SOUTH AFRICAN CULTURAL OBSERVATORY

SCENARIOS FOR THE CULTURAL AND CREATIVE INDUSTRIES

Submitted to:
Department of Arts and Culture
Submitted by:
Nelson Mandela University
In Partnership with:
Rhodes University, University of Fort Hare and University of KwaZulu-Natal

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INYUVESI YAKWAZULU-NATALI

Nelson Mandela University, University Way, Summerstrand, Port Elizabeth, 6019, South Africa

South African Cultural Observatory

Report

SCENARIOS FOR THE CULTURAL AND CREATIVE INDUSTRIES

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Motivation and context

The outbreak of COVID-19 and the consequent loss of life and the regulations imposed in 2020 to try to deal with the pandemic dramatically underlined the element of uncertainty that often upsets linear planning for understanding policy choices at a country or sector level. To cope with this, futurologists in the mid-20th century came up with the idea of creating different scenarios to capture possible futures arising from specific choices and events.

Scenarios have been influential in changing the narrative and drawing attention to the need for change. Anglo American corporate strategist Clem Sunter helped change the minds of influential white South Africans in the 1980s about the preferability of orderly change over civil war though his High Road/Low Road scenarios.[i] As South African Cultural and Creative Industries recover from the damage inflicted by COVID-19 it is essential that the South African public, opinion leaders and agenda setters in the public and private sectors become aware of the national economic, social and political importance of the cultural and creative industries.

Few seem to be aware that, according the most recent SACO Mapping study, CCIs in South Africa directly contributed almost 3% of South Africa's Gross Domestic Product in 2020 before the COVID-19 crisis, and that the creative economy employs around one million people or 6% of all employment in South Africa.[ii] An attractively presented examination of the possible futures of the CCIs will hopefully enable awareness as well as informed discussion and debate of what can be done to create an environment in which CCIs can prosper — for the benefit of all South Africans.

Goals and Method

The main aim of the project is to produce comprehensively researched possible futures or scenarios for the main CCIs as a whole in South Africa, as defined by UNESCO and discussed in the SACO 2022 Economic Mapping Report.[iii] Sub-goals include:

- An assessment of resilience of the different CCIs, and the most important subdivisions of those CCIs, as the country decisively moves from COVID-19 regulations and the lingering effects of increased digital events;
- The effect of continued disruptive innovation on the CCIs, including the shift to the digital environment before, during and after COVID-19;
- An attempt to calculate the economic effect on the CCIs of potential technological, political, economic and geopolitical developments;
- Using knowledge of mass communication, and producing credible scenarios that explain effectively and accurately the possible different futures for South Africa's CCIs.
- Developing visualisation and infographics to illustrate the scenarios as part of a public dissemination plan.

Research Methods

The report will be informed by the following:

- Mapping studies
- Legislation

- Existing scenarios for strategic importance
- Government strategies and policies
- Industry reports
- Academic articles
- Media articles
- Case studies
- Consultation with key members of the CCIs, including interviews, focus groups and workshops

Phases of research

- First, all relevant SACO documentation will be reviewed to identify among other things variables that may shape the development path of CCIs;
- Second, based largely on desktop research, the scenario exercise framework will be set out, including identifying best practice;
- Third, but overlapping with the first and second phase, interviews will be conducted with as many key players in the public and private sector as identified in the desktop research;
- Fourth, focus groups and workshops will be set up, time permitting, to provide maximum input to the scenarios from consultation; and
- Fifth, research outputs will be consolidated and a report written up.

Introduction

Plans are worthless, but planning is everything – attributed to General Dwight D. Eisenhower

Scenario planning has played a starring role in South Africa's political, social and economic development, starting with the High Road/Low Road scenarios developed for the Anglo-American Corporation and made famous by corporate strategist and author Clem Sunter in the 1980s (though preceded by secretive apartheid government "futures thinking" exercises[1]).

The Anglo-American Corporation's "The World and South Africa in the 1990s" scenarios, with its starkly contrasting futures, originated within the corporate sphere before being presented widely across the country. It is acknowledged to have had some influence in persuading key figures in apartheid South Africa to pursue a negotiated settlement rather than a continuation of conflict and civil war.[2] [3] The Nedbank/Old Mutual scenario planning exercise and then the landmark Mont Fleur Scenarios,[4] both focusing on the economy, followed in the uncertainty of the early 1990s before the democratic elections. In more recent history, the Presidency of the SA government launched its "South Africa Scenarios 2025: The future we chose?"[5] in 2008 and the Mapungubwe Institute for Strategic Reflection (MISTRA) in 2018 the "Indlulamithi South Africa Scenarios 2030".

The Mont Fleur scenarios in particular stand out both because of their apparent success and obviously different method.

In the Mont Fleur exercise, compared to what seems to have become standard practice, the exercise originally produced seven scenarios, which were then whittled down to four. These four were, according to the chief architect of the scenarios Adam Kahane: Ostrich, Lame Duck, Icarus, and Flight of the Flamingos:

- "Ostrich" pointed out the risk and futility of the white government's trying to prevent or avoid a negotiated settlement with the black majority.
- "Lame Duck" envisioned a prolonged transition with a constitutionally weakened government. Because the government "purports to respond to all, but satisfies none," investors hold back, and growth and development languish amidst a mood of long, slow uncertainty. This was an important scenario because, in 1991, the majority political parties were negotiating a coalition government. "Lame Duck"

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[1] Nick Segal, *Breaking the Mould: The Role of Scenarios in Shaping South Africa's Future*, 1st ed (Stellenbosch [South Africa]: Sun Press, 2007), 17.

[2] Clem Sunter, "Meet Clem Sunter - the Ultimate Fox: The Alec Hogg Show," *BizNews.Com* (blog), October 4, 2020, https://www.biznews.com/thought-leaders/2020/10/04/clem-sunter-fox.

[3] Segal, *Breaking the Mould*, 13–19.

[4] Adam Kahane, "The Mont Fleur Scenarios - What Will South Africa Be like in the Year 2002?" (Global Business Network, 1997).

[5] Policy Co-ordination and Advisory Services, "South Africa Scenarios 2025: The Future We Chose" (RSA Government, September 2008), https://www.gov.za/sites/default/files/gcis_document/201409/sascenarios20250.pdf.

allowed people to see potential dangers in certain ways of organising the coalition and how these could be mitigated.

- "Icarus" suggested that a black government could come to power on a wave of public support, embark on a huge, unsustainable public spending program, and consequently crash the economy. This was the first time that a team including prominent left-wing economists had discussed the dangers of a new government trying to do too much.
- "Flight of the Flamingos" outlined the broad parameters of a positive and successful transition: everyone in the society rises slowly and steadily together. Overall this project contributed to the building of a common language for talking across groups about the opportunities and challenges facing the country, and hence about a way forward.[6]

A wide ranging publicity campaign involving among others a video and a 16-page insert in the alternative newspaper The Weekly Mail was an integral part of the scenario process so that the names of the four scenarios became part of common parlance[7] - at least among the literate and perhaps privileged population. Nonetheless, it is hard to evaluate the immediate effect. One extensive study judges the scenarios had , apart from the impression on the influential participants "limited direct impact" in South Africa.[8] Yet the Icarus scenario did not eventuate and fiscal conservatism persisted, though the contending views of the need for greater spending by the State did not vanish.[9]

A contrarian view of the Mont Fleur scenarios and the fight against what was seen as the threat of macro-economic populism is that the economic orthodoxy the scenarios subscribed to have caused long-term problems. Greater redistributive spending – along with redistribution of economic opportunity – may have shifted South Africa from its stubborn path of inequality and poverty contrasting with conspicuous consumption by newly enriched elites and lessened the temptations of crime and corruption.

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[6] Adam Kahane, "Civic Scenarios as a Tool for Societal Change," *Strategy & Leadership* 30, no. 1 (January 1, 2002): 32, https://doi.org/10.1108/10878570210697027.

[7] Adam Vigdor Gordon, "Limits and Longevity: A Model for Scenarios That Influence the Future," *Technological Forecasting and Social Change* 151 (February 2020): 4, https://doi.org/10.1016/j.techfore.2019.119851.

[8] Segal, *Breaking the Mould*, 54–55.

[9] Segal, 32–33.

Figure 1 Scenario planning word cloud

[Source: Generated from a Google search of "scenario planning"]

Scenario planning arose as an awareness grew of the near impossibility of long-term prediction based on inductive logic. The difficulties of prediction are well known but a paradox of prediction is that we are forced to make predictions, even simple ones about the immediate future, to be able to act in the world. A world of complete unpredictability, of sinkholes appearing and disappearing as we walk for example, is the stuff of unhelpful science fiction, as opposed to science fiction – and scenarios – that aid understanding of constructive and destructive choices. Black Swan events emphasise that assuming business as usual can upset the best preparations. Yet, to take a mundane example, choosing between a fixed interest rate mortgage bond or the more common inflation-linked bond depends to some extent on prediction. It would be wise to choose a fixed rate bond if the prediction is for enduringly high interest rates. Yet if we cannot predict with certainty, what is the way forward? Scenarios offer to cut the Gordian knot. We simply make more than one plausible prediction. In this sense scenario planning has become simple and frequent. Take the table, produced at the early stages of the pandemic, showing the possible effect of COVID-19 on South Africa's GDP.

Table 1: Average Annual Growth Rates for 2020 in three scenarios: GDP expenditure components at market prices

	Quick	Slow	Long
Household consumption	-5.1	-11.4	-16.8
Government consumption	0.0	0.0	0.0
Investment	-11.4	-26.6	-33.8
Exports	-8.1	-17.6	-20.8

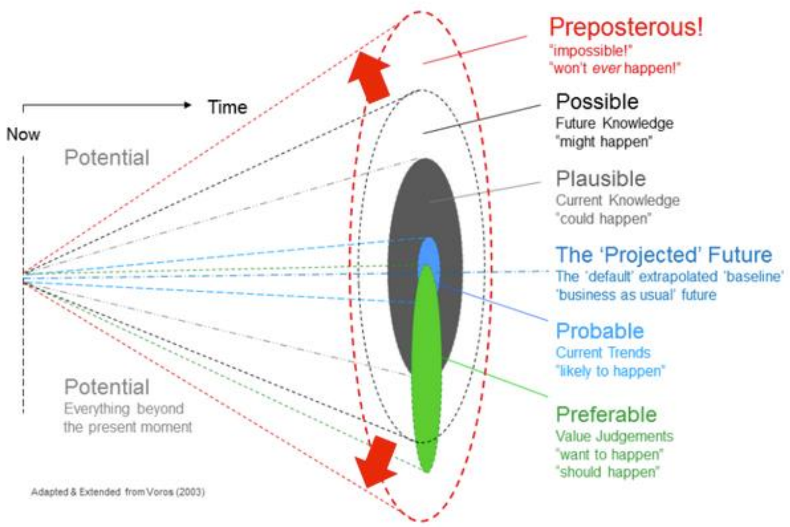
Imports	-7.7	-17.3	-22.7
GDP	-5.4	-12.1	-16.1

[Source: Southern Africa –Towards Inclusive Economic Development (SA-TIED)]

Even a cursory glance at the history of scenarios and scenario planning show that the topic is more complex and their potential broader, as will be examined. For instance, "Scenario planning is a tool for helping decision makers reperceive the potential future in alternative ways," and "for surfacing assumptions so that changes can be made in how decision makers see the environment."[10]

Illustrative of scenario planning is the Voross Futures Cone,[11] which sums up visually the essence of scenarios and in its present incarnation is an evolution of the concept from a simple cone shape widening over time. Why a cone? The closer to the present, the narrower the range of possibilities. What will the Reserve Bank policy be on interest rates in the long term? In the next three months we can be fairly confident the Reserve Bank's monetary policy committee can raise interest rates by 0.25, 0.50, 0.75, 1 or even 2 percentage points – perhaps as high as 10 percentage points, but not 100 percentage points. In 20 years, to take an unlikely but remotely possible scenario, a theocratic Islamic government may ban interest rate banking entirely, rendering central bank rates irrelevant – or hyperinflation after effects of civil war might necessitate a 100 percentage point rise.

Figure 2 The Futures Cone



[10] Thomas J Chermack, *Scenario Planning in Organizations: How to Create, Use, and Assess Scenarios.* (San Francisco: Berrett-Koehler Publishers, 2011), 31.

[11] Joseph Voros, "The Futures Cone, Use and History," *The Voroscope* (blog), February 24, 2017, https://thevoroscope.com/2017/02/24/the-futures-cone-use-and-history/.

[Source: The Voroscope – reproduced with permission]

The Voroscope is to be found on the website of Joseph Voros, whose Linkedin page describes him as a "professional futurist" one of several such professionals who teach, research and consult. That scenario planning has found a firm place in business consulting is evidenced by the seriousness with which it is treated, for example an online discussion by the Futures Strategy Group of an article by competitor McKinsey.

