



Ministry of Foreign Affairs

Dominican Republic Creative Sector Report 2023

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Summary

Over the past 25 years, the Dominican Republic (DR) has experienced a remarkable period of robust economic growth. The economy expanded by an average of 5.3 percent in 2000–19, driven primarily by capital accumulation and private consumption. The economy recovered strongly in 2021, with GDP rebounding by 12.3 percent, supported by a solid policy response to COVID-19, including fiscal, macroprudential and supervisory policies, and monetary easing. Tourism, remittances, foreign direct investment, mining revenues, free-trade zones, and telecommunications have helped make the DR the second fastest growing economy in Latin America and the Caribbean over the last decade, and as of 2019 the country was on track to realize its ambition of achieving high-income status by 2030. The robust growth performance continues in 2022, with GDP reaching in the first half of the year a 5.6% y/y growth. (World bank, 2022).

In recent decades, the Dominican economy has achieved an important transformation of its export basket, moving from a specialization in primary goods to one based on manufacturing and tourism. The country's economy is increasingly concentrated in the service sector. Between 1990 and 2019, its share in the Gross Domestic Product (GDP) increased from 55% to 70%, while the share of the primary (agriculture and mining) and secondary (manufacturing and construction) sectors decreased. The share of services in employment shows a similar trend, increasing from 60% to 70% between 1990 and 2016 (Ministry of Industry, Commerce and MSMEs and ECLAC, 2021).

Cultural and creative industries significantly contribute to the world economy. The cultural sector accounts for 3.1 per cent of global gross domestic product (GDP), while UNCTAD estimates that in 2020, creative goods and services represented 3 and 21 per cent of total merchandise and services exports, respectively. In addition, cultural and creative industries provide 6.2 per cent of all employment, generating nearly 50 million jobs worldwide, and employ more young people (15–29-year-olds) than other sectors. The creative economy promotes social inclusion, cultural diversity, and human development (UNCTAD, 2022). It is also the sector that employs and provides opportunities for the largest number of young people under the age of 30.

The COVID-19 pandemic had a devastating impact on certain creative industries and deepened their pre-existing vulnerabilities. Reports indicate that during this period, as many as 10 million jobs disappeared from the cultural and creative sectors, which contracted by US\$ 750 billion globally in 2020 (UNCTAD, 2022). In this scenario, digital creative trade has increased sharply, and digital content is replacing physical goods in the sector, for example, in music, books and gaming. Dominican Republic still faces certain barriers to participating in global trade of creative industries, such as human skills, access to financing or digital infrastructure. However, lack of updated information and statistics on the sector on a regular basis, which constitutes a common challenge for developing countries, impedes a more precise approach to the sector.

There is no single definition of the creative economy and the economic activities it covers. The United Nations Educational, Scientific and Cultural Organization (UNESCO) defines cultural and creative industries as "those sectors whose main object is creativity, production or reproduction, promotion, dissemination and marketing of goods, services and activities of cultural, artistic or heritage content" (2010). According to this definition, the branches that make up these sectors are cultural heritage, creativity and media, audiovisual and creative media, books and press, visual arts and crafts, and functional creations. For this report, creative industries will comprise Film, Music, Fashion, videogaming, digital animation, and Arts & Craft.

Contents

Summary.....	2
Creative industries outlook in the Dominican Republic	4
Institutional and legal framework.....	7
Creative industries in Dominican Republic: performance and challenges	12
Conclusions and recommendations	10

List of acronyms

AECID	Spanish Agency for International Development Cooperation (in Spanish)
CCIs	Cultural and creative industries
ECLAC	Economic Commission for Latin America and the Caribbean
ENESM	National Strategy for the Export of Modern Services (in Spanish)
END	National Development Strategy 2030 (in Spanish)
GDP	Gross Domestic Product
IMF	International Monetary Fund
INFOTEP	National Institute of Technical-Vocational Training
LAC	Latin America and the Caribbean
MNC	National Qualifications Framework
MESCyT	Ministry of Higher Education, Science and Technology
MICM	Ministry of Industry, Trade & MSMEs
OECD	Organization for Economic Cooperation and Development
ONE	National Bureau of Statistics
PNFE	National Export Promotion Plan 2020-2030 (in Spanish)
SODAIE	Dominican Association of Artists, Performers
SGACEDOM	General Society of Dominican Authors, Composers and Music Publishers
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization

