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South African Cultural Observatory

RURAL CULTURAL POLICY IN SOUTH AFRICA: ANALYSIS, PARAMETERS AND DEFINITIONS

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Contents

Abstract

This document analyses and assesses rural cultural policy in South Africa, and focuses specifically on defining how cultural policy applies to rural areas, and what form of cultural policy will be most suitable for the South African context. The document critically assesses the standard approach towards cultural policy, which is (in part) based on the approach that cultural and creative industries are vehicles for development. We point out that more work is needed regarding the rural cultural sector, for three reasons: (a) rural policies are often not visible enough in local government practice and are subsumed under different departments, and various private and public development agencies, (b) rural creative industries and heritage practitioners are located in the informal sector and therefore less visible, and (c) rural cultural and creative industry development for rural areas mostly takes place in urban zones. In order to assess regional dynamics, the document develops a basic profile of CCIs in each province in South Africa, using datasets from SACO and DAC, the South African Heritage Resource Agency, and StatsSA. As this document contends, cultural policy encompasses far more than the creative and cultural sector alone, but includes heritage, and more particularly, intangible and tangible rural heritage and tourism. The results of this document suggest that cultural and heritage policy in rural areas of South Africa is clearly a collaborative process which should be present in all facets of local government planning, and link up more pertinently with private strategies and entities.

Introduction to Rural Cultural Policy

As the ANC draft cultural policy of 1996: indicates, the practice of cultural traditions is a basic human right enshrined in the Constitution:

All people must be guaranteed to practise their culture, language, beliefs and customs. The freedom of creativity, and freedom of expression, must be guaranteed.

Cultural policy can be conceptualised as the way in which elements of heritage, tradition and culture are incorporated into state policy at a local and national level (Bianchini 1993). These policies are essentially designed for the purposes of developing the creative and cultural sectors. The standard focus of the South African Cultural Observatory (SACO) is on the production of the knowledge economy within the Cultural and Creative Industry sector in South Africa. This is primarily derived from UNESCO's focus on Cultural and Creative Industries (CCI), including music, television, film products and publishing, art, craft and design, as well as the architecture, sport, advertising and textual mediums (Figure 1).

Cultural policy has become an increasingly popular buzzword in re-branding the cultural, heritage and creative sectors as 'industries'. However, there is not much clarity on what it actually means, nor how culture, heritage and creativity may overlap. The way in which the term 'rural' is used is similarly problematic, as there are very different conceptions of what makes rural areas 'tick' and how they function, particularly in South Africa. Policy, likewise, has different meanings at a local, provincial, national and international level, and differs widely in urban and rural environments. Public policies are not isolated, but largely depend on how they are implemented in practice, particularly at local government level. While much of the focus of SACO has been to create an idea of the economic value of these industries, and to measure and map the input and output of CCIs, there has been far less emphasis on heritage, particularly in rural areas. In many cases the term 'industry' is itself misleading.

There is a growing emphasis in state circles that the creative economy has under-utilised potential in contributing to job creation and economic growth. UNESCO (2009) has developed a particularly useful model in determining the contribution that CCIs can potentially make to economic growth.

- Identify the arts and cultural production commodities
- Identify the industries producing these commodities
- Identify the arts and cultural weightings
- Estimate the output
- Estimate the value added
- Estimate the employment and compensation, and
- Estimate the total and indirect output and employment.

Although quantifying and mapping culture is important, this report focuses on something different - defining and discussing the parameters of rural cultural policy. As Galloway and Dunlop (2007) argue, there must be a strong theoretical basis for an definition used for policy purposes because this has important consequences for the way in which these 'industries' are measured, and the type of development adopted. Rural culture and policy are often difficult to define and isolate, which is especially heightened in rural areas and within the tangible and intangible domains of heritage and culture in South Africa.

This document has two basic sections. The first is conceptual, and reviews the dynamics of what is meant by ‘rural’, ‘cultural’, and ‘policy’ respectively, in South African and beyond. This section also discusses craft, which is an important sector of *rural* CCI development in South Africa. Such a discussion is critical because it establishes the reasons why rural cultural policy is needed in South Africa, and which aspects of policy need to be refined in order to deal more effectively with CCIs in rural areas. Rural cultural industries clearly need different treatment to urban cultural regeneration efforts otherwise they will simply not be very effective. This section will also help establish the parameters of this report, and illustrate what has been omitted and included.

The second section of the report develops a basic profile of CCIs in each province of the country, using existing information and datasets from the Cultural Observatory (Plus 94 in particular; StatsSA (Census 2011, Community survey 2016 and agricultural surveys), and FHISER (small town regeneration reports)). This section will provide an overview of the general rural dynamics of each province and provide an indication of provincial policies in each. It must also be noted that this section is an overview of existing data and by no means describes or quantifies all the different types of rural heritage sectors in South Africa, which are too large to examine in this particular report. This section specifically focuses on two provinces – the Eastern Cape and Mpumalanga – and these have been treated as extended case studies in comparison to the data in other provinces.

The general goal is to provide as much information regarding past research studies of rural cultural policy in South Africa (especially craft), and to work with the Plus 94 dataset provided by SACO. This report is not a definitive version of what constitutes and defines rural cultural policy and CCIs in South Africa, but is meant to be an introduction to future work. We will examine different sectors of culture and heritage as comprehensively as possible in order to give a more complete picture of what is available nationally, and in order to inform future work.

Policy and institutional context

As mentioned by DAC, the terms ‘policy’ and ‘cultural policy’ share many of the same difficulties of interpretation and understanding as the term ‘culture’. Policy is understood as a set of guidelines informed by an ideology, but achieved through consultation with communities and local management (DAC, Draft policy review report, 2005: 12). A policy is a projected programme of goals, values and practices lead by governments on the local, national and provincial level. Given that culture often is vested in an informal realm, which makes it difficult to measure, policy cannot only be about the planning of culture, but ensuring that all cultural considerations are present in all processes of planning and development. The heart of actual practice is the imperative for what is called ‘joint up thinking’ (DAC 2005:19), which links cultural policy to agendas in economic, social and human development, linking cultural policy to community development and regeneration. In this sense, the development of CCIs as the foremost component of cultural policy and planning is relatively recent, and the focus lies mostly within the knowledge economy of those individuals and institutions classified as ‘cultural and creative’. However, the cultural economy is more about CCIs, and this is directly reflected in South African development of cultural policy contained in the White paper.

When political organisations were unbanned early in 1990, exiles returned to South Africa and started to debate the future of cultural policy issues. During May 1990 diverse local and regional cultural activists came together to launch a National Interim Cultural Co-ordinating Committee (NICCC), which did not take off the ground. In April 1993 when the ANC`s Culture and Development Conference was held in Johannesburg, the Department of Arts, Culture, Science and Technology was created. This resulted in the launch of the draft White Paper on Arts, Culture and Heritage in June 1996. In 1997 the National Arts Council Act was passed, which established South African Heritage Resource Agency and the SAHRA Council in terms of the National Heritage Resources Act, as well as the National Heritage Council.

In these terms, early South African Cultural policy was centred around issues of culture, arts, but also heritage, particularly the preservation of heritage and historical resources through the SAHRA and the NHC. The revised White Paper in 2013 did create a combined focus on describing cultural and heritage industries, within the following classificatory indices, which has been used by the Cultural Observatory:

Table 1: Classification of Cultural and heritage industries, White paper, 2013

Cultural and natural heritage	Performance and Celebration	Visual arts and crafts	Languages and publishing	Audio visual and interactive media	Design, creative and technical services
Museums (including virtual museums) Geology, Palaeontology, Archaeology Historical Places Cultural Landscapes Natural Heritage	Performing Arts Theatre Music Dance Festivals, rituals and events Days of commemoration Orchestra Story-telling	Fine Arts Photography Crafts	Books Newspapers and magazines Other printed and electronic material Library (including virtual libraries) Book fairs and clubs Archives Heraldry Languages	Film and video TV and Radio (including Internet live streaming) Internet podcasting Video Games (including online)	Fashion Design Graphic Design Interior Design Furniture Design Landscape Design Architectural Services Advertising Services ACH Technical Support Services e.g. lighting, sound, stage

However, the 2013 White Paper was never adopted. Instead, a revised White Paper was drafted, after the formation of a directive council and after consultation with arts bodies had taken place in 2015. Although the revised paper in 2016 has also been criticised for not being as consultative as the 1996 White Paper, what did emerge from the consultations that were implemented was the need for more effective coordinated funding of the arts and heritage sector (DAC 2015). Combined with this, there was a call for implementation of national and provincial cultural policy on local government level. Currently, various organisations such as DAC, National Lottery, and provincial departments, provide funding in a rather uncoordinated manner. There was some expression for utilisation and protection of Indigenous Knowledge Systems, and important part of intangible heritage as outlined by the 1996 White paper and UNESCO (DAC 2015).

Despite the commitment to preservation of heritage and the role of culture in promoting development, the draft White Paper (and associated legislation) did not focus specifically on a local policy context, nor on the specific development of cultural industries. What the draft White Paper did was to suggest that the functional area of cultural matters could be legally enacted in both the national and provincial sphere. As it mentions, national and provincial governments clearly are the leading promoters and developers of arts and culture in their defined areas, as suggested by the formation of provincial departments of arts, culture and heritage. Unfortunately this meant that in most cases 'cultural matters' were interpreted as being outside of the ambit of local governments.

Importantly, early cultural policy tended to emphasise culture and arts as an urban initiative, based in cities and townships. Thus, while the various White Papers did provide a considerable amount of strategic cultural policy touchstones and guidance to central government, the application and formulation of policy at a local and provincial levels has by and large still to gain traction, although there are exceptions at provincial and metro levels.

What does need to be emphasised within the policy context is that local (municipal) governments also have some responsibility to promote and develop arts and culture in their defined areas, since it is these policies that directly affect rural areas in South Africa. The development of rural cultural policy in South Africa thus largely depends on the ability of local municipalities to formulate specific development strategies for culture and heritage. This has been a far more gradual, less specific and more recent than national policy.

Cultural policy

To date, the role of the Cultural Observatory has been to assess and describe the value of the Cultural and Creative sector in terms of Cultural Capital – the estimated economic contribution of a product or industry. This involves a statistical process of determining the instrumental (ie: economic and social) value of commodities and industries that are related to the culture and arts sector (Snowball, 2015: 8). Thus, an arts performance can be measured by the revenue it may generation (economic), but also the type of skills and education it may provide to audience members (social).

While the intrinsic and institutional value of the Cultural and Arts sector is very important to the way in which one defines the value of cultural capital, this is nonetheless less measurable and more difficult to describe (Snowball 2015: 12). The intrinsic value of a work of art, for instance, revolves around the communities and shared meaning created around a particular artistic movement (such as Impressionism). The institutional value of the same artistic product and movement is the way in which Impressionism has been utilised in scholastic curricula, or tourist packages. These two value chains are difficult to describe and quantify largely because their value is limitless. Likewise, as will be illustrated, the scope of the heritage sector and its inclusion into CCI's may be equally challenging to map, particularly in rural areas.

