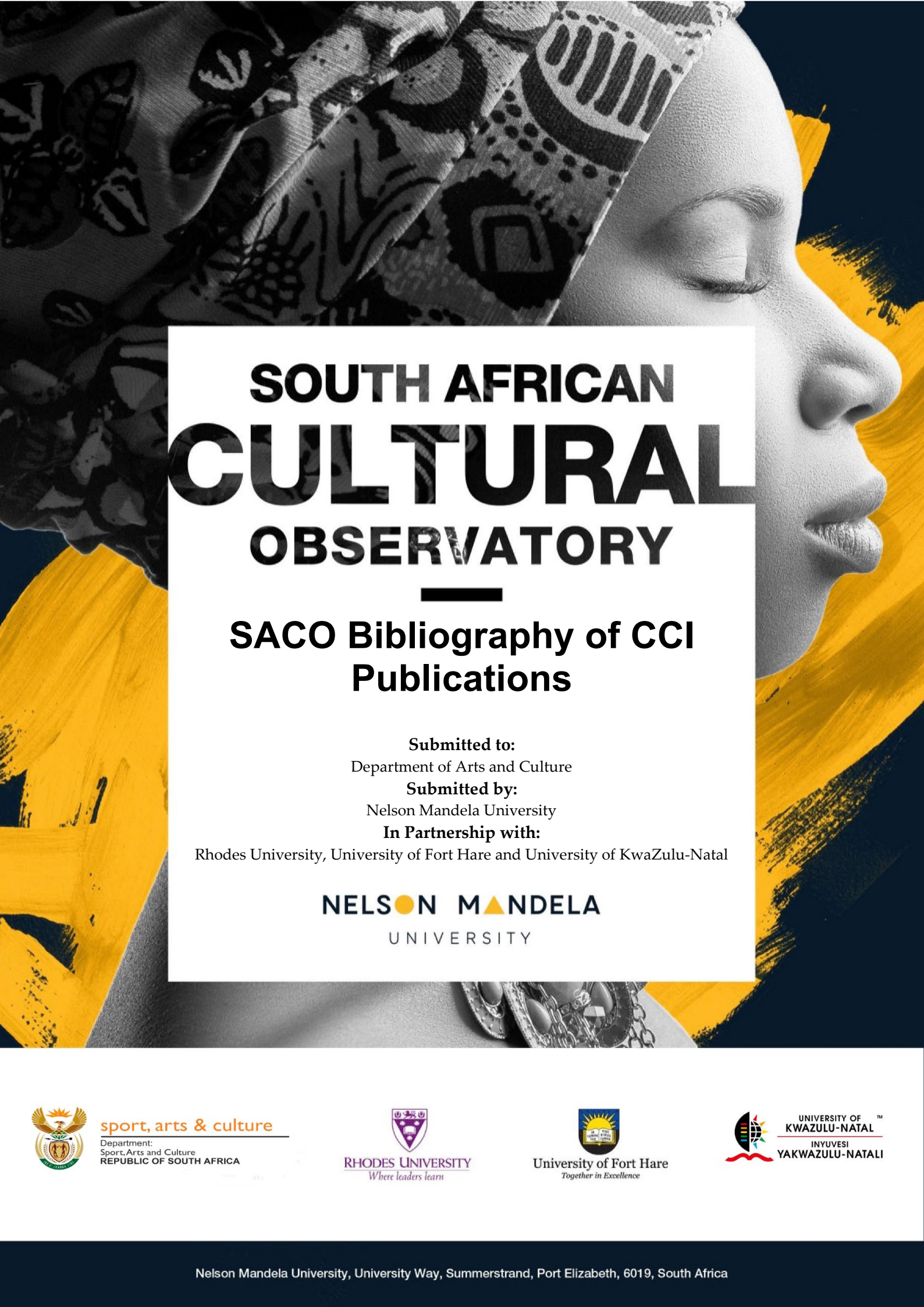




SOUTH AFRICAN CULTURAL OBSERVATORY

SACO Bibliography of CCI Publications

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

NELSON MANDELA
UNIVERSITY



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South African Cultural Observatory
Report

SACO Bibliography of CCI Publications

June 2022

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1. Introduction and Purpose

The purpose of this report is to present a bibliography of research reports that has been produced by the South African Cultural Observatory (SACO) since its inception in 2015.

It is envisaged that presenting this bibliography could aid researchers, policymakers and practitioners by providing a summary of research produced to assist in determining the relevance of research reports produced to their own research endeavours.¹

To aid ease of use, the bibliography has been structured to reflect the fifteen (15) themes mentioned in the Research Agendas that have been issued by the South African Cultural Observatory (SACO) since 2015.²

In addition, each citation has been structured to include:

- the title of the report
- bibliographical reference of the report;
- institution with whom the author(s) are affiliated;
- brief description of the content of the report³; and
- location where the report can be accessed on-line.

¹ <https://guides.library.cornell.edu/annotatedbibliography>

² <https://www.monash.edu/learnhq/write-like-a-pro/how-to-write.../annotated-bibliography#:~:text=The%20purpose%20of%20an%20annotated%20bibliography,-The%20purpose%20is&text=provide%20an%20overview%20of%20the,connections%20between%20the%20information%20sources>

³ <https://ask.library.unlv.edu/faq/96315>

2. Theme 1: Establishing a Robust Intellectual and Academic Base

This theme focusses on establishing a robust intellectual and academic base for the generation of new knowledge, advancing reflection, supporting debate, exchanging of ideas, and articulation of responses to existing and emerging intellectual, academic discourses and/or technical challenges within the sector.

2.1. Research Agendas (2015 to 2023)

Liebenberg, S. Research Agenda. South African Cultural Observatory. SACO.

Institution: Nelson Mandela University, South Africa

The South African Cultural Observatory has published several Research Agendas. These Research Agendas presents a record of the research needs for the arts, heritage, cultural and creative sectors of South Africa for the relevant years as stated per individual Research Agenda.

The purpose of each of the Research Agendas is to define and focus research efforts and resources towards achieving research outputs that would enhance the development of the arts, heritage and cultural and creative sectors in South Africa and advance the policy imperatives of the South African Government and its stakeholders and beneficiaries.

All Research Agendas contain:

- research requirements;
- individual research agenda items required to address the research requirements of the industry; and
- alignment of the proposed research agenda items with strategic and policy imperatives.

The Research Agenda for 2015/16 contains 24 research items across 15 themes.

The Research Agenda for 2016/17 contains 47 research items across 15 themes.

The Research Agenda for 2017/18 contains 94 research items across 15 themes.

The Research Agenda for 2018/19 contains 109 research items across 15 themes.

The Research Agenda for 2018/19 contains 135 research items across 15 themes.

The Research Agenda for 2019/20 contains 198 research items across 15 themes.

The Research Agenda for 2020/21 contains 250 research items across 15 themes.

The Research Agenda for 2021/22 contains 274 research items across 15 themes.

The Research Agenda for 2022/23 contains 334 research items across 15 themes.

Location:

The Research Agenda for 2015/16:

<https://www.southafricanculturalobservatory.org.za/download/comments/1027/883e881bb4d22a7add958f2d6b052c9f/Research+Agenda+2015-16>

The Research Agenda for 2016/17:

<https://www.southafricanculturalobservatory.org.za/download/comments/1028/3806734b256c27e41ec2c6bffa26d9e7/Research+Agenda+2016-17>

The Research Agenda for 2017/18:

<https://www.southafricanculturalobservatory.org.za/download/comments/1029/84d2004bf28a2095230e8e14993d398d/Research+Agenda+17-18>

The Research Agenda for 2018/19:

<https://www.southafricanculturalobservatory.org.za/download/comments/1020/65cc2c8205a05d7379fa3a6386f710e1/20180926+Research+Agenda+Draft+2+%28Incl.+inputs+from+DAC%29>

The Research Agenda for 2018/19:

<https://www.southafricanculturalobservatory.org.za/download/comments/1020/65cc2c8205a05d7379fa3a6386f710e1/20180926+Research+Agenda+Draft+2+%28Incl.+inputs+from+DAC%29>

The Research Agenda for 2019/20:

<https://www.southafricanculturalobservatory.org.za/assets/researchagenda/29042019researchagenda20192020version1.docx>

The Research Agenda for 2020/21:

<https://www.southafricanculturalobservatory.org.za/download/comments/1022/93d65641ff3f1586614cf2c1ad240b6c/Research+Agenda+2020+to+2021>

The Research Agenda for 2021/22:

<https://www.southafricanculturalobservatory.org.za/download/comments/1031/afdec7005cc9f14302cd0474fd0f3c96/Research+Agenda+2021-22>

2.2. Realising the Economy of the Imagination and Creative and Cultural Industries: Options for South Africa.

Haines, R., Shelper, A., Lutshaba, U. and Sithebe, R. 2016. Realising the Economy of the Imagination and Creative and Cultural Industries: Options for South Africa. South African Cultural Observatory Research Report.

Institution: Nelson Mandela University, South Africa.

This report highlights a series of unfavourable trends and circumstances that appear to have affected South African economic prospects for development. These include heightened disparities in payments, poor growth rates, continuing inequalities and the effects of climate change

To further address these issues, the report is divided into five sub-sections which focuses on the challenges of embedding the CCIs within a supportive and creative industry, the key contextual policy issues and initiatives regarding the contemporary creative economy and the CCIs in South Africa, the emergence of the creative economy and examines the contemporary trends and advances in CCIs throughout the world, as well as providing a brief historical backdrop.

The industrial cluster strategy for the formation and development of CCI clusters, and the analysis of several social and political-economic concerns in relation to South Africa's 'imaginative economy.' is also discussed.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1015/298923c8190045e91288b430794814c4/Realising+The+Economy+of+the+Imagination+-+Report>

2.3. Rethinking Culture: A Provocation

Van Graan, M. 2018. *Rethinking Culture: A Provocation*. South African Cultural Observatory. Research Report. SACO

Institution: Nelson Mandela University, South Africa.

The purpose of this provocation is to contribute towards the contestation of ideas in the cultural policy domain, to arrive at the most appropriate policies to address a range of South African realities.

The provocation argues that advocates for arts and culture often do so on the backfoot. They appear to justify their relevance and need for funding by making use of appropriate language and metrics that they believe would appeal to decision-makers.

The report argues that the case for culture has been made before; however, the conditions in which and the personalities for whom the case needs to be made, have changed.

The report argues that it is not only external decision-makers that need to be educated about the role and impact of culture; it is also the arts, culture and heritage sector that needs to better understand what they do, the contexts in which they do it, and to be able to clearly articulate the case for culture and to give expression to culture.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1004/fed33392d3a48aa149a87a38b875ba4a/Publication+Report+-+Rethinking+Culture+-+FINAL>

3. Theme 2: Data Management and Access to Data Sources

This theme focusses on the data eco-system within the sector and deals with issues pertaining to data consolidation, verification and access to data to enhance knowledge sharing and decision-making.

3.1. Framework for Developing Interactive Information Platforms to Provide User-Friendly Economic Data to the Cultural and Creative Industries

Gouws, A. 2020. *Framework for Developing Interactive Information Platforms to Provide User-Friendly Economic Data to the Cultural and Creative Industries. Research Report. SACO.*

Institution: Nelson Mandela University, South Africa.