Creative industries outlook in the Dominican Republic

The Dominican Republic (DR) occupies two-thirds of the island of Hispaniola (the second largest of the Greater Antilles in the Caribbean) with a land area of 48,671 Km² and an estimated¹ population of 10,847,910. DR is divided into 32 provinces and has a total coastline of 1,604.05 kms. Over 80% of the country's population lives in cities. The largest being the Greater Santo Domingo metropolitan area, with close to 4 million people in 11 municipalities.



Figure 1: Dominican Republic

The Dominican Republic is a country with great potential in the creation of products and cultural content and with a great cultural wealth of Spanish, black and mestizo roots. However, the educational and cultural consumption levels of the Dominican Republic are still below the current state of the country's development. There is very little official data. We can only cite the National Survey of Cultural Consumption carried out within the framework of the National Labor Force Survey in 2014 by the Central Bank and published in 2015 by the Ministry of Culture and the OEI, and a report of first preliminary results of the Culture Satellite Account project. At present, there is no cultural observatory in the country (AECID, 2021).

Public cultural institutions are in a process of consolidation. There is a lack of continuity in the strategy of cultural policies, a scarce training offer and insufficient support for artistic creation, which lead to hindering access to culture for a significant part of the population. Likewise, much of the cultural infrastructure lacks adequate equipment or is in a process of reform and adaptation of spaces, as is the case of the Plaza de la Cultura, home of the main National Museums and the National Cinematheque, the last which have been closed since 2017. Because of this closure, events of great cultural importance such as the Biennial of Visual Arts have not been able to be held since the last edition in 2015.

The Dominican cultural industries are structurally weak and the active public policies that allow their adequate development are insufficient (AECID, 2022). The Ministry of Culture, one of the main public institutions with responsibilities in the sector expended around 3,017,699,205 Dominican pesos (45.8 million euros) for the year 2022, which represents 0.31% of the general budget of the country (AECID, 2022). However, the orange economy contributes to national economy with thousands of jobs and its contribution to GDP represents 1.5% (data corresponding to 2021, see figure 2).

¹ <https://population.un.org/wpp/>

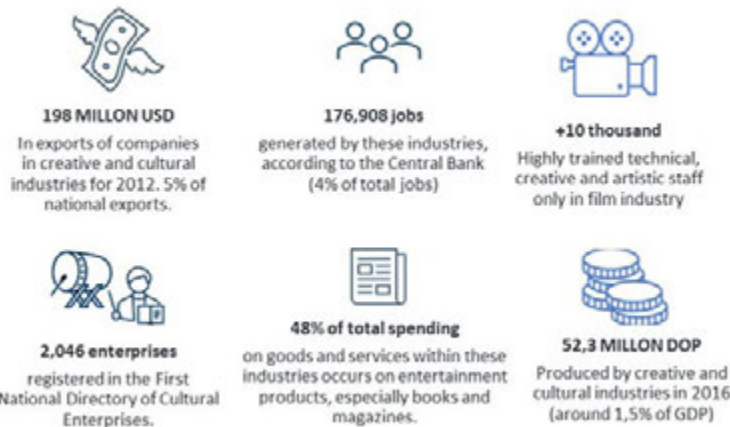


Figure 2 Creatives industries in the Dominican Republic: key numbers. Source: Tracking Report of Culture satellite Account of the Dominican Republic, 2017, and ENESM, 2021

According to the Tracking Report of Culture satellite Account of the Dominican Republic, jointly published by the Central Bank and the Ministry of Culture in October 2017, the sector comprises a relatively small and heterogeneous group of cultural companies (see figure 3).