Defining culture and heritage

The challenge of designing a policy for the culture, heritage and CCI sector does also depend on the nature of culture itself. Culture is both an observable phenomenon as well as a social ideational system, and is thus too large to only define in terms industries and commodities. The problem lies in that cultural meanings can inform any particular public product, event or building, both in the sense of social ideas and behaviour, and in terms of regional variations. The question of how one can measure culture thus becomes slightly more complex as it is both a public and private enterprise that is based on ways of living in particular regions or countries. We thus speak about a South African culture but also of a Sesotho or Pondo culture (and artefacts), since these refer to both the ideas and observable practises of these issues. However, even if a product has a cultural base it may not necessarily be creative.

Generally and publically, the term culture refers to the arts, whether being music, dance, spoken word and film. However, culture is generally accepted by social scientists as a system of knowledge, beliefs and practises that are more or less shared by members of (a) society. A classic definition of culture is based on the work of Tylor (1871), who defined culture as:

That complex whole that includes knowledge, belief, art, morals, law, custom and any other capabilities and habits acquired by humans as members of society.

The Oxford Dictionary describes heritage as:

The sum total of wildlife and scenic parks, sites of scientific and historical importance, national monuments, historical buildings, works of art, literature and music, oral traditions and museum collections and their documentation which provides the basis for a shared culture and creativity in the arts.

It is important to note that this is the definition that has been adopted in the ANC White Paper on Arts and Culture of 1996. The White Paper does emphasise the development of arts and creative enterprises, but includes regional culture and natural heritage as an important aspect of this development. The South African National Heritage Act specifically argues for an inclusion of what is called living heritage: the intangible aspects of inherited culture, and which includes cultural traditions, oral history, ritual and performance, skills and technology and Indigenous knowledge systems.

Living Heritage also known as Intangible Cultural Heritage is defined internationally by UNESCO (2001 and 2003) as:

> People's learned processes along with the knowledge, skills and creativity and skills that inform and are developed by them, the products they create, and the resources, spaces and other aspects of social and natural context necessary to their sustainability; these processes provide living communities with a sense of continuity with previous generations and are important to cultural identity, as well to the safeguarding of cultural diversity and creativity of humanity.

UNESCOs matrix of the six cultural domains encompass both tangible and intangible domains. Intangible cultural heritage may be limited to a specific geographical area, people, or country, or may span borders to include people who are geographically distant but culturally similar.

The research of these intangible and tangible cultural domains involve specific methodologies based on history (archiving) and disciplines such as anthropology, archaeology and palaeontology, which all feed into the public policy domains of tourism, museums, and cultural funding bodies. As the World Commission on Culture and Development has stated (Munjeri 2004: 13), the intangible facet of heritage has long been ignored. What they refer to as 'ways of life', has largely been bypassed by policy and development, mostly because it may be in a simple formats, hidden away from more noticeable components of heritage as a place, or thing – a world where the 'visible takes precedence over that which is immaterial'.

More recent emerging definitions of heritage include liberation heritage (all people and movements for the struggle for liberation, as well as Geological heritage. The Geological Society of South Africa defines geo-heritage as being 'places and sites of geological importance [that] are recognized and preserved as outstanding natural sites' including mineral deposits, and sites which have led to breakthroughs in the understanding of a region and the earth as a whole'.

These types of definitions of culture and heritage are specifically important for defining cultural policy in South Africa because they are more inclusive of developing regional efforts to promote heritage and tourism as the drivers of cultural industries such as craft, design and performance. As this report will point out, this is especially important in regions that do not have a large CCI base, particularly in urban zones, and that rely more on political, cultural and natural heritage to give direction to cultural development.

Cultural and Creative Industries

In South Africa, after the development of the draft White Paper on Heritage and Culture in 1996, the 1998 Cultural Industrial Growth Strategy (CIGS, 1998) gave substance to what is now considered to be CCI's. In general, CCIs use and rely on heritage and culture in order to define the content and marketability of their products. However, the use of terminology used to refer to CCIs can be confusing.

Internationally, the concept of the creative and cultural industries is in part context specific. As Galloway and Dunlop argue (2007), the emergence of the concept can be traced back to the 1980s, to those capitalist countries such as Britain that have long-standing state support for culture. The term cultural industries was originally used to refer to commercially produced entertainment and the arts – large scale arts events, film, television, music and publishing. This underpinned the establishment of the Arts Council of Great Britain, as well as UNESCO, and Europe and France in the early 1980s, and which informed local council efforts to develop cultural industries.

The term is, however, is in part, context specific – it has been widely adopted in advanced capitalist countries with a tradition of state support for culture. The concept of the 'creative' was later adopted to refer to any industry that used a creative focus. However, as Munjeri (2004) points out, there are a few problems associated with this definition, especially in an African context. Besides the fact that any industry can have a creative focus, culture itself has come to refer to more than just the arts. Notably, 'heritage', as well as elements of regional culture and tradition, do not feature very much in determining the monetary value of CCIs. This is partly due to two factors:

- CCIs in developing markets such as South Africa usually operate within the informal sector. The number of CCIs that actually 'make it' to formal arts festivals only represent a fraction of the total market. Many CCIs operate with high labour input and low financial output and in many cases the value of a product cannot be measured. Unlike many other products (such as gold or diamonds), the value of an artistic product or service can decrease from the time it is produced until it is exhibited or staged. Most CCIs are knowledge based and labour intensive, but most artists are still badly paid and operate chiefly within the informal sector, sometimes on a part-time basis.

- CCIs are essentially collaborative enterprises, which combine a number of inputs from different sectors and disciplines. This makes then far less visible to policy makers and funding bodies and very difficult to map. The creation of one artistic product may combine knowledge from agriculture, craft, as well as small business development. It may not attract much attention from a specific arts or heritage funding body but rather from a small business and economic development unit. In most instances artists and crafters tend to gravitate towards places that can offer a wide range of artistic services in one location – these usually being urban zones. In cities, audience and consumer numbers are higher, wealthier, and internationally connected, which means that artists have the means to make a living.

Craft

The 1998 CIGS report definition of the scope of CCIs originally revolved around three key industries: craft, music, film (and television). Of these, CIGS describes craft as a quintessentially rural phenomenon, with the potential to provide economic stimuli to rural communities. Subsequently, there has been a specific focus on the development of craft as a particular focus of cultural policy in South Africa, but only in selected provinces of the country.

We have chosen to focus on craft within the scope of cultural policy simply because this may be the best vehicle for development of cultural industries and cultural policy in rural areas. It is clear that although many local municipal IDPs do not have specific cultural policies, they do have active craft industries that are located around strategic heritage sites that attract considerable tourist throughput. Moreover, craft itself has partly led to the creation of SACO and associated mapping of CCIs.

There are five categories of craft, as the 1998 document describes:

- Traditional art - produced by people in localities and originally intended for local consumption, based on traditional techniques
- Designer goods - such as beaded earrings or handbags
- Functional wares - such as massed produced pottery, bags or woven mats.
- Craft art -overlaps with traditional art

Since the CIGS report, an initiative by the HSRC (Joffe and Newton 2007) and the British Council saw the preliminary mapping of CCIs in South Africa. This took place in Gauteng, the Western Cape and KwaZulu Natal. These studies, led (in part) to the creation of the Cultural Observatory in 2007. However, despite a few valuable reports at local level, there has not been significant mapping and description of the progress of CCIs, particularly within craft, music and film, since 2007. During 2014-15 a DAC-commissioned national mapping study was carried out by Plus94, with the data being inherited by the newly-formed South African Cultural Observatory. The integrated Plus 94 dataset, contains 21786 entries of CCIs in South Africa and helps provide a larger picture of the CCIs in South Africa.

However, due to the size and scope of the heritage and CCI sector, it has not been easy to create a definitive picture of the scope of all rural CCIs and associated policies in nine different provinces. In many cases research about rural CCIs does exist, but is spread so thinly throughout the development literature and local municipal IDPs that it is difficult to isolate. Thus, while research may be opaque, it is also difficult to determine who is precisely who should be responsible for this sector. The terms culture, heritage, and craft are often used interchangeably, and may lack definition. The craft sector itself overlaps with both heritage and culture, and development of industries is shared by a number of state departments and private entities.

Here the development of the Gauteng, KwaZulu Natal and Western Cape strategies for craft development are important. The Micro-Economic Development Strategy (MEDS) for craft in the Western Cape (Kaiser& Associates 2005) engaged with the development of the craft sector, which led to a vast expansion of the training and education sector as well as the music market. The KwaZulu Natal report was the smallest of the three, but nevertheless established the greater St Lucia areas as one of the primary craft producing areas in the country. The Gauteng Creative Industry Development Framework (2006) and their branding of what was known as Creative Gauteng, was particularly important. Besides leading to urban development (particularly in the Newtown precinct), it was here that the term 'creative' was used to broaden the scope of culture and heritage to specifically include the creative sector (p 8). The Gauteng report defined the creative industry sector as:

- Basic or upstream creative industries – visual and traditional forms of art,
- Applied or downstream creative industries – which obtain their value from application in other activities and sectors (ie: craft)
- Distribution of art and their products.

Despite these three key initiatives, the potential of the craft sector in South Africa, particularly in rural areas, remains untapped, particularly when compared to the increase in urban tourism, heritage sites, sporting activities and heritage routes in South Africa. Here three sets of research reports and information have been useful:

- The HSRC report (Joffe and Newton 2007) found that there were 5725 craft enterprises (in the Western cape, Gauteng and KwaZulu Natal) with around 30 000 employees, 750 craft outlets and 436 material suppliers. The GDP contribution of the craft sector in 2006 was estimated at 0.14%, and displayed a growth of 3-4% since 1996-2006. During the five years from 2002 to 2006, the market for craft increased by 40%, particularly due to a corresponding increase in the turnover of tourist numbers, which grew exponentially by 82%. Compared to 7518 tourist arrivals in 2008, for instance, numbers more than doubled in 2015, up to 15052.

- The 2005 Western Cape report (Kaiser & Associates 2005) found that there were around 6187 craft enterprises nationally, based on figures gained from a national Craft Workshop in 2004. This information will be used in order to illustrate key points in the forthcoming sections.

- As discussed above, the most recent information available from SACO has produced a database of around 21 787 culture or heritage industries. Of these, those that can be classified as 'craft' (ie: visual arts and crafts) number around 3284, which is 15.1% of the CCI database. SACO have also described different ways of classification and measurement of this sector, particularly consumer use and expenditure of CCIs items and services.

One of the goals of this report was to start working with the classification of these rural industries, and locate them within rural regional markets, in order to provide a basis for future work. This analysis is particularly important in order to understand the origins and roots of CCIs since they function based on regional networks. However, in order to do this, some evaluation of what is meant by 'culture' and 'rural' must take place first.

Re-imagining the rural

The development of rural cultural policy in South Africa, based on the inclusion of heritage and culture, thus does not only recognise the value of arts and the creative industries, as measurable items, but values that can be associated with cultural environments. It is here that culture takes a distinctly non-urban approach. The White Paper on Arts, Culture and Heritage in South Africa notes that national heritage 'begins with the land itself and its many natural resources' and that the preservation of these resources rests on the dissemination of cultural domains, particularly those which were mismanaged through colonialism and apartheid.

Studies conducted of the development of rural heritage industries have emphasised the value of investing into rural creative economies due to the increasing popularity of urban to rural migration. Urban to rural migration in South Africa has not been a factor in academic research. Rather, it is rural to urban migration that has captured attention, since the levels of urbanisation have increased drastically over the last few decades since 1994. This does not mean rural in migration does not occur – it does, although on a smaller scale than urbanisation.