As will become evident, the approach to scenario planning common in the corporate world needs some tweaking at least to cope with futures thinking that involves such a vital aspect of society as what we will refer to for convenience sake as the creative sector or creative industries.

Method and methodology

Method should follow theory. In scenario planning, however, literature on method, initially least, outpaced theory.

In setting out a range of scenario planning methods in a book devoted to finding a theory, Chermack, for instance, notes that "… none of the documented methods for conducting scenario planning provide any theoretical insight."[12] While he may be correct that an absence of a theory of scenario planning has rendered understanding and validating practice difficult if not impossible, the quantitative theory he arrives at, with its emphasis on "empirical indicators and hypotheses,"[13] seems to me to be at odds with the spirit and the practice of scenario planning itself. Articles and papers on scenario planning often stress that scenarios are not predictions. Scenario planning, in the view of one of the field's foremost practioners, Rafael Ramirez, is incompatible with modelling or prediction: "We're not interested in predictions, we're much more interested in making plausible and purposeful scenarios, useful scenarios, than probable ones." Ramirez goes on to declare that including probability in scenarios is impossible in the kind of "radical uncertainty that the scenarios face."[14] "Radical uncertainty" is a key concept that supports the validity of scenario-based exercises, and the title of a book dealing with "decision-making for an unknowable future".[15]

Moreover, Chermack's theory is framed within organisational strategic planning, human resource development and decision-making. His conclusion, stressing as it does learning and changing of mental mind maps, seems unchallengeable in that "… practitioners may find it useful to consider that planning consists of much more than simply creating scenarios about the future. Planning requires using those scenarios to challenge the ways in which decision-makers perceive their environment. With such an understanding, it seems that practitioners

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[12] Thomas J. Chermack, "A Theory of Scenario Planning" (Human Resource Development Research Center, May 2003), 30, https://www.richardswanson.com/hrdrcreports/Chermack(2003)ATheoryofSP.pdf.

[13] Chermack, 95.

[14] *An Introduction to the Oxford Scenarios Planning Approach*, Foresight Fridays (Centers for Disease Control and Prevention (CDC), 2021), https://www.youtube.com/watch?v=wrwn7oc26Vk.

[15] J. A. Kay and Mervyn A. King, *Radical Uncertainty: Decision-Making beyond the Numbers*, First edition (New York, NY: W. W. Norton & Company, 2020).

may be more thoughtful in their approach to building scenarios …”.[16] However, the theory puts aside the other observed effects of scenario planning, particularly at the national level, of, for example, enhancing shared understanding of a country’s prospects and problems.[17] The Mont Fleur scenarios which exemplify that point the way to a different kind of scenario exercise.

All this is not to deny the validity of this and other ongoing attempts to theorise scenario planning. The phenomenon, originating in corporate practice whose details are sometimes proprietary in nature,[18] may prove harder for theory to pin down than expected. A postulation is that the clue is in the first part of the name itself “scenario”. The Shorter Oxford Dictionary of 1973 contains a brief definition: “A sketch of the plot of a play; giving particulars of the scenes, situations, etc. b. The detailed directions for a cinema film.” Scenarios as descriptions of possible futures can be compared to science fiction, which at its most imaginative and thoughtful is a literary and film genre that deserves more attention, and “illustrate how narratives can be used to challenge existing ideas about how the world works”.[19]

Their genesis in the corporate world has meant scenario planning characteristically avoids surfacing ethical considerations as such, and if considering them at all disguising them with the language of sustainability. The scenarios tend to look at adapting to external events that shape the complex landscape that firms compete in rather than the possible choices that lead to different outcomes. The traditional Shell orientation to scenario planning emphasises observation and adaptation as well as clearly recognising what the organisation cannot change.[20] In any case, the Mont Fleur Scenarios have been singled out as a normative scenario planning exercise that achieved results.[21] The normative understanding of futures thinking and scenarios raises the prospect of avoiding a dominant positivist perspective in favour of a “critical and emancipatory tradition in foresight”[22] that is more inspiring, certainly in the context of the creative industries, than corporate strategic planning.

Ramirez et al ask rhetorically how organisations can use scenario planning and advocate developing scenarios that look at “plausible changes in the larger contextual environment — such as changes in macroeconomic conditions or in technology”. Yet in the two scenario exercises that proved most effective at bringing about change, the High Road/Low Road scenarios and the Mont Fleur scenarios, the broader environment was less important than the choices of present and future government leaders. The Mont Fleur scenarios were created by a carefully curated team that included two future Finance Ministers, one of whom was also the first central bank governor and a future department of trade and industry minister.[23]

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[16] Chermack, “A Theory of Scenario Planning,” 99.

[17] Kahane, “The Mont Fleur Scenarios - What Will South Africa Be like in the Year 2002?,” 1.

[18] Chermack, “A Theory of Scenario Planning,” 30.

[19] Kay and King, *Radical Uncertainty*, 219.

[20] Gordon, “Limits and Longevity,” 6.

[21] Gordon, 1.

[22] Gordon, 2.

[23] Gordon, 3.

Business-oriented scenarios tend to deprecate the normative scenario approach.[24] The unconscious positivism of much business writing may be blamed here, the idea that facts are completely free from values. A moment's reflection will show that a disguised normative stance is present in most if not all scenario approaches. For instance, in Ilbury and Sunter's Games Foxes Play, almost a scenario planner's handbook, the Scenario Gameboard, a rectangle divided into four parts, shows "A Best-Case Scenario," "A Worst-Case Scenario" and two "Intermediate Scenarios". Since scenario planning is not a doctrine but a practice-based exercise, nothing prevents the scenario creator from imagining two or three dismal scenario futures, but even here one of these will be presented as better than the others, even if only marginally, and one worse than the other two, subtly translating the scenario creator's perhaps unconscious ideas of what should be done and what should not be done.

The ought-to's are evident in Thomas Chermack's summarisation of many planners' scenario outcomes definitions: "changed thinking, informed narratives or stories about possible or plausible futures, improved decision making about the future, and enhanced human and organisation learning and imagination." Presumably the "changed thinking" will not be like a blow to the head that befuddles the thinker but improves thought processes.

In the South African scenarios of the sort referred to the quality of the imaginative fiction *and its presentation* has probably meant the success or failure of scenarios in the public area. The Nedcor/Old Mutual scenarios of the 1990s were comprehensively researched but did not have much traction outside the team of expert participants who developed the scenarios. Part of the problem lay in the tone of the presentation of the exercise, which came across less like scenario planning than an exercise in straightforward technocratic public policy analysis.[25]

The output and the results of the Nedcor/Old Mutual scenarios can be contrasted with those of the Mont Fleur scenarios. Even more than with the Nedcor/Old Mutual scenarios perhaps, the participants in the Mont Fleur gained from being involved. Communication with the public was judged important. Particularly memorable was the visual depiction of the scenarios, well adapted to publication in the media.

An important part of scenario planning can be the effect it has on those participating in the scenario exercise.

> Optimal learning during the application of the scenario method occurs in two important components of the process, namely, (a) building scenarios and (b) embedding scenario thinking as a way of thinking and operating in a particular organization (Chermack et al., 2006; Chermack & van der Merwe, 2003; Chermack et al., 2007).[26]

Scenarios tend to be designed **for** some group. In the case of scenarios outside the corporate environment, the potential is to involve civil society and government among other

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[24] Rafael Ramirez et al., "Using Scenario Planning to Reshape Strategy," *MIT Sloan Management Review* 58, no. 4 (2017): 2, https://ora.ox.ac.uk/objects/uuid:916e9b13-163c-4a2a-989d-2804e907f4a8.

[25] Segal, *Breaking the Mould*, 42.

[26] Louis van der Merwe, "Scenario-Based Strategy in Practice: A Framework," *Advances in Developing Human Resources* 10, no. 2 (May 2008): 11, https://doi.org/10.1177/1523422307313321.

stakeholders. Sadly, this was not possible in this scenario exercise because of the diffuse nature of the ultimate stakeholders, the many practioners of the creative industries and the insufficient time and money available. “A typical scenario-based planning project usually unfolds over a period of 6 to 9 months and is made up of several general phases.”[27]

If this process were to be followed, the ideal would be to use a select group to create the scenarios over a year and present them as part of a futures-oriented annual conference, for instance. The scenarios would be debated thoroughly and recommendations arising from them taken forward for further study or action.

A start has been made, however, at the very least as a jumping off point for futures scenario exercises. This scenario exercise focuses on the Books and Press domain as the keystone of the cultural and creative industries that are the focus of the South African Cultural Observatory.

[27] Louis van der Merwe, “Scenario-Based Strategy in Practice: A Framework,” *Advances in Developing Human Resources* 10, no. 2 (May 2008): 216–39, https://doi.org/10.1177/1523422307313321.

Figure 3 The Cultural and Creative Industries

[Source: UNESCO framework for cultural statistics, via the South African Cultural Observatory]

The Scenario Process

After understanding the background to scenario planning, the process of seeding the scenarios with ideas about first possible and then desirable scenarios started with desktop research of news sites and papers produced by the SA Cultural Observatory, information which was returned to later to provide more nuance. This was followed by conversations with a range of people in the arts world, with a conscious attempt to include the young and excluded. This included arranging a workshop of young artists facilitated by the SACO interns. Advice from interviews and general discussions was to avoid the arts commentators already prominent in the public sphere and try to get new perspectives from those involved at the grassroots level.

One key interview was with an artist-designer, whose views on the effect of Artificial Intelligence robotics in the form of Dall-E on his work and business preceded a spike in interest in the topic in the news media, and sparked a line of inquiry into the consequences of technological development as a driver of change in the scenarios. The interest in A.I. and the arts in the news media around the time of the completion of this study revolved around ChatGPT, offered for use for free to the public, and the interview pointed to the broader use of A.I. in the visual arts.

Of immense help in understanding the problems and prospects of the creative sector was Steven Sack, former Chief Director of the Department of Arts and Culture.

Interviewed were two people whose description as organisers of events belie their knowledge of the creative industries generally. One was, in her own words, “the missing middle” in discussions about funding, someone who might be regarded as a “connector” in the words of author Malcolm Gladwell, practically minded people with an ability to organise creative people, plugged into formal and informal networks. Another was an event organiser of the biggest arts festival in South Africa. - Yet another was a former music promoter now involved in teaching creativity to business. A seasoned arts journalist.

A key focus of the scenario exercise is the Books and Publishing Domain, and several people involved in the publishing industry were contacted, including the head of Wits Journalism, Dinesh Balliah. To get a broad overview of topics important in the arts, two arts journalists were interviewed, a former arts editor and arts journalist who is also a member of the South African Freelancers’ Association.

On the cultural aspect of the CCIs, the curator of the newly built Amazwi Museum of Literature was interviewed. It must be emphasised these interviews aimed to begin to get an understanding of the concerns of people working in and around the creative industries. Many more interviews would have to be conducted, and possibly surveys, to be able to confidently say what might be on the minds of people working in the creative industries about the future now and what they collectively might believe about their futures. What interviews and careful interpretation of existing literature can do is to identify the truly important and discard the simply distracting drivers of future events.

Equally important for the process of trying to understand the broader landscape of the CCIs, aside from the SACO research, was attending the SACO conference in 2022. This helped greatly in identifying the possible drivers of change.

Individual artists would seem to be an obvious choice for ideas about preferable futures for the arts. And here the first lesson for anyone looking at ideas for how the future of the cultural and creative industries might develop in the medium to near term is that artists or more accurately those involved in the creative industry are operating under considerable pressure, focused on the here and now rather than the distant future. A key concern is, unsurprisingly, money.

Interviews with artists about possible futures of the arts, including their particular domains, often revolved around funding, the effect of Covid-19 on live audiences, and funding of art by government and the corporate sector. The comments of arts critic Chris Thurman in Business Day sum up these commonly voiced concerns:

> Most of the conversations I have with South African performing artists revolve around familiar themes: the difficulty of securing and filling venues, the financial precariousness of almost every show, the unpredictability and unsustainability of our arts funding practices (such as they are).[28]

The second lesson is that the specific concerns of artists, or those involved in the creative industry, at any point in time might be quite narrow. Thus higher level perspectives needed to be sought.

Not only creative people scrabbling to survive focus too narrowly on the present John Kay, writing during Global Financial Crisis in 2008, had this to say about what might be called anchoring, the projection of present concerns onto the future:

> Extrapolation assumes that the future will be like the past, only more so. We project current preoccupations – the rise of China and India, global terror, climate change – with exaggerated speed and to an exaggerated degree.
>
> We forget that our preoccupations change. The people who worry about these issues today would 20 years ago have worried about the coming economic hegemony of Japan and the cold war. These issues were resolved in ways that few predicted.
>
> It is a safe prediction - and the only one I shall make - that the topics that grab our attention 20 years from now will differ from those that consume us today and, if anyone has guessed what they are, it is only by accident.[29]

Part of the problem in sifting through information to find key drivers is to distil from present concerns the generative mechanism of change. Before the Global Financial Crisis, readers of newspapers might be alarmed by the threat to economies of the soaring price of oil, a threat that vanished almost overnight to be replaced by worries about the possible collapse of the global financial system. The underlying problem of the scarcity of resources remains, however.

