.

e) **Investment in Talent Development** – Scholarships, certification programmes, and mentorship initiatives will support the growth of a qualified animation workforce.

f) **Adaptive Planning** – Implementation frameworks will include contingency protocols to adjust to external shocks and ensure continuity of critical programmes.

g) **Export and Market Development Support** – Specific measures will be introduced to strengthen international partnerships and reduce barriers to accessing global markets.

h) **Strengthening Intellectual Property Protection** – A combination of enforcement, education, and legal support will safeguard the industry's creative outputs.

i) **Equity and Inclusion Interventions** – Programmes will be designed to ensure accessibility, participation, and monitoring for women and persons with disabilities.

j) **Awareness and Promotion Campaigns** – Nationwide campaigns will increase awareness and uptake of training and education opportunities.

k) **Institutional Support for Education Reform** – Case studies, consultations, and support frameworks will be provided to reduce resistance to curriculum changes.

l) **Sustained Stakeholder Engagement** – Regular forums, annual progress updates, and pilot projects will keep stakeholders engaged throughout implementation.

m) **Market Resilience Measures** – Diversification of partners and enhanced local value creation will mitigate risks associated with global volatility.

### Risk Matrix

Risk No.	Risk Description	Category	Likelihood	Impact	Risk Rating	Mitigation Strategies	Responsible Entities
R1	Insufficient funding and shortage of skilled human resources.	Financial/Human Capacity	High	High	Very High	<ul style="list-style-type: none"> <li>Engage MOFPS for budget support.</li> <li>Leverage donor/private investment.</li> <li>Strengthen HEART/NS-TA and tertiary training.</li> </ul>	MOFPS HEART/ NSTA Trust UCJ JAMPRO
R2	Shifts in government priorities may delay or derail the policy.	Political/Governance	Medium	High	High	<ul style="list-style-type: none"> <li>Embed NAP in Vision 2030-National Development Plan.</li> <li>Institutionalize in sector plans.</li> <li>Secure bipartisan support.</li> </ul>	MIIC MCGES PIOJ
R3	Weak coordination among MDAs, academia, and private sector.	Institutional	High	Medium	High	<ul style="list-style-type: none"> <li>Conduct quarterly coordination meetings.</li> </ul>	MIIC JANN MOESYI
R4	Lack of stakeholder engagement or industry resistance.	Engagement/Social	Medium	Medium	Medium	<ul style="list-style-type: none"> <li>Co-create programmes with industry.</li> <li>Conduct regular outreach.</li> </ul>	HEART/ NSTA Trust CPTC PSOJ

Risk No.	Risk Description	Category	Likelihood	Impact	Risk Rating	Mitigation Strategies	Responsible Entities
						<ul style="list-style-type: none"> <li>• Launch awareness campaigns.</li> </ul>	
R5	Inadequate access to technology and infrastructure.	Technological	Medium	High	High	<ul style="list-style-type: none"> <li>• Create a tech upgrade fund.</li> <li>• Expand digital labs.</li> <li>• Partner with tech firms.</li> </ul>	MTET JAMPRO MIIC
R6	External disruptions (e.g. climate events, pandemics).	Environmental/ External	Medium	High	High	<ul style="list-style-type: none"> <li>• Include climate resilience in planning.</li> <li>• Build financial buffers.</li> </ul>	MOFPS MFAFT JANN
R7	Barriers to accessing international markets.	Trade/External	Medium	Medium	Medium	<ul style="list-style-type: none"> <li>• Support export readiness.</li> <li>• Facilitate international festivals/trade shows.</li> <li>• Collaborating with JAMPRO and MFAFT.</li> </ul>	JAMPRO MFAFT MIIC
R8	Weak intellectual property protection and enforcement.	Legal	Medium	High	High	<ul style="list-style-type: none"> <li>• Enforce IP education campaigns.</li> </ul>	JIPO MOJ JAMBAR
R9	Inequitable access for women and persons with disabilities.	Equity & Inclusion	Medium	High	High	<ul style="list-style-type: none"> <li>• Integrate accessibility standards.</li> <li>• Collaborate with JCPD and advocacy groups.</li> <li>• Track participation using disaggregated data.</li> </ul>	JCPD MOESYI HEART/ NSTA Trust