For those who prefer the countryside, rural areas are still thought of as being places where culture is created and nurtured, due to their remoteness and closeness to nature. James (2001: 102) points out in Limpopo province that labourers perceive farms as rural homes to where children (in particular) can be sent 'to learn traditional values'. Ainslie (2003: 9) writes that rural communities in South Africa have constructed their identity through a commitment to and choice of a specific 'way of life' (McAllister 2006; 1985). This outlook is informed by building a rural homestead, keeping cattle and some arable land, and the retention of some connections between absent kin and elderly, rural relatives. In some cases farms are purchased as second homes, and only inhabited during school holidays. In short, rural areas are very important to many people in South Africa, and a rural lifestyle is sometimes valued above city buzz. Rural areas are part of people's identities, and roots. Even the remains of commercial agriculture in many rural areas, still prompt many households to follow vestige production for the sake of maintaining rural identity (Connor 2014).

Despite differences, there is still a clear agenda for a re-imagination of rural economies in South Africa as meaningful and connected, apart from the debates around poverty and dependence. CCIs in rural areas are very different to their urban counterparts : they focus more on issues of tourism, identity, and the idea of rural 'folksiness' or 'tradition', as opposed to city buzz and trendiness. Cloke (1997: 168) calls this the 'cultural' turn in rural studies, which moves away from an acceptance of rural residents as simply 'poor', towards a re-examination of what makes rural areas 'tick'. Rural creative industries will not solve the problems of rural areas, but will go a long way in promoting the image of rural areas as places with history and roots. The rural cultural economy therefore focuses more on issues of identity and place, and natural areas in particular, are particularly important as they are markers with spiritual significance, an authentic lifestyle, often synonymous with natural identity.

However, as Kneafey (2001: 164) warns, there are still very real challenges that exist within cultural rural landscapes. Landry (2000) suggests that rural CCI development should not simply 'recycle' urban CCI policy in a rural setting. Rural areas need a policy than is distinctively rural, and related to the interactions of place, people and creativity. This can be compared to the status of indigenous laws and practices in colonial Africa, and particularly the issue of the customary. Laws preventing the practise of customs, and then later actually promoting the use of traditions, has been used to motivate ethnic separation, which was enforced through indirect rule and later, the creation of Bantustan states. As Mamdani's classic work (1996) illustrates, separation revolved around a bifurcated notion of culture: between the accepted modern ideal of western culture, and the perceived backwardness of traditional culture. Most customary practises in South Africa were denied recognition by the Cape Colonial Government, so that practises such as lobola, customary marriage, and circumcision were deemed illegal.

During Apartheid, cultural practices were politically reinforced within the rural Native Reserves and became a false, altruistic and 'imagined' part of government policy. One such example of imagined cultural identity is that of the Nama, who used their performance of a ritual to assert their identity and prove the authenticity of their land claim to outsiders in 1994. As Boonzaaier and Sharp (1994) point out, this was different to the way in which Inkatha (in the 1980s) had used the idea of violent masculinity to show the validity of Zuluness, an identity which was not common to Zulu women at the time.

Rural cultural policy therefore should try and avoid the classification of rural traditional practices as unchanging – which includes the idea of a 'commodification' of culture, where heritage is presented as something unchanging and archetypal in order to market a product to tourists and outsiders. These images are made all the more important by increased access to technology, where a static image of culture may appeal to tourists and outsiders. Cultural villages and tourism brochures certainly present a very different world than experienced by locals, for whom poverty and struggle may be more important than heritage. As in many other case studies of rural cultural development in Europe, the status of rural residents may often determine access to commodities and networks, and is sometimes dominated by the monopoly of certain individuals over another. This does not mean that culture or heritage does not exist, but that rural cultural policymakers should be aware that there are difficulties posed by CCIs in rural (as opposed to urban) areas. These revolve around:

- Who owns knowledge in rural areas,
- How outsiders define communities and individuals,
- How local status or ownership is conferred and
- The degree of similarity between urban and rural environments

As Ying and Zhong (2007) point out, the western idea of community development within tourism is not often very successful when applied to developing economies because of the perceptions of elitism and unequal distribution of resources. Cultural rural tourism, which is defined as 'a distinct rural community with its own traditions, heritage, arts, lifestyles, places and values as preserved between generations' (MacDonald and Joffe 2003), does not necessarily work in practice. Essentially, both participation in the potential material benefits of tourism, as well as participation in decision making can become problematic if not defined well beforehand.

It is very important to factor in that culture and heritage practices may still suffer from similar ambiguities as in the past. It is very true that South Africa's democratic constitution has improved the position of customary law and practices by giving each person a right to participate in their culture or tradition of choice, irrespective of race, age, gender or creed. However, the market is clearly skewed towards urban areas, and rural cultural policy will clearly be ineffectual if it markets products and services that are disconnected from local social and political conditions. So – what are some of the features of rural areas in South Africa?

Rural areas in South Africa

The standard definition of 'rural' and 'urban' is very difficult to capture in South African municipalities where these distinctions have been eroded over the years. This is primarily due to the interchangeability of rural and urban experiences, as well as people. A person who resides in a city in South Africa is highly likely to have a second rural home in a rural area, an 'original' home occupied by his parents and grandparents. Likewise, a product sold in a city and produced in a rural area may be sold and bought by an urbanite but is still fully a 'rural' product. What is true, however, is that the input and value of rural areas can often be invisible in the regular value chain of production and consumption, but are nonetheless very important in the way that heritage products and identity are produced and consumed. Rural areas are usually defined using the following criteria:

- The presence of crops**:** agriculture is generally assumed to be the principal activity of rural dwellers, while urbanites are thought to engage in industrial activities. However, the level of agricultural activity in most rural areas of South African has markedly decreased - the Eastern Cape, for instance, is regarded as one of the most de-agrarianised zones in Africa (Bryceson 1996). However, this does not mean that residents in rural areas do not own and use rural resources. In fact, many residents own stock – goats, sheep and cattle are still fairly popular – and most will define themselves as 'rural' residents, based on their history in a specific area. Urban residents in South Africa, even in the largest cities, will make use of rural connections, resources and traditions while they are living in town, and will continue to draw on their rural roots and sometimes even maintain a home there. In rural areas land availability and extended family networks create an incentive for re-investment by urban migrants. Thus, while agriculture might not be the dominant activity in rural areas, the identity of rural residents will always depend on more than just agriculture, but on the ability to access rural resources and networks (Hebinck and Shackleton 2011).

- Lower population density**:** in censuses rural and urban areas are usually defined by size - a population density of 500 people or more per square kilometre, parallel or grid-like street patterns, and the presence of public buildings such as parks, cemeteries, or library are standard indications of urbanity. However, the population of 'rural' towns has markedly increased during the last few decades (FHISER 2011). Often census data does not reflect such and increase because migration, particularly from outlying rural areas to towns, is usually not reflected in census data, which makes the idea of discrete rural and urban residents unreliable. StatsSA itself (2003) admitted this in 2003 when it said that around 1.25% of the population in South Africa had been misclassified as rural. In fact, many urban zones in rural areas are too small. A Small Town Regeneration project in nine different towns in the Eastern Cape (FHISER 2011), as well as a housing needs project in Alice (FHISER 2012), reflected that like many other small towns in the Province, Alice has a shortage of accommodation. This was partly due to the rapid expansion of the urban housing market during the last decade, particularly increased numbers of students and civil servants. The re-classification of communal land to urban status surrounding Alice – as many other towns in the country - cannot not take place fast enough, which puts pressure on development and housing expansion in these areas. Thus, together with increased levels of migration to large urban zones, smaller rural towns in South Africa are also experiencing a mini-boom of in-migration, due to the ability of civil servants (and associated businesses) to make a living.

- Rural out migration: In South Africa the economic migration of people from rural areas is an entrenched pattern that has continued beyond 1994, and as Gelderblom (2005: 6) estimated in 2004, over 206 000 people left the Eastern Cape, with Gauteng receiving 262 00 people and the Western Cape another 143 000. However, rural areas such as Limpopo and the Eastern Cape tend to support circular migration more than permanent migration to urban areas. Circular migration does not necessarily involve relocation to a large city (like Cape Town or Johannesburg), but temporary relocations to nearby urban zones and a periodic return to a rural home base. While the income produced by a circular migrant is therefore periodic, at best, a rural household can generate income through state grants and can (in theory) be relatively self-sufficient using arable land and stock for production. This is the reason why some small towns in rural areas have experienced a boom in population numbers, to such an extent that housing is not always available.

Table 2: Estimated provincial migration streams, 2006-2011 (Source: StatsSA, Census 2011)

	Out- migrants	**In- migrants**	**Net Migration**
EC	240 751	164 859	-75 892
FS	129 430	121 612	-7 819
GP	574 816	1 067 668	492 852
KZN	229 177	222 622	-6 555
LIM	295 479	228 801	-66 678
MP	181 907	219 475	37 569
NC	70 688	68 098	-2 590

NW	179 748	247 157	67 409
WC	177 833	331 444	153 611

As the information above from Stats SA indicates, the two main urban centres in South Africa (Gauteng and the Western Cape) attract the highest numbers of in migrants. Provinces such as the Eastern Cape and Limpopo have the highest number of out migrants, while rural provinces such as Mpumalanga and the North West are actually experiencing the opposite. Mining is an attraction in the latter province, while burgeoning centres such as Nelspruit and Polokwane in Mpumalanga explains increased levels of migration to this province.

- Rural to urban weighting: The last issue to consider when defining the scope of 'rural' in South Africa is that rural municipalities may themselves differ widely according to the weighting of urban and rural residents within their geographical area. To draw on a case study in the Eastern Cape, in the erstwhile Nkonkobe local municipality, Census 2011 classified 39.9% of households as urban, and 60.1% as rural and farm based. This is relatively urbanised compared to a rural municipality as Instika Yethu, which only has 3% of people living in urban areas such as Cofimvaba (FHISER, 2015). In many areas of Mpumalanga, houses in rural settlements are so closely spaced together that they resemble urban townships. McHale (pers.comm) has mentioned that increased levels of migration to rural towns has prompted a reclassification of rural areas and smaller towns. The idea of the 'new urban' is based on the fact that some rural towns have actually become urban in their layout, and as more people have clustered around resources, and have been affected by historical resettlements and economic disparities. However, people may still have rural livelihoods, networks and outlooks.

Urban residents clearly do have different levels of access to communication and information depending on the level of service delivery and infrastructure in their respective areas. A study conducted for the Office of the Premier in the Eastern Cape (FHISER 2006) has shown that urban households have, on average, access to twice as many basic services as rural households in the Eastern Cape. This means that they are primarily consumers of products, through their buying power, but also that they have the necessary markets and networks to market local produce and products, more so than their 'rural' counterparts.

However, the fact that there are such close linkages between rural and urban areas in South Africa means that rural cultural and heritage practitioners are much more connected, resourceful, and are able to potentially produce a much better (and diverse) product than before. A vastly improved means of access to the internet, and a particular preference for using mobile devices to access the internet. This has increased people's ability to keep in touch with national and international trends and information. Census 2011 has reflected that in general, households in South Africa are becoming more modernised in terms of possessing more electronic goods. For instance, the proportion of households using cellphones increased from 21,5% in 2001 to 81,9% in 2011. The proportion of households owning radios decreased from 64,3% in 2001 to 61,1% in 2011, while households owning television sets increased from 39% in 2001 to 63,2% in 2011 (FHISER 2016).