[28] Chris Thurman, "A Stirring Musical despite Uncomfortable Home Truths," News, BusinessLIVE, February 24, 2023, https://www.businesslive.co.za/bd/life/arts-and-entertainment/2023-02-24-chris-thurman-a-stirring-musical-despite-uncomfortable-home-truths/.

[29] John Kay, "Blown off Course by Butterflies," *John Kay* (blog), November 25, 2008, https://www.johnkay.com/2008/11/26/blown-off-course-by-butterflies/.

It may now in the era of battery storage shift to lithium. The overall problem of energy and economic growth has not gone away.

Technological disruption

In the creative industries, ChatGPT, the Large Language Model that surprised even its creators by becoming widely discussed in the media at the end of 2022, is a pertinent example.[30] In 20 years, mentioning ChatGPT may be as quaint as discussing the threat of Microsoft monopolising the web by insisting Windows users exclusively employ Internet Explorer. What is not quaint is all the evidence of the threat of further devastating technological disruption to business models in the arts, up to now mostly limited to music reproduction and journalism. The creator of scenarios then should concentrate not on A.I. but technology more broadly as a disruptor of jobs and lives as well as business models.

A focus on technology should not fall into the trap of technological determinism. The way technology interacts with economics, politics and society, and issues of political and personal choice, notably including regulation, determines outcomes. Technology must, however, be considered as a key driver of how the cultural and creative industries develop in the immediate and more distant future.

Similarly, the worries about where the next pay-cheque will be coming from and, during the pandemic, how artists were supported or not by government points to bigger issues of funding and hence politics and economics.

Politics and economics

If technology is one pillar of imagining the future, politics and economics, intimately entwined, are two other important drivers of positive or negative change, as recognised by science fiction writers such as H.G. Wells. Wells's Time Machine presents a disturbing dystopian vision of the future where the class divisions of his age have intensified to such an extent that the brutish working poor, despite advanced machinery supplying material needs, literally eat the idle rich. Interviewees did not refer explicitly to the economic measure of the class division in South Africa, the Gini coefficient, recognised as among the highest in the world, or the poverty levels, though they were clearly aware of the income and wealth gaps in the society. More than half the population lives below the upper poverty line and a quarter suffer food poverty[31] while the Gini coefficient at 0,67 (2014) is not only high but is thrown into relief when considering that Brazil had managed to decrease its inequality measure to 0,49 by 2020. That none of the interviewees referred to this gap is not surprising, given their non-economic background, nor is it necessarily mainly an issue for the arts sector. However, along with the

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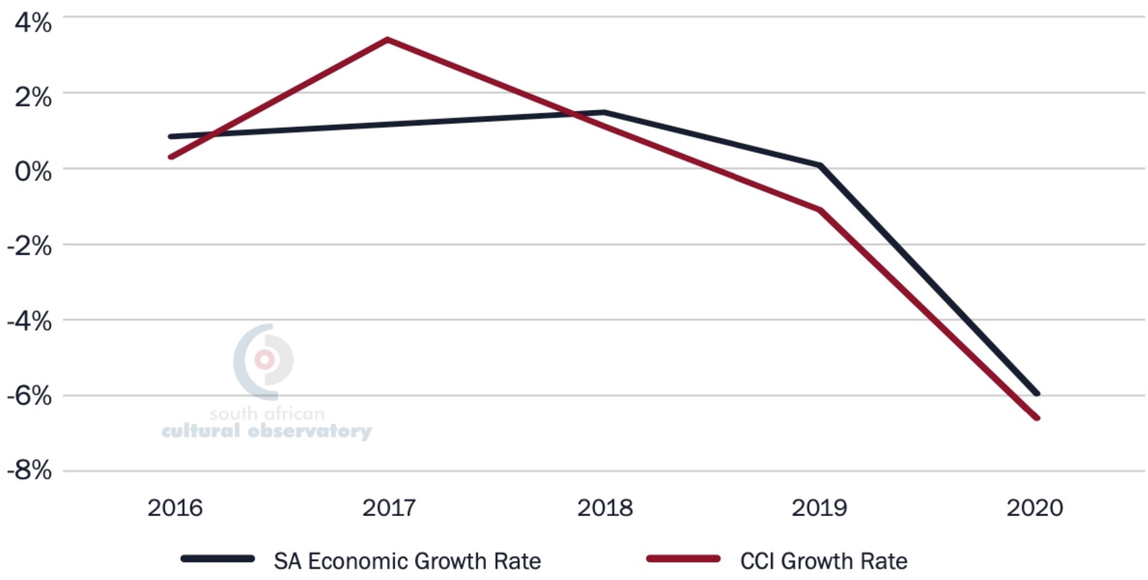
[30] Sarah Jackson, "OpenAI Executives Say Releasing ChatGPT for Public Use Was a Last Resort after Running into Multiple Hurdles — and They're Shocked by Its Popularity," News, Business Insider, January 6, 2023, https://www.businessinsider.com/chatgpt-openai-executives-are-shocked-by-ai-chatbot-popularity-2023-1.

[31] "Poverty & Equity Brief Sub-Saharan Africa South Africa" (World Bank, April 2020), https://databankfiles.worldbank.org/public/ddpext_download/poverty/33EF03BB-9722-4AE2-ABC7-AA2972D68AFE/Global_POVEQ_ZAF.pdf.

need for racial equity, this facet of South Africa cannot be simply ignored as its persistence limits positive change.

While inequality as an economic phenomenon cannot be overlooked, what of economic growth as a driver of change in the CCIs or vice versa? It is an intriguing idea that the creative sector may help push back or stall economic downturns, the evidence is the opposite. The SACO mapping study of the growth rates of the general South African economy and the CCIs shows a high degree of dependence of the creative sector on the economic growth of the country as a whole (Figure 4). This then is a constraining factor of the material growth of the CCIs – though not necessarily of their other positive characteristics. A careful examination of an hierarchy of national needs my reveal the essential nature of creativity for thriving if not survival. Manifestations of culture such as music and film, to name but two, along with the freedom of information and expression that Books and the press encapsulate, can help resilience to adverse events and resistance to authoritarianism anti-democratic tendencies.

Figure 4 The relationship between creative industry growth and general economic growth



[Source: The Economic Mapping of the Cultural and Creative Industries in South Africa 2022]

Inequality in the CCIs is evident both within the domains and in the nature of work itself. For example, the "volatile"[32] creative sector is much more likely to feature freelancers, a little more than third being "own account workers" as opposed to less that 10 percent of workers overall in the non-creative sectors.[33] Former VC of the University of Johannesburg and now Rector of the United Nations University Tshilidzi Marwala, in his attempt to apply the Sustainable Development Goals to South Africa's local challenges, sums up a belief that the pandemic may have sparked a need to seriously consider the rights of many artists working in the

[32]Jen Snowball et al., "The Economic Mapping of the Cultural and Creative Industries in South Africa 2022 - Capstone Report" (South African Cultural Observatory, n.d.), 35, https://www.southafricanculturalobservatory.org.za.

[33] Snowball et al., 33.

precarious gig economy.[34] Indeed, in 2021 an Artists' Charter[35] was a subject of debate at the STANDTogether Arts Summit summit,[36] at which South African cultural activist and artist, Mike van Graan in a keynote address noted increased activism around artists' rights, sparked by the pandemic.[37] These and similar issues are likely to persist even if the levels of protest decline as the South African arts sector regains more or less a semblance of normality. Artists and arts organisers interviewed expressed, contradicting the Reset theme of the SACO conference in 2022, a belief that the economic after-effects of Covid-19 and other developments such as electricity blackouts meant some former aspects of the more physical arts such as theatre would not return to normal. Rethinking here involved, for instance, bringing performances to people in rural areas and former black townships rather than asking them to travel long distances expensively at night through darkened streets. In turn this suggests a more fundamental decentralisation of performance.[38] At the same time, it was acknowledged that the uses of technology in the form of streaming performances to online audiences had created new opportunities.

Geopolitics

The importance of geopolitics to aspects of life that more often might revolve around intimacy and non-material meaning may seem distant to artists. Concerns about Western or Eastern cultural imperialism, for example, or colonial hegemony, hover in the background. South Africa, as a Cultural Observatory study has argued, needs not only a coherent cultural diplomacy policy but such a policy "should become part of the very fabric of its international relations".[39]

An Antidote to Declinism

At the time of completing this study an air of pessimism about the future was apparent among the news media commentariat. This observation by former trade unionist, academic, policymaker, regulator and co-founder of Corruption Watch David Lewis, writing in the Business Day, is illustrative. Lewis remarks that the gloom of apartheid and Zuma years was lightened by the prospect of change. "But it's difficult to find light at the end of a very dark tunnel strewn with violent criminals, perpetrators of corruption and coruscating incompetence,

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[34] Tshilidzi Marwala, *Heal Our World -Securing a Sustainable Future*, 1st ed. (Johannesburg: Tracey McDonald Publishers, 2022), 142.

[35] Bruce Dennill, "Policy: Charter Of Rights For South African Artists," *Bruce Dennill* (blog), July 29, 2021, https://www.brucedennill.co.za/2021/07/29/policy-charter-of-rights-for-south-african-artists/.

[36] Bridget Rennie-Salonen and Yvette Hardie, "Creating a Healthy Arts Sector Ecosystem: The Charter of Rights for South African Artists," Herri Website, November 20, 2022, https://herri.org.za/6/bridget-rennie-salonen-yvette-hardie/.

[37] Mike van Van Graan, "Maverick Citizen: Keynote Address: Arts in South Africa under Existential Threat: 'We Have to Imagine and Remake Our Society,'" Daily Maverick, September 20, 2021, https://www.dailymaverick.co.za/article/2021-09-20-arts-in-south-africa-under-existential-threat-we-have-to-imagine-and-remake-our-society/.

[38] Van Graan.

[39] "Proposed Policy Framework for Cultural Diplomacy in South Africa" (South African Cultural Observatory, September 201i7).

as well as inertia at the upper reaches of the state".[40] Still, for those in the country at the time the South African mood – and the international perception of South Africa - after the Rubicon speech of 1985 that sent the rand plummeting and accelerated disinvestment cannot be described as jolly. Corruption is, like inequality an inhibitor of positive change not to say a cancer but hope can be held out of slowing the malignancy is not outright remission. More important is not to be lured into declinism in the sense of being captive to unfounded pessimism and to resist simply extrapolating from the dismal present into a dismal future. Normative scenarios of the kind envisaged can combat this tendency through deliberately imagining a different national path and in the process contributing to creating one.

Forgotten now is the role of artists at the height of apartheid, highlighting the positive role the CCIs can play in advocating for change. Externally and internally the music of Abdullah Ibrahim and Hugh Masakela, who played at the ANC's 1982 Botswana Culture and Resistance Conference to attendees from South Africa and farther afield,[41] and the work of many other artists or "cultural workers," to use the language of the conference, inspired defiance of the oppressive forces of the state. The role of the arts in unifying resistance across racial lines was demonstrated by black musicians like Steve Kekana[42] and by the white musicians whose alternative popular music under the Shifty Records label[43] encouraged the kind of anti-establishment scepticism of prevailing authoritarianism. It aided, through an artistry uncompromised by doctrinaire political bureaucracy, the campaign to embolden white youth to refuse compulsory national service in the South African Defence Force for white males, in line with the End Conscription Campaign of the United Democratic Front. It was "partying for a purpose".[44]

An important point is that an upsurge in cultural resistance to apartheid occurred as a response to deepening political crisis amid economic turmoil.

Art and religion

Interviews and wide-ranging close reading of relevant material is aimed at, to use a popular expression that crops up in design theory and in business studies of "understanding what's going on", in other words the present landscape. Much of this has been described by the SACO mapping studies, though some gaps still need to be filled. One gap is the role of religion in the creative industries. In the West for many if not all "... artworks have become the closest thing we have to sacred texts ..." and art resembles religion. However faithfully art has served religion and been inspired by religion over centuries, the two are not the same, as the secular age has shown, and the prospect of conflict is evident in theocratic systems. Scenarios must

[40] "Proposed Policy Framework for Cultural Diplomacy in South Africa."

[41] "Culture and Resistance Conference, Botswana, 1982 | South African History Online," History, South African History Online, May 18, 2022, https://www.sahistory.org.za/article/culture-and-resistance-conference-botswana-1982.