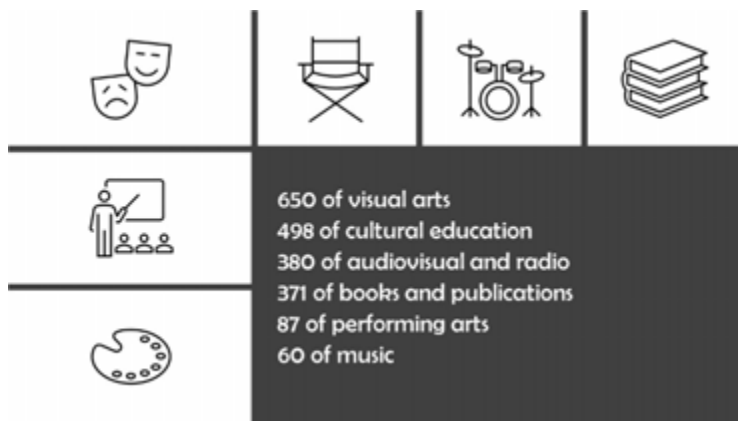


Figure 3 Creatives industries in the Dominican Republic, by areas. Source: Tracking Report of Culture satellite Account of the Dominican Republic, 2017

Regarding music, the third edition of Caribe Emergente's International Seminar for New Dominican Music Management and Distribution took place in 2021. This event is part of the ACERCA program by the Spanish Agency for International Development Cooperation (AECID), and during this edition, the project "Mapping the Dominican Music Ecosystem" was successfully concluded. The document highlights the composition of the value chain of local music and its actors, identifies strategic axes and proposes actions to stimulate the sector, in the short, medium, and long term. This constitutes a valuable contribution in the framework of the crisis caused by the paralysis of cultural activity because of the distancing measures to face COVID-19. According to the mapping, the country count on around 585 musical projects, whether soloists or groups, that have their own identity and validity or current existence, work in a stable way (not sporadic), whether authorial projects or interpretation of versions and covers. In recent years, new groups have emerged that, little by little, are being inserted into

DR CULTURE STATISTICS

Following an agreement between the Ministry of Culture and Central Bank in 2013, the Dominican Republic produces culture satellite accounts to estimate the economic dimensions of its creative sector.

The methodology is based on international statistical standards such as the 2008 System of National Accounts, UNESCO Framework for Cultural Statistics, and the Culture Satellite Account Compilation Guide of the Andrés Bello Organization Agreement. The culture satellite accounts include statistical tables on production, income generation, jobs, and people employed by gender and non-monetary indicators. In a first phase, activities prioritized include performing arts and shows; books, impressions, and press; audio-visual media; music and concerts; visual and plastic arts; and material and natural heritage.

international circuits, although they are insufficient or have little technological infrastructure. According to the Dominican Association of Artists, Interpreters and Performers (SODAIE) and the General Society of Dominican Authors, Composers and Music Publishers (SGACEDOM) these two organizations bring together around 5,500 members.

In 2019 of Santo Domingo was designated as a Creative City of Music by UNESCO; recognition that promotes cooperation between cities that they have sustainable urban development as a strategic factor and for which it was highlighted that it is the center of greater diversity of meetings, festivals, concerts, and cultural manifestations of the country Caribbean and where the greatest musical production is generated. However, many expectations of the sector's development for 2020 were paused by the COVID-19 crisis. The consequences are not only economic: music contributes to social cohesion, education, identity, and self-esteem that all people need to get ahead (AECID, 2021).

As in most countries in Latin America and the Caribbean, the animation industry is still incipient in the country. According to experts, animation is almost an image laboratory and requires a workforce that does not exist in DR today and with high production costs. A single animated film may require an animation staff of up to 50 people, and longer lead times compared to a regular film (6 months versus four weeks). In terms of audiences, while the average animation for the whole family is higher than for dramas, audiences' preference for real actors prevails. However, the industry could attract investment to develop the visual effects and animation segment, taking advantage of the facilities and equipment available in the country, as well as potential synergies with segments of ICT industries such as software development.

Another global trend, the video game industry, could find an interesting niche of services in the country, with application in different fields (educational, tourism promotion). Academic institutions such as ITLA have specialized training in this field, which is aimed at personal audiences, leads to less production time, and generates high incomes for their producers. (ENESM, 2021).