The report argues that research into the cultural economy and the associated Cultural and Creative Industries (CCI) is relatively new. The report argues for the use and application of the United Nations Educational, Scientific and Cultural Organisation's (UNESCO) Framework of Cultural Statistics (FCS) and proposes the development of an interactive information platform based on this framework.

The report proposes that classification and statistical units should be aligned to South African pre-scripts and conditions while meeting international standards. The report also states that the benefit of the proposed interactive CCI information platform is that it will make a useful contribution to both research and policy development. This will also contribute to the monitoring and evaluation at both national and subnational level data and assist with benchmarking of outcomes and impacts of interventions.

The report noted that substantial work needs to be carried out to acquire the data and develop the necessary digital platforms that will support the proposed interactive CCI-framework.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/674/0d7de1aca9299fe63f3e0041f02638a3/Framework+for+developing+interactive+information+platforms+to+provide+user-friendly+economic+data+to+the+Cultural+and+Creative+Industries+>

4. Theme 3: Levels of Government Spending and Support to the Sector

This theme aims to quantify the span and scope of government and private sector spending and support within the Arts, Heritage, Cultural and Creative Sectors.

4.1. How Much Funding is Available for the Cultural Sector in South Africa?

Bob, U. 2019. How Much Funding is Available for the Cultural Sector in South Africa. Research Report. SACO.

Institution: University of Kwa- Zulu Natal.

This study was undertaken against the backdrop of continued dominance of public sector funding for the cultural and creative industries (CCI).

This dominance raises concerns of sustainability for the industry and calls for urgent industry attention to attract and leverage private sector funding to reduce dependency on government funding. The report argues that the above-mentioned will further unlock the industry's potential to be a major contributor towards economic growth, job creation and social cohesion.

The report found that private sector funding is largely geared towards events and festivals, the visual and performing arts, shows and exhibitions, film and television and training and educational programmes. In this regard, the report also found that private sector support is predominantly aimed at bigger events and larger and more established organisations.

The report found that the main form of private sector funding support is Corporate Social Investment (CSI) and is often done with economic considerations and for regulatory compliance.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=How+much+funding+is+available+for+the+cultural+sector+in+South+Africa&search.x=24&search.y=17&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

4.2. The Role of Venture Capital in Promoting the Cultural and Creative Industry (CCI)

Bob, U. 2019. The Role of Venture Capital in Promoting the Cultural and Creative Industry (CCI). Research Report. SACO.

Institution: The University of Kwa-Zulu Natal, South Africa.

This report examined relevant literature and documents to provide an overview of the role of venture capital in promoting the Cultural and Creative Industry (CCI). The CCI contributes substantially to the economy and has the potential to further contribute to social cohesion, job creation and socio-economic development.

The research was undertaken in the context that globally there is a high reliance on public funding to support the CCI; which raises sustainability concerns.

The report critically examines current scholarly literature and reports on the role of venture capital to promote and support the CCI sector. Specifically, venture capital financing needs and trends in relation to the CCI sector are identified, current sources and future opportunities of venture capital support for the CCI sector are assessed, the types of support provided by venture capital to the CCI sector are defined, and implications and associated challenges are detailed.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/670/17c276c8e723eb46aef576537e9d56d0/The+Role+of+Venture+Capital+in+Promoting+the+Cultural+And+Creative+Industry+%28CCI%29>

4.3. Private Sector Support for the CCI in South Africa

Gouws, A. and Bob, U. 2020. Private sector support for the CCIs in South Africa. Research Report. SACO.

Institution: University of Kwa-Zulu, South Africa.

A key orientation of the Department of Sports, Arts and Culture's (DSAC) strategy is to unlock the potential of the Cultural and Creative Industry (CCI) to substantially contribute to economic growth and job creation in South Africa, which can be attained if the sector is adequately supported.

This report adopted a desktop study approach which examined relevant literature, reports and extracting Corporate Social Investment (CSI) information from Top 100 Johannesburg Stock Exchange (JSE)-listed companies' Annual Integrated Financial Reports for the 2016-2018 reporting years, to identify key debates and issues pertaining to private sector funding of the CCI in South Africa.

In the context of the above, this report examines the current scholarly literature in relation to private sector support of the CCI and sources of private sector support for the CCI in South Africa; including, where possible, to establish the quantum of private sector funding provided to the CCI. The report also examines allocation models/approaches in the private sector (including private and public sector joint venture programmes/ initiatives and partnerships).

Location:

<https://www.southafricanculturalobservatory.org.za/download/706>

4.4. Presidential Employment Stimulus Programme Survey Report (PESP)

Vitshima, S. and Holmes, P. 2021, Presidential Employment Stimulus Programme Survey Report. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The report presents the results of a beneficiary survey of the Presidential Employment Stimulus Programme that was implemented by the Nelson Mandela University as part of the South African Cultural Observatory (SACO) project.

A survey focussed on all SACO PESP participants (artists and mentors) following the completion of the training programme. The purpose of the survey was to gain feedback from the participants and insight into the programme, to understand where, in the opinion of these

beneficiaries, the programme had succeeded in delivering what was intended, and where it may have failed to do so. The purpose of which was to identify potential improvements that could be made, should the programme be repeated.

The feedback from the survey was generally positive. Some pertinent issues and feedback were recorded. It was noted that a substantial number of feedback issues fell outside of the scope of the project.

Several recommendations have been made to improve the overall experience for participants and increase the impact of interventions in possible future interventions.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1025/82b8a3434904411a9fdc43ca87cee70c/SACO+PESP+SURVEY+REPORT+>

5. Theme 4: Quantifying the Arts, Culture, Heritage and Creative Sectors

This theme focusses on quantifying the size, profile, location and contribution levels of the Arts, Heritage, Cultural and Creative Sectors towards achieving sustainable socio-economic policy imperatives.

5.1. A Position Report on the Nature, Requirements and Operationalisation of a Satellite Cultural Account for South Africa

Gouws, A. 2016. A Position Report on the Nature, Requirements and Operationalisation of a Satellite Cultural Account for South Africa. South African Cultural Observatory. Research Report.

Institution: Nelson Mandela University

This report argues for the establishment of a Cultural Satellite Account for South Africa. It bases its proposals on the UNESCO Framework for Cultural Statistics published in 2009 as well as the requirements of the then Department of Arts and Culture (DAC), now known as the Department of Sport, Arts and Culture (DSAC).

The report provides an overview of the rationale for establishing a satellite account and explains how the system of national accounts operates.

It also explains how the classification of economic activities works and explains how these classifications are applied and the best practices associated with them.

The report also details the coding and classification system that could be considered and the available data sources.

An overview of the cultural and creative sector is also provided which informs the proposed approach for developing a satellite account.

Location:

https://www.dropbox.com/search/personal?path=%2Fandpreview=id%3AL7goMirKSSAAAAAAAEkgandquery=A+position+report+on+the+nature%2C+requirements+and+operationalisation+of+a+Satellite+Cultural+Account+for+South+Africa&search_session_id=20100410255622330702697643505901&search_token=X836bZFYXlcqC5%2F%2BuWzFJg5Dx6kOgrvpuC8fsXl5wrM%3D

5.2. South African Cultural and Creative Industries Mapping Study: Review of Methods and the Way Forward

Prof. Snowball, J. 2016. South African Cultural and Creative Industries Mapping Study: A Review of the Methods and the Way Forward. Research Report. SACO.

Institution: Rhodes University.

This report argues that mapping studies of the Cultural and Creative industries (CCIs) can raise the profile of the CCIs, benchmark industry development and be used as evidence of the economic importance of the industry and identify potential areas of growth and policy intervention.

The aim of this report was to evaluate the methodology of the DAC Mapping Study (2014), which was the first national mapping study in South Africa.

The report accordingly evaluated the DAC (2014) Mapping Study's methodology, which used a database of 24 756 CCIs of which 2 477 of were interviewed using primary data.

The SA Framework for Cultural Statistics (SAFCS) study from 2014 disclosed that South Africa had "important data sets" at the national level to map the CCI.

The report recommended that the 2014 Mapping Study data and Phase 3 of the SAFCS (data populating the framework) ought to be implemented, according to the recommendations. This is also the first step toward setting up a system of Cultural Satellite Accounts for government, agencies and non-governmental organizations to apply.

The report recommends that Data from the 2014 Mapping Study be disseminated to stakeholders in various forms; and that Phase 3 of the SAFCS (populating the framework with data) should be implemented.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1013/6b180037abbebea991d8b1232f8a8ca9/South+African+Cci+Mapping+Study+Review+Of+Methods>

5.3. South African Cultural Observatory Assessment of the DAC CCI Mapping Study Methodology

Snowball, J., Litvine, I. and Haines, R. 2016. Assessment of the DAC CCI Mapping Study Methodology. Research Report. SACO.

Institution: Rhodes University and Nelson Mandela University, South Africa.

In reviewing previously applied mapping methodologies, the report recognises that research requires methodological choices. It was found that some of the choices made in the first mapping study, may have reduced the reliability of the survey in representing the CCIs in South Africa. In this regard, issues of reliability have been raised which for example pertain to the fact that some CCIs listed in the study appear to be outside of South Africa as recorded in the mapping portal.

Accordingly, the report proposes the reclassification of the CCI Database with all the firms put into their correct domains, to aid in the assessment of CCIs in South Africa and, by implication, quantifying the economic impact and employment within the sector.

The study recommends that the initial mapping data should be reviewed to provide explanations pertaining to the original classifications used in the study. Importantly the study also recommends that future studies should make use of national level data from StatsSA as opposed to a survey method used in the initial mapping study.

Location:

<https://www.southafricanculturalobservatory.org.za/download/732>

5.4. Measuring Cultural Employment in South Africa: A comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Code

Snowball, J. and Hadisi, S. 2016. Measuring cultural employment in South Africa – A comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Code. Research Report. SACO.

Institution: Rhodes University.

Cultural and creative industries are increasingly being recognised as making a significant contribution to employment. At the time of the publication of this report there had been no systematic attempt to define and measure cultural sector employment in South Africa using national data.

The aim of this report was to determine to what extent the classification systems for occupations and industries used in South Africa fits the classification system used by UNESCO in their Survey of Cultural Employment Statistics Manual (2015) because it is important to produce internationally comparable statistics.

The findings of this research show that the South African Labour Force Survey provides a potentially useful source of data on employment in the cultural industries, although the classification system used by South Africa is somewhat different from that used by UNESCO.

It is recommended that future research should focus on defining cultural occupations using the South African LFS classification system and then populating the framework with data from the LFS going back overtime.

Location:

<https://www.southafricanculturalobservatory.org.za/download/659>

5.5.A Guide to Using the Online South African Economic Impact Calculator (SAFEIC)

Seaman, B., Snowball, J. and Kara, R. 2017. A guide to using the Online South African Economic Impact Calculator (SAFEIC). Research Report. SACO.

Institution: Georgia State University, Atlanta, Georgia and Rhodes University, South Africa.

This Guide is intended to be used with Version 1 of the South African Festival Economic Impact Calculator (SAFEIC), a free online tool developed by the South African Cultural Observatory specifically for cultural festivals and events.

SAFEIC was developed by two experienced cultural economists: Prof Bruce Seaman from Georgia State University, Atlanta, Georgia, and Prof Jen Snowball, Chief Research Strategist of the South African Cultural Observatory and a professor at Rhodes University.