[42] Marwala, *Heal Our World -Securing a Sustainable Future*, 140–41.

[43] "Shifty Records - Virtual Exhibition," History, South African History Online, November 12, 2019, https://www.saha.org.za/exhibitions/virtual_exhibitions/shifty_records_virtual_exhibition.htm.

[44] "Singing for a Just Peace: Music against Conscription," History, South African History Online, November 12, 2019, https://www.saha.org.za/shiftyrecords/a_naartjie_in_our_sosatie.htm.

consider what might happen if the religious tolerance that has characterised South Africa, certainly since the advent of apartheid, fails and is replaced by dominance of one faith or another.

Books and Press

Digital disruption

As noted in the SACO The Economic Mapping of the Cultural and Creative Industries in South Africa 2022, the Books and Press domain share of contribution to South Africa's Gross Value Add has been in steady decline, drifting down from 17.7% in 2016 to just under 16% in 2020, while Audiovisual and interactive media has strongly trended upwards.[45]

Table 2 GVA per Cultural Domain (percentage of total CCI output) 2016, 2018 and 2020

Domain	2016	2018	2020	% decline 2020 vs 2016
Design and creative services	31,75%	31,75%	32,42%	2,11%
Audiovisual and interactive media	24,61%	26,31%	27,70%	12,56%
Books and press	17,74%	17,12%	15,95%	-10,09%
Visual arts and crafts	15,37%	15,32%	13,90%	-9,56%
Performance and celebration	6,34%	5,79%	6,00%	-5,36%
Cultural and national heritage	4,20%	3,89%	4,03%	-4,05%

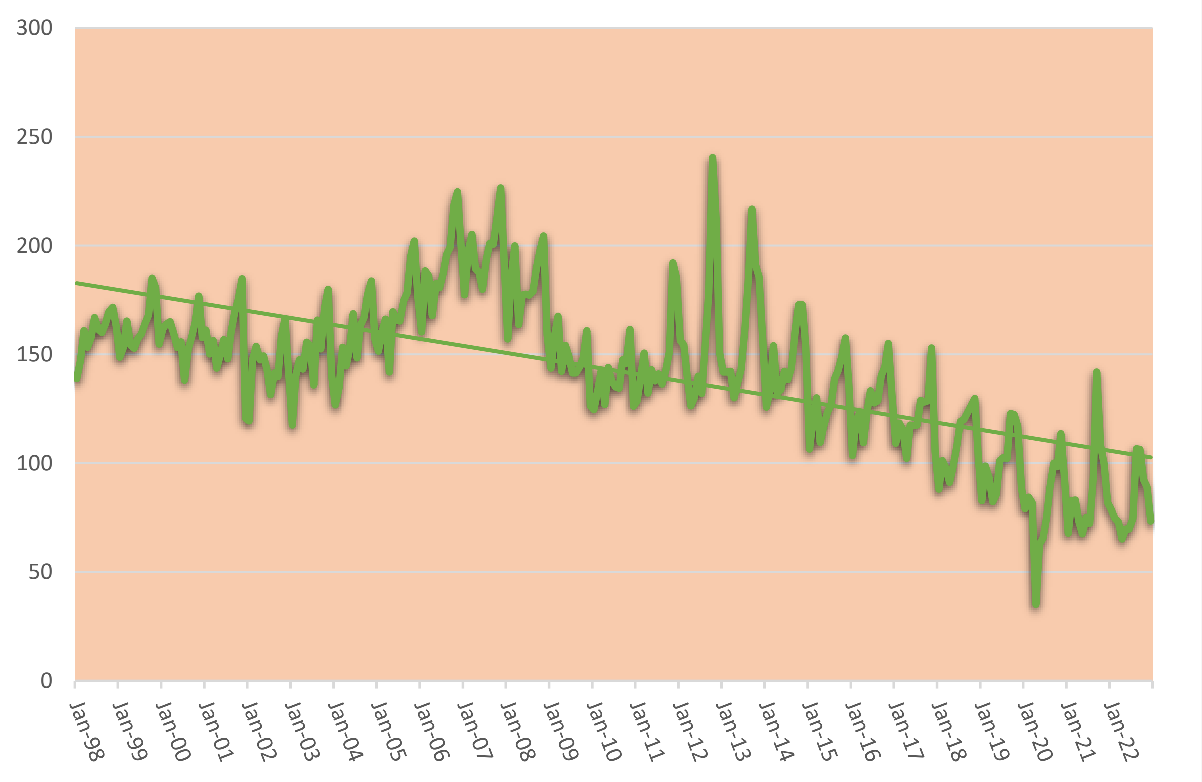
[Source: The Economic Mapping of the Cultural and Creative Industries in South Africa 2022]

The SACO study attributes the decline in the Books and Press domain at least partly to a shift to imported digital books, but a more likely culprit is a fall in revenue as the physical distribution of newsprint publications, measured by circulation, has plunged. The Statistics South Africa index of physical production volume for the publishing sector, cited in the SACO study and updated here, has been in gradual decline since 2012 (Figure 5).[46]

[45] Jen Snowball et al., "The Economic Mapping of the Cultural and Creative Industries in South Africa 2022 - Capstone Report" (South African Cultural Observatory, n.d.), 15, https://www.southafricanculturalobservatory.org.za.

[46] Snowball et al., 15.

Figure 5 Index of Physical Volume of Production, Publishing



[Source: Statistics South Africa, Statistical Release P3041.2]

At the same time, online news popularity has risen, but the decline in advertising and loss of copy price revenue of the physical product has not been made up by online revenue. The result has been a shrinking of newsrooms, though the exact number of journalistic jobs lost is guesswork, since no baseline study exists and the South African Union of Journalists, whose membership numbers might have provided at least a clue, ceased to exist some time ago. Jobs in the Books and Press domain generally as a percentage share of the total cultural and creative industries jobs have fallen from 14,5% in 2017 to 12,4% in 2019.

South African book publishing

Technology and books

The future period often employed in scenario exercises is 20 years though it could be shorter. Looking back at predictions about technology in a particular area of creative activity, such as book publishing, may give us a clue about forecasting the nature and pace of change. In 1996 Microsoft founder Bill Gates wrote, “We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next 10. Don’t let yourself be lulled into inaction."[47] Twenty years ago, e-books were an uncertain technology.[48] Ten years ago, some were certain they would dominate reading in the future.[49] E-books are no longer novelties. But paper books are still very much in demand and in evidence.

Technology has had a positive effect on the way books reach readers, whether for print or electronic form, radically streamlining production and distribution. E-books have changed the book business, though as will become clear potential threats and opportunities are not confined to them.

Though the idea of e-books has been around since 1930s, Michael Hart is credited with the creation of what is considered the first true e-book in 1971. In the same year, he founded the popular online repository of public domain e-books, downloadable for free, Project Gutenberg.[50]

The Amazon Kindle dedicated e-book reader was launched in 2007, the same year as the iPhone,[51] around 15 years ago – at the time of writing. The iPhone sparked a boom in smartphones, which essentially are small powerful, connected computers with a phone attached. Books and news articles can be read on a smartphone, the device of choice for connecting to the Internet for a large part of the population. The Apple iPad, which can among other purposes better act as an e-book reader than a smartphone, was launched in 2010, around 12 years ago, and the tablet form has been copied by among other manufacturers Samsung.

The distribution and reading of e-books have soared, not the least because Project Gutenberg allowed free access to the electronic versions of its now 60 000 books, among them what are considered the Western classical works of fiction as well as popular out-of-copyright works. For example, among the most downloaded are A Room with a View by E. M. Forster, Moby Dick; Or, The Whale by Herman Melville, The Complete Works of William Shakespeare, and The Adventures of Sherlock Holmes by Arthur Conan Doyle. It is worth highlighting that Native Life in South Africa by Sol. T. Plaatje is available on Project Gutenberg. This non-profit represents the altruistic, progressive high-tech movement, along with Open-Source software and the Internet itself. This is in sharp contrast to the Silicon Valley ethos that infuses the mostly US multinationals which among others operate what is called social media but is in effect commercial media masquerading as free services that we have come to depend on.

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[47] Nancy Weill, "The Quotable Bill Gates," ABC News, June 23, 2008, https://abcnews.go.com/Technology/PCWorld/story?id=5214635.

[48] Robert Godwin-Jones, "E-Books and the Tablet PC," *Emerging Technologies* 7, no. 1 (January 2003): 4–8, https://scholarspace.manoa.hawaii.edu/server/api/core/bitstreams/6deae972-f9b9-41ef-ae17-f7a784ca8067/content.

[49] Michael Agresta, "What Will Become of the Paper Book?," *Slate*, May 8, 2012, https://slate.com/culture/2012/05/will-paper-books-exist-in-the-future-yes-but-theyll-look-different.html.

[50] Michael Hart, "Project Gutenberg," Project Gutenberg, August 1992, https://www.gutenberg.org/.

[51] History.com Editors, "Steve Jobs Debuts the IPhone," HISTORY, accessed December 1, 2022, https://www.history.com/this-day-in-history/steve-jobs-debuts-the-iphone.

This includes the dominant search engine, Google, whose free services are in effect the main competition for multinationals Microsoft and Apple.

Fifty years after the invention of e-books and 15 years after the launch of a dedicated e-reader by marketing giant Amazon, it is hard to determine the global status of e-books – which are thanks to the Internet an example of one of the meanings of globalization, the ubiquity and speed of information flows. The top downloaded book on Project Gutenberg in the last seven days at the time of writing was A Room with A View, downloaded more than 150 000 times in the last 30 days.

The publication of these e-books on the web to an audience of anyone with a web connection and a device to read them undoubtedly displaced some printed books but may have supplemented physical production. No easy way of determining which is which presents itself. Apart from the tactile experience of handling a printed book, and its non-dependence on battery or electric mains power, et al, the Project Gutenberg e-books all have a price advantage. Classical e-books may no longer incur royalties, but the paper and printing costs entail some price, even if far less than new books.

Reader preference

The availability of free e-books may have shrunk the market for printed classics. It may have made it possible for many in the world who might have been dissuaded by cost or inconvenience to instead download and read such books online. Despite the incursions of free, non-copyright e-books, one measure of preference in one of the world's most prosperous country, the US, shows that print books are still preferred for reading, though the percentage of e-book reading has increased.

A 2021 Pew Research Centre survey showed a slight increase in the share of Americans surveyed who report reading e-books, from 25% in 2019 to 30%. This compares with a figure of 65% for adults who had read a print book in the past year and 75% who had read a book in any format.[52] Ten years previously, in 2011, the percentage of adults who had read an e-book was 17% and those who had read a printed book was 72%. The growth in e-books cannot simply be extrapolated into the future: the figure for e-book reading in 2021 is only slightly higher than the previous high in 2018 of 28%. Moreover, only a small percentage of US citizens, according to the Pew survey, that is 9%, read only e-books while 32% read only print books. A full third read both e-books and listen to audiobooks.

Printed books are still overwhelmingly preferred, despite the widespread availability of e-books.

A distinction must be made between reading and buying e-books. The Pew research survey did not focus on purchase preference. According to Statista, readers in several countries prefer buying print books to buying e-books. Globally, Statista reports the estimated share of

[52] Michelle Faverio and Andrew Perrin, "Three-in-Ten Americans Now Read e-Books," *Pew Research Center* (blog), January 6, 2022, https://www.pewresearch.org/fact-tank/2022/01/06/three-in-ten-americans-now-read-e-books/.

population who bought an e-book or a printed book in 2021 ranges from just over 6% for e-book purchases in India versus 25% for printed books to 26% versus 33% in China.

The lockdown had a dramatic and apparently permanent effect on the purchase of newspapers and magazines – with a concomitant surge in online news consumption. Why was this tipping point not replicated in book publishing? The Publishers Association of SA (PASA) notes “some evidence” that lockdown measures increased e-book revenues,[53] and some publishers did look to increase revenue from e-book sales. However, an industry expert reported during the lockdown that “local digital sales would not suffice,” suggesting that publishers would have to look to an international market for extra revenue. The association has remarked South Africa’s undeveloped infrastructure and consumer readiness prevented taking “full advantage of digital opportunities.”[54] This key barrier calls to mind the digital divide in South Africa, which goes far beyond lack of access to the Internet or high data prices.[55]

The percentage of purchased e-books in South Africa remains small. Digital book revenue remains around 4% of the total revenue from book sales of around R3-billion, down 19% from before the pandemic.[56] It remains to be seen if the book business recovers to the level of around R3.5-billion of 2018/19. A familiar factor has been the depressed economy, to which can be added the lingering lockdown effects, what PASA calls “fluctuations” in the educational market, and at the higher education level, a change in the way the NSFAS pays for books.[57]

The Pew survey of US citizens also shows the growth of audiobooks alongside e-books. This highlights the problems of categorisation posed by dematerialisation. While e-books are still regarded as electronic version of the printed product, audiobooks might be better placed in the audiovisual domain, alongside podcasts, YouTube videos and social media, all sources of distraction in the attention economy of the Internet. If e-books had fulfilled their early promise of being able to use connectivity and audiovisual tech to offer an imaginative multimedia experience,[58] with enhanced e-books, they would be even more deeply embedded in the audiovisual domain. As it is they remain linear, mostly black and white, and non-pictorial. This is not to say that, particularly in education, enhanced books have much promise in enriching learning.