Institutional and legal framework

In the Dominican Republic, the creative industries sector is overseen by multiple agencies. This institutional landscape involves diverse organizations, including the Ministry of Culture and the Ministry of Industry, Commerce and MSMEs, responsible for policy formulation and implementation, as well as government bodies like DGCINE, which focus on directly fostering specific subsectors (refer to table 1).

Table No. 1
Institutional ecosystem of CCI in the Dominican Republic, by sector

Public sector	Private sector, academia, and civil society
Central Bank of the Dominican Republic	Association of Art Chroniclers of the Dominican Republic (ACROARTE)
Pedro Henríquez Ureña National Library	Association of Scenic and Cinematographic Artists (AECI)
Export and Investment Center of the Dominican Republic (PRODOMINICANA)	Dominican Association of Film Actors (ADAC)
National Commission of Public Spectacles and Radiophony	Dominican Association of Film Industry Professionals (ADOCINE)
National Competitiveness Council (CNC)	Film cluster
Directorate-General for Cinema (DGCINE)	Collectives of artists and cultural managers
Local Governments (municipalities)	Filming/audiovisual production studios
Dominican Institute of Telecommunications (INDOTEL)	Fashion Institute (Instituto de la Moda-INMODA RD)
Ministry of Culture (MINC); Ministry of Higher Education, Science and Technology (MESCYT); Ministry of Education (MINERD); Ministry of Industry, Trade and MSMEs (MICM); Ministry of Foreign Affairs (MIREX); Ministry of Tourism (MITUR)	Media
National Copyright Office (ONDA)	MSMEs and large companies in the sector
National Institute of Vocational Technical Training (INFOTEP)	Dominican Association of Artists, Interpreters and Performers (SODAIÉ)
National Center of Crafts (CENADARTE)	General Society of Dominican Authors, Composers and Music Publishers (SGACEDOM)
National Industrial Property Office (ONAPI)	Universities and specialized education institutions;
Vice Presidency of the Republic (Dominican Hands Program)	Artistic training centers

Source: Prepared by the author with data available in different institutional portals and data from the ENESM, 2021

The National Development Strategy (END as in Spanish) voted as law 1-12 of 25th January 2012, defines the path to the transformation of the Dominican Republic's economy according to an aspirational model characterized as integrative, innovative, diversified, and competitive by 2030. To pursue this goal, the country has led exercises of regulatory reforms, concertation, and design of instruments to support exports, mainly focused on trade in goods. Subsequently, in November 2020 the National Export Promotion Plan (PNFE) 2020-2030 was launched and the next year, the National Strategy for the Export of Modern Services (ENESM), a complementary instrument focused on services promotion. The regulatory framework for creative industries comprises several rules and laws that define policies, create institutional spaces, and regulate various subsectors of industry (see table 2).

Table No. 2
Legal and regulatory framework of CCI in the Dominican Republic

Instrument	Brief description	Date of issue/approval
Law No. 116-80	Creates the National Institute of Vocational Technical Training (INFOTEP)	January 20, 1980
Decree No. 183-87	Creates the Permanent Commission of the National Book Fair with national jurisdiction.	April 15, 1987