The tool is based on a regional economic impact calculator developed specifically for cultural events in the US and adapted for South Africa with the assistance of the original modeller.

The Guide gives both a theoretical basis and some practical advice on how to use SAFEIC and it is highly recommended that the guide be carefully read before the tool is used.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/668/192fc044e74dffa144f9ac5dc9f3395/A+Guide+to+Using+the+Online+South+African+Festival+Economic+Impact+Calculator+%28SAFEIC%29>

5.6. South African Cultural Observatory: A Creative and Cultural Industry Index for South Africa.

Gouws, A., Snowball, J., Haines, R. and Jordaan, J. 2017. A Creative and Cultural Industry Index for South Africa. Research Report. SACO.

Institution: Rhodes University and Nelson Mandela University, South Africa.

The report argues that although most people think they know what the terms ‘cultural’ or ‘creative’ denote, once they commence defining CCIs, several issues begin to emerge.

Even the definitions of creative and culture, when related to industries, have no clear definitions when applied globally, nationally and even locally in some instances. There is a continuum of products and services that may seem to be more cultural and others more creative. Another problem is the rapidly changing landscape that renders some creative products obsolete while introducing others. Coupled with technology, definition is often a shifting goal.

This document addresses these issues from both a theoretical and a practical point of view. It identifies both the domains and the dimensions that can be used to calculate the South African CCI Index and sub-indices.

This report identifies data that is available and the issues that may present potential challenges. It also recommends the establishment of partnerships to develop and maintain a CCI Index.

The report by way of example demonstrates how a few indices are calculated to highlight some of the issues that may be experienced when developing a CCI Index. A way forward is proposed, based on the sequencing of events that are necessary to develop a stable and robust South African CCI Index.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/994/934815ad542a4a7c5e8a2dfa04fea9f5/CCI+Index+for+South+Africa+-+Report>

5.7. An Input-Output Model for the Cultural and Creative Industries in South Africa and Possible Extension

Gouws, A. 2017. An Input-Output Model for the Cultural and Creative industries in South Africa and Possible Extension. Research Report. SACO.

Institution: Nelson Mandela University

As part of the System of National Accounts, input-output tables derived from supply and use tables are essential to ensure that the national estimates are correct. Input output tables are also useful to derive estimates of the expected socio-economic benefits that are to be derived from any government intervention.

This report briefly discusses the history of input-output tables, the System of National Accounts, the data that is available and the methodology used to adapt the South African 2014 input-output tables into a South African Cultural and Creative Industries input-output table. It also includes a proposed input-output table in the appendix.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/993/7b13b2203029ed80337f27127a9f1d28/An+Input+Output+Model+For+The+CCIs+In+South+Africa+And+Possible+Extensions>

5.8.A Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage.

Snowball, J. 2018. A Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage. South African Cultural Observatory.

Institution: Rhodes University, South Africa

The report sets out to develop and test a monitoring and evaluation framework for publically funded arts, culture and heritage projects.

From a review of the international literature, three kinds of cultural values were identified: Economic, Social and Intrinsic. Debates around the relationship of these values to each other and their relevance to cultural policy were reviewed. Using South African and international case studies, a variety of valuation methods were discussed.

Based on the work pertaining to cultural indicators, five major cultural value “themes” were identified in line with the aims of the Mzansi’s Golden Economy funding guidelines developed by the Department of Arts and Culture. These were: Audience development and education; Human capital and professional capacity building; Inclusive economic growth; Social cohesion and community development; and Reflective and engaged citizens.

Examples of indicators for each theme were also presented.

The report also demonstrated how the proposed framework could be applied to a wide variety of funded projects and how the emphasis of the framework could be changed depending on the specific aims of each funding category. In terms of monitoring progress towards the stated goals of the project, a “logic” model was suggested.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/656/26408ffa703a72e8ac0117e74ad46f33/A+Framework+For+Monitoring+And+Evaluation>

5.9.Towards the Development of a Framework for Cultural Statistics for South Africa

Snowball, J. & Antrobus, G. 2018. Towards the Development of a Framework for Cultural Statistics for South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa.

The development of a Framework for Cultural Statistics (FCS) is a critical first step in gathering data and gaining a better knowledge of South Africa's cultural and creative sectors. The goal

of this report is to examine existing materials related to the establishment of an FCS for South Africa, as well as to trace the knowledge and development of the cultural and creative industries in South Africa.

The report argues for example, that expanding the Framework to include "creative" sectors (together with the "cultural" sector) greatly expands the sector's size, however, this may divert attention away from the generally smaller, "core" businesses (theatre, dance, fine art, museums etc.). Therefore, to gain 'some sort of balance', it will be necessary to provide data that is relevant to the South African context and policy concerns while also ensuring that the numbers are comparable worldwide.

This, however, doesn't come without its own share of challenges because firstly, the national-level data collection and analysis in any business is essentially costly due to their magnitude; secondly, every nation has its own methodologies and systems for classifying national accounts, professions and industry classifications and these systems are typically outlined with varied degrees of precision to fit onto financial flows, labour markets and intangible assets.

Finally and probably most importantly, the arts and culture industries lack the financial capacity to compete for statisticians' attention and resources as they strive to assess all other aspects of the economy. What needs to be the focus is that at certain levels a variety of specialised talents are required with technical knowledge in statistical data sources, meta-data analysis and information systems; as well as conceptual policy analysis and social survey approaches, such as tracking data sources and negotiating data use with a range of stakeholders and not just official sources like StatsSA.

However, the downside to this is that organizations, private businesses, governmental archives and institutions and so on, are likely to take a long time to support and comply with such an initiative.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Towards+the+Development+of+a+Framework+for+Cultural+Statistics+for+South+Africa.&search.x=14&search.y=26&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

5.10. Refining the SACO (2016) Monitoring and Evaluation Framework to Align with the Policy Framework for the Government-Wide Monitoring and Evaluation System

Snowball, J., Antrobus, G. and Bob, U. 2018. Refining the SACO (2016) Monitoring and Evaluation Framework to Align with the Policy Framework for the Government-Wide Monitoring and Evaluation. SACO.

Institution: Rhodes University and University of Kwa-Zulu Natal, South Africa.

SACO published a report in 2016 on the impact of Mzansi's Golden Economy (MGE)-funded cultural festivals and events. The research aimed to track and assess the economic effect of publicly funded arts, cultural, and heritage initiatives.

Implementation is being hampered by poor reporting by MGE grant recipients. Accordingly, the report proposes a framework to increase the effectiveness and efficiency of monitoring and evaluation of MGE-funded cultural festivals and events.

Location:

<https://www.southafricanculturalobservatory.org.za/download/687>

5.11. A Position Report on a Forecasting Model in regard to the Cultural and Creative Industries of South Africa

Snowball, J., Collins, A. and Litvine, I. 2018. A Position Report on a Forecasting Model in regard to the Cultural and Creative Industries of South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa & Portsmouth University, England.

The objective of this report is to provide a framework for forecasting and prescriptive analytics in the tourism, cultural, and entertainment industries.

It outlines broadly that relevant data may be categorised into three sets being geographical, demographic, and socio-economic. The report notes that previously collected and recoded data related to Quarterly Labour Force Surveys (QLFS), Time-use surveys (TUS), Import-Export data, Household and Community Surveys, Tourism Satellite Account (TSA), Input-Output tables, Supply and use tables relied on Statistics SA and purposely collected data (e.g. via specialised surveys). The authors place data that was (or will be) gathered by the Department of Arts and Culture (DAC), the Cultural Observatory (SACO), or firms and persons hired by the former under this category.

Two datasets were used as part of a programme known as the Mapping Study, applied by a commercial company that was hired by the DAC to conduct mapping research. The initial collection contained 2478 data items and provides extensive information on a sample of cultural sector stakeholders.

The first data set is particularly important for predicting since it provides a temporal variable (information about the business/inception and organization's). The open data also examine possible useful strategies and techniques for the challenge of developing scientifically informed statistical, mathematical and computational predictive models which is becoming more popular as a data collecting approach.

Finally, the report proposes how to use visualisation approaches to help comprehend the data as well as the modelling of findings.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/719/2afe4567e1bf64d32a5527244d104cea/A+Position+Report+on+a+Forecasting+Model+In+Regard+to+the+Cultural+and+Creative+Industries+of+South+Africa>

5.12. Framework for Measuring the Sports and Recreation Economy: Moving towards and Scoping a Satellite Account

Gouws, A and Bob, U. 2020. Framework for measuring the Sports and Recreation Economy: Moving towards and Scoping a Satellite Account. Research Report. SACO.

Institution: University of Kwa-Zulu Natal, South Africa.

Sport is a complex activity ranging from a group of school children playing soccer in the veld to mega events such as the Olympic Games or major world cups.

The report focussed on developing a framework to measure the value of the sports and recreation economy and developing a Sports Satellite Account.

The report considers practical issues that will have to be addressed when implementing a framework for measuring the sports and recreation economy. These include issues such as database management, data software and econometric modelling techniques. The report also deals with the legal issues that could arise and proposes several agreements with strategic partners.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1001/b8c37e33defde51cf91e1e03e51657da/Framework+for+measuring+the+Sports+Economy+Moving+towards+a+scoping+for+a+Satellite+Account>

5.13. Criteria for “Measuring” Success in Relation to Entrepreneurship in The CCIS Which takes into Account the Different Types of Genres and Sub-sectors

Bob, U. 2020. Criteria for “Measuring” success in relation to entrepreneurship in the CCIs which considers the different types of genres and sub-sectors. Research Report. SACO.

Institution: University of Kwa-Zulu Natal, South Africa.

The importance of entrepreneurship generally and in the Creative and Cultural Industries (CCIs) is well documented at both academic and policy levels. There are high expectations that unlocking and supporting entrepreneurship in the CCIs, especially among small and individual businesses that characterise the sector, will contribute towards job creation, poverty alleviation and social cohesion.

There is currently limited research and frameworks that provide guidance on entrepreneurship in the CCIs generally and how to measure success specifically. In this context, measuring success in entrepreneurship in the CCIs is critically important to assess the sustainability of entrepreneurs in the CCIs as well as identifying trends and challenges to inform the development of policies (or revisions if need be) and appropriate interventions/support as well as permit monitoring and evaluation to be undertaken.

Several challenges are associated with measuring success in entrepreneurship which are applicable to the CCIs as well. These relate to conceptualising entrepreneurship and what constitutes the CCIs, since substantial variations exist. Another challenge is identifying appropriate and feasible methods and approaches to source and access relevant information that captures different outcomes relevant to varying types of CCIs. Gaps in data quality and availability are also issues to consider.

The main recommendations emanating from this report are the development of databases that address the information challenges and permit dashboard monitoring. Caution needs to be exercised during implementation to ensure that relevant indicators are chosen that allow

for ease of participation of entrepreneurs and that implementation is feasible. Effectively managing databases is also critical.

Areas for further research are also suggested, including the impacts of the COVID-19 pandemic in terms of changing the CCIs' landscape and how entrepreneurs operate.

In addition, it is suggested that research focuses on the trajectory, experiences and perceptions of unsuccessful entrepreneurs/enterprises.