Risk No.	Risk Description	Category	Likelihood	Impact	Risk Rating	Mitigation Strategies	Responsible Entities
R10	Low uptake of training and education programmes.	Communication	Medium	Medium	Medium	<ul style="list-style-type: none"> <li>• Launch public awareness campaigns.</li> <li>• Conduct school outreach.</li> <li>• Tailor content for various audiences.</li> </ul>	HEART/ NSTA Trust  MOESYI  CPTC
R11	Resistance to curriculum reform by education institutions.	Socio-Institutional	Medium	Medium	Medium	<ul style="list-style-type: none"> <li>• Conduct participatory consultations.</li> <li>• Share case studies on industry benefits.</li> </ul>	MOESYI  CAPE Boards  UWI
R12	Stakeholder disengagement over extended implementation timelines.	Engagement	Medium	Medium	Medium	<ul style="list-style-type: none"> <li>• Hold regular forums.</li> <li>• Publish annual updates and success stories.</li> </ul>	MIIC  JANN
R13	Global market volatility and co-production risks.	Economic/External	Low	High	Medium	<ul style="list-style-type: none"> <li>• Diversify international partners.</li> <li>• Enhance export resilience and local value creation.</li> </ul>	JAMPRO  MFAFT

### Ongoing Risk Monitoring and Review

The NAP Steering Committee, under the direction of the Office of the Prime Minister, will conduct biannual reviews of the risk matrix. These reviews will include updates to identified risks, mitigation measures, and assignment of responsibilities. The following activities will be undertaken to effectively treat with risks:

- Annual Implementation Reports will include mitigation progress updates;
- Monitoring & Evaluation Framework indicators will integrate key risk factors; and
- Contingency protocols and risk registers will be developed and maintained by each implementing entity.

## 5.0 Monitoring and Evaluation Framework

A Monitoring and Evaluation Framework is essential for assessing the impact of the National Animation Policy's implementation. This framework is crucial for enhancing accountability and transparency, as well as for tracking progress through continuous review and analysis of the proposed strategies' effectiveness and efficiency. The Ministry of Industry, Investment and Commerce (MIIC), as the proposed ministry responsible for implementing the policy, is accountable to coordinate the review of the NAP every three (3) years and recommend necessary adjustments.

The critical areas for review for the NAP include:

- **Strategic Planning and Policy Development:** Setting priorities and developing strategies (passive, active, and mandatory interventions).
- **Data Compilation and Reporting:** Compiling and reporting national data.
- **Public Education and Outreach:** Educating and engaging the public about the animation industry.
- **Coordination Among Stakeholders:** Ensuring coordination among relevant public sector agencies and between this sector and other stakeholders.
- **Communication with Stakeholders:** Maintaining open lines of communication with all stakeholders.
- **Monitoring, Enforcement, and Compliance:** Ensuring adherence to the policy through monitoring and enforcement.

The Ministry will collaborate with stakeholders to implement these critical elements. Actions outlined in the policy must be integrated into the Corporate Plans of the respective stakeholders, with a reporting mechanism devised for effective monitoring. The policy implementation, monitoring and evaluation is guided by various indicators aligned with targets to measure Jamaica's progress towards the vision outlined in the policy. Evaluating these targets and indicators will allow stakeholders to assess the effectiveness or progress of the implementation of activities, support continuous improvement and provide a solid foundation for informing future activities and work plans.

All MDAs with responsibility for specific activities or programs related to policy implementation shall share relevant information and reports with the MIIC. This collaboration is essential for effective coordination, integration, monitoring, and evaluation. Relevant information should be submitted by the third year after the policy has been approved or revised, and as subsequently required by the Ministry in the stipulated format.

The Ministry will report to the Cabinet after the third year of policy implementation for their information or action, following peer review from relevant stakeholders. The revision will be informed by the results of the monitoring and evaluation and other relevant sources including the analysis of the country's development results as published by Vision 2030 Jamaica – National Development Plan.

## 6.0 Legislative Framework

The NAP is supported by the following legislation:

- The Copyright Act (1993)
- Fiscal Incentives (Miscellaneous Provisions) Act (2013)
- The Customs Tariff (Revision) (Amendment) Act (2013)
- The Special Economic Zones (SEZ) Act (2016)
- The Urban Renewal (Tax Relief) Act (2021)
- Patents and Designs Act (2020)
- Trade Marks Act (2021)

## 7.0 Linkages with Other Policies

The provisions of the NAP is linked to and in agreement with the following policies:

- National Policy on Culture and Creative Economy of Jamaica
- National Science, Technology and Innovation (ST & I) Policy (2022)
- Intellectual Property Strategy (Draft) and the National Investment Policy (2022)

## 8.0 Conclusion

Several opportunities for growth exist within the Jamaican animation industry. Jamaican animation has the potential to appeal to global audiences, particularly with its unique cultural perspectives. By leveraging its rich cultural identity and storytelling traditions, Jamaica can create compelling and authentic content. Animation can also be used as a promotional tool for Jamaica's tourism industry, showcasing its attractions and culture. This can help to attract more tourists and boost the local economy. With the right support and promotion, Jamaican animation has the potential to gain international recognition and awards. Furthermore, the rise of digital streaming platforms provides opportunities for content distribution and global reach.