Technology is clearly one of the drivers of change in publishing, but the shape of that change may be surprising. A South African publisher interviewed mentioned, not facetiously, that AI would not only be used to design look-alike covers of increasingly homogenous best-sellers,

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[53] Elizabeth Le Roux et al., “South African Book Publishing Industry Survey 2019 - 2021” (Publishers’ Association of South Africa, 2022), 5, https://publishsa.co.za/publishing-industry-survey-2019-2021-revised/.

[54] Le Roux et al., 2.

[55] Wesley Diphoko, “Tech Is Not the Only Answer to Connect the Unconnected,” November 21, 2022, https://www.iol.co.za/technology/opinion/tech-is-not-the-only-answer-to-connect-the-unconnected-370a3046-8fa6-466c-8eff-da57f6190b70.

[56] Le Roux et al., “South African Book Publishing Industry Survey 2019 - 2021,” 5.

[57] Le Roux et al., 2.

[58] David Kudler, “The Problem with Enhanced Ebooks - The Book Designer,” May 18, 2020, https://www.thebookdesigner.com/the-problem-with-enhanced-ebooks/.

but to write them to a formula as well. Expressing the same fear, an artist has posted on Facebook: “AI art is in its infancy. Just because we can doesn't mean we should – like many other things in life. As an artist, I'm watching this all unfold with a sick sense of dread. They're going to come for the writers next, I just know it.”

This is not alarmist. AI with Big Data are part of what Flew calls “algorithmic culture,” opaque by nature of algorithms’ commercial value, which is replacing human decision-making with machine judgement, in areas such as the shape and content of a TV series.[59]

Some overall trends can be discerned. Self-publishing is now established. Book readership is low in South Africa, a fact that can be regarded as an opportunity for growth. Technological disruption has not affected book publishing in the same way as it has newspapers and magazines. E-book prices are not that different from printed books, despite the lower costs of production, and while readership and purchase of e-books is increasing, bookshops still exist though globally book publishing is consolidating.

At the level of technology, what changes could occur that reshape the book publishing landscape differently? Given what has happened to recorded music, could e-books become as widely pirated and shared as MP3s were before first the advent of Apple’s iTunes store and other online music stores? And then to be deprecated in turn in favour of streaming services Apple Music and Spotify, et al? Piracy of books through simple PDF copies is already rife and intellectual property issues arise with digital internet libraries. Could e-books replace printed books almost entirely, the way that online news platforms threaten to do with newspapers and magazines? Could platforms that offer a subscription to a range of books, mimicking the streaming services, come to displace individual sales of ebooks? Could the printed book go the way of CDs and DVDs as a discarded though not entire vanquished format? Might, on the other hand, e-books, like audiobooks, simply expand the channels by which authors can reach audiences? Will the changes in book publishing and distribution lead to a greater audience? And what foreseen and unforeseen problems lie in wait for publishers, booksellers, readers, and policymakers?

In the rush to embrace the convenience of technology, we may have overlooked the fragility of digitisation. That fragility applies to books. Printed material can be damaged or lost, but in the normal course of events it has a greater longevity than purely digital material, which is easily copied but easily vanishes – as any computer user who has experienced disk failure will attest. The Internet Archive, which maintains a library of digitised books, has pointed this out.[60] The Title of Don Mattera’s groundbreaking work Memory is the Weapon reminds us of the political imperative to preserve personal and public histories. The destruction of memory represented by the neglect of books and libraries is reminiscent of the effect of a human being undergoing a debilitating stroke. The preservation and lending of books for reading is the job of libraries and museums, pointing to the link between domains and underlining the importance of libraries such as Amazwi, which houses many significant printed works.

[59] {Citation}

[60] Brewster Kahle, “Digital Books Wear out Faster than Physical Books,” *Internet Archive Blogs* (blog), November 15, 2022, http://blog.archive.org/2022/11/15/digital-books-wear-out-faster-than-physical-books/.

As important a link between Books and Press and the other domains is what is inelegantly called “repurposing of content” for other domains. Books become scripts for plays for the performing arts and films in the audiovisual domain. Designers create covers and illustrators create artwork for books, and many others are involved. “Every book is a collaborative effort.” Moreover, the 2017 Revised White Paper on Arts, Culture and Heritage recognises the centrality of books to the CCIs. “The Book Sector is a key driver of the country’s artist and cultural heritage. Its significance and its influence therefore extend far beyond the relatively small book industry itself [and] contributes meaningfully to the cultural creative economy.”[61]

Finally, while “Books can be conceptualised broadly as carriers of information, or as information packaged for a specific audience,” one should be wary of definitions that exclude form, such as the now ubiquitous word “content.” Marshall McLuhan's observation, "The medium is the message," may now be largely forgotten, but it is a reminder that form and content are fused in creation, and efforts to extract content from artistic creation can be dreary exercises. Books do not automatically make either popular or critically acclaimed films, and films rarely convert into books.

Books in SA and the world

Looking at book publishing in South Africa through the lens of technology yields some insights but an important factor, constraining rather than driving change, and reinforced if anything by technology could be internationalisation, in particular the lingering effect of colonialism, which established the dominance of the English language. English is not coincidentally the language of the Internet.

Many books in South Africa are imported from the UK, and their prices are subject to changes in the forex value of the rand[62].

Table 3 Total net publishing revenue 2018-2021 R' 000

Sector	2018/19	2019/20	2020/21	Change 2021 vs 2019
	R '000			
Academic	469 974	276 544	214 709	-54,3%
Trade	847 303	866 886	758 441	-10,5%
Education	2 203 544	1 699 309	2 027 373	-8,0%
Total	3 520 821	2 842 739	3 000 523	-14,8%

[61] Republic of South Africa, “Revised White Paper on Arts, Culture and Heritage: Third Draft” (Republic of South Africa, February 2017), 29, https://www.gov.za/sites/default/files/gcis_document/201706/revised-3rd-draft-rwp-ach-february-2017.pdf.

[62] Shaazia Ebrahim, “Why You’re Paying So Much For Books In South Africa,” *The Daily Vox* (blog), October 26, 2018, https://www.thedailyvox.co.za/why-youre-paying-so-much-for-books-in-south-africa-shaazia-ebrahim/.

[Source: Publishers Association of South Africa)

South Africa's established local publishing business has thrived on producing for schools, and unlike in other markets general book sales come second, and academic books third (see table). Writers for general or "trade" book publishing in South Africa for the South African market cannot expect to get rich, with the sale of 5 000 copies marking a local best-seller. Most South African writers, one can confidently say are not in it for the money. A host of problems crimp the local market, ranging from illiteracy and poverty to a lack of books written in indigenous languages and inadequate distribution in townships and rural areas. A 2016 survey by the South African Book Development Council found that 25% reported reading books and "just over 16 million adults in South Africa (58%) reported living in a household with no books."[63] It does not help that South Africa remains deeply divided by race and class, with poverty, inequality and the digital divide forming added barriers to book buying or even free downloading.

Whether for adult or children's books the numbers of indigenous language books is dwarfed by those in English or Afrikaans (See Table).

Table 4 Table 5: Revenue from local titles, by format and language (R '000)

Language		**2018/19**		**2019/20**		**2020/21**
	Print	*Digital*	*Print*	*Digital*	*Print*	*Digital*
	R '000					
Afrikaans	298 229	11 689	200 639	71 890	215 195	78 830
English	2 182 779	92 747	1 763 310	9 855	1 836 033	13 616
IsiNdebele	1 655	19	89 811	604	106 079	832
IsiXhosa	42 407	857	29 663	1 436	40 965	1 020
IsiZulu	121 675	1 093	11 775	274	25 026	347
Sepedi	32 485	695	6 827	416	19 645	491
Sesotho	20 864	710	36 362	344	59 128	411
SiSwati	6 077	83	2 894	4	3 037	9
Setswana	50 956	624	7 109	82	9 594	142
Tshivenda	9 192	116	866	15	2 770	14
Xitsonga	11 091	274	10 769	1	10 989	59

[63] Kate Wilkinson, "[FACT CHECK] Do Only 14% of South Africans Read Books?" September 8, 2017, https://ewn.co.za/2017/09/08/fact-check-do-only-14-of-south-africans-read-books.

Multilingual	6 363	121	3 311	2 050	1 939	93
Other	577	13	637	13	1 306	181
Total	**2 784 351**	**109 041**	**2 163 972**	**86 984**	**2 331 706**	**96 045**

[Source: Publishing Association of South Africa]

One way or another, more books in indigenous African languages are needed,[64] especially for children.[65] Translation is an option but is expensive if done well.[66] Also, books translated from English will retain a cultural developed-world view that may be inappropriate and difficult for young black South African readers.[67] Of more than symbolic significance is that the South African Book Development Council (SABDC), credited with championing indigenous language publishing and a national reading campaign, is defunct.

Decolonisation in a real rather than rhetorical sense would make a difference, a concept that straddles CCI domains and where the driving forces of the political, ethical, social, among other spheres, overlap.

Finally, the effect of publishing on the natural environment must be considered. Books contribute to consumption of paper, which – despite perceptions of its environmental benefits – is a major polluter, not only downstream in filling up landfills but upstream in its manufacture, consuming vast amounts of energy and water and poisoning the environment of those near the paper plants, as well as, in South Africa, necessitating environmentally unsound monoculture.[68] [69]On the other hand, sustainably managed forests help mitigate climate change through absorbing carbon dioxide emissions.[70]

However, the paper waste produced by the proliferation of printed-out PDFs, form-signing bureaucracy and paper packaging is no doubt far more damaging than books, which - even

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[64] SACO, "A Feasibility Study on a State-Owned Publishing House and an Online Book Purchasing Portal" (South African Cultural Observatory, September 2021), 8.

[65] Tamsin Metelerkamp, "CHILD LITERACY: A South African Reading Revolution Needs More Books in African Languages," Daily Maverick, September 9, 2022, https://www.dailymaverick.co.za/article/2022-09-09-a-south-african-reading-revolution-needs-more-books-in-african-languages/.

[66] Interview with publisher

[67] Sindi-Leigh McBride, "Why Are South African Children Struggling to Read Properly?," April 26, 2019, https://africasacountry.com/2019/04/why-are-south-african-children-struggling-to-read-properly.

[68] Centre for Environmental Rights, "Paper & Pulp," Full Disclosure 2015, accessed December 9, 2022, https://fulldisclosure.cer.org.za/2015/paper-pulp.

[69] Mandeep et al., "Pulp and Paper Industry–Based Pollutants, Their Health Hazards and Environmental Risks," *Current Opinion in Environmental Science & Health* 12 (December 2019): 48–56, https://doi.org/10.1016/j.coesh.2019.09.010.

[70] Shakespear Mudombi, "South Africa's Forestry Value Chain and the Transition To Climate Compatibility" (Trade and Industrial Policy Strategies, June 2020), 5.Enyinna Nwauche, "Fair Use versus Fair Dealing: Implications for the Cultural and Creative Industries (CCI) in South Africa" (South African Cultural Observatory, December 2019), 40.

for pulp fiction - tend to be recirculated often before being recycled. And e-books threaten to add to the growing mountains of electronic waste that have to be managed in future.

Intellectual property issues for books are a special challenge, encapsulated in the debate about the Copyright Amendment Bill, damned as the work of “dark forces” undermining South African authors and publishers[71] and at the same time hailed “a positive tool for users and producers of information”.[72] One economist believes copyright protection should be weighed against its effect on inequality.[73] A South African Cultural Observatory study comes down on the side of fair use, with recommendations on how to make it work for the creative sector in South Africa.[74] It has to be realised that the public may have different views – as the widespread copying and sharing of digital music on the internet has shown – on copyright from the originators of original material and from industry. Moreover, law aside, technological developments have long threatened the rights of authors, with students liberally using photocopying machines without regard for royalties as soon as the machines became easily accessible. At present several websites offer PDF copies of whole books for free or a small fee. One such does not cache any PDF copies itself but simply directs the website user to the site where the probably illegally copied book is hosted, possibly posted by a helpful lecturer for his students. Digital rights management may help to some extent but expect little interest from the technology enthusiasts. “An impenetrable tone deafness rules Silicon Valley when it comes to the idea of authorship.”[75]

The vanishing press

The Press sector was among hardest hit by the COVID-19 lockdowns, as detailed in an initial SANEF 2020 report on the effect of the pandemic on the media.[76]

The first lockdown had an immediate and disastrous effect on magazines. Family business Associated Media Publishing (AMP), founded by woman publishing pioneer Jane Raphaely, shut, with a reported loss of 97 jobs. AMP blamed its inability to continue in business on “the closure of printing and distribution channels, the global halt on advertising spend as well as the inability to host events for the foreseeable future ...”[77] This was undoubtedly true, but the magazine sector had shown signs of trouble for a while. The AMP closure was followed by the

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[71] Owen Dean, “Copyright Dark Forces | CIP - The Anton Mostert Chair of Intellectual Property,” January 20, 2023, https://blogs.sun.ac.za/iplaw/2021/06/24/copyright-dark-forces/.