Location:

https://www.dropbox.com/search/personal?path=%2FSACO+2+-+Deliverablesandpreview=id%3AL7goMirkSSAAAAAAMRwandquery=Criteria+for+%E2%80%9Cmeasuring%E2%80%9D+success+in+relation+to+entrepreneurship+in+the+CCIs+which+takes+into+account+the+different+types+of+genres+and+sub-sectorsandsearch_session_id=39494271715859133021736328810603andsearch_token=X836bZFYXlcqC5%2F%2BuWzFJg5Dx6kOgrvpuC8fsXl5wrM%3D

6. Theme 5: Economic Analysis

This theme focusses on quantifying and analysing the scope of the economic contribution of Arts, Heritage, Cultural and Creative Sectors to the South African Economy in accordance with relevant statistical frameworks and policy imperatives.

6.1. KDI Report: Indoni Youth Empowerment National Culture and Heritage Celebration Festival

Snowball, J., Antrobus, G., Mowat, S., Mavundla, A., Ngundze. L., Nyathi, M., Munyai, R. and Radebe, Z. 2016. KDI Report on DAC interventions: Indoni Youth Empowerment National Culture and Heritage Celebration Festival. Research Report. SACO.

Institution: Rhodes University and University of Kwa-Zulu Natal.

Using the Framework for the Monitoring and Evaluation of publicly Funded Arts, Culture and Heritage (SACO, 2016), this study used interviews with audiences and organisers to evaluate the Indoni Youth Festival.

The research results showed that Festival audiences were mostly from Kwa-Zulu Natal, but were diverse in terms of their gender, age and income groups. There was also cultural diversity in terms of both audience cultural groups and in the participants and performers in both the Street Carnival and the Miss Cultural SA event.

A very high percentage of audiences agreed or strongly agreed that the festival is important in educating young people about traditional cultural heritage. Similarly, a very high percentage of the audience agreed or strongly agreed with statements relating to the value of the Indoni Festival in terms of social cohesion.

The festival is also successful in audiences to think about their culture and heritage “in a different way”, with 91% of respondents agreeing (28.9%), or strongly agreeing (62.2%), with the statement. This is an important result in that it shows that Indoni has some success in reshaping views and educating audiences about cultural heritage and traditions.

The economic impact analysis showed that the 2016 Festival had a financial impact of between R25.3m and R31.9m on the economy of Durban. Overall, the Indoni Festival was shown to have successfully met its stated aims.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/631/b7bb35b9c6ca2aee2df08cf09d7016c2/KDI+Report+-+Indoni+Festival>

6.2. KDI Report: Royal Heritage Festival Vhembe

Snowball, J. and Antrobus, G. 2018. KDI Indicator Report on DAC Interventions – Royal Heritage Festival Vhembe. Research Report. SACO.

Institution: Rhodes University, South Africa.

The Royal Heritage Festival (RHF) in Vhembe is depicted as Limpopo's largest music festival. It consisted of a career day, an all-night Music Concert and a traditional boxing event.

A large proportion of the participants were residents of Thohoyandou and other parts of Limpopo Province.

In addition to valuing the impact of the Royal Heritage Festival (RHF), one of the aims of this research was to test the Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage.

Face-to-face interviews were conducted at the events, using a structured questionnaire to arrive at conclusions. The report estimated the economic impact of the festival to be between R7.78m and R10.51m.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/632/abd815286ba1007abfbb8415b83ae2cf/KDI+Report++Royal+Heritage+Festival+In+Vhembe>

6.3. KDI Indicator: Mahika Mahikeng Festival

Snowball, J., Antrobus, G., Drummond, J., Mere, K., Phora, K., Matsie, R. and Mosepele, M. 2017. KDI Report on DAC Interventions – Mahika Mahikeng Festival. Research Report. SACO

Institution: Rhodes University, South Africa, and University of the North-West, South Africa.

Using the Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage (SACO, 2016), this study interviewed audiences and organisers to evaluate the 2016 Mahika Mahikeng Cultural Festival.

The festival includes drama, music, dance and arts and crafts. In 2016 when the report was commissioned, it was the second year in which the festival took place.

The study found that the most popular event was Jazz, followed by Motswako. Most of the attendees (65%) were residents. Non-local visitors spent an average length of 1.5 nights and 2.35 days at the event while 45% of visitors came for only one (1) day. Interestingly, 1.3% of the audience came from Botswana.

Overall, 77% of respondents agreed that the festival made them feel proud of their cultural heritage; with 32% strongly agreeing and 45% agreeing that “the festival is part of what makes Mahikeng a special place”.

The Total Economic Impact of the event on Mahikeng was calculated at R7m.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/634/6766aa2750c19aad2fa1b32f36ed4aee/KDI+Report+-+Mahika+Mahikeng+Festival>

6.4. KDI Indicator Report: Summative Report on Year 2 Impact Studies of a Sample of Live Events using the SACO Framework

Snowball, J. and Antrobus, G. 2017. KDI Report on DAC Interventions: Summative Report on Year 2 Impact Studies of a Sample of Live Events using the SACO Framework. Research Report. SACO.

Institution: Rhodes University, South Africa for the South African Cultural Observatory

This summative report provides an overview of the monitoring and evaluation of six festivals and events funded under the Mzansi's Golden Economy (MGE) initiative in 2016.

It also provides a critical discussion of the Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage (SACO, 2016) produced by the South African Cultural Observatory for the Department of Arts and Culture.

The Framework demonstrates how the value of cultural festivals and events can be measured under five different themes: audience development and education, human capital and professional capacity building, inclusive economic growth, social cohesion and community development and reflective and engaged citizens.

The six live events on which the Framework was tested were: the SA Music Awards, the National Arts Festival, the Indoni Youth Empowerment Festival, MACUFE, the Royal Heritage Festival and Mahika Mahikeng.

Results demonstrate a wide variety of ways in which data can be used to express and measure the cultural values associated with festivals and events.

In most of the value themes, the Framework was successful in capturing important aspects of cultural value. Some longer-term values (such as building the human capital and careers of performers) may need to be evaluated over time as well.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1003/aa68c75c4a77c87f97fb686b2f068676/M%26E+KDI+Summary+-+Report>

6.5. KDI Indicator Report: 2016 MACUFE Festival

Snowball, J., Antrobus, G., van Rooyen, D., Lenka, M., Dube, O., Lukhele, S., Makhele, M., Makhaohle, M., Motluli, T. and Makhombe, S. 2017. South African Cultural Observatory Monitoring and Evaluation: KDI Indicator Report on DAC Interventions: 2016 MACUFE Festival. Research Report. SACO.

Institution: Rhodes University, South Africa, and University of the Free State, South Africa.

Using the Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage (SACO, 2016), this study interviewed audiences and organisers to evaluate the 2016 MACUFE Festival.

The festival is managed by a private events company on behalf of the Free State Department of Sport, Arts, Culture and Recreation and receives additional sponsorship from corporates, such as Standard Bank and Vodacom.

The study found that over 25 000 individuals bought nearly 43 000 tickets, which resulted in a total of 68 600 visitor days, a net visitor spending of R36,65m and a total economic impact of R103,4m from MACUFE on Bloemfontein and Mangaung.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/633/26dd0dbc6e3f4c8043749885523d6a25/KDI+Report+-+MACUFE+Festival>

6.6. Socio-Economic Impact of the 2017 Cape Town Carnival

Snowball, J., Antrobus, G., Durno, D., and Prins-Solani, D. 2017. Socio-Economic Impact of the 2017 Cape Town Carnival. Research Report. SACO.

Institution: Rhodes University, South Africa, and SADC Research Centre, South Africa.

The Cape Town Carnival was established in 2010. The theme for the 2017 Carnival was 'Amaza – Ocean Odyssey.' The prime aim of the event was to provide opportunities for community participation and networking, building social cohesion and building tourism and job creation.

The research design was based on the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage (SACO, 2016). Data was collected via interviews with audiences, data provided by organisers and focus group discussions held with community participants in the parade.

In 2017, the event attracted an estimated audience of 44 900 people and a further 1 391 participants in the parade. 65% of the audience were younger than 35 years old, 57% were coloured and 21% were black African. 87% were local Cape Town residents. Of the visitors, 55% were South African, with the rest coming from foreign countries including Zimbabwe, China, Australia, Canada, and the USA.

The CTC has both loyal repeat visitors (54% had attended before) and the ability to attract first-time attendees. 40% of the audience rated the 2017 CTC "world class", with another 46% rating it "good for SA". 80% rated it "great" in terms of the cultural diversity of the parade. For visitors, the average length of stay in Cape Town was 5.6 days/nights. 48% of visitors stayed in paid-for accommodation.

Focus group discussion with CTC participants showed good facilitation of diverse participants by organisers using a variety of methods. There were high levels of trust between participants and organisers. Three-quarters of respondents regarded the cost of food, transport and other things at the CTC "reasonable."

The economic impact of the 2017 Cape Town Carnival on the economy of Cape Town was R41.14m.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/636/c5ab0bc60ac7929182aadd08703f1ec6/Socio-Economic+Impact+of+the+2017+Cape+Town+Carnival>

6.7. KDI Report: Miscellaneous Arts Projects and Community Arts Centres

Snowball, J. and Antrobus, G. 2017. M and E KDI Report: Miscellaneous Arts Projects and Community Arts Centres. Research Report. SACO.

Institution: Rhodes University, South Africa

Miscellaneous Arts Projects (which includes Community Arts Centres funded events/activities) is a MGE category that makes provision for limited investments in the costs of high impact small projects, productions and community cultural groups not

accommodated in the other four DAC MGE workstreams (Provincial and National Flagships, Festivals and Events, Touring Ventures and Public Arts). It focuses particularly on theatre, dance and art (with training programmes only considered under specific circumstances) which need to meet the overall DAC MGE objectives.

The evaluation is based on an analysis of 40 Miscellaneous Arts events/activities of which 14 were interviewed and included documentary analysis of all the initiatives where contracts and reports were available.

These Miscellaneous Arts projects received different levels of funding and ranged from R50 000 to R4 460 000 with an average of R475 693. In terms of the spatial distribution of these events/ activities; they were hosted in all nine provinces with the most dominant provinces being Gauteng, followed by KwaZulu-Natal and Limpopo.

Location:

<https://www.southafricanculturalobservatory.org.za/download/693>

6.8. KDI Report: Public Art

Snowball, J. and Antrobus, G. 2017. M and E KDI Report: Public Art. Research Report. SACO.

Institution: Rhodes University, South Africa.

The Public Art Development Programme (PADP) is a MGE workstream which is intended to be implemented in partnership with other levels of government and government agencies and civil society via the DAC PADP.

The evaluation focussed on the sub-categories of the cultural events that receive funding as part of the MGE programme focussing on the Public Arts Development Programme (PADP).

The evaluation of Public Arts events/activities comprised a period of three funding cycles (2014- 2015, 2015-2016 and 2016-2017). These events/activities received a wide range of funding, from R25 000 to R1 500 000 with an average of R296 333 for the last year in which DAC MGE funding was received.

Public Arts were hosted in all nine provinces with the most dominant provinces being Gauteng (34.6%), Limpopo (14.5%), KwaZulu-Natal (13.8%) and Western Cape (11.2%). The Public Arts events/activities focused primarily on visual arts and exhibitions displayed in public spaces, targeting mainly schools.