Profile of Cultural and Creative Industries in South Africa

This section will illustrate some of the key trends of CCIs in rural areas of South Africa. SACOs Plus 94 data has been used in order to (a) develop a profile of the type of cultural industries in each area and which domain they can be grouped within, (b) the amount and percentage of rural industries that each province may contain. It must be noted that this data does not contain all the information available on heritage sites, routes, events, and CCIs in South Africa. It only gives an indication of what has been captured thus far. Using the Plus 94 data, rural CCI types and domains were classified using the following criteria:

(a) Information concerning the eight metropolitan areas in South Africa was sifted through for rural based CCIs not based within the inner city areas of these metros. In Buffalo City, for instance, CCIs that were located in East London city and Mdantsane were excluded and categorised as urban. King Williams Town is defined by Stats SA as rural town, so this information was included as 'rural'. In NMM, CCIs within the areas of Port Elizabeth city were excluded – but CCIs in Despatch and Uitenhage were included since these areas are predominantly rural. Likewise, CCIs in Cape Town excluded those that were based in the city itself, but included some that were based on farms around Stellenbosch and Paarl. Importantly, sifting through for the incidence of rural or urban CCIs required some knowledge of the area itself and could only be done manually by looking at each individual entry.

(b) Some provinces were treated as completely rural. This included:
- The Northern Cape
- Limpopo
- Mpumalanga and
- North West

The following provinces were treated as partially rural due to the presence of metropolitan areas:

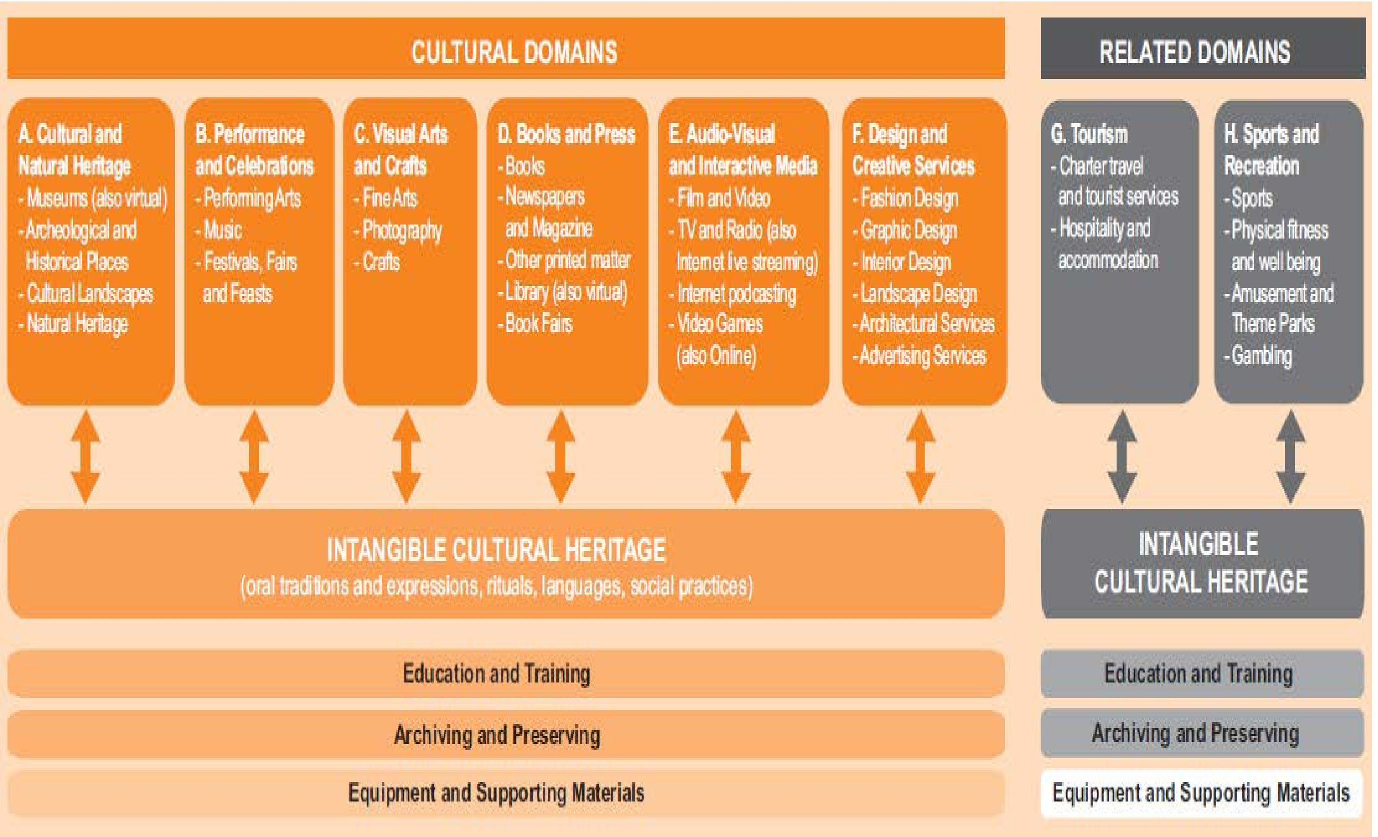
- Eastern Cape
- Western Cape
- KwaZulu Natal
- Free State

The entries for Gauteng appeared to be almost 100% urban, and therefore this province was omitted and categorised as urban.

(c) SACO had classified the available Plus 94 data according to the following domains, as illustrated by the UNESCO matrix:
- Cultural and natural heritage sites (A))
- Performance and celebration (B)
- Visual arts and crafts (C)
- Books and Press (D)
- Audio Visual and Interactive media (D)
- Design and creative services (E)

The related domains of tourism (G) and sports and recreation (H) were not classified as such and only in selected provinces. This facet of intangible heritage thus remains to be fully classified by SACO. Intangible domains were not classified at all.

Figure 1: UNESCO Matrix of intangible and tangible cultural and heritage domains



The Plus 94 database provided by SACO was previously cleaned (by SACO) in order to provide a more accurate picture of CCIs in different provinces. As indicated by Snowball and Tarentaal (2016) the result has been a marked overestimation in the number of CCIs within the domains of culture and national heritage (A), Performance and celebration (B), information books and press (C) and audio visual and interactive media (D). The only sector that seemed to have been underestimated was design and creative services (E). Notably, these observed inaccuracies only applies to data within the database and not to all the data concerning CCIs in South Africa, which is much more than this database suggests. Thus, Snowball doubts that the picture of CCIs by domains in the Plus94 data report is accurate, particularly because there are a very small number of entries in Domain A – Culture and Natural Heritage. Snowballs cleaned data reflects the following:

Table 3: Original and Re-classified mapping data (SACO, Snowball 2015)

Domain	Sorted Total	Reclassified Percentage	Original Number	Original Percentage
A Cultural and Natural Heritage	169	0.78%	1958	8.4%
B. Performance and Celebration	2469	11.33%	3747	16.2%
C. Visual Arts and Crafts	3460	15.88%	3455	15%
E. Information, Books and Press	3603	16.54%	2077	9%
F. Audio-Visual and Interactive Media	629	2.89%	1242	5.5%
G. Design and Creative Services	11124	51.06%	10592	45.9%

H. Other	332	1.52%		
Total	21786	100.00%	23071	100%

This report would add that the similarly small number of entries in the tourism and sport/recreation (F and G domains), as well as the omission of intangible heritage as a whole, would also suggest additions to the Plus94 data. The Plus 94 data does not illustrate the specific number and extent of all CCIs in South Africa, but is a general indicator to illustrate trends within each province. Rural industries are even more difficult to pinpoint than in urban areas. In each province, for instance, there were a few entries that seemed to be placed in the incorrect province. The reason for this may either be due to human error, or may also be an indication that an industry's market base is in an urban area (such as Cape Town), but that its production takes place in rural areas of the country (such as the Eastern Cape). Thus, what we have done is to provide information from the cleaned Plus94 data about the characteristics of rural CCIs in South Africa in combination with other data. The Plus 94 data has been combined with the following:

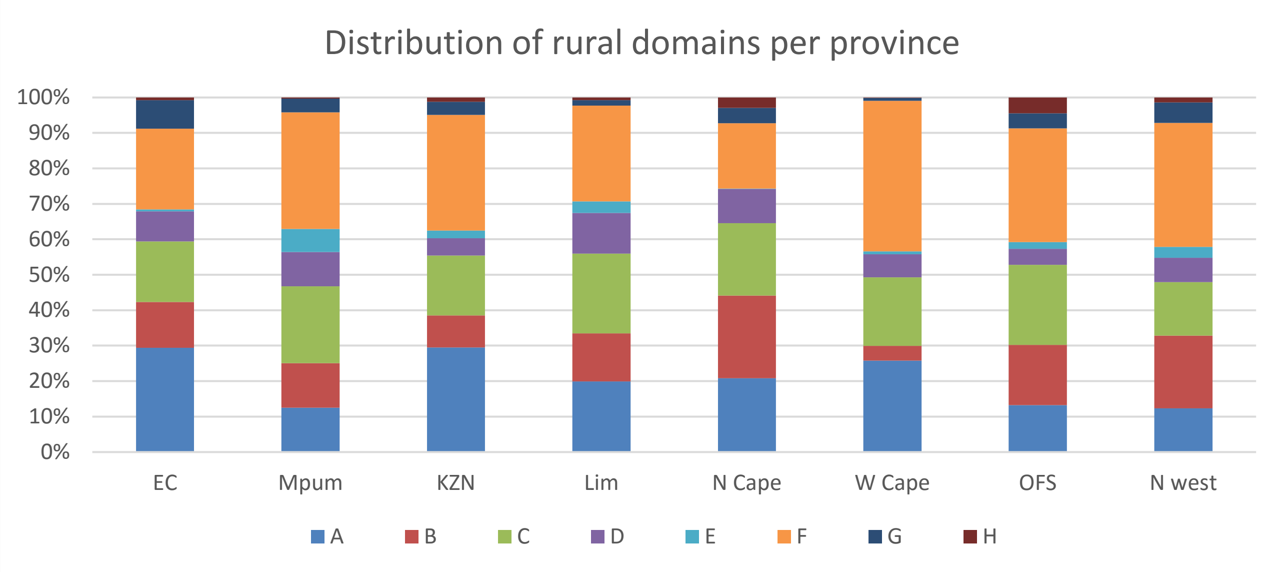
- Heritage resources per province – including national and provincial monuments (SAHRA database)
- Agricultural activity per province (Census 2011, Community Survey 2016, Commercial Agriculture survey 2007)

The table and graph below gives an indication of the distribution of each of the domains (A to H) in each of the 8 provinces included in the database. We have used this to inform a discussion of each province, as it is difficult to create a regional picture of these industries and associated policies based on a description of the domains alone. What is clearly apparent, however, is the strength of domains A (culture and natural heritage) as well as F (Design and creative services), followed by C (visual arts and crafts).