Instrument	Brief description	Date of issue/approval
Decree No. 232-90	Creates the National School of dance, as a dependency of the General Directorate of Fine Arts.	July 11, 1990
Law No. 41-00	Creates the Secretary of State for Culture, as a higher-level body, responsible for coordinating the National System of Culture of the Republic.	June 28, 2000
Law No. 65-00	It is responsible for protecting only the way in which the author's ideas are described, explained, illustrated, or incorporated into literary, artistic, or scientific works, but not the ideas, procedures, methods of operation or mathematical methods themselves.	July 24, 2000
Law No. 94-02	Creates the National Center of Crafts (CENADARTE), with the objective of helping in the marketing and placement in the international markets of Dominican crafts, through permanent attendance at national and international fairs and exhibitions, as well as creating and promoting craft squares in the main areas of the country.	January 2, 2002
Decree No. 3-02	It creates the Directorate for the Promotion and Development of National Handicrafts (FODEARTE), as a dependency of the Secretary of State of the Presidency.	January 2, 2002
Resolution No. 1-04	From the National Council of Culture, creates the National Directorate of Cinema (DINAC).	September 17, 2004
Law No. 502-08	Establishes the norms and principles aimed at promoting the bases of a policy that leads to democratize reading and access to books in the Dominican Republic, to achieve the harmonious development of the publishing industry in its various sectors and processes; as well as, to structure the National Library System as a necessary means for the social, educational, cultural, scientific, technological, and economic development of the Nation and for its integration into the world.	December 30, 2008
Law No. 108-10	For the Promotion of Cinematographic Activity in the Dominican Republic. It defines an incentive regime for cinematographic activity in the country, including tax credit facilities both for local firms and foreign productions filmed in DR.	July 29, 2010
Law No. 257-10	Amends law no. 108-10 and expands the scope of its powers.	November 18, 2010
Regulation No. 370-11	It regulates the application of Law 108-10, expands the powers of DGCINE, regulates co-production agreements and establishes the regime to encourage investment in the film industry.	June 13, 2011
Law No. 1-12	Creates the National Development Strategy (END). Specific objective 2.6.2 aims to promote the development of cultural industries. Among others, action line 2.6.2.2 mandates to promote cultural industries, including those based on the use of ICTs, and markets for cultural goods and services as instruments for economic development, raising the standard of living of the population and promoting cultural identity as an added value, ensuring respect for intellectual property rights.	January 25, 2012
Law No. 688-16	Entrepreneurship and Innovation. Creates the National Entrepreneurship Network, RD-EMPRENDE, an organization open to the public and private sector with a vocation to support the generation of employment and wealth via entrepreneurship, to develop the activities of the Network and promote the development of the national policy of entrepreneurship and innovation.	November 18, 2016
Law No. 37-17	Organic of the Ministry of Industry, Trade & MSMEs. It gives the mandate to establish national policy and implement strategies for the development, promotion, and competitiveness of foreign trade, together with the competent institutions to facilitate access and sustained increase of national products and services in foreign markets.	February 3, 2017
Law No. 340-19	It establishes the incentive and promotion regime for cultural patronage in the Dominican Republic and constitutes an achievement for cultural development. It creates the General Directorate of Patronage (DGM) and the National Council of Patronage (CONME). The regulations for its implementation are pending preparation.	September 2019

Source: Prepared by the author with data available in different institutional portals.

Other fundamental laws are still under discussion, such as the Law on the Promotion and Development of Performing Arts and Music, the Public Art Law, and the Heritage Law.

An important step forward in the collection and harmonization of statistics for services is the formal adoption, in 2021, of methodological tools for the classification of economic activity, and education and training. Decree No. 26-21 of January 13 of that year establishes for all statistical and administrative purposes, the National Classification of Economic Activities 2019 (CNAE-2019), adapted to the Dominican Republic by the ONE, following the guidelines of the revised ISIC. The CNAE-2019 takes as references the classifications already adapted by other countries such as Colombia, Costa Rica, Paraguay, and Uruguay. (ENESEM, 2021). The classification of activities linked to the creative and cultural industries is described in Table 3.

Table No. 3
Economic activities linked to creative industries according to CNAE 2019

Division	Group	Class	Subclass	Description
Section C	Manufacturing			
18	Printing and playback of recordings			
	181	1811	1811.1	Printing of books and brochures, newspapers, magazines, and other periodical publications
	181	1812	1812.1	Printing-related service activities
Section J	Information and communications			
58	Editing activities			
	581			Publishing of books and periodicals and other publishing activities
59	Production activities of cinematographic films, videos and television programs, sound recordings and music editing			
	591			Production activities of cinematographic films, videos, and television programs
	592			Sound recording and music editing activities
Section M	Professional, scientific, and technical activities			
74	Other professional, scientific, and technical activities			
	741	7410		Specialized design activities
			7410.9	Other specialized design activities n.e.c.
	742	7420	7420.0	Photography activities
Section R	Artistic, entertainment and recreational activities			
90	Creative, artistic and entertainment activities			
	900	9000	9000.0	Creative, artistic and entertainment activities
91	Artistic, entertainment and recreational activities			
		9101	9101.0	Library and archive activities
		9102	9102.0	Museum activities and conservation of historic sites and buildings

Note: Subclass 9000.0 comprises the operation of facilities and the provision of services to serve the cultural and entertainment interests of customers. It covers the production, promotion of and participation in shows, events or exhibitions intended for the public, and the provision of artistic, creative, or technical knowledge and skills for the creation of artistic products and performances. Source: Prepared by the author with data from the National Classification of Economic Activities (CNAE 2019).