The findings show that different types, sizes and spatial/geographical spread of the Public Arts events/activities assist with meeting the broader DAC MGE objective of contributing to increased diversity of cultural offerings.

However, it is unclear whether the funding has led to existing Public Arts events/activities to be upscaled in communities which is one of the key objectives of the PADP.

An estimated 240 permanent jobs are associated with the DAC MGE Public Arts programme, specifically in developing and promoting arts, culture and heritage skills beyond that of the event/activity being sponsored. The PADP also creates opportunities

for additional employment, with most being employed on a temporary/casual basis for a week, month and mainly more than a month, however, disaggregated information by gender, historical racial category and location of additional persons employed was not readily available. Nevertheless, the results indicate that both women and men, with Africans as the main historically disadvantaged group in South Africa are the key beneficiaries as intended.

Furthermore, the DAC MGE objectives of focusing on locally based job creation and opportunities in the creative and cultural industry is evident, thus supporting livelihoods as intended by the DAC MGE.

Many of the Public Arts events/activities also had volunteer programmes and both staff and/or volunteers received training, underscoring the importance of skills development in the creative arts sector and among the youth.

In terms of local beneficiation, mainly local service providers and stallholders benefitted economically from the hosting of the events/activities, in alignment with DAC MGE objectives, demonstrating that DAC MGE funded events/activities go beyond the direct benefits to organisers and employees. While the diversity of the events/activities supported by DAC MGE funding is evident, it was not possible to examine audience diversity and brings into question whether the extent of the audience exposure can be quantitatively determined due to a lack of disaggregated data and the methods used to estimate attendance.

Although most of the media exposure leveraged was locally based, media tracking needs to be improved to achieve the DAC MGE goal of increasing the audience and exposure that each event/activity receives. In terms of Public Arts events/activities' sustainability, two-thirds (66.7%) were generally unable to secure additional sponsorship, demonstrating the heavy reliance on public funds, specifically DAC MGE funding.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/701/b4a528955b84f584974e92d025a75d1f/M+%26+E+KDI+REPORT+PUBLIC+ART>

6.9. KDI Report: Flagship Events

Snowball, J. 2017. Flagship Events. South African Cultural Observatory.

Institution: Rhodes University, South Africa.

The Mzansi Golden Economy (MGE) was launched in 2011 to unlock the South African cultural economy by making strategic investments to optimise the economic benefit of the Arts and to enhance the sector's global competitiveness.

The evaluation focussed on the sub-categories of the cultural events that receive funding as part of the MGE programme pertaining to National and Provincial Flagships. National and Provincial Flagship Projects are large and small-scale local, provincial and national events that promote the arts, culture and heritage and contribute to local economic development, job creation and the development of audiences.

National Flagship Projects are projects that have an impact on a national level and support the mandate and objectives of DAC. They are supported by DAC on a three-year renewable basis whereas Provincial Flagship Projects are supported on a one-year renewable basis.

The evaluation of the National and Provincial Flagships comprised a period of three funding cycles (2014-2015, 2015-2016 and 2016-2017). The events/activities received different levels of funding and ranged from R85 065 to R20 000 000 for the last year in which DAC MGE funding was received. Thus, the funding is an annual estimation.

In terms of the spatial distribution, the National and Provincial Flagships were hosted in all nine provinces with the most dominant provinces being Gauteng (22.9%), KwaZulu-Natal (14.3%), Eastern Cape (11.4%) and Western Cape (11.4%).

The evaluation is based on an analysis of surveys undertaken with 13 National and Provincial Flagships events, in addition to documentary analysis of 30 of the 35 Flagships that provided reports to DAC.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=M+%26+E++KDI+Report%3A+Flagship+Events+%28December+2017%29&search.x=16&search.y=26&dcx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&dcrcf=andie=utf-8>

6.10. KDI Report: Touring Ventures (December 2017)

Snowball, J. 2017. Touring Ventures, Research Report. South African Cultural Observatory.

Institution: Rhodes University, South Africa.

The then South African Department of Arts and Culture (DAC) embarked on a strategy to reposition the arts, culture and heritage sector to address social cohesion, creation of sustainable jobs and ensuring social and economic development. The Mzansi Golden Economy (MGE) was launched in 2011 to unlock the South African cultural economy by making strategic investments to optimise the economic benefit of the Arts and to enhance the sector's global competitiveness. An evaluation of the sub-categories of the cultural events that receive funding as part of the MGE programme was conducted, including Touring Ventures, which is the focus of this report.

Touring Ventures was established to ensure that exhibitions, fairs, shows and performances are supported to tour domestically and internationally. Tours to remote areas are included to provide access for marginalised audiences and to sustain jobs. It is anticipated that this workstream will permit the Arts, Cultural and Heritage Sector to stabilise and consolidate, providing access to work and experience, capacity building and linkages to tourism. Furthermore, the long-term goal is to reduce dependency on financial assistance from government, insecurity in the Arts Cultural and Heritage Sector and to enhance professional planning and accountability.

The evaluation of the Tourism Ventures comprised a period of three funding cycles (2014-2015, 2015-2016 and 2016-2017). Touring Ventures received different levels of funding and ranged from R20 000 to R1 000 000 for the last year in which DAC MGE funding was received. Thus, the funding is an annual estimation.

Although the spatial distribution could not be established for close to a third of the Touring Ventures (34.4%), the rest of the events/activities were hosted in all nine provinces with the most dominant province being Gauteng (28.9%), followed by KwaZulu-Natal (7%), Northern Cape (6.3%) and Western Cape (6.3%).

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=M+%26+E++KDI+Report%3A+Touring+Ventures+%28December+2017%29&search.x=23&search.y=24&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

6.11. KDI Report: Festivals and Events

Snowball, J. and Antrobus, G. 2017. KDI Report: Festivals and Events. Research Report. SACO.

Institution: Rhodes University, South Africa and Fort Hare University, South Africa.

The Festivals and Events initiative intends to enhance the number of employment and upskilling possibilities in the arts and cultural sector, as well as the tourist industry. It emphasises the importance of DAC MGE financing in promoting and supporting South Africa's many cultural events and activities.

The impact of DAC MGE financing was evaluated in the following areas, financial aid, status or recognition of events, the quality of cultural aspects, its ability to include local communities and artists, the promotion of social cohesion and skills and employment in the cultural sector. It also identified issues that are associated with funding especially amongst black South Africans being the primary beneficiaries.

Because these festivals and events bring economic advantages, the report concludes that it is important to ensure that the local service providers, being black South Africans, receive the benefits of the funding aid.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=M+%26+KDI+Report%3A+Festivals+and+Events.&search.x=12&search.y=21&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

6.12. KDI Report: Udomo Entertainers – Youth Dance Event

Snowball J. and Antrobus, G. 2017. Key Development Indicator Report Analysis of the Sample of Events under The Mzansi's Golden Economy Initiative Udomo Entertainers- Youth Dance Event. Research Report. SACO.

Institution: Rhodes University, South Africa.

The findings of this research reveal that events supported under the MGE initiative can vary greatly in terms of what they are attempting to accomplish, in terms of their aims and goals as well as their funding.

The Udomo Entertainers received R30,000 in financing and served 300 individuals, resulting in a "cost" of R100 per person which is small in comparison to the Mpumalanga Comes Alive

Festival in 2015. They did, however, contribute to the DAC MGE aims in a variety of ways and enabled an event that would not have happened otherwise.

While the economic financial impact was unlikely to be great, the social and non-market effects were substantial. Small events, such as the Udomo Entertainers, are likely to rely on self-reporting and observation as effective assessment techniques.

Focus groups with some of the children and their parents, as proposed in this report, may have also aided in establishing proof of the event's importance to the community. It is recommended that beneficiary's own knowledge, observations, and surveys be used for assessing larger events, such as the Mpumalanga Comes Alive Festival (2015).

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Key+Development+Indicator+Report+Analysis+of+the+Sample+of+Events+under+the+Mzansi%E2%80%99s+Golden+Economy+Initiative+Udomo+Entertainers+Youth+Dance+Event.andsearch.x=18andsearch.y=19andcx=008312365418257951562%3Ahmci6huvty4andcof=FORID%3A11andcref=andie=utf-8>

6.13. KDI Report: N. M. Mabote Craft and Development Project

Snowball, J., Antrobus, G. and Ndhlovu, E. 2016. Key Development Indicators Report on a DAC Intervention – Analysis of a Sample of Events under the Mzansi's Golden Economy Initiative - N. M. Mabote Craft and Development Project. Research Report. SACO.

Institution: Rhodes University, South Africa.

Monitoring and Evaluation can be important tools for both funders and arts practitioners in terms of demonstrating the value of the arts to communities and funders, accounting for the use of public funds and designing policy interventions. The arts (broadly defined) result in three types of value: Economic (economic growth, employment, trade), Social (community development, social cohesion, inclusiveness) and Intrinsic (artistic quality, personal enlightenment, spiritual values).

This proposed M&E Framework identifies five cultural value themes and links them to indicators that could be used by arts organisations to demonstrate these kinds of value. This report demonstrates how the Framework could be applied to a sample of projects funded under the Mzansi's Golden Economy (MGE) initiative.

What the results of this analysis show is that events funded under the MGE initiative can be very different in terms of both what they are trying to achieve (aims and goals) and their funding. The Framework can accommodate these differences and can also help both arts organisations and funders to develop a common "language" when expressing aims and goals and linking these to indicators.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/720/5f2c22cb4a5380af7ca75622a6426917/KDI+Report+-+NM+Mabote+Craft+%26+Development+Project>

6.14. KDI Report: National Arts Festival

Snowball, J., Antrobus, G. & Ndhlovu, E. R. 2016. Key Development Indicator Report on a DAC Intervention – National Arts Festival. Research Report. SACO.

Institution: Rhodes University, South Africa.

Attendees of the National Arts Festival (NAF) receive substantial social and cultural benefits. These numbers are more difficult to calculate than economic impact figures. The goal of this study was to see how well the Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage held up under scrutiny.

The NAF plays a key role in audience growth by boosting audience pleasure and comprehension of culture and the arts. According to the findings, the festival valued the opportunity to see artists and events they are not otherwise able to see and through encouraging festivalgoers to take risks and experience new art forms.

As evidenced by comparisons to the NAF 2013, the NAF 2016 performed a beneficial effect in strengthening social cohesion by offering a venue for individuals of all origins and cultures to connect and interact and the festival increases cross-cultural understanding to a lesser level and both goals are critical to the operation of a democracy.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Key+Development+Indicator+Report+on+a+DAC+Intervention+%E2%80%93+National+Arts+Festival.&search.x=7&search.y=21&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

6.15. KDI Report: South African Music Awards

Snowball, J'. Tetani, S.' Shelver, A.' Lutshaba, U. & Mashologu, N. 2016. Key Development Indicator Report on the DAC Interventions South African Music Awards. Research Report. SACO.

Institution: Rhodes University, South Africa, and the Nelson Mandela University, South Africa.

The South African Music Awards (SAMAs) are the country's most prestigious music awards, with some comparing it to the Grammys in the United States. The Awards, which were hosted in Durban on June 4th 2016, were in their 22nd year.

The SAMAs' major goals are to promote local music, recognise musicians' contributions to the music and entertainment sector, and use music to reflect South Africa's rich cultural variety and heritage. One of the aims of this research was to apply the Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage. As a result, the Framework served as the foundation for the study design.