Table 4: Distribution of CCI domains in rural areas in South Africa (Plus 94 dataset)

Domain	EC	Mpum	KZN	Lim	N Cape	W Cape	OFS	N west
A	29.8%	12.4%	29.5%	19.9%	20.7%	25.8%	13.2%	11.8%
B	13.1%	12.5%	9.1%	13.6%	23.1%	4.2%	17%	19.5%
C	17.3%	21.5%	16.9%	22.5%	20.2%	19.3%	22.6%	14.4%
D	8.6%	9.6%	4.9%	11.4%	9.6%	6.5%	4.5%	6.6%
E	0.5%	6.5%	2.1%	3.3%	0.1%	0.8%	1.9%	2.9%
F	23.1%	32.6%	32.7%	27%	18.3%	42.5%	32.1%	33.4%
G	8.1%	3.9%	3.7%	1.5%	4.3%	0.8%	4.2%	5.5%
H	0.8%	0.3%	1.2%	0.8%	2.9%	0.15%	4.5%	1.3%

Figure 2: Distribution of rural domains per province



The next table below illustrates the representation of rural industries as a whole within those four provinces that have large urban areas. Here, the Free State has the largest number of rural industries, followed by the Eastern Cape and KwaZulu Natal. Interesting, the Free State also has the highest number of commercially active agricultural units in South Africa.

Table 5: Rural CCIs within metropolitan provinces

Province	Percentage
Eastern Cape rural	28.8%
Western Cape Rural	11.7%
Free State Rural	46.7%
Gauteng Rural	n/a
KwaZulu Natal Rural	22.9%

In order to gauge whether a province is rural or urban, we have primarily used agricultural figures from Census 2011, and the Community Survey of 2016. This data primarily concerns household activities in South Africa. As illustrated by Table 6, as a chiefly urban province, Gauteng had the lowest amount of households involved in agriculture. The Western Cape had the lowest level of agricultural activity per household after Gauteng. ALL provinces demonstrated a marked decline in household agricultural activity, which means that far more people are depending on external livelihood sources such as grants, pensions and urban remittances for their income.

Table 6: change in the number of agricultural households 2011-2016

	Agricultural households				
Province	**Census 2011**	**CS 2016**	**% Change**	**Difference**	**% contribution**
WC	84 57	69 152	-18.2	-15 22	-0.5%
EC	596 573	95 02	-17.0	-101 531	-3.5
NC	55 150	8 798	-11.5%	-6 525	-0.2

KWZN	717 006	536 225	-25.2	-180 781	-6.3
NW	214 09	167 780	-21.6	-180 781	-6.3
GTENG	279 110	22 594	-13.1	-25 516	-1.3
MPML	263 391	225 282	-14.5	-28 109	-1.3
LIM	468 494	386 660	-17.5	-81 834	-2.8
RSA	**2 879 638**	**2 329 043**	**-19.1**	**-550 595**	**-19.1**

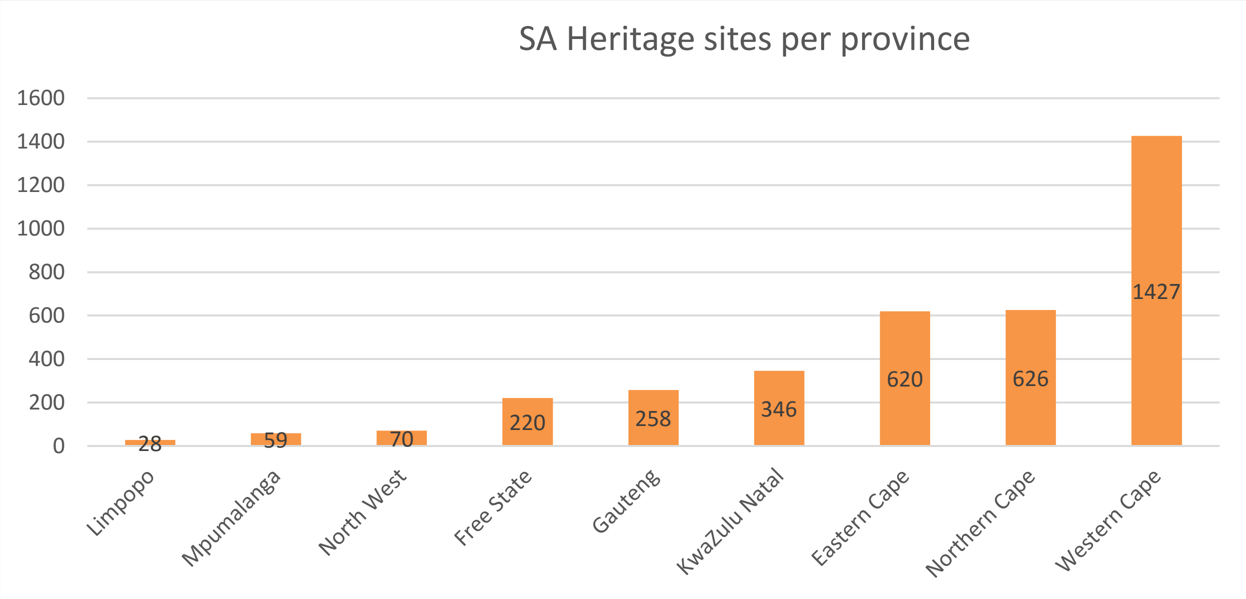
However, this information does not provide an idea of agricultural activity in each province, as it excludes commercial farming. In the Western Cape and Gauteng respectively, the number of commercial farmers actually exceed the number of subsistence household farmers – which means that commercial farming dominates in these zones. As the below 2007 information from Stats SA illustrates, commercial farming units are the highest in the Free Sate, followed by the Western Cape and Northern Cape – all maize, wheat and fruit producing areas – followed by the North West and the Eastern Cape. Thus, balanced with the decline in the number of agricultural households in South Africa, commercial farming is certainly very active and increasing in certain zones. When combined with rural tourism, farming activity is particularly important for defining the nature and character of rural industries. As mentioned previously, this may have a positive effect in developing CCIs, as the spin offs from commercial agriculture are far greater than those associated with subsistence activity.

Table 7: Number of farming units per province (StatsSA Census of Commercial Agriculture 2007)

Province	Number of farming units
Eastern Cape	4 006
Free State	7 473
Gauteng	1 773
KwaZulu Natal	3 574
Limpopo	2 934
Mpumalanga	3 523
North West	4 902
Northern Cape	5 125
Western Cape	6 653
South Africa	33 966

The SAHRA database used in this document includes those sites, items and places that defined as provincial, natural or national monuments and heritage sites. The graph below depicts the distribution of these sites nationally, and here the leading provinces are the Western Cape (1427 sites), the Northern Cape (626 sites) and the Eastern Cape (620). Again, this information will be used to illustrate specific trends within each province. In total, we counted around 1006 (27.5%) urban heritage sites and 2648 rural. This means that the majority of sites - 72.5% - are in rural areas. This gives a good indication of the richness of rural areas for CCI development and tourism. The Western Cape, in particular, has an extremely well developed heritage sector, and the success of CCIs (particularly craft) is a testimony to how well heritage has been used to inform economic development of these small industries.

Figure 3: SA heritage sites per province (SAHRA database)



Provincial analyses

The Eastern Cape

Table 8: Distribution of CCI domains in the Eastern Cape (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	107	29.8%
B: Performance and celebration	47	13.1%
C: Visual arts and crafts	62	17.3%
D: Books and Press	31	8.6%
E: Audio Visual and Interactive media	2	0.5%
F: Design and creative services	83	23.1%
G: Tourism	29	8.1%
H: Sport and Recreation	3	0.8%
No data		
Total rural CCI	359	28.8%
Total urban CCI	888	71.2%
Total entries	1247	

The Eastern Cape is the third most populous province in South Africa, containing 12.6% of the national population, based on a 2015 projection from 2011 census information. As the above figures show (Cencus 2011), 35.4% of households were engaged in agriculture (livestock, domestic and commercial crop production). In 2016, the Community survey showed a sharp drop in the number of agricultural households to 27.9%, in line with declines around the country. The province appears to have a very high number of cultural and heritage sites in rural areas (28.8%), more than KwaZulu Natal. This can be viewed in conjunction with the SAHRA database, which indicated that the Eastern Cape as whole has the third highest number of declared heritage sites in the country (620), after the Western and Northern Cape respectively.

The number of CCIs In domain B (performance and celebration was average, approximately the same size as all the other provinces, except for the largest – the northern Cape. The number of visual arts and crafts industries was the second lowest among the province, while industries in domain D were average, at 8.1%. Design and creative services in the Eastern Cape lagged behind, and was the second smallest at 23.2%, just above the Northern Cape. Tourism was relatively large in comparison to provinces such as Limpopo, and was the largest of all the provinces in the dataset. Sport industries amounted to 3 in the Eastern Cape.

Both the tourism and sporting figures can be viewed with some degree of scepticism. The South African Events Calendar lists 19 events for the Eastern Cape in 2016, 12 of these rural and 7 urban. This does not include the amount of markets, music clubs and smaller artistic events hosted in the Eastern Cape, which do not feature in national and provincial tourism sites. Likewise, the existence of only two audio visual CCIs (these being radio stations) is also highly unlikely. Both of these are underestimations.

The greatest omission in the Plus 94 database is that of craft enterprises which constitute a major component of rural CCIs, as well as rural cultural policies in South Africa. 1998, the South African Craft industry report counted 83 retail outlets for crafts in the Eastern Cape, with a further five craft markets and three cultural villages – since then, another two villages have been added. More recent initiatives includes a 2016 ECDC funded craft collection store in East London worth 23 million ZAR, which showcases and markets the works of more than 80 enterprises. In 2014 the ECDC also launched a craft catalogue, and in 2015 crafters funded by the ECDC exhibited their work at more than three local exhibitions. The craft industry therefore appears to be a relatively well funded and marketed CCI in the Eastern Cape. The Eastern Cape Parks and Tourism agency reflects a total of five tourist and heritage routes in the province, another 21 art and craft galleries and centres, as well as 62 craft making enterprises. Most of these (55) are based in rural areas of the province, while the arts and crafts galleries are almost entirely based in urban areas such as East London and Port Elizabeth. The craft market clearly lies within urban zones, while the production takes place in rural areas.

A second factor to consider in rural areas in the Eastern Cape is that of hunting, which according to the 2007 agricultural survey, was the second most prevalent in the Eastern Cape, after Limpopo. Hunting is a very important part of the rural economy in southern Africa, sometimes outstripping tourism income from national parks. During 2004 it was estimated (by the Weekend Post 25 June 2005) that the number of hunters in South Africa had shot some 53453 animals worth 40.7 million USD. Snijders (2012) estimates that up to one sixth of South Africa's total arable land surface has been privately game ranched in some form or another since 1990. However, besides the fact that many people are employed in the hunting tourism sector, these businesses are wholly owned by elite farmers and operate within a niche market (including taxidermy), with minimal spill over into regional tourist markets. This, in combination with wildlife sales, as well as a very high number of ostriches and horses in the Eastern Cape, makes rural areas of the province very marketable. As the below table illustrates, the Eastern Cape is a productive zone for ostrich, game farmers and horse farmers.