[72] Denise Rosemary Nicholson, “2018-11 - Why ‘Fair Use’ Is so Important for South African Copyright Law - Wits University,” January 20, 2023, https://www.wits.ac.za/news/latest-news/in-their-own-words/2018/2018-11/why-fair-use-is-so-important-for-south-african-copyright-law.html.

[73] Dean Baker, “Working Paper: Is Intellectual Property the Root of All Evil? Patents, Copyrights, and Inequality,” October 2018.

[74] Nwauche, “Fair Use versus Fair Dealing.”

[75] Jaron Lanier, *You Are Not a Gadget: A Manifesto* (London New York: Penguin Books, 2011), 46.

[76] Reg Rumney, “SANEF COVID 19 Impact on Journalism Report (Interim)” (Johannesburg: South African National Editors Forum, June 1, 2020).

[77] Ruan Jooste, “BUSINESS MAVERICK: An Empire Comes to an End as Associated Media Publishing Closes Its Doors,” Daily Maverick, May 1, 2020, https://www.dailymaverick.co.za/article/2020-05-01-an-empire-comes-to-an-end-as-associated-media-publishing-closes-its-doors/.

shutting of the magazine division of publisher and printer Caxton & CTP Ltd and the possible loss of up to 300 jobs. Later in the year, Naspers subsidiary Media24 announced sweeping rationalisations and closures of its magazines and newspapers.

The newspaper industry fared better than the magazine sector, in that fewer newspapers closed but restrictions on movement caused a precipitous drop in newspaper circulations, with daily newspapers excused entirely from reporting their figures to the Audit Bureau of Circulations for the second quarter of 2022. Together with lockdowns cutting off the third-party revenue that news organisations increasingly look to so as not to be overdependent on advertising or newspaper sales, this depleted income to such an extent that retrenchments and various schemes such as furloughs were resorted to so that salary expenditure could be lowered.

What became evident in the follow-up to the 2020 SANEF report, the State of the Media report exactly two years later, is that the press had not recovered from the blow dealt by the lockdown. From the quarter before the pandemic fully arrived on our shores to the last quarter of 2021, a full year, many daily newspapers had lost up to 50% of their pre-pandemic circulation, and sometimes circulation was artificially boosted by free copies.[78] Any recovery in following quarters of regional and national dailies and weekend and weekly newspapers has been marginal. In subsequent years, free and local (perhaps more accurately hyperlocal) newspapers audited by the ABC bucked the trend[79] – though for advertisers the existence of paying newspapers is evidence that readers might actually engage with what is in the newspaper rather than use it for puppy training. Small newspaper publishers independent of the big commercial groups producing most free papers across the country, represented by the Association of Independent Publishers, were also dealt a blow by the pandemic. Here too there are difficulties but "green shoots" of recovery are visible.[80] More evidence that the Books should not be separately considered from the press is that some members of the AIP publish books as well as newspapers. Indeed, mainstream news publisher Media24 owns the major book publishing brands.

Readers "lost the habit", to use the words of one publisher interviewed this year, of buying newspapers. And sometimes many of them did so. It is evident the effect of the lockdowns accelerated a trend of decreasing newspaper circulations. It was, in a sense, a tipping point. Evidence is that the audience went online for news[81] or to TV or radio instead during the pandemic and many have become used to getting their news online. A major beneficiary was News24, already the biggest publisher.[82] As well as boosting digital news platforms, the pandemic gave new life globally to an unlikely format, the e-edition or e-paper, an electronic

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[78] Reg Rumney, "The State of the News Media - An Update to SANEF's 2020 Covid-19 Interim Report and Some Cross-Cutting Issues" (South African National Editors Forum, June 2022), 17.

[79] Karabo Ledwaba, "Newspapers ABC Q3 2022: Daily and Local Papers Decline but Numbers Steady," Bizcommunity, November 15, 2022, https://www.bizcommunity.com/Article/196/90/233509.html.

[80] Kate Skinner, "State of the Newsroom 2021," ed. Alan Finlay (Wits Centre for Journalism, November 24, 2022).

[81] Rumney, "SANEF COVID 19 Impact on Journalism Report (Interim)," 16–17.

[82] Rumney, "The State of the News Media - An Update to SANEF's 2020 Covid-19 Interim Report and Some Cross-Cutting Issues," 6.

version of a newspaper, sometimes in PDF format. Such e-papers were innovatively distributed via WhatsApp in Africa.[83] Indeed, the pandemic did not only destroy old ways of doing business. It also spurred innovation.

At the same time, for news organisations and society the conundrum is simply, “Who pays for the news?” As news has increasingly migrated online, advertising revenue has plummeted as advertising spending online has gone to social media, competing not only for attention with news platforms but also for revenue, and to search engine near-monopoly Google.[84] The news on online news platforms, such as Independent Online, News24, and TimesLive, is mostly aggregated from newspapers in a group. In that sense, online news platforms are arguably cross subsidised by newspaper advertising sales. Newspaper closures would mean fewer reporters and less news. Since most South Africans get their news from television and radio, this might not seem to be a difficulty let alone a crisis. It is a crisis because, while newspapers could be seen to be serving a relatively privileged, literate group, most news that finds its way onto other platforms has been originated by newspapers.[85]

The tribulations of publishing illustrates the interconnectedness of the CCIs. Even more, perhaps, than other commercial organisations, newspapers, for centuries central to public life, cannot be seen in isolation from their contribution to society. In South Africa, this is underlined by the historical political opposition to apartheid by English-language newspapers in South Africa. Added to this are the lengths to which English-speaking business went to prevent the anti-apartheid Press being captured by the Nationalist Party government and that government in response secretly setting up the English-language Citizen newspaper with public money as part of its pro-apartheid propaganda drive.[86]

More than its role in informing the public about politics, and its essential service of investigative journalism, the press traditionally has been the way the public has learned about books, public events, plays and art exhibitions. Socially it has contributed to the common public discourse. This now falls increasingly to online news media, whether commercial – increasingly using a subscription model – donor-funded or the membership hybrid model of the Daily Maverick online platform and weekly newspaper.[87] All models have their weaknesses and strengths, including the donor-funded model.[88] In South Africa, where much of the funding is foreign, donor-funded media can come under threat from a hostile government arguing against foreign meddling.

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[83] MISA, “Impact of Covid-19 on Media Sustainability” (MISA Zimbabwe and the Konrad Adenauer Stiftung, 2021), 31.

[84] Rumney, “The State of the News Media - An Update to SANEF’s 2020 Covid-19 Interim Report and Some Cross-Cutting Issues,” 6.

[85] Rumney, 22.

[86] Joel Mervis, *The Fourth Estate, A Newspaper Story*, 1st ed. (Johannesburg: Jonathan Ball Publishers, 1989), 434–52.

[87] MISA, “Impact of Covid-19 on Media Sustainability,” 33.

[88] Reg Rumney, “Funding Is a Thorny Issue for Independent Media,” *The Mail & Guardian* (blog), August 20, 2022, https://mg.co.za/opinion/2022-08-20-funding-is-a-thorny-issue-for-independent-media/.

That the press and its online incarnations are important for democracy and the functioning of a modern state is indisputable – though members of the press do not always behave well and the "mainstream media" has become an object of scorn for right and left. As a way of distinguishing what is the normative role of news media is the idea of public interest journalism, a possible definition of which has been put forward as "journalism that is independent of political, commercial or factional interest, producing verified and verifiable information for an intended audience and transparent in its methods of pursuing the truth for the sake of the common good while being careful to do no harm."[89]

The public, it is to be hoped, recognise the value of those news organisations in print or online who put in practise what has been the underlying guiding principle of journalism since it became distinguished from propaganda. In any case, it can be shown that the value of the press goes far beyond the low market value placed on it – the last sale of a major news organisation, the former Tiso Blackstar, which publishes what is still the best-selling newspaper in the country, the Sunday Times, was for a R1-billion.[90]

Most important for the purpose of thinking about the future, is the reaction of the press to the COVID-19-induced news crisis. No money was forthcoming specifically for news media from government except for community media from the Media Diversity and Development Agency (MDDA). Five rounds of relief funds were raised by the non-profit South African National Editors' Forum for unemployed journalists around the country.[91] The MDDA is the only example of subsidy for news media and has massively boosted if not created South African community media, which did not exist pre-1994, but it seems to attract the newspaper cliché "mired in controversy".[92] Other government intervention in the news media are the SA Government News Agency and the Government Communications and Information Systems' free newspaper Vuk'uzenzele. South Africa has no independent news agency – Sekunjalo's African News Service has a continental focus and is associated though not owned with Independent Media – and Vuk'uzenzele competes directly with independent local newspaper publishers. There is a case for government to support a new version of now defunct SA Press Association.[93]

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[89] Rumney, "The State of the News Media - An Update to SANEF's 2020 Covid-19 Interim Report and Some Cross-Cutting Issues," 62.

[90] Mudiwa Gavaza, "Tiso Blackstar Group Sells Media Business to Lebashe for R1bn," June 27, 2019, https://www.timeslive.co.za/news/south-africa/2019-06-27-tiso-blackstar-group-sells-media-business-to-lebashe-for-r1bn/.

[91] Dzudzie Netshisaulu, "SANEF Media Relief Fund Calls for Applications for the Fifth Round » SANEF | Protecting Media Freedom," *SANEF | Protecting Media Freedom* (blog), August 16, 2021, https://sanef.org.za/sanef-media-relief-fund-calls-for-applications-for-the-fifth-round/.

[92] By Daniel Steyn, "Massive Staff Costs at State Agency That Is Supposed to Fund Media," GroundUp News, June 14, 2022, https://www.groundup.org.za/article/state-media-funding-agency-resources-eaten-up-by-massive-staff-bill/.

[93] Rumney, "The State of the News Media - An Update to SANEF's 2020 Covid-19 Interim Report and Some Cross-Cutting Issues," 54–57.

The scenarios

Three scenarios are presented.

Happily ever after?

The creative industries, including the newspaper industry and book publishing, exploit an unexpected fillip in the economy granted by an unexpected but welcome super-cycle surge in commodity prices to innovate and become more sustainable. They do this by testing other revenue streams and media, including books. They engage more deeply with readers, focusing on subscriptions, and most importantly they spend on retaining paying readers through research and using advanced computer technology. Privacy concerns around the world have by 2033 almost completely put an end to the tracking mechanisms previously unnoticed by internet users, such as by third-party cookies. This means that organisations that can show they have real readers rather than possibly fictional visitors to websites become more valuable to advertisers. The confidence which is a byproduct of the inflow boosts the foreign exchange value of the rand and makes newsprint cheaper, helping both big and small print publishers.

Higher incomes enable more households and businesses to install solar power to bypass or supplement electricity supplied by Eskom, effectively adding electricity to the grid as if new power stations were being built. In time private domestic solar power is supplying substantial MW to the grid. The exercise also maps a new path for private-public partnerships at a grassroots level.

A newly formed cultural and creative industries department headed by an inspirational leader creates policy that keeps up with technological developments, aided by timely research. Among other initiatives of the new department, a social media policy is put in place and with the communications department a policy on data collection by tech giants such as Apple, Google, and Oracle. The SA Book Development Council is replaced by an independent body to take South African publishing forward.

A stronger currency also makes buying technology cheaper, and boosts the audiovisual and interactive media sector, leading to a surge in podcasting, including news podcasting to supplement broadcasting, and to videogames which tap into other domains such as books and press and design.

Newspaper circulations, which had plummeted to new lows in 2020 as a result of the pandemic and had never quite recovered from their own "long Covid," reach a kind of plateau, though they continue to drift downwards. However, the focus on print news products, the result of a manufacturing process that harks back to the 20th century has missed the point. Despite the introduction of paywalls, despite the intense battle for online revenue, the sophisticated news consumer has never had so much choice – some of that choice exposing the myth that news produced elsewhere is better. South African online news continues to see innovative start-ups take advantage of the low barriers to entry in the online environment to successfully compete with better resourced news organisations. Newspapers still hit the newsstands, but consolidation in the industry means that fewer newspaper titles survive and only two or three newspaper houses are left out of what were once called "The Big Four". A transformation of ownership to visibly black people – as opposed to Black Economic Empowerment ownership

– makes the newspaper industry more resilient to government criticism. Online news organisations for the moment mostly avoid this problem, catering for niche audiences or – in the case of non-profit news - having no owners at all.