The data was gathered during the ceremony via a brief self-completion questionnaire, which received 236 responses, as well as from data gained from organisers.

According to the findings of the opinion poll, the SAMAs are succeeding in accomplishing their objectives, particularly in terms of enhancing the visibility of South African musicians within the country. The majority of those who attended the 2016 SAMAs agreed or strongly agreed that it was a significant event in the South African music calendar. Of the respondents 89% agreed or strongly agreed that the SAMAs serve to boost the profile of South African musicians within the country.

However, just 62% of respondents thought they were successful in enhancing the international reputation of South African musicians.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Key+Development+Indicator+Report+on+the+DAC+Interventions+South+African+Music+Awards.&search.x=9&search.y=22&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cresf=&ie=utf-8>

6.16. KDI Report: Evaluation of the 2018 National Book Week

Gouws, A. 2019. Evaluation of the 2018 National Book Week. Research Report. SACO.

Institution: South African Cultural Observatory, South Africa.

The National Book Week (NBW) was launched in 2010 and is probably the longest-running book promotion event in South Africa. The initiative was started after a study by the South African Book Development Council (SABDC) in 2007 that investigated the reading habits of South Africans. The study found that South Africa did not have a reading culture. The NBW was set up as a joint venture by the Department of Arts and Culture and the SABDC to celebrate the book and promote a love for reading.

The event is held in the 1st week of September which coincides with the beginning of Heritage month in South Africa. It must however be noted that 23 April has been designated by UNESCO as World Book Day.

The information that was made available to the research team by the SABDC on the outputs of the 2018 NBW were rather dismal. Although there were events in all 9 provinces, the number of attendees was very low.

Therefore, on the face of it the impact of the NBW has been low. Some of the reasons for this are administrative while others are more practical. It is critical that the NBW continue but it needs to be restructured in such a way that it can achieve a bigger impact.

Departments other than DAC must be involved in the formulation of the objectives of the SABDC.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/635/6a10bbd480e4c5573d8f3af73ae0454b/SACO+-+KDI+Report+on+National+Book+Week>

6.17. KDI Report: uMaskandi Festival

Bob, U. 2019. Umaskandi Festival. Research Report. SACO.

Institution: University of Kwa-Zulu Natal, South Africa.

The Indlamlenze Development Foundation for the first time organised the 2019 the uMaskandi Festival which was held on the 30 March at the Moses Mabhida Stadium in Durban/eThekweni Municipality, KwaZulu-Natal. The main aim of the festival was to showcase maskandi music nationally and internationally.

The findings reveal that most of the attendees were from Kwazulu-Natal (mainly from within the Durban/eThekweni Municipality area). Mostly African males were in attendance from

diverse income groups and educational backgrounds, with most attendees having completed secondary schooling.

The festival attracted approximately 30 000 audience attendees, 1 200 participants, 90 media persons and 200 support crew. Additionally, 11 778 visitors attended the event from outside Durban/eThekweni Municipality. Most of the attendees had previously attended events such as the uMaskandi Festival which indicates a demand for this type of music cultural event.

Furthermore, almost all attendees came to the location and visited Durban/eThekweni Municipality specifically for the festival.

Hosting the Festival also led to the organisers employing an additional 9 permanent and 94 casual/ temporary persons. Furthermore, 100 volunteers were recruited who assisted with the event.

Sponsorship was mainly from government departments, including DAC. The main expenditure items were capital expenditure, venue hire and advertising and marketing.

The satisfaction levels with the uMaskandi Festival were high among attendees and the organiser of the event. There were specifically positive associations among the attendees and organiser that the uMaskandi Festival contributes to increasing awareness of culture, enhances cultural pride and has cultural entertainment value.

The economic impact analysis showed that the 2019 uMaskandi Festival had an economic impact of between R19 386 807 and R25 434 602 on the economy of Durban/eThekweni Municipality. This is substantial for a one-day event.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=maskandi+festival&search.x=16&search.y=30&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

6.18. KDI Report: COVID-19 Impacts on the Sports Sector: - Business survey responses

Snowball, J., Gouws, A. and Bob, U. 2020. KDI Report: COVID-19 Impacts on the Sports Sector: Business Survey Responses. Research Report. SACO.

Institution: Rhodes University, Nelson Mandela University and the University of Kwa-Zulu Natal, South Africa.

The COVID-19 pandemic had devastating impacts on almost every aspect of life globally. Sports and related cultural impacts are not exceptions in the context of close linkages between culture, sports and tourism.

This research focuses on examining how the COVID-19 virus impacts on sports in South Africa.

The results indicate that sports businesses/organisations in South Africa are varied (in terms of types, size and activities involved in) have been severely impacted by the COVID-19 pandemic.

Various strategies are being adopted to deal with the pandemic with the main ones being closure, suspension and cancellations of activities/events, moving to online/virtual platforms and using personal funds and seeking additional resource.

Location:

<https://www.southafricanculturalobservatory.org.za/download/802>

6.19. KDI Report: Impact Study of the DSAC Funded BASA Supporting Grant Programme

Bob, U. 2019. Impact study of the DSAC Funded BASA Supporting Grant Programme. Research Report. SACO.

Institution: The University of Kwa-Zulu Natal, South Africa.

BASA, an NPC that supports the arts, has maintained a strategic cooperation with DSAC since 1997. The goal of this study was to determine the impact of DSAC financing to BASA on the arts sector. Only 12 surveys were completed and the findings were analysed, raising questions about their validity.

From R6 898 000 in 2014 to R8 946 000 in 2019, DSAC's annual funding for BASA has risen steadily in comparison to the entire annual allocation. According to the findings, three people were hired on a permanent basis and eleven were hired on a casual/temporary basis. The DSAC surveyed 12 beneficiaries who had received BASA funds or support in the previous six years.

Further study is needed to determine how reliant BASA recipients are on the funds they receive. According to the findings, people that are informed are more likely to obtain information and profit from financing opportunities and programmes.

Almost all the 12 recipients who replied said they were adequately educated about the programme. Access to grants/funding and networking opportunities were the key factors that enticed respondents to join.

The primary issues noted were insufficient/lack of funds, as well as a dislike of the competition technique. Sponsorships/additional funds, mentoring and access to knowledge and training were indicated as the most important sources of assistance for artists by the respondents.

Both the beneficiaries and the organisers argued strenuously for the continuation of DSAC financing. The DSAC is the primary sponsor of the BASA Supporting Grant and Debut Programs, giving over 70% of the total expenditure. The report recommends that the DSAC should continue to fund these programmes, based on the high levels of satisfaction shown by both the organiser and the recipients questioned.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Impact+study+of+the+DSAC+funded+BASA+supporting+grant+programme.&search.x=33&search.y=20&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

6.20. Measuring the Impact of Covid-19 Crisis on the Cultural and Creative Industries in South Africa: An Early Assessment

Snowball, J, 2020. Measuring the Impact of Covid-19 Crisis on the Cultural and Creative Industries in South Africa: An Early Assessment. Research Report. SACO.

Institution: Rhodes University, South Africa

As of March 2020, the South African Cultural Observatory (SACO) conducted a survey targeting businesses and freelancers in the cultural and creative industries (CCIs) to quantify the impact of the Covid-19 pandemic.

An overwhelming number of the participants (82%) had a turnover of about R525 000, 00 per annum. Very few, (12%) of those surveyed indicated that they could continue with 50% or more of their normal business activities, i.e., face-to-face operations. This was largely because more than two-thirds (69%) of the participants were involved in face-to-face activities which were not permitted.

The businesses using mostly the face-to-face mode were also less likely to be able to conduct their business online, work from home, do other work, or use the time to build up stock. It was learned that they were also less likely to make use of their reserve funds and more likely to depend on the financial support of family. A very small percentage (15%) of the employers and freelancers who completed the survey believed that they would see an increase in demand for their products and/or services because they were able to conduct their business online. A sizable number (40%) of the respondents were now using their reserves to survive, while 21% said they were relying on family and friends for support.

At least a third (35%) said that they would make use of the shutdown time to move their businesses to online platforms, whilst about (32%) said they would use this time to upskill themselves. The understanding of those wanting to move to online platforms is that the online environment would expose them to an even larger, newer and geographically diverse audience.

The majority (79%) of the employers and freelancers claimed to know about the government support that was being offered at the time, however, only a quarter (25%) of them believed that they qualified for it largely since their businesses have remained informal.

In economic terms, the study shows a direct impact on total output of the Covid-19 shutdown on the sector to be just over R53 billion. The sector shutdown is expected to reduce South Africa's GDP (direct and indirect impact) by R99,7 billion in 2020.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=early+assesment+andsearch.x=0andsearch.y=0andcx=008312365418257951562%3Ahmci6huvty4andcof=FORID%3A11andcref=andie=utf-8>

6.21. Impact analysis: Live Music and its Venues and the South African Economy During COVID-19

Le Roux, A. 2020. Impact Analysis: Live music and its Venues and the South African economy during COVID-19. Research Report. SACO.

Institution: IKS Konsulting, South Africa.

This research follows up the SACO survey on the impact of the COVID-19 pandemic across the whole South African creative and cultural industry landscape, published in May 2020, by applying a more detailed lens to the specific impact on the live music industry and its venues.

Survey respondents came from all South Africa's provinces (with Gauteng, the Western Cape and KwaZulu-Natal dominating), worked along all segments of the music value chain and included representatives of all music genres.

The research gathered 697 responses by means of an online qualitative and quantitative survey, conducted seven in-depth case interviews and undertook extensive desk research on the most recent international publications and research on the impact of COVID-19 on the creative and cultural industries.

The report finds that a majority of the sample had previously been operating for more than five years, but the impact of COVID-19 has been devastating even on these established practitioners.

The report found that 90% of the live music industry lost income due to COVID-19 and 25% indicated that they would not be able to continue with any elements of their business under lockdown. The data presents a picture of a highly interconnected value chain, where venues and other music delivery mechanisms serve as hubs for music practitioners; the loss of one venue impacts on the work and revenue opportunities of multiple other industry professionals.

Location:

<https://www.southafricanculturalobservatory.org.za/download/691>

6.22. Interactive Africa: Design Indaba - Emerging Creatives Development Programme

Bob, U. 2019. Interactive Africa: Design Indaba – Emerging Creatives Development Programme. Research Report. SACO.

Institution: University of Kwa-Zulu Natal, South Africa.

Design Indaba developed the Emerging Creatives Development Programme (ECDP) in 2005. The program's goal is to provide a platform for young creatives to improve their skills.

The number of recipients has increased over the previous six years, from 42 in 2014 to 57 in 2017. Consisting of illustrators, fashion designers, furniture designers and graphic designers were the major sorts of designers that participated in the programme.

The majority of those who have benefited from the programme work in the field of design. Networking, exposure, mentoring, media attention, presenting work and workshops/seminars were among the most mentioned advantages.

The report recommended that the organiser should actively engage additional business and public sector sponsors rather than relying entirely on DSAC funding.

The DSAC Program has a 15-year track record of benefiting the design industry. The allocation of funds and resources to the recipients was a major difficulty when helping financially in particular. The report also argues that the location of responses must be considered. It's vital to remember that not all design industries are created equal, with some having greater manufacturing and exhibition expenses than others.