Table 9: Provincial distribution of game, horses and ostriches (2007 StatsSA commerical farming survey)

Province	Horses	Game live sales	Game: hunting	Ostriches
Eastern Cape	20 586	28 818	37 720	46 827
Free State	6786	13 738	13 287	4 985
Gauteng	7573	5 839	5 049	213

KwaZulu	17478	8 822	12 267	14
Limpopo	393	60 826	77 750	43
Mpumalanga	377	31 711	12 243	10
North West	12939	35 274	19 429	21
Northern Cape	11363	11 424	16 066	1660
Western Cape	68 797	7 245	3 805	363 084

In terms of tourism, bed nights compared to previous years in the Eastern Cape appeared to have dropped. In 2003, 2004 and 2005 the province attracted 6% of the national share of international bed nights, but in 2015 this was 3.5%. Tourism figures are in general very mixed for the Eastern Cape in 2015 and 2016. Specific events such as the Ironman hosted by NMBM and Buffalo city attracted between 7641 and 10965 guests, but figures in 2015 compared to 2014 appeared to have dropped in NMBM and Buffalo city by 13.8% and 4.3% respectively (Eastern Cape Tourism Baraometer 2016). Tourist arrivals in 2015 also have dropped to 4.4%. However, nature reserves such as the Addo Elephant Park, Camdeboo, garden route and the Mountain Zebra Park all had increased figures from 2014 to 2015 – the Garden Route showing a growth rate of 13.5%. The barometer also indicates that 3.2 million domestic trips were made to the province in 2014, nearly tripling the figure of 2013.

Table 10: National Tourist arrivals 2016 (Source: Tourism South Africa)

Province	Percentage
Gauteng	49.4%
Western Cape	18.6%
Mpumalanga	14.1%
Limpopo	13%
KwaZulu Natal	11.8%
Free State	7.3%
North West	6.6%

Table 11 Eastern Cape Park Visitors 2014/2015 (Source: SANParks Annual Report 2014/2013)

Park	Park Visitors	Annual growth
Addo Elephant Park	204 881	10.1%
Camdeboo National Park	37 326	15%
Garden Route	376 458	13.5%
Mountain Zebra	24 426	4%

In order to illustrate the different variations of what is meant by rural and the dynamics of small rural towns, one can draw selectively on studies conducted in various small towns in the Eastern Cape (FHISER 2015). These have all been managed, funded and partially implemented by ASPIRE, the development agency for the Amathole District Municipality, which has also focused on corridor development in the wider ADM. Corridor development has focused on 27 rural towns in the footprint of the three corridors, specifically on the N2, the R63, and the R72.

ASPIRE: Alice and Bedford

The spatial development plans borne out by ASPIRE in the Eastern Cape is the latest in a series of sub national strategies focusing on Spatial Development Corridors (SDIs), which spearheaded economic policies in the early 2000s. In the Eastern Cape this includes the Fish River SDI, as well as the Wild Coast SDI, which unfortunately did not evolve into integrated development strategies. Industrial Development Zones (IDZs) and Special Enterprise Zones are in part an update on SDIS, but were more regionally relevant in urban zones. ASPIRES focus on regional development of small towns, and corridors in the rural Amathole region, is part of a reworking of these strategies, and echoes the Regional Industrial Development programme (national), that had placed a particular emphasis on decentralised industrial development in the ex-homeland areas of South Africa. However, there has not been much traction with regard to provincial implementation of these plans except in cases where organisations gained leverage from international and private donors (Harrison and Mathe 2010; Haines 2014*)* In the case of ASPIRE, EU funding for small town development did result in significant infrastructural changes for these areas, but also in a more concerned inclusion of heritage and cultural items.

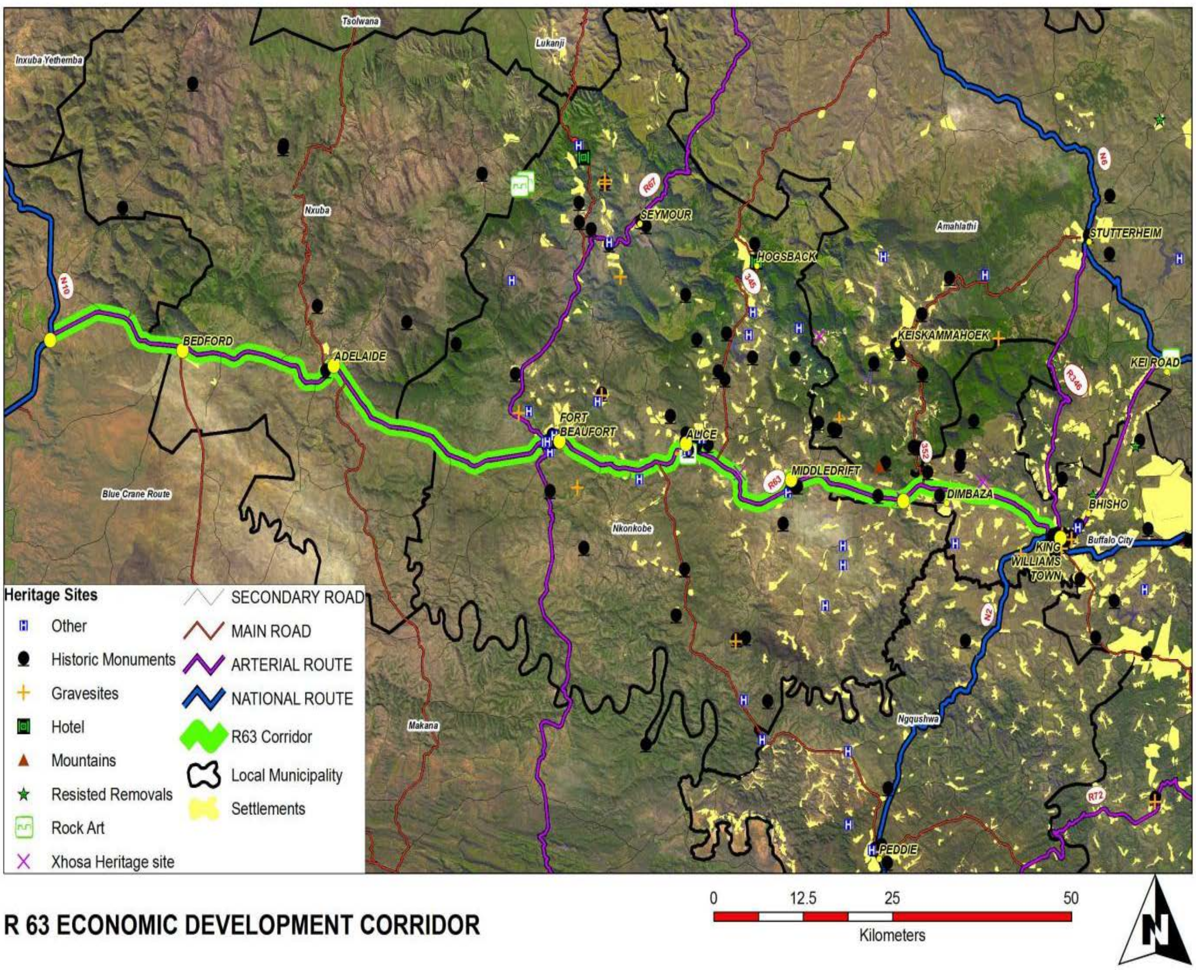
ASPIRE was established in 2008, previously known as AEDA, and is the primary vehicle of rural development in the Amathole municipal area. As the IDP of the previous Nkonkobe and Ngqushwa municipalities reflect, heritage and cultural issues are mainly subsumed under a tourism and environment description of existing resources and plans for development of these sectors. ASPIRE works directly with a number of agencies, including the ECDC, the Border-Kei Chamber of Commerce, the Amathole District Municipality itself, the Eastern Cape Parks Board and the Buffalo City development Agency. Funders for initiatives include the EU, who funded around R700 000 for an essential oils project in the R63 corridor. However, since 2015 ASPIRE has generally not functioned well and has been under investigation for mismanagement.

The historic town of Alice is home to the University of Fort Hare, where many of Africa's political and business leaders gained their education. Today, some 43 000 people live in this small town and it is the economic centre for people who live in 56 surrounding villages. During 2009, ASPIRE developed a framework for a small town regeneration programme, which specifically concentrated on the Alice CBD, where urban densities were higher than 10 units per hectare. The regeneration programme has the following key areas of development:

- ICT (24)
- Heritage assets (Lovedale College, ZK Matthews house, University of Fort Hare)
- CBD upgrading – upgrading buildings and open spaces.
- Heritage: conference centre and lodge to be created
- Upgrading of professional and student accommodation, as well as social housing
- Upgrading and provision of student accommodation
- Developing local agriculture and key business

Alice houses the historic Lovedale College, as well as the University of Fort Hare. Furthermore, Alice is located at the foothills of the Amathole Mountains, at the entrance to Hogsback. However, despite these attractions, they are not developed, and in most cases are poorly advertised, and not well maintained. ASPIRE and Neda (the Nkonkobe Economic Development Agency) were commissioned to investigate possibility of creating more accommodation, particularly for students and tourists, since the town lacks guest establishments and rental housing. Lovedale College also embarked on the creation of a craft centre, and cooperative vegetable gardens near the school. A memorial park and a small walking trail within the town, passing through most the heritage sites, was also created. Currently, although many of the ideas for housing and accommodation were not created, the town of Alice has gained a regeneration of heritage sites, including Bokwe's grave and ZK Mathews' house, as well as a new heritage park and route.

Bedford is a small town located in the Nxuba Local Municipality, which is the smallest municipality by population numbers in the Eastern Cape. Bedford contains 24.1% of residents in the local municpality, with an 18% rural component, while Adelaide contains 47.8%, with an 18.1% rural component. Bedford is located near the Winterberg Mountains, and is regarded as an artist's haven and retirement village. It is only two hours away from Port Elizabeth, and property development for middle class retirees has boomed. There are plenty of local accommodation establishments, as well as three craft and gift shops – including a large Art and Craft shop, as well as hand-made furniture and traditional craft venues. One furniture shop has over 20 registered artisans and has attracted funding from Telkom. Since 2008 Bedford has also hosted thea very popular garden festival, and has a few game farms situated along the southern edge of the town. Sporting activities such as trail running, hiking, and hunting are popular in the area. However, there are still very high levels of unemployment in the town, and very low levels of literacy (only 68.9% have grade 7). Bedford has potential of being a tourist attraction, however there is no defined 'tourism destination brand', and serious lack of regular gathering of logistics, and lack of aggressive marketing, and investment in the local tourism sector.



Mpumalanga

Table 12: Distribution of CCI domains in Mpumlanga (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	76	12.4%
B: Performance and celebration	77	12.5%
C: Visual arts and crafts	132	21.5%
D: Books and Press	59	9.6%
E: Audio Visual and Interactive media	40	6.5%
F: Design and creative services	200	32.6%
G: Tourism	24	3.9%
H: Sport and Recreation	2	0.3%
No data		
Total rural	614	100%
Total urban		

Mpumalanga is the second-smallest province in South Africa after Gauteng, is located in the north-eastern part of the country, bordering Swaziland and Mozambique to the east. It also borders Limpopo, Gauteng, Free State and KwaZulu-Natal within South Africa. It covers an area of 76 495km² and has a population of 4 335 964, making it the sixth most populous in the country. It is situated mainly on the high plateau grasslands of the Middleveld, which roll eastwards for hundreds of kilometres. In the north-east, it rises towards mountain peaks and terminates in an immense escarpment. In some places, this escarpment plunges hundreds of metres down to the low-lying area known as the Lowveld.