Technology is boosted by massive increases in computing power, enabling even faster increases in Artificial Intelligence applications. A.I. does see the destruction of jobs in the South African cultural and creative industries, such as for voice-over artists, graphic designers, and computer programmers. This is disastrous for those too old or rigid to retrain in other areas or to use AI to their advantage. Government combats the drive to robotisation that AI is part of, resisting the kind of Silicon Valley technological determinism that influences Western capitalism. It does so by outlawing technologies that remove human interaction from simple transactions like buying groceries, the self-checkout systems of some supermarkets in the UK for example. It is not only that such technology fails to enhance human experience and destroys jobs. The economic rationale is that some technology is expensive to buy and expensive to maintain while not necessarily boosting productivity or saving money. Government also exercises its power, together with other nations, to stop Large Language Models being trained on data without the consent of the users. Voice-over artists, for example, can deny programmers access to their voiced audiobooks to copy their intonation etc. In the African context this means that human voices remain valuable. Similar regulation applies to the visual arts.

Despite the misgivings of artists, AI is embraced in a host of unexpected and helpful areas though the implications of its training in terms of intellectual property theft remains contentious. AI has unexpected consequences in writing, making authenticity and originality more valuable. Those involved in the creative sector, especially management, stop referring to writers, journalists, artists, game makers, video producers and other creative staff as "content creators" and recognise their unique contributions. Government mitigates the loss of jobs that do occur from A.I. and other technologies, including robotisation, by broadening employment schemes and introducing generous retraining and social welfare payments for the unemployed.

Along with technological development the changes in the way South Africans use the internet arise from regulation of Internet giants, following recognition of their power and regulation in the US itself. South Africa is enabled to require Google and Facebook to pay their share of tax and some of this money is ring-fenced for subsidising media, namely the under-resourced community media sector, which promises to produce independent news for communities. Community media still acts as a training ground for commercial media, but as the government has hoped, more stations grow closer to being viable new entrants to the commercial media sector. The losers are the print media houses producing local newspapers and freesheets, whose dominance of local news media is challenged, along with the SABC, whose dominance of indigenous-language broadcasting is tested.

The news media plays an especially important role in continuing to expose corruption, without fear or favour, whatever its other faults. Revelations of high-level state and corporate malfeasance do not prevent looting but limit it, especially in preventing a repeat of what "State Capture" in that era really meant, which is the penetration of organised crime into the highest levels of government. Government officials in the years after 2022 who deny, at least through silence, the role of investigative journalism are condemned to irrelevance by a growing strata of citizens who do not subscribe to the increasingly divisive role of established political parties.

The news media, thanks to a system of co-regulation of the Press Council, fights off attempts to discredit its role. The Press Council continues to sustain journalism by educating the public and the news industry about the meaning and importance of independent news. More than the negative idea of regulation, the news media after a long hiatus renews its commitment to training. Universities once again create or renew journalism and media departments, sometimes with a different emphasis that includes studying social media intensively and sometimes in encouraging specialist news media, such as science journalism, which South Africa could have benefited from during the pandemic. The existence of health news sites that did aid informing the public beyond official announcements and defend against what seemed like a deluge of mis- and dis-information proves the point.

Transparency of ownership and funding becomes increasingly important as the non-profit news media, often largely foreign funded, looks over its shoulder at legal restrictions elsewhere that wiped out non-profit news media. Some politicians make threatening noises about foreign influence.

Financial pressures on news media persist and new funding sources are always sought. Even government funding is sometimes mentioned though almost instantly dismissed by media owners who are now most black rather than black empowered. Larger commercial news media is visibly staffed overwhelmingly by black employees and managed by black managers, allowing them to easily fend off racially based political attacks. Government persists in its almost benign neglect of print and online news media, while members of the government party every now and then successfully interfere in the running of the SABC, without, however, turning it into a State broadcaster in a cycle of interference and resistance. Boosted by inflows of advertising in a growing economy and a change in funding that replace the unpopular and inefficient licence fee, the SABC almost fails to counter the bigger threat that reveals itself towards the end of 20 years, that of convergence. The online news organisations have conquered the video format and have now become broadcasters. The SABC rises to the occasion, revolting as always against the menace to its independence, to upgrade its linear reporting skills to create a website worthy of BBC to compete with the print portions of the online news sites.

In books, government toys with using newfound wealth to intervene in pursuit of its objectives, and a government publisher – which would compete with small nascent publishers, especially black entrepreneurial ventures – is discussed again but, to the relief of the industry, never eventuates. More black-owned publishing houses are established and diversity of book publishing increases. South Africa once again produces inspiring literature and thanks to cheap and efficient translation software as well as subsidisation, more books in indigenous languages are published. A strong reading culture emerges. The other arts, covered by the various domains, flourish too, though not evenly and inequality both within and between domains persists. The design and audiovisual domains still do better than arts and crafts and books, though within the visual arts, painters and sculptors supply impressive work to wealthy clients domestically and abroad. The country uses its rich creative sector as a diplomatic tool not only for itself but also for Africa, with which it has united around book, arts, and music fairs to give artists bigger audience and greater earnings power. South Africa's relative prosperity and social welfare draws immigrants to the country, legal and illegal and though they may benefit the nation overall the inflow causes resentment.

The demand for printed books increases, and prices are kept in check by a stronger currency enabling cheaper imports of both books and paper. Exports increase too as greater economic integration with other countries on the African continent exposes new readers to South African books. E-books become more popular in academic settings and more effective regulation and digital rights management ensure authors and publishers are remunerated properly for them. E-book technology, which enables interactive books with audiovisual properties, becomes cheaper and more popular and e-books escape the cage of grey-screen electronic book readers. Instead, they are read or rather seen and heard on the colourful screens of ubiquitous smartphones, electronic tablets or PCs. Libraries are properly funded, and the new creative industries department ensures museums are properly run and valuable archival material preserved. Libraries aid book publishing by expanding their purchase of domestically published books and public lending rights are legislated. The country finds its metaphorical voice, mentally decolonised in the sense of discovering a self-confidence bolstered by a vibrant national literature holding its own with international influences.

Rather than trying to support artists directly, the department directs its spending to carefully vetted and monitored intermediaries and co-operatives who leverage the money for collaborative projects that benefit many creative industry workers.

All this helps South Africans cope with the vicissitudes of living in a country still coping with a transition from colonialism and apartheid and its attendant heritage of vast gaps between rich and poor, corruption, and the ever-present fear of falling victim to sometimes violent crime. Increased welfare has smoothed over some of the glaring gaps between rich and poor.

The authorities have used the newfound wealth in manner that conservative economists find exemplary, running a surplus while increasing social welfare and even managing to boost South Africa’s film industry to an innovative and commercially successful level not seen before. As the commodities super-cycle comes to an end, however, it becomes clear that poverty and inequality are still the albatross around the country’s neck, and over-relying on mining is perilous. Incomes decrease and populist pressures for radical interventions grow.

Horror story

The trials and tribulations of the press, recovering at first slowly from the Covid-19 pandemic, worsen as the years pass. Various innovative attempts to buttress this vital cog in the functioning of democracy, the economy, and society are tried in vain. Interest in most regional newspapers, whose quality declines in a death spiral of financial loss leading to lower quality leading to more financial loss, fades. Circulations keep falling, and newspapers are closed or merged until only a few viable print publications remain.

Left standing are a national daily business newspaper, two or three regional newspapers and a couple of weekend and weekly newspapers. They are thinly staffed, and some are apparently kept alive because of the political connections of the owners or to propagandise on behalf of the owners’ business interests outside of newspapers. The biggest publisher of books and news is forced by government threats to introduce new laws on ownership that target the profitable holding company to split book publishing and news.

The withering of newspapers diminishes the advertising revenue on which they rely while most online ad revenue continues to flow out of the country to the foreign-headquartered search engines and social media that pay little more than lip service to their social responsibility in South Africa. Attempts to get the foreign multinational internet giants to pay their fair share in tax or in any other way fail. The legal system, which has become increasingly a recourse for politicians to settle disputes, is weakened by political interference, disguised ironically as de-politicising the courts.

Advertisers, except for the retail chains, desert the discredited press and their online incarnations to try to reach consumers through billboards, social media influencers and below-the-line advertising or through broadcasting, which more and more relies on entertainment rather than news to attract viewers.

The precarious financial situation the news media houses find themselves in lay them open to media capture. Government revenue is diverted to Print news media that is on the side of factions that have access to the power to allocate advertising. The professional and ethical staff of the Government Communication and Information Service is sidelined. Legislation on internet publishing, designed to crack down on underage consumption of pornography, is used to censor criticism of government. Religious intolerance grows as government looks for support among fundamentalist religious groups, and they mobilise against art that is considered decadent, shuttering galleries, shutting down theatre performances, banning books, and causing an exodus of artists.

Donor-funded or non-profit news increasingly takes up the slack in not only investigative reporting but the coverage of events in rural areas and in running opinion that decries injustice and government malfeasance. It finds a ready audience among those disillusioned with the news offered by the mainstream. Government, mimicking similar laws introduced in other BRICS countries, outlaws foreign funding of “unpatriotic” NPOs and foreign funding or ownership of news organisations. The result is disastrous, but a few NPOs, relying on local funders who dare defy government, struggle on.

The government continues to tax the commercial broadcasters to fund community media, but money is drying up and attempts to draw in corporate social investment, already thinly spread, come up largely empty handed while moving community media into the commercial sector puts them in conflict with companies already occupying that space and is fiercely resisted. Community print media outfits remain dependent on provincial or government advertising and lack independence. Some community media outlets serve their communities well, but without proper monitoring many are platforms for would-be DJs or propaganda for local businesses or politicians.

Commercial broadcasters battle multinationals in the form of over-the-top streaming of films and online news broadcasts. For a while, their online news sites compete more strongly with the weakened news sites of the print media until a hostile state clamps down on criticism by closing broadcasting outlets on satellite TV and threatening to cancel the licence of the only free-to-air TV station. One company still monopolises sports broadcasting. The national broadcaster becomes the State broadcaster, with officials from government holding high positions and deciding news policy as the government takes control of the only news source for most of the population.

The commercial newspaper titles have online websites, but the staff of the small newsrooms must work harder to produce the equivalent of time-pressured reactive news agency copy as well as more thoughtful own initiative in-depth news for print and mostly newspapers and online outlets simply share news, often sensational crime stories from court reports. Reporters, dubbed “content producers” or “multimedia journalists” struggle to produce real news even when they are allowed or encouraged to do so, and are obliged to produce audio, video, and social media posts in a converged environment. The tendency has been increasingly towards political horse-race news about who is jockeying for power, and theatrical politics along the lines of “Politician A says Politician B is racist,” and “Politician B says Politician A is corrupt.” As the political space darkens, even this is frowned on, and many newspapers are reduced to attacking foreign sanctions, producing clickbait celebrity news, or regurgitating official announcements.

Business news survives in an etiolated form for an elite, but even here the attenuation of competition along with the shrinking of what passes for the public sphere and the decrease in transparency as investors ditch public listing for private equity or opaque offshore trusts deflate business, financial and economics journalism. News agencies like Reuters and Bloomberg still operate in the country and are a valuable source of real news for residents, though their coverage is limited, and reporters judged too critical are likely to be harassed, intimidated, or even imprisoned on made-up charges. The mistake, in retrospect, was that supporters of freedom of expression and of a free press focused too much on legal government intervention to control the press and not enough on financial sustainability until it was too late.

The cheapening of public conversation and poor quality news and opinion arising from this toxic mix of forces contributes to the polarisation and regressive political atmosphere, with political parties engaging in xenophobia and violence in a fragmented political environment. The government, while implicated in corruption and beholden to reactionary religionists, reacts to increasingly defiant challenges from populist leaders and opportunist criminals with unnecessary force, anti-democratic rhetoric, and legal positivism. “The law is the law,” the police minister says when protestors are gunned down, and a compliant news media mostly parrots his utterances. Dissidents sometimes vanish, a hard-pressed news media unable to trace their final resting places.

The government, under sanction for human rights violations, adopts a foreign policy that aligns itself with the BRICs against the West at the same time as its state-owned firms co-operate with Western rogues in looting the State. Ugly xenophobia alienates other African nations, rendering co-operation difficult and retarding implementing the African Continental Free Trade Agreement Area agreement. Attempts at cultural diplomacy are futile and South African firms encounter hostility in other African countries as they try to broaden their sales beyond the diminished domestic market. South Africa continues to rely on exports of commodities – exceptions are made for these by countries enforcing trading penalties, in the form of a carbon border tax, on South African exports for continuing to rely on coal-fired power stations for electricity. This intransigence, though understandable is unfortunate and manufacturing shrivels. Government is autarkic in intent and prefers borrowing from foreign investors who do not care much about human rights.