Collaborations and partnerships with international studios and organizations can provide new opportunities for the Jamaican animation industry to reach a wider global audience, and to strengthen its capacity to produce higher quality and unique content. This collaboration with international studios on co-productions can also provide access to funding and expertise. This can result in major expansions, mitigate challenges, and enhance the visibility and recognition of the Jamaican animation industry across the world. Furthermore, strategic partnerships with marketing and promotional agencies can help raise awareness of Jamaican animation.

Additionally, the quality and quantity of talent in the industry can be enhanced through the strengthening of animation education and training programs as well as aligning curriculum with industry needs. This is the most significant opportunity for growth, as it focuses on improving the creative and technical skills among talents and fosters higher quality productions. This fosters a favourable environment for local talent development, thus encouraging persons to pursue their education locally rather than abroad. Growth and investment can also be stimulated through continued government support, such as tax incentives and grants.

Strengthening intellectual property rights, maintaining high quality animation content, formulating a regulatory framework, and promoting sustainability can shape the future of the Jamaican animation industry. Strengthening intellectual property protection for animators and studios is crucial to safeguard their creations. It is also very important to maintain high-quality standards in

animation production as this is essential to compete on the global stage. Developing a supportive legislative framework can provide legal protection and incentives for the industry. Additionally, fostering sustainability practices, including eco-friendly animation, can align with global trends and values.

In conclusion, the animation industry in Jamaica has significant growth potential, driven by its creative talent and cultural richness. Overcoming funding challenges, improving infrastructure, and expanding market access are key focus areas. Continued government support, international collaborations, and investments in education and training can further enhance the industry's prospects and contribute to Jamaica's creative economy.

## Glossary of Terms

<b>2D Animation</b>	The art of creating movement in a two-dimensional space.
<b>3D Animation</b>	A process of creating moving images in a three-dimensional environment
<b>Animator</b>	Someone who makes animated movies, drawings, models, etc.
<b>Artificial Intelligence</b>	Technology that enables computers and machines to simulate human learning, comprehension, problem solving, decision making, creativity, and autonomy.
<b>Augmented Reality</b>	A real-time direct or indirect view of a physical real-world environment that has been enhanced/augmented by adding virtual computer-generated information to it.
<b>Computer-generated imagery</b>	The use of computer graphics to create or enhance images in various media
<b>Content Quota</b>	A fixed, limited amount or number that is officially allowed in a particular context, often related to media or programming. For example, in the context of television, content quotas may require broadcasters to produce a certain percentage of their programming from local content or to adhere to specific categories of programming.
<b>Incubation Centre</b>	A program or institution that assists entrepreneurs in developing their business and solving problems associated with it, especially in the initial stages, by providing an array of business and technical services, initial seed funds, lab facilities, advisory, network and linkages. These centres are often affiliated with universities, government agencies, non-profits, or private organizations.
<b>Motion graphics</b>	Animated graphic designs that create the illusion of motion. They are often used to illustrate a certain idea more explicitly, add depth or excitement to a story or convey a message.
<b>National Registry of Entertainment and Creative Industries Practitioners</b>	A single repository of information on the Entertainment, Culture and Creative Industry practitioners in Jamaica

**Omnibus Incentives  
Legislation**

The slate of four (4) new pieces of legislation that provide non-sectoral fiscal incentives aimed at increasing business competitiveness within the Jamaican economy. This new framework will replace the long-standing or “legacy” incentives, as well as remove the necessity for discretionary waivers, thus increasing transparency and fairness in the process of granting incentives.

**Stop-motion Animation**

A technique in filmmaking whereby objects are physically altered in small movements and captured one frame at a time. After consecutive moves are recorded in single images on a camera, it will eventually give the illusion of motion.

**Virtual Reality**

A technology that creates a simulated environment, allowing users to feel like they are in a different place or world.

**Visual effects**

A process by which imagery is created or manipulated outside the context of a live-action shot in filmmaking and video production.