Most respondents reported favourable results and experiences because of their participation in the programme. Private sponsorships, broadcasting/media rights, stallholder/exhibitor fees and products provided no financial benefit.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/651/55743cc0393b1cb4b8b37d09ae48d097/Interactive+Africa+Design+Indaba+Emerging+Creatives+Development+Programme+%281%29>

6.23. Transformation and Job Creation in the Cultural and Creative Industries in South Africa.

Snowball, J., Collins, A. and Tarentaal, D. 2016. Transformation and Job Creation in the Cultural and Creative Industries in South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa, and University of Portsmouth, England.

Using data from a survey of 2 400 firms in the CCIs in South Africa, this report examines the extent to which the CCIs in South Africa have transformed in terms of ownership and employment.

Comparisons are also made across the six UNESCO (2009) “Cultural Domains” in terms of ownership, average monthly turnover and the number of full-time, part-time and contract employees.

Results show significant transformation in the industry, but that there are statistically significant differences between the Domains, particularly between the less and more commercial sectors.

Location:

<https://www.dropbox.com/home/Deliverables/Year%202/Y2Q2%20-%20Deliverables%20-%20SACO/3.1%20-%20Commission%20Research?preview=CCI+transformation+in+South+Africa.pdf>

6.24. The role of Cultural and Creative Industries in Regenerating Urban and Rural Space and Economies in South Africa

Haines, R., Lutshaba, U. and Shelper, A. 2016. The Role of Cultural and Creative Industries in Regenerating Urban and Rural Space and Economies in South Africa. Research Report. SACO

Institution: Nelson Mandela University, South Africa.

The report seeks to answer the following questions: What role do cultural and creative industries (CCIs) play in regenerating rural and urban space economies in South Africa? Can creativity and other aspects of the creative and cultural industries become driving forces in the development of urban centres or even rural areas?

The research approach is based on a case study methodology centred on the analysis of four South African examples of creative urban and rural environments. These include two urban

settings: Port Elizabeth (Eastern Cape) and Cape Town (Western Cape) as well as two located in a rural setting: Hamburg and Nieu-Bethesda (both in the Eastern Cape).

Several dimensions of analysis were then defined, based on the existing theory and then used to assess the respective case studies with the aim of identifying key lessons learnt.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1010/1e48c4420b7073bc11916c6c1de226bb/Theme+Role+Of+Ccis+In+Regenerating+Urban+And+Rural+Space+And+Economies+In+Sa+-+Final>

6.25. The Cultural and Creative Industries in South Africa: A Case Study of the Sarah Baartman District

Drummond, F. and Snowball, J. 2017. The Cultural and Creative Industries in South Africa: A Case Study of the Sarah Baartman District. Research Report. SACO.

Institution: Rhodes University, South Africa.

There is growing international interest in how the cultural and creative industries can be used to drive regional economic growth and development. However, previous research has found that the cultural and creative industries (CCIs) usually form clusters in cities due to the benefits of established hard and soft infrastructure.

To date there has been little research on CCI clustering in rural areas and regions without large cities. This report aims to fill the gap by demonstrating how mapping techniques can be used to identify regional clusters. Such information is important for the design of effective regional cultural policy.

Location:

<https://www.southafricanculturalobservatory.org.za/download/204/274ad4786c3abca69fa097b85867d9a4/Drummond%20C+Fiona+-+Regional+Development+and+the+cultural+and+creative+industries+in+the+Sarah+Baartman+District+in+the+Ec+of+South+Africa>

6.26. Employment in the Cultural and Creative Industries in South Africa

Hadisi, S. and Snowball, J. 2017. Employment in the Cultural and Creative Industries in South Africa. Research Report. SACO.

Institution: PESA (Political Economy Southern Africa), and Rhodes University, South Africa.

This study extends the work of four previous studies on employment in the CCIs in South Africa. Using the UNESCO (2009) Framework for Cultural Statistics and their Manual on how to compile statistics on cultural and creative industry employment from national data sets.

The study found that 2.52% of all jobs in South Africa in 2015 were classed as creative occupations. This includes people working in sectors traditionally classed as cultural or creative (such as fine art, performing art, film, museum, libraries, music, craft etc.) as well as the more commercial sectors (such as designers, architects, advertising and computer programming).

The study also estimated that if all three parts of the creative trident, total cultural/creative employment is considered, that the sector accounted for 6.72% of all jobs in the country, or just over a million jobs in 2015.

Eighty percent of those in CCI occupations are Africans, Coloured and Indian or Asian. More than half of all cultural occupations are held by men (57%). A much higher percentage of cultural and creative workers have tertiary education (38%) than non-cultural workers (19.4%).

Salaries for cultural occupations are also generally higher than for non-cultural occupations, which indicates that the sector can offer viable employment opportunities and decent jobs. Forty-three percent of cultural jobs are informal and more people are freelance or contract workers (own account workers with no employees) compared to non-cultural jobs (32.5% compared to 8.3%).

As found in other studies, cultural and creative occupations may thus offer more precarious employment than non-cultural jobs.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/999/b706835de79a2b4e80506f582af3676a/Employment+in+the+CCIs+in+South+Africa+-+Report>

6.27. Cultural Employment in South Africa.

Snowball, J. and Hadisi, S. 2016. Cultural employment in South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa for the South African Cultural Observatory

At the time of publication of this report, there have been no studies of employment in the CCIs in South Africa using officially collected, national-level data, although there have been attempts to measure the size of the creative economy using survey data (for example, regional studies such as the Western Cape (2009) and Gauteng (2009) studies and a national study conducted in 2014).

“Cultural employment” includes those working in “cultural occupations”, both in the CCIs and outside of them, but does not include those working in CCIs in non-cultural jobs.

Making use of national-level data the study found that CCI jobs made up 2.93% of total employment in SA in 2014 (443 778 jobs) which is slightly more than mining. Time series analysis showed that, while cultural employment could grow faster than non-cultural employment, it is more volatile, being significantly affected by economic downturn.

As also found in other studies, cultural workers tend to have higher levels of education and earnings than non-cultural workers, suggesting that this sector has the potential to boost economic growth.

However, cultural jobs tend to “cluster” in some provinces, notably those with larger cities. This report demonstrates how reliable, national-level data, collected by Statistics South Africa, can be used to provide information on cultural employment.

Location:

<https://www.southafricanculturalobservatory.org.za/download/658>

6.28. South Africa's Trade in Cultural Goods and Services With a Focus on Cultural Trade with BRICS Partners

Cattaneo, N. and Snowball, J. 2017. South Africa's trade in cultural goods and services with a focus on cultural trade with BRICS partners. Research Report. SACO.

Institution: Rhodes University, South Africa.

This report set out to examine the growth and structure of South Africa's cultural and creative industries trade between 2007 and 2016, with a focus on the country's trade with its BRICS partners. It also investigated the country's intra-industry trade by domain with each partner, since increased intra-industry specialisation within sectors or domains can better harness the potential benefits of trade expansion and promote more balanced value-added trade.

The main findings of the study are as follows. Cultural goods exports accounted for 0.46% of South Africa's total commodity exports in 2016, while cultural goods imports accounted for 0.66% of total commodity imports. A significant slowdown in South Africa's total cultural goods trade was evident in 2015, in line with the slower growth in the economy more broadly. However, there was evidence of a comfortable recovery in 2016. Cultural goods exports grew faster than cultural goods imports for much of the post-crisis period, reducing the country's trade imbalance in cultural goods markedly, particularly in the most recent period.

The study found that the Visual Arts and Crafts domain is a significant driver of this trend, alongside weaker import performance in several domains. On the import side, Audio-visual and Interactive media imports are important but volatile. The trade balance by domain is only positive in the case of Cultural and Natural Heritage, while the trade imbalance is most significant in Books and Press and Performance and Celebration.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1006/9246444d94f081e3549803b928260f56/SAs+Trade+in+Cultural+Goods+and+Services+-+Report>

6.29. Transformation, Ownership and Employment in South Africa's Cultural and Creative Industry (CCI) and Creative Economy

Snowball, J. and Hadisi, S. 2017. Transformation, ownership, and employment in South Africa's cultural and creative industry (CCI) and creative economy. Research Report. SACO.

Institution: Rhodes University, South Africa.

The purpose of this study is to (a) highlight key macroeconomic findings relating to South Africa's CCIs and (b) provide interpretation and analysis of the data as it pertains to policy development and implementation in accordance with the 2011 National Development Plan (NDP) and relevant policy initiatives of the arts and culture department.

In terms of national employment, the report confirmed that, in 2016, the CCIs employed roughly 1.7% of the total South African employed labour force (or just over 260000 jobs).

The “Design and Creative Services” domain was the biggest employer, employing roughly 47% of the total CCI workforce, followed by 17% in the “Audio-Visual and Interactive Media” domain.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1011/7f975a56c761db6506eca0b37ce6ec87/Transformation+Ownership+and+Employment+in+South+Africa's+CCIs+and+Creative+Economy>

6.30. Summative Report of DAC MGE Funded Categories

Snowball, J. 2018. Summative Report on DAC MGE Funded Categories. South African Cultural Observatory. Research Report. SACO.

Institution: Rhodes University, South Africa.

The then South African Department of Arts and Culture (DAC) embarked on a strategy to reposition the arts, culture and heritage sector to address social cohesion, creation of sustainable jobs and ensuring social and economic development. The Mzansi Golden Economy (MGE) was launched in 2011 to unlock the South African cultural economy by making strategic investments to optimise the economic benefit of the arts as well as enhance the sector’s global competitiveness. An evaluation of the five sub-categories (National and Provincial Flagships, Festivals and Events, Touring Ventures, Public Arts and Miscellaneous) of the cultural events that receive funding as part of the MGE programme, was conducted. The evaluation of the five DAC MGE categories comprised a period of three funding cycles (2014-2015, 2015-2016 and 2016-2017).

The methodological approach adopted, included survey implementation with event organisers as well as an examination of documents submitted to DAC as part of a documentary analysis. The largest category was Festivals and Events (153) followed by Touring Ventures (128), Miscellaneous (41), Public Arts (40) and Flagships (35).

For the smaller event categories, all organisers where contact details were available were approached to participate. For Festivals and Events and Touring Ventures, a purposive sampling approach was used.

Most interviews were conducted in the Touring Ventures (38) and Festivals and Events (30) categories followed by Public Arts (15), Miscellaneous (14) and Flagships (13). In total 110 surveys were completed.

In terms of spatial distribution, events were hosted in all nine provinces, mainly in Gauteng, Limpopo, Western Cape and KwaZulu-Natal. Some of the organisers received funding for two and three years (mostly Flagships and Festivals and Events).

While many of the organisers (especially Flagships and Festivals and Events) are established and have been involved in organising events for long periods, the DAC MGE programme has also assisted new organisers in the cultural event/ activity arena who have been planning the event for three years or less. This suggests that the DAC MGE is creating opportunities for more cultural events/activities to be held in South Africa, thus contributing to the objective of increasing and diversifying cultural offerings.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Summative+Report+andsearch.x=7andsearch.y=10andcx=008312365418257951562%3Ahmci6huvty4andcof=FORID%3A11andcref=andie=utf-8>

6.31. Mapping the Spatial Distribution of Mzansi Golden Economy Funding using GIS

Van Der Linde, J.C., Jooste, T. and Snowball, J. (2018). Mapping the Spatial Distribution of Mzansi Golden Economy Funding Using GIS. Research Report. SACO.