In the paucity of intelligent public debate and because populist rhetoric replaces critical thinking, the government uses nationalisation of the central bank to install a puppet governor who monetises a huge increase in government debt under the guise of being informed by modern monetary theory. Foreign investors, both direct and portfolio, take flight and the currency plummets. Attempts to fix foreign exchange rates and local prices and introduce tighter capital controls flop.

The state bank has been rendered bankrupt by loans to bankrupt state-owned entities, including a state publishing company, and the country is forced to ask for aid from the International Monetary Fund to shore up the balance of payments. The IMF insists on privatisation of SOEs and reduction of government spending, which inflicts pain, even on staunch government supporters. Government, which has cracked down on reporting of human rights issues cannot suppress this news, which is reported by international agencies working in the country and the business press.

Artificial Intelligence is used to help in surveillance. The use by government of personal data supplied by social media and search companies to spy on citizens is mitigated by using artificial intelligence to avoid being spied on. Nonetheless, activists maintain carefully curated bland social media profiles.

Some bright spots stand out amid the gloom. Local papers find a new lease of life and avoid too much scrutiny from the authorities by focusing on what is going on around them rather than the national political news. Foreign-based news sites, free from government pressures, give a more accurate picture of what is going on, as do some brave local journalists, undeterred by insult and very reall threats of physical assault.

Authorship of new work is under pressure as writers and academics emigrate, but a depreciated currency encourages local publishing by those that stay. A minor flourishing of local fiction breaks out. Similarly, other artists, finding the artistic atmosphere in the country stultifying or for economic reasons, also emigrate. But a core of people working in the cultural and creative industries cluster around remaining civil society resistance. New popular music, visual arts and even videogames and comics offer resistance to the authoritarian and increasingly unpopular government. Key lessons learned from coping with the pandemic about survival through collaboration are kept in mind.

The mood in the country favours political change, and this is celebrated by artists whose inspiration now comes from resistance. By 2033, a new hope dawns again.

Soap-opera

As the country entered 2023 the news media seemed frayed at the edges and book publishing was weathering economic decline. Book stores still sold books, though fewer than before the pandemic. Regional and weekends newspaper circulations continued to fall. Radio seemed robust, with many in the rural areas and many who spoke no English reliant on radio for their views of the outside world. TV broadcasting had suffered from power outages because TV needs electrical power. While those who could afford it watched video online, particularly streaming services that showed entertainment rather than news, many people still watched TV and sports coverage kept fans chained to DSTV, the satellite TV provider, regarded as an expensive service, even though it had many channels.

Many TV viewers seemed addicted to a particular programme, Generations the Legacy. The soap opera, originally set in an ad agency, had been on air in 2023 for 20 years, the time span of a typical scenario. A columnist, Bheki Mashile wrote about the show in Noseweek in 2017, expressing one of the rare articulations in news media of criticism of popular entertainment. “Storylines have included a female character subjected to S&M who commits suicide; a character who throws a woman off a balcony; and another storyline where a woman is kidnapped and held captive. Let’s not forget the woman forced to sleep with a brother for the sake of the family since the other brother is sterile. Promoting this crap in this day and age? Generations’ content makes a mockery of the fight against violence and abuse of women.”

Despite – and perhaps because of its sensationalism – the soap opera had as many viewers, around 4-million, as the two most popular news programmes on TV, the Zulu news and the Xhosa news, combined in 2023. Twenty years later, the national broadcaster, competing against a host of converged competitors is still showing Generations the Legacy on one of its many channels, one devoted to old shows, possibly for the nostalgic. A new Generations or something similar is showing on SABC, competing with new dramas and soap operas. Does it also show the material aspirations of the viewers alongside the grim reality of ordinary South African lives? In a sense the long-lived soap opera continues to tell the South African story in all its messy glory. Black people can now *skinner* to use a distinctive South African term about the ills of newfound wealth as well as celebrate the opportunities of democratic South Africa.

One piece of good news, ignored by the business press, some of whose economic commentators continue to be fixated on fiscal rectitude, is the governing party’s attempts to stay in power by slowly but steadily improving the lives of ordinary people. Certainly, the country by 2043 has made a dent in desperate poverty while not eliminating it entirely. Social welfare spending stays high, though public services are still plagued by corruption and lack of accountability, including unions that use their power to frustrate progress. Commentators and reporters publicise the benefits of social welfare as well as uncritically reporting denunciation of increased public spending as wasteful. Spending on journalism education is lacking and this is reflected in coverage of important issues, though specialist non-profit news organisations fill the gap.

Community media outlets, united in an umbrella organisation much like National Public Radio, and funded by government, donations, and corporate social investment, has helped give a real voice rather than a ventriloquised one to the population shut out of elite conversations about what government should do. This to some extent offsets the lack of news and entertainment in indigenous languages because stubborn funding problems threaten the very existence of the national broadcaster which continually has to be bailed out by government.

The fragile financial status of the SABC makes it vulnerable to external pressure, and it becomes more of a state broadcaster as governing party loyalists are promoted to top positions in the news department blunt any possibility of critical coverage. Making funding problems worse, the audience flees to private sector broadcasters and online news services that have finally, helped by new technology which brings down costs, fulfilled the promise of convergence. What were once print media houses now host professionally produced video news inserts and documentaries, bringing in much needed revenue. A few newspapers, mainly weekly or weekend papers, survive but most news moves online over the years. Commercial online news media retreats behind paywalls ranging from those that allow some news to be free to hard paywalls that demand subscription fees upfront for any access. They insist this is the equivalent of paying for newspapers and the public become used to the idea, though copying, and republishing on social media, condemned as piracy by publishers, is not seen as unacceptable and is common. The real problem for news media remains bringing in enough money to produce quality news that the audience demands. Subscriptions alone do not earn enough, even with the aid of new technologies to attract and retain subscribers, because of the small number of news consumers with enough disposable income and interest in the news. By 2043 the news media has shrunk and attempts to re-create a South African Press Agency to fill gaps in news coverage especially in news deserts in rural areas end inconclusively.

Government falls into the trap of clumsy intervention by expanding its own news agency and local publishing, competing unfairly with community print media and small publishers. Luckily need for any news coverage of rural areas declines, as the years pass and a clearly inadequate system of local government in small towns accelerates urbanisation and migration to less dysfunctional metropolitan areas. It also boosts online news, because of better and cheaper access to the internet. By 2023 South Africa is riding the online super highway.

While the story of underfunded news media drags on, as the years pass, technology brings with it big changes in, among other things, language understanding. Massive advances in A.I. mean translation software becomes available on smartphone applications that instantly translate any of the many South African indigenous languages into another language. The translation software is available for no cost on the web, funded by search engines. Anyone can read any text in any language. This frees all South Africans who struggle to speak and understand more than one language. Its unintended consequences are still filtering through the society. South African English speakers now have even less inclination to learn other South African languages. Non-English speakers have less incentive to learn English. English, however, is still the international language of business, and knowing how to speak and write fluently has been a big competitive advantage. Translators lose their jobs as computers voice accurate translations in real time. Questions arise about the software that highlight the problems of new and disruptive technologies. How accurate is the technology? Does it miss nuance and subtle meaning? Could it mislead a witness or an accused person in court by translating inaccurately? Will the translation software challenge the hegemony of English or fortify it?

Management of the fiscus stays conservative in relation to the public need but not as conservative as ratings agencies and some of the middle class and their commentariat representatives would like. How much to spend stays contentious. The department of sports, arts and culture is merged with the department of tourism, and its budget is not increased. Funding for the arts effectively decreases. Even money for museums is scarce and private sector has to step in with philanthropic donations to preserve heritage. Privatisation by stealth of public services proceeds ineluctably over the decades, following in the path of the poorly managed post office, whose profitable courier services were taken over by the private sector. The news media, unconscious of its middle-class bias, applauds this trend, even though it entrenches the high inequality the country suffers from. This is reflected in the creative sector: internationally famous South Africa artists sell paintings for fabulous prices alongside inventive and puzzling art installations while outside craft workers make a few rand selling labourintensive and beautiful wire-and-beadwork creations, though some attempts to organise in the sector and advertise intricate craft creations have moved some artists up the artworld ladder.

In this environment, non-profit news media thrives but is limited by both the amount of funding available and the preferences of the donors for specialised news such as science journalism or investigative journalism. The persistence of corruption and gangsterism ensures that investigative journalism finds willing funders and interested audiences, including a growing number of investigations published in books, though the revelations do not always lead to improvement in how institutions function or even prosecution of lawbreakers. Much daily news coverage is run-of-the-mill court reporting of violent wrongdoing, aided by A.I., and video footage of criminal activity or its aftermath. Opinion masquerading as news is plentiful. Non-profit funders and thoughtful journalists struggle to interest their publics in issues of social justice and the fight of poor communities for their rights and the news is increasingly partisan.

Bad faith actors still use fake websites and social media to try to spread dis- an mis-information and experts make heroic attempts to unmask them. While government grapples with how to regulate social media, big changes in the US regulation of Facebook, Twitter and other US-headquartered internet companies and their treatment of personal information upsets their business models. The internet witnesses the end of the free services, as companies increasingly try to monetise their operations, often by subscription services. South Africans struggle to find the dollars and cents to pay for all the subscriptions demanded, turning away from foreign news subscriptions to local outlets. Multinational social media platforms command less attention as users tire of opaque algorithms, and consumers around the world turn to local and regional ways of sharing news, sometimes on platforms of local newspapers, sometimes on new regional platforms, including an African version of a combined Twitter and Facebook on which ordinary people tell their stories and news distribution is to some extent democratised.

On the political front, attempts by rogue elements within the governing political party to interfere in elections is frustrated by news exposure that quickly leads to a rout in the bond market and a precipitous though temporary fall in the foreign exchange value of the currency. Capital flows linking South Africa to the world mean the country has to be careful about governance issues that threaten investment, and a still independent news media ensures that malfeasance comes to light.

Book publishing by South African black authors explodes in response to a public keen to read about their own people and environment. Though many of the books feature trivial and superficial reading matter, suitable for readers used to soap operas, new literary giants emerge as well and become hits in the reading capitals of the world. South African computer games by 2043 have made their mark on the continent and in the world, and Western countries snap up South African talent. South African films increasingly command respect abroad, helping with cultural diplomacy. Artistic output features the horrors of Gender-Based Violence, but increased consciousness of the issue has sadly not helped decrease its prevalence much. A.I. plays havoc with the design sector, and only the agile and truly innovative survive. South African plays and festivals flourish, and virtual reality finally moves beyond fantasy to transcend borders so that South Africans can get a feeling for festivals on the continent and overseas, while foreign virtual visitors experience the country’s performing arts from a distance.

The South African story continues to be that of newly emancipated nation struggling with a variety of problems with mixed results but on balance worth celebrating.

Conclusion and recommendations

Only two recommendations need to be made:

- More input is needed to ensure the scenarios can fulfil the various purposes of scenario planning detailed in this document. The scenario stories should be presented at workshops of SACO members so that they can be fine tuned.
- The scenario exercise can then be used to engage with the public and the artistic community to “change the narrative” around what government can do and to listen to constructive ideas about how it can do it.

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[i] Alec Hogg, “Clem Sunter: What Life Will Be like as We Lift Covid-19 Lockdown - Four Scenarios,” *BizNews.Com* (blog), April 20, 2020, https://www.biznews.com/inside-covid-19/2020/04/20/covid-19-lockdown-scenarios-clem-sunter.

[ii] “The SA Cultural Observatory - Measuring and Valuing SA’s Cultural And Creative Industries,” South African Cultural Observatory, April 5, 2022, https://www.southafricanculturalobservatory.org.za/article/the-sa-cultural-observatory-measuring-and-valuing-sa-s-cultural-and-creative-industries.

[iii] Jen Snowball et al., “The Economic Mapping of the Cultural and Creative Industries in South Africa 2022 - Capstone Report” (South African Cultural Observatory, n.d.), 9, https://www.southafricanculturalobservatory.org.za.

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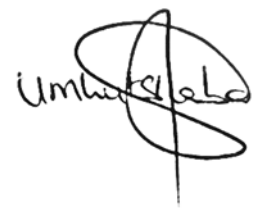
	NAME	**TITLE**	**SIGNATURE**	**DATE**
Prepared and recommended by:	*Ms Unathi Lutshaba*	*SACO Executive Director*		15 December 2022
Approved by:	*Ms Lisa Combrinck*	*DSAC, SACO Project Manager*		
Approved by:	*Dr Stella (CN) Khumalo*	*DSAC Deputy Director General: Arts, Culture Promotion and Development*		