According to SAHRA, the province has 63 listed provincial heritage sites, and objects, which is less than the 76 listed in the Plus 94 dataset. This includes natural suites such as waterfalls and other objects of natural significance, buildings, and monuments. Towns listed include Sabie and Pilgrims Rest (6 sites), Barberton (8), Belfast (2), Bethal (2), Carolina (3) Ermelo (5), Lydenburg, Origstad and Evander (10), Middleberg (10), Piet Retief and Nelspruit (3), Waterfall Boven and Wakkerstroom (7) and Witbank/Belfast (2). Private and national protected areas include the Kruger National Park the Blyde Rivier Reserve, Djuma Game reserve, Lion Sands, Londolozi, Sabie Sabie and Sabie Sands, Singita, Timbivati, Mala Mala and Ilusaba Game Reserves. Provincial Parks include Loskop Dam, Mahushe, Mdala, Mkhombo, Mthethomusha, Nootgedacht Dam, Origstad Dam, Songimvelo game reserve, SS Skosana nature reserve, and Verloren Vallei reserve. Tourist routes in Mpumalanga are the Highlands meander, Panorama Route, Mpumalanga Heritage route, Lowveld Legogate and the Wild Frontier.

This province was treated as entirely rural, so that all of the 614 entries in the Plus 97 database were classified according to their inclusion into rural CCIs. Here the number of cultural and natural heritage sites was far lower than that of the Eastern Cape, mainly due to the fact that Mpumalanga is the smallest province in South Africa by virtue of population figures, and the smallest rural province through size. The SAHRA database also reflects that Mpumlanga has the second lowest number of cultural and heritage sites in South Africa, being 59. Mpumalanga has 13 protected areas, including the southern Kruger Park and reserves such as Sabi Sabi, but is lower than provinces such as Limpopo and the Eastern Cape. Domains B and D are similar to the Eastern Cape, although a bit smaller. However, Mpumalanga outdoes the Eastern Cape in three domains:

- The arts and crafts market (C) is far larger than that of the Eastern Cape, mainly due to the presence of the Kruger National Park and other well-developed tourist routes through Lowveld towns such as Sabie and Pilgrims Rest.
- Likewise, in domain E (Audio Visual and Interactive media) Mpumalanga is also active – the number of CCIs here are 40 compared to 2 in the Eastern Cape.
- Lastly, domain E (Design and creative services) is also high and where Mpumalanga outshines the Eastern Cape.

Notably, Mpumalanga attracted the third highest share of international tourists after Gauteng and the Western Cape, this being 14.1% in 2015. The Kruger National Park recorded an increase of 8% from 2015 to 2016, while in and around Hazyview there was an increase of 5%. Again, this can be attributed to cultural and natural sites in the area – and the large craft market is an indication of the popularity of Mpumalanga to international and domestic visitors.

Agriculture in Mpumalanga is characterized by a combination of commercialized farming, subsistence and livestock farming, and emerging crop farming. Crops such as subtropical fruits, nuts, citrus, cotton, tobacco, wheat, vegetables, potatoes, sunflowers and maize are produced in the region. It is the highest producer of nuts and bananas in South Africa, and the second highest of subtropical fruit, and citrus (StatSa 2007)

In Mpumalanga each local municipality has their own IDP, in which the plans and progress of their focal areas are described – CCIs are usually subsumed in tot the category of Sport, has Mega – the Mpumalanga Economic Growth Agency. This was created some 20 years ago with a focus on housing, trade, SMMEs, agriculture, and development zones. Tourism and CCIs are not part of its mandate and MEGA has been under suspicion of mismanagement for a number of years.

As Rogerson and Sithole (2001) emphasise, development of tourism attached to areas of natural and cultural significance in Mpumalanga largely rests of regional initiatives, including local government and related agencies. In this regard the province has several – notably Maputo Corridor, a zone that runs through Limpopo, Mpumalanga and Gauteng and links industry and tourism up between Maputo and Gauteng. Mpumalanga is also the site of an important regional initiative related to tourism and heritage – the Kruger 2 Canyon Biosphere. The K2CBR is recognised as a Biosphere reserve site under UNESCO, and is the 411th Biosphere Reserve Worldwide. The K2C Biosphere Programme is a community-driven initiative which bridges Mpumalanga and Limpopo, and has R1.4 million dedicated to long term conservation of natural habitats. It the entire registered Biosphere Reserve area is 2.5 million hectares.

The number of craft industries in Mpumlanga is difficult to gauge. The last document produced was by CIGS (1998: 34), who estimated that there about 66 craft retail outlets in Mpumalanga, with three markets, and 10 cultural villages. The producers of craft are primarily people from rural areas, who were said to number between 400 and 500 in the province.

KwaZulu Natal

Table 13: Distribution of CCI domains in KwaZulu Natal (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	200	29.5%
B: Performance and celebration	62	9.1%
C: Visual arts and crafts	115	16.9%
D: Books and Press	33	4.9%
E: Audio Visual and Interactive media	14	2.1%
F: Design and creative services	222	32.7%
G: Tourism	25	3.7%
H: Sport and Recreation	8	1.2%
No data		
Total rural	679	22.9%
Total urban	2285	77.1%
Total entries	2964	

KwaZulu Natal is South Africa's second most populous province, containing 19.8% of the country's population. However, it is only the 6^{th} largest (among the nine provinces) in geographical size, making up 8.6%. It is one of the poorest provinces in South Africa, with nearly half of the youth being unemployed. Approximately 34% of the KwaZulu-Natal province population resided in eThekwini in 2011 and hence the metropolitan district was the most populous in the province. Second ranked is iLembe (north coast), which contains the highest population density after eThekwini. About 281 568 people left KwaZulu-Natal, with approximately 65% having migrated to Gauteng, followed by 10% who relocated to Mpumalanga. Approximately 174 228 people moved to KwaZulu-Natal from the other eight provinces, with Eastern Cape having the largest percentage (42,3%) of people that moved to KwaZulu-Natal as 2001 and 2011 was 12,4% and 11,4% respectively. In 2011, 10,6% of the population aged 20 years or older reported to have no schooling, 4,8% reported to have achieved tertiary qualification and 30,4% reported to have a matric.

In terms of agriculture, agricultural households in 2016 comprised 18.6%, in third place behind the Eastern Cape and Mpumalanga. The province showed a very sharp drop in the number of agricultural households, a decrease of 6.3% or 180 781 households from 2011 to 2016. Commercially, KwaZulu Natal had the fourth largest commercial farming income in South Africa, and in 2007 generated 606 154 from income associated with farming – including agri-tourism, land rentals, accommodation and eco-tourism.

According to the SAHRA database, KwaZulu Natal ranks fourth amongst the province with regard to heritage sites – these sites number 346 in the province in total, which is higher than the Plus 94 dataset. This report suggests that KwaZulu Natal has the highest number of cultural and natural heritage sites in rural areas out of all three provinces discussed thus far. This can be attributed to the presence of national and provincial game reserves such as the Londolozi complex, Maputaland and St Lucia, and numerous historical sites related to the Zulu and colonial empires. It lags a bit behind both the Eastern Cape and Mpumalanga with regards to Domain B, C and D, particularly with books and press. The number of design and creative services (F), however, is very high, and similar to Mpumalanga. Tourism (G) is also comparable to Mpumalanga. Unfortunately the Plus 94 database only lists 8 sporting sites

Municipalities in KwaZulu Natal do not appear to have a coherent heritage or cultural policy. Heritage is mentioned in the Ethekwini IDP but only in passing reference to a general set of values to be developed. The KwaZulu Natal tourism sector is well developed, and has a coherent website which is well referenced and utilised. DAC mentions that KwaZulu Natal, however, has one of the foremost craft industries in the country, and has a well-developed network of crafters as well as numerous initiatives and workshops aiming for development of the craft sector. This includes the St Lucia Wetland complex, as well as the craft industries associated with this and other natural areas in the Province. In 2009 the Department of Economic Development in KwaZulu Natal published a business plan for a craft hub and database. The plan found potential for development of the craft market in the Province – the number of active full time craft producers in the province (9374) represented 29.7% of the national total, and actual sales represent only 13% of the national total, with craft producer income a corresponding 13% of the national total.

Limpopo

Limpopo Province is the northernmost area in South Africa, adjoining the Kruger National Park to the east, and Zimbabwe to the north. It is relatively large, and with the exception of Gauteng, containing the second highest population behind the Western Cape. It has the least amount of heritage sites in the country, according to SARHA (0.8%), and is also the second smallest commercial farming zone in South

Africa. It has, however, the highest number of game hunted and sold in South Africa – far above Mpumalanga and the Eastern Cape. This is by far Limpopo's most valued asset, as it is based on an international market for game products and hunting safaris.

With regard to the Plus 94 domains, Limpopo's domain A is very similar to the Northern Cape, while Visual Arts and Crafts is one of the biggest in the country. Design and creative services is the smallest rural sector in South Africa.

Table 14: Distribution of CCI domains in Limpopo (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	120	19.9%
B: Performance and celebration	82	13.6%
C: Visual arts and crafts	136	22.5%
D: Books and Press	69	11.4%
E: Audio Visual and Interactive media	20	3.3%
F: Design and creative services	163	27%
G: Tourism	9	1.5%
H: Sport and Recreation	5	0.8%
No data		
Total rural	604	
Total urban		

Limpopo Province has some of the lowest numbers of CCis in domains A (Cultural and heritage sites), and G (tourism). However, it has the highest numbers of CCIs involved in performance and celebration

Western Cape

The Western Cape is overtly urban in nature. Thus, the distribution of CCIs is predominantly urban, with rural industries only representing around 11.7% out of a total of 5520. This is echoed by the 2005 Craft Industry Report (Kaiser 2005), where 85% of craft industries in the Western Cape were located in the city of Cape Town. All inner city suburbs were considered urban in nature, as well as outer city areas such as Stellenbosch and Paarl. Some CCIs were still selected as rural in these areas, however, based on whether they were located on farms or in towns. The majority of rural CCIs were located in towns such as George, Knysna and the Overberg. It is possible that some urban CCIs could be rural, and vice versa, as the data selection process was based on prior knowledge of the area.

Table 15 : Rural CCIs in the Western Cape (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	167	25.8%
B: Performance and celebration	27	4.2%
C: Visual arts and crafts	125	19.3%
D: Books and Press	42	6.5%
E: Audio Visual and Interactive media	5	0.8%
F: Design and creative services	275	42.5%
G: Tourism	5	0.8%
H: Sport and Recreation	1	0.15%
No data		
Total rural	647	11.7%

Total urban	4873	88.3%
Total	5520	

The majority of South Africa's cultural and heritage sites, as shown in the SAHRA dataset, is overwhelmingly located in the Western Cape – almost 40%. The majority of CCIs in the rural Western Cape appear to be design and creative services, much more so than any other rural area or province in the dataset. The Western Cape also has the greater share of tourism and commercial agricultural figures in South Africa – and also has a much larger and developed CCI and craft industry than any other province. The Craft Industry report, produced in 2005 (Kaiser and Associates) was one of the first of its kind in South Africa and provides a good basis for understanding the scope of the industry, and its specific challenges.