Between 2018 and 2019, the Dominican Republic carried out a national adaptation exercise of UNESCO's International Standard Classification of Education (ISCED), as part of the development of the National Qualifications Framework (MNC, as in Spanish), to have a methodological tool that allows the comparability of statistical data on education and training. The result was the establishment of correspondences for an adaptation to the socioeconomic reality of the Dominican system, with the National Classification of Education and Training 2019 (CNEF-2019). Programs and certifications relating to creative industries are presented in Table 4.

Professionalization of the arts is vital to develop a competitive offer and for the sustainable development of the Dominican cultural and creative industries adapted to new times, which require renewed profiles, committed to artistic research and the creation of works raised from a global and integral perspective. According to the results of the Great National Consultation on the Future of Technical-Professional Training, held between May and July 2021 by the National Institute of Vocational Technical Training (INFOTEP), around 80% of Dominican professionals in the music and composition subsector are empirical. Based on these findings, in August 2021 INFOTEP signed a tripartite agreement with the

Dominican Association of Artists, Performers (SODAIE) and the General Society of Dominican Authors, Composers and Music Publishers (SGACEDOM) to ensure that authors and artists in the country obtain professional technical qualification, based on training and updating of their skills in the managerial, technical and administrative areas, in areas of Music Production; Management of music software; Repair of musical instruments; Acoustics; Professional contracts linked to the entertainment industry; Copyright / Related Rights and Formulation of Projects for Access to Funds (INFOTEP, 2021).

Table No. 4
Programs, certifications, and degrees linked to the creative industry, according to the CNEF-2019

Educational level	Secondary level second cycle	Senior technician or technologist	Degree	Master's degree and specialty	Doctorate	Non-formal education
0211 Audiovisual techniques and media production	Technical bachelor in camera, lighting, and sound	Media techniques	Degree in cinematography and audiovisuals mention cinema			Animation
	Technical bachelor's in graphic processes	Sound techniques				
	Technical bachelor's in production and realization of audiovisuals and shows	Basic technician in graphic operations				
		Technical advertising graphic design				
		Graphic Arts Technician				
0212 Industrial, fashion and interior design		Senior Technician in Fashion Design	Bachelor of Industrial Arts mention fashion design			
		Costume Design				
0213 Fine arts			Bachelor of Fine Arts	Professional Master's Degree in Visual Arts		Certificate of qualification for work in brushstrokes
			Bachelor of Fine Arts mention sculpture			
			Degree in History and Art Criticism			
0214 Handicraft						Certificate of qualification for painting work
						Certificate of qualification for work in decorative painting
						Painter decorator
						Painter decorator on silk
						Sign painter
						Poster writers, decorative painters, and engravers
						Art and crafts in glass
						Decorative metal crafts
						Indigenous handicrafts
						Clay artists
						Jewelry Assistant
						Handmade embroidery
						Manufacture of costume jewelry
						Decorative painting
0215 Music and performing arts			Degree in film and audiovisual communication			Musicology
			Bachelor's degree in audiovisual communication and cinematographic arts			Acting and directing
			Bachelor of Contemporary Music			Composition (music)
			Bachelor of Music mention music theory and education			Dance
			Bachelor's degree in theatre with a mention in acting			Direction (music)
			Degree in theater mention direction			Drama
			Degree in theater mention dramaturgy			History of music
						History of cinema and theatre

Source: Prepared by the author with data from the National Classification of Education and Training (CNEF 2019). ONE, 2020

More recently, in May 2022, the Ministry of Culture has initiated, with the support of the PROETP II program funded by the European Union, the process of designing an Institutional and Educational Proposal for the creation of the University of Fine Arts (UBA) based on the updating of the middle and basic level curricula of the Schools of Fine Arts. This process seeks to create higher education and strengthen the training system in specialized studies of the arts in the country, defining occupational opportunities according to new needs and under a competency-based approach. The project includes, among others, the elaboration of the curricula of the Bachelor of Dance, Bachelor of Dramatic Art, bachelor's degree in general art studies, bachelor's degree in music, and the bachelor's degree in

Plastic Arts; as well as postgraduate curricula in the areas of Cultural Management of the Creative Industries, and the Master of Arts (www.proetp2.edu.do). It is expected that this project will contribute to upgrading the level of professionalization of the creative industries in the country.