The craft sector in the Western Cape is the second largest in South Africa, and in 2005 was estimated to include 27% of the market, or 1662 enterprises. The key characteristics of the Western Cape crafts sector include strong retail and commercial possibilities for products, particularly within the tourist market. Most products have a strong urban focus, with a diverse cultural influence, and therefore occupies a relatively sophisticated 'high end' craft focus. Although the industry has a high degree of fragmentation, with people mostly operating in the informal sector and on a micro scale, there are relatively established industry organisation and support structures for craft industries in the Western Cape. However, as with most craft industries, people have weak business skills, and have a tendency to work on supply, not demand. The 2005 study also noticed that there was some exploitation and suspicion associated with the craft market, especially since many industries used intermediaries due to inadequate business or financial training. There was also an inadequate reach into rural communities of the Western Cape, and the market in the province had little traditional skills due to the presence of an immigrant community. In 2005, many craft markets in South Africa were beginning to show the influence of immigrant communities from West Africa, particularly Ghana, Nigeria and Zimbabwe – and these crafters often produce products that are popular, but not based on indigenous skills or local materials.

The types of material used among crafters in the Western Cape (and this applies to South Africa) includes the use of textiles (21%), beads (17%) and ceramics (11%), while other materials include wood, leather and wire. These products are primarily distributed and sold in retails stores (42%), galleries (20%) and producer outlets (17%). Notably, prices for products vary, based on the type of item and the way it is marketed. Collectibles and hand-made items, particularly furniture, can see a mark up for between 150 and 400%. In the UK, the hand-made furniture market is marked up by between 300% and 400% for Fair Trade items, and by 200% in retail stores (Kaiser and Associates, 2005). Many smaller crafters in the Western Cape, however, face decreasing profits particularly when profit is shared by intermediaries. Cheaper products made in China or India may often lead to less profit.

The craft market in the Western Cape has also confirmed that many of the products sold do not actually originate in the Province, but from rural areas where the item is made. This is of great significance to smaller producers in rural areas of South Africa since urban zones are clearly better markets for products than rural zones. However, as with many other crafters, profit margins may decrease or even disappear by relying on a chain of intermediaries in order to sell a product. However, despite accurate statistics of craft in the Western Cape, the 2005 study confirmed that this marked was making a meaningful contribution to the economy, particularly for new entrants to the formal economy. The craft market was being used as a stepping-stone by many people to other activities.

Northern Cape

The Northern Cape is relatively unique in South Africa. It is the largest province in the country but has the least amount of people. Moreover, according to the SARHA database, the Northern Cape contains the third largest amount of protected heritage sites in the country 626), only after the western Cape and the Eastern Cape (620). Furthermore, it is also one of the most commercially active farming provinces – it has 5125 farming units, after the Western Cape and Free State. However, it has the lowest amount of active agricultural households, the least in the country.

With regard to the Plus 94 domains, rural data indicates that the northern Cape has just over 20% of the country's rural heritage and cultural sites, which is perhaps an underestimation based on the information from SAHRA. What is noticeable the domain of performance and celebration is the largest among the rural information from provinces, and that domain C (visual arts and crafts) is also relatively large compared to other provinces. The smallest rural domain for the Northern Cape is F (design and creative services), which indicates a lot market base for crafts, particularly due to low population levels.

Table 16: Rural CCIs in the Northern Cape (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	43	20.7%
B: Performance and celebration	48	23.1%
C: Visual arts and crafts	42	20.2%
D: Books and Press	20	9.6%
E: Audio Visual and Interactive media	2	0.1%
F: Design and creative services	38	18.3%
G: Tourism	9	4.3%
H: Sport and Recreation	6	2.9%
No data		
Total rural		
Total urban		
Total	208	

Free State

Urban areas in the Free State are limited to Manguang (Bloemfontein) and surrounds, but province still has a large rural base. We estimated that 46.7% of the CCIs in the Plus 94 database were in rural areas of the in the Free State. The province is also the primary commercial farming producing area in South Africa – it has the highest number of commercial farmers nationally, this representing 46.7% of the national total. It has, however, one of the smallest rural cultural and heritage sectors in South Africa, with only 220 sites or 6% of the national total. With regard to the rural domains below, the Free State has a relatively large performance and celebration sector, but Sector C – visual arts and crafts – is the largest among the rural provincial sectors in the country. Books and press appear to be the smallest rural domains compared to other provinces.

Table 17: Rural CCIs in the Free State (Plus 94 dataset)

Domain	Number	Percentage

A: Cultural and natural heritage sites	35	13.2%
B: Performance and celebration	45	17%
C: Visual arts and crafts	60	22.6%
D: Books and Press	12	4.5%
E: Audio Visual and Interactive media	5	1.9%
F: Design and creative services	85	32.1%
G: Tourism	11	4.2%
H: Sport and Recreation	12	4.5%
No data		
Total rural	265	46.7%
Total urban	303	53.3%
Total	568	

North West

This province is located alongside Botswana, and contains the second smallest population in South Africa, despite being almost as big as the Free State. It also, however, has one of the most active rural populations in the country, relative to its size. Commercial farming is prevalent, and the province has the fourth highest number of commercial farmers after the Free State, Western Cape and northern Cape. Notably, the province contains some of the richest platinum deposits in the world, and has a very active mining belt around Marikana. Predictably the North West also has one of the highest rates of in migration in the country, of 67 907 migrants, second to Gauteng. It has the third least number of heritage sites, only 70 or 1.9% of the national total. With regard to the Plus 94 rural domains illustrated below, the North West clearly has some of the lowest numbers of rural CCIs in domains A, C and D, but sector F (Design and creative services) as well as B (Performance and celebration) are much better represented rurally.

Table 18: Rural CCIs in the North West (Plus 94 dataset)

Domain	Number	Percentage
A: Cultural and natural heritage sites	45	11.8%
B: Performance and celebration	74	19.5%
C: Visual arts and crafts	55	14.4%
D: Books and Press	25	6.6%
E: Audio Visual and Interactive media	11	2.9%
F: Design and creative services	127	33.4%
G: Tourism	21	5.5%
H: Sport and Recreation	5	1.3%
No data		
Total rural		
Total urban		
Total	381	

Summary and recommendations

This report has assessed and expanded the analysis of the available SACO Plus 94 database, which was very useful in providing a regional and comparative overview of each domain. However, there are some important additions to consider:

- Cultural and natural heritage sites may have been underestimated, especially when compared to the SAHRA database of protected sites. This includes some natural, geological and archaeological sites, artefacts, and buildings/monuments.
- An indication of the dynamics of each CCI sector per domain and in each province need to be included.
- Previous reports on the extent of craft sector during 2006 and 2007 in the Western and Eastern Cape suggest that domain C (Arts and Crafts) may need to be expanded using past information.

These Plus 94 report generally illustrates the opaque nature of the heritage industry as a whole, given that many CCIs in the informal sector are not included. It is also clear that heritage, particularly intangible heritage, as well as the linkages between heritage based tourism and CCIs, needs to be part of spatial development and IDP plans in each region. Craft is one example of how rural areas can develop through CCI linkage with spatial heritage areas and routes, urban markets and small town development. Furthermore, the strength of the commercial and hunting farming sectors can definitely support the development of CCI and heritage industries in rural provinces of South Africa.

The value of cultural policy on a national and provincial level has revolved around a number of key organisations, such as the NHC, DAC, and various provincial departments to implement cultural planning. However, at a local level, local IDPs do not reflect a specific concern with development of cultural or heritage issues as a specific part of a spatial development plan. This also applies to many state development organisations – such as ASPIRE and the ECDC. Rather, cultural matters are subsumed into different categories related to natural heritage sites, sports and recreation, and infrastructural development. The complex nature of rural areas and of CCIs themselves often do not benefit from a succinct summary in a policy document. Many artists, CCIs, and heritage matters are located within the informal sector, and largely depend on urban markets and linkages.

It is also clear from this document that linkages between urban and rural areas are a positive increment for the development of markets for cultural products and CCIs. However, cultural planning is different and needs a specific strategy and focus. In particular, more markets are needed for rural areas that can link with international markets. SDI link up with urban development zones is a priority. This is especially needed in conjunction with the 'new economies' of trade and consumption based on internet sales, tourism and high levels of consumer mobility. These markets may be based in small towns, local cities, or even larger cities such as Cape Town or Johannesburg. In these terms, there are also scope for designing new strategies and policies for multi-sectoral work and collaborations between state and non-state partnerships to promote rural areas. The work done by private and state associated organisations in Mpumalanga (Kruger 2 Canyon) as well as in the Eastern Cape (ASPIRE and SDIs) and Western Cape is promising. Academic units such as FHISER has also done some promising work with a number of related parastatals and state entities in the Eastern Cape with regard to spatial development. The University of Fort Hare in general has developed excellent programmes in conjunction with heritage sites and routes in the Eastern Cape, particularly with their centenary celebrations in Alice (ZK Matthews house) and King Williams Town (Ginsberg).

The case studies of the Eastern Cape and the Western Cape are specifically important to understand the work of specific parastatals (like ASPIRE) and private organisations (such as Cape Craft) in organising, researching and promoting spatial development in rural areas. However, the work of these organisations is difficult to implement because of the underrepresentation of cultural policy in IDPs – but also in general research plans and outputs of privately funded spatial development plans. Local governments are often hamstrung by inefficiencies with regard to the release of land for development, and the overall challenges of small town municipalities to cope with the demands of urbanisation, migration and infrastructure. The IDP process is an area where there appears to be most substantive linkages between central, provincial and local government. However, the IDP is not a spatial development plan in a meaningful sense. In this sense, the full range of CCIs, heritage and culture and associated private sector development needs to be reflected in IDPs in order to take stock of what benefits these may hold for each region. Likewise, each private organisation needs to link up more pertinently with local IDPs in order to gain maximum visibility for CCIs and heritage related development.

In terms of cultural policy it is thus crucial to achieve both vertical and horizontal linkages with existing structures and current and new policy processes. This is in part a reflection and the challenges of the multi-dimensional aspects of cultural policy, and the particular legacies of rural heritage in South Africa. Implicit in a focus on rural cultural economics is a re-imagination of the rural. The economic challenges of these areas do not mean that they are not significant and important in the definition of national heritage. In fact, many people regard rural areas as the primary 'carriers' of traditional knowledge. It is very clear from our analysis in this document that CCI industries in rural areas are most active within:

- In heritage rich areas,
- Provinces that contain a high proportion of commercial farmers
- Provinces that have a mix of urban and rural zones, and
- Active tourist networks.

If these rural resources are to be tapped then cultural policy needs to be embedded in a more detailed grasp of the extent to which different industries, rural heritage and cultural sites can link up with private and state sector support. The various provincial profiles development in this report therefore provide a working indication of the resources of each area, but will need to be more fully understood in terms of their potential through collaboration with provincial entities in the future. This work will involve a range of agencies besides national and provincial departments. The challenge is to create inter-departmental and multi-stakeholder governance with substantive private and third sector involvement. This is borne out by the successes in terms of harnessing and developing creative economies by high performing locales and regions which have such governance and partnerships in place.

In this respect, local and provincial government agencies would benefit from a number of training programmes and courses specifically focusing on the dynamics of rural areas. An important component of this would be to develop a more complete picture of what cultural and heritage resources are available and active in each province. A related goal would also be to formulate linkages between rural and urban markets, between local and provincial government departments, and the public and private sector. As gained from the nine provincial domain workshops run by SACO in 2016, these were common themes that ran through workshop responses: more systematic contact and interaction between local and provincial governments, as well as between private and third-sector intermediaries and the state entities. Such requests are in line with international best practice and new ways of undertaking local and regional economic development.

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Submitted by:	Mphikeleli Mnguni	Research Officer		4/4/2017
Recommended by:	Charles Mabaso	Chief Director		4/4/2017
Approved by:	Monica Newton	Deputy Director General		04.4.2017