Creative industries in Dominican Republic performance and challenges

International trade in creative goods and services generates increasing revenues for countries, but creative services exports vastly exceed those of creative goods. The global exports of creative goods represented US\$524 million in 2020, while world exports of creative services reached US\$1.1 trillion. In addition, UNCTAD estimates that, in 2020, creative goods and services represented 3 and 21% of total merchandise and services exports, respectively. (UNCTAD,2022).

At regional level, creative and cultural services have also been opening a space for participation in GDP. In 2015, the cultural and creative industries (CCIs) generated 1.9 million jobs in Latin America and the Caribbean, and revenues of \$124 billion (IDB, 2017). However, despite the great relevance and dynamism of CCIs in Latin America and the Caribbean, the region has a low participation compared to other regions of the world: barely 6% of the total income and 7% of the total employment produced by CCIs in the world, according to the Organization of Ibero-American States for Education, Science and Culture (OEI).

In Dominican Republic, main creative industry sectors to watch comprise design, fashion, and film. Design is one of seven creative goods categories, which include: Art Crafts; Audio-Visuals; Design; New Media; Performing Arts; Publishing; and Visual Arts.

According to the National Survey of Cultural Consumption (ENCC-RD 2014), cinema is the activity that represented the most significant expenditure (personal/family) (52%). Local consumption has allowed the industry to position itself as the first in Latin America in share of its own cinema screen (26%), only followed by Spain (21%). However, the sector faces the challenge of increasing the availability of cinemas throughout the national geography to make the most of this advantage (in 2020, only a quarter - 8 of 31 of the provinces and the National District - have movie theaters).

The contribution of the film industry to the Dominican economy has been consistent over the past decade, and the country has experienced an increasing development of audiovisual creative activity. The ecosystem of the industry includes a legal framework that creates a regime of incentives for investment and production, as well as institutional governance governed by the Intersectoral Council for Cinematographic Activity (CIPAC) and the DGCINE as executive arm, and more than 10,000 trained people. The local industry has high-quality art directors, camera technicians, lighting, costumes, makeup, sound, and post-production. However, the need to strengthen leadership and implementation capacities is recognized. The public-private partnership has been key to the development of the industry in the country. The industry has numerous elements that determine its competitiveness and the attraction of international productions, including logistics and connectivity (proximity to Colombia, Miami, and Panama), which facilitates accessibility to bring technical equipment if they are not in the country. Other competitiveness factors include state-of-the-art soundstages and production support services. With co-production agreements established with five nations (Brazil, Spain, Israel, Italy, and Morocco), the Dominican Republic generates approximately 30 films annually, encompassing both domestic and foreign productions. While not yet saturated, the industry's expansion and workforce adjustments rely on analyzing macro trends to foster growth effectively. In recent years Dominican independent cinema is successfully reaching festivals. (ENESM, 2021).

Estimates collected in the National Study on Cultural and Creative Industries of the Dominican Republic (2010), estimated the contribution of the sector at 4.6% GDP and an employment rate of 7.4% of the active population. In 2014, it employed 468,324 people (approximately 12.5% of the total formal and

informal workers according to the Follow-up Report of the CSC of the Dominican Republic published in 2017). However, based on the National Classification of Economic Activity (CNAE), figures presented by the National Statistic Office from 2016 to 2019 shows that contribution of artistic, entertainment and recreative activities to formal employment could be less than 50 thousand employees. Data collection presents a challenge and classification of cultural and creative activities is an ongoing work (Directorio de Empresas y Establecimientos (DEE), 2016-2019).

The creative industry or "orange economy" represents a great income opportunity, due to its wide economic chain (Mipymes Observatory, 2020). Although the participation of these industries in national exports has fluctuated during the period 2002-2014, it has a great potential for exporting creative services, considering the increase in these exports in the last five years, but Its performance is still far from reaching other sectors positioned in national exports, such as tourism. Intellectual Property is one of the critical features of the creative sector and Dominican performers and creative industries lack of capacity to increase economic benefit from enforcing the law and exploiting property rights (see Table 5).

Table No. 5

Export performance of Dominican creative services to the rest of the world, 2015, 2019 and 2021

(In USD millions)

Product/sector	2015	2019	2021
BOP6-SD- Travel	6116	7468	5687
BOP6 - SH - Charges for Use of Intellectual Property n.i.e	0	0	0
BOP6 - SJ - Other business services	273	558	936
BOP6 - SK - Personal, cultural, and recreational services	9	58	110

Source: <https://stats.wto.org/>

Note: According to EBOPS 2010 classification based on IMF BPM6

The sector faces several challenges, which have intensified due to the Covid-19 pandemic. According to the survey "Assessment of the impact of COVID-19 on cultural and creative industries", 52% of creative companies experienced a reduction of more than 80% in their sales during the first months of the pandemic. This has strongly affected their workers, especially the most precarious, such as freelancers and informal workers. Almost two out of three freelance workers lost 80% of their income. Those working in sectors that attract audiences and those in the craftwork sector were the most severely affected. Meanwhile, the impact was milder for those working in industries that are already highly digitalized, for example, architecture or design. The new normal has created favorable conditions to set up new businesses that allow for new job opportunities. The survey data show how the crisis has accelerated the digital transformation. Industries like the arts and entertainment have more than doubled the number of products provided digitally (MERCOSUR, UNESCO, BID, SEGIB y OEI, 2021).

Conclusions and recommendations

In general, Dominican cultural industries are quite weak structurally: absence of value chain approach, limited budgets of binding public institutions, informality of some subsectors, among other factors, explain this weakness. In addition, the lack of specialized training on the part of cultural managers and artists themselves limits the possibilities of exporting cultural services (AECID, 2011). Other challenges for the industry are the lack of statistical updating (and uniformity) and high levels of inequality (Mipymes Observatory, 2020).

The cultural wealth of the country, the climate and its permanent tourist offer and the growth of cultural and creative industries, constitute an ecosystem conducive to the development of the so-called orange economy, with the impact that this means for the economic development of the country. In this framework, strengthening the professionalization of the sector, both creatives, artists, technicians, cultural managers, communicators, and promoters of cultural industries, constitutes a way to contribute to economic and human development.

Intellectual property is a catalyst that transforms creative activity into creative industry and value. It is recommended to strengthen capacities of the local industries for the exploitation of the creative skills of their workforce and the generation of Intellectual Property.

Generation, dissemination, and analysis of information is a fundamental component in diagnosing, formulating, and evaluating public policies. This process is key to strengthening the management capacity of public institutions and the other agents such as companies, freelancers and managers, and civil society organizations that come together and interact in cultural activities (MERCOSUR, UNESCO, BID, SEGIB y OEI, 2021). The results of the National Survey of Cultural Consumption and the first result of the Culture Satellite account, despite being discontinued, provide valuable data that reflect the contribution and potential of culture as an economic sector. The updating of these instruments on a regular basis, particularly after the new post-pandemic reality, will allow more targeted policies to be designed in the different subsectors of the industry.

The impact of informality could not be underestimated in Dominican creative and cultural industries. It is necessary to develop policies oriented to promote labor formalization of creative workers and performers, including not only fiscal but also non-fiscal incentives such as scholarships and certifications.

Dutch knowledge institutions which offer Creative Arts and Design courses could be instrumental to strengthen physical and digital infrastructures as well as promoting the development of digital and technical capacities.

Promotion of public-private partnerships and collaborative work are necessary for a greater scale, scope, diversity, and integration of creative industries. **Dutch creative industries platforms** could add value and contribute with interesting experiences to scale Dominican industries.

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