Institution: Nelson Mandela University and Rhodes University, South Africa.

The purpose of the report is to offer policy recommendations for a more equal geographic distribution of MGE funding across provinces, rural and urban areas and metropolitan areas.

The results from this report focused on the following: Cultural Vibrancy, this centred around Festivals and Events, National and Provincial Flagship events, Miscellaneous and Community Arts which indicated that Gauteng, the Western Cape (around Cape Town) and KwaZulu-Natal are among the provinces with the most MGE-funded events and activities.

MGE-funded activity is more equally spread in provinces where there is no major urban region. The Cultural Resources investigated focussed on Population Density per municipality, Funding Per Province and the Percentage of population under the poverty line. The study found that resources were well-distributed when consideration was given to places with higher population density, where financing would benefit the greatest number of people, but also include more rural areas which include a significant amount of support for impoverished towns.

MGE financed events outside of metros include Clusters of CCIs and their link to MGE-funded events are depicted on a heat map. Although cultural mapping studies are becoming more popular, cultural study seldom use geographic information systems (GIS) to analyse spatial data from different sources.

This report argues that GIS maps have a lot of promise as policy analysis tools since they can visually display links between factors which may assist to uncover creative hotspots and provide feedback on financing inequities.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Mapping+the+Spatial+Distribution+of+Mzansi+Golden+Economy+Funding+using+GIS+%28March+2018%29.andsearch.x=13andsearch.y=27andcx=008312365418257951562%3Ahmci6huvty4andcof=FORID%3A11andcref=andie=utf-8>

6.32. South Africa's Cultural Goods Trade with Africa: Policies and Trade Potentials in the Context of the African Continental Free Trade Area Agreement

Cattaneo, N. and Snowball, J. 2017. South Africa's cultural goods trade with Africa: policies and trade potentials in the context of the African Continental Free Trade Area Agreement. South African Cultural Observatory: Gqeberha, South Africa

Institution: Rhodes University. South Africa

The aim of this report is to explore South Africa's cultural goods trade with selected African countries from 2007 to 2017, with reference to the current cultural policy environment at the continental and regional level affecting such trade. The UNESCO (2009) Framework for Cultural Statistics is used to identify cultural goods, with trade data sourced from UN Comtrade (2018).

The results of the study indicate that South Africa's overall deficit in cultural goods trade has narrowed markedly in the period 2014-2017. This is due to persistent cultural good export growth (especially in the Visual Arts and Crafts domain) coupled with weak or declining import growth. South Africa's cultural goods export growth has outstripped growth in total commodity exports since 2011.

Location:

(<https://www.southafricanculturalobservatory.org.za/download/comments/712/19bc916108fc6938f52cb96f7e087941/AU+Trade+Report+2018+final+with+summary>)

6.33. Determining the state of cultural tourism in South Africa

Chinyamurindi, W. 2019. Determining the State of Cultural Tourism in South Africa. Research Report. SACO.

Institution: University of Fort Hare, South Africa.

This report sought to determine the state of cultural tourism from the lens of the South African context. In essence, apart from being descriptive in nature, the report also sought to be analytical in framing how cultural tourism as a field or sector of operation can be enhanced.

Based on the document analysis, strategies are proposed in enhancing cultural tourism in South Africa, not only as a field but also as a sector.

The report found that cultural tourism in Southern Africa was beneficial for local communities and has the potential to improve the livelihoods and wellbeing of people, especially in the remote or peripheral regions where there are limited alternative economic options to tourism.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/640/4ffce04d92a4d6cb21c1494cdfcd6dc1/Determining+the+state+of+cultural+tourism+in+South+Africa>

6.34. Unpacking the disparity between employment levels and contribution to GDP within the craft sector

Snowball, J. and Hadisi, S. Unpacking the disparity between employment levels and contribution to GDP within the craft sector. Research Report. SACO.

Institution: Rhodes University, South Africa, and Political Economy Southern Africa

Visual Arts and Craft are recognised in many countries as having the potential to create employment and contribute to GDP. This is especially the case in emerging markets, like South Africa, where rich cultural heritage and artisanal traditions, the low barriers to entry of the

sector and its potential for rural development, make it an important focus area for CCI (cultural and creative industries) development.

The aim of this report is to use national-level data to unpack the workings of the Visual Arts and Crafts (VAC) domain and particularly the crafts sector from several angles. to gain a better understanding of its potential for development and constraints faced by the sector.

The results show that the VAC domain does provide opportunities for the employment of women and youth, but it is more male dominated than other CCI domains, especially in terms of young women. Earnings in the VAC domain are generally lower than in other CCI domains, especially for women, which supports other studies that claim that the sector is more of a “survivalist” livelihoods strategy.

Location:

<https://www.southafricanculturalobservatory.org.za/download/700>

6.35. Cultural participation and consumption in South Africa: A demand-side report

Snowball, J. 2020. Cultural participation and consumption in South Africa: A demand-side report. Research Report. SACO.

Institution: Rhodes University, South Africa.

Understanding levels of cultural consumption, as well as more broadly defined “participation” is important for several reasons. Understanding formal cultural consumption patterns and determinants of demand can aid in the development of the cultural and creative industries in South Africa, enhancing their contribution to GDP and employment. Information on cultural participation can help to motivate more effectively for public funds and develop an understanding of the “cultural ecosystem.”

Results also show that, even with the restricted variables capturing cultural engagement in the AMPS data set, South Africans are relatively highly culturally engaged. 74.7% had engaged in some form of cultural consumption in the last year, while 78.3% had engaged in some form of cultural participation in the last year.

Implications of these findings for the cultural and creative industries are that, in general, higher income and education households are those most *likely* to engage in formal cultural consumption activities, even when controlling for population group, age level and gender. Men are more likely to be formal consumers of culture than women. People in older age groups are less likely to engage in cultural consumption.

Location:

<https://www.southafricanculturalobservatory.org.za/download/717>

6.36. South Africa’s International Trade in Cultural Products: A Focus On Trade with the EU in a Comparative Regional Setting

Gouws, A. 2019. South Africa’s international trade in cultural products: A focus on trade with the EU in a comparative regional setting. South African Cultural Observatory: Gqeberha, South Africa

Institution: Nelson Mandela University, South Africa.

This report is the third in a series on South Africa's cultural goods trade, the previous reports having focused on BRICS (Brazil, Russia, India, China, South Africa) and selected countries in Africa.

The main goal of the current report is to analyse the structure and performance of South Africa's cultural goods trade with the European Union (EU) for the period from 2010 to 2018, with comparisons to updated cultural goods trade with BRICS partners and the rest of Africa. By studying changes over time by domain, as well as trade patterns, areas of current and potential future growth are identified. The effects of current and potential future trade and industrial policy strategies are also discussed.

Some of the main findings of the study are as follows:

- South Africa's trade deficit in its overall cultural goods trade globally has decreased markedly since 2012. The trade deficit narrowed even further in 2018, with growth of cultural goods exports accelerating even as import growth recovered. In 2018, South Africa's cultural goods exports were valued at US\$446.5 million, while the value of cultural goods imports was US\$469.8 million.
- Strong export growth in the Visual Arts and Craft domain continued to drive the trend in the trade balance together with a recovery in Books and Press exports. In addition, weak import performance in Books and Press and Audio-visual and Interactive Media continued. Both domains are impacted by digitisation and data while the latter has also been affected by the HS statistical reclassification of the "Video games" sub-sector.
- South Africa's total cultural goods export growth continued to outperform total commodity export growth in the period 2015-2018, with an average annual growth rate of 14.6 percent relative to 5.6 percent.

Location:

<https://www.southafricanculturalobservatory.org.za/download/722>

6.37. Updated Satellite Account Embedded into Social Accounting Matrix for South Africa 2019/2020

Gouws, A. 2019. Updated Satellite Account Embedded into Social Accounting Matrix for South Africa 2019/2020. South African Cultural Observatory: Gqeberha, South Africa

Institution: South African Cultural Observatory, South Africa.

This report is an updated version of the original Research Report pertaining to Cultural and Creative Industries Satellite Account Embedded into a Social Accounting Matrix for South Africa that was produced in December 2017 and which was the second in a series of five reports that were produced in 2017 in response to a specific request from the Department of Arts, Sports and Culture (DSAC) and the South African Cultural Observatory (SACO).

This updated CSA and SAM-Based MEIAM report continues to include the full sections that describe the process used to compile the CCI CSA compiled in 2017 and to update it to 2018 prices (see Section 2: Compiling a Cultural and Creative Industries Satellite Account for South Africa); as well as the process used to compile the 2016 CCI SAM and update it to 2018 (see Section 3: Compiling a Cultural and Creative Industries Social Accounting Matrix for South Africa).

The reason for including the complete text for Sections 2 and 3 is to provide readers with a comprehensive description of the processes used to compile an updated CCI SAM for South Africa that incorporates an internal CCI CSA.

Section 4 presents the results produced by the updated 2018 CCI CSA for South Africa.

Location:

(https://www.southafricanculturalobservatory.org.za/download/comments/679/ca9c267dad0305d1a6308d2a0cf1c39c/Techinical+Research+Report+2_CCI+SAM+and+CSA_2019+Update_Ver+1_3+Feb+2019)

6.38. Reviewing the Impact of the Art Bank

Corrigall, M. 2020. Reviewing the Impact of the Art Bank. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

Establishing an art bank in South Africa has been a resolute goal of the Department of Sport, Arts and Culture (DSAC) since the late 90s as it has been envisaged as the primary vehicle to support and stimulate further growth in the visual arts sector in this country.

The concept has been inspired by a Canadian model, but it has taken some time to discover a feasible and appropriate model that is suitably tailored to our country's context and the shifting conditions in the South African art market. In 2017, the current iteration, dubbed Art Bank of South Africa came into being.

There are currently 298 artworks in the Art Bank SA collection. They are housed in a makeshift storage facility on the grounds of Oliewenhuis Art Museum. To date R4,4 million has been spent on acquiring them over a four-year period, from 2017 to 2020.

An analysis of the 146 artists whose works are in the collection show that 74% are black and 66% are male. The goal of the report was to discover to what degree this national iteration of an Art Bank has been successful in its support of emerging artists and related to this, how the artworks have circulated – through leasing and other programmes – to expose them to the public in ways that would stimulate the art market.

Location:

<https://www.dropbox.com/home/SACO%2020%20Deliverables/Year%203/2.%20Champion%20Evidence/Q4?preview=Art+Bank+SA+-+Assessment.docx>

6.39. Measuring the impact of Covid-19 Crisis on the Cultural and Creative Industries in South Africa: An early assessment

Snowball, J. and Gouws, A. 2020. Measuring the impact of Covid-19 crisis on the cultural and creative industries in South Africa: An early assessment. South African Cultural Observatory: Gqeberha, South Africa

Institution: Rhodes University, South Africa.

This report offers an early assessment of the impact of the Covid-19 shutdown on the South African creative economy. Data and the impact scenarios based on the data, was collected very early on in the shutdown (April 2020).

This report is divided into two parts: The first sections review international research about the impact of the Covid-19 crisis on the creative economy, outlines the support measures put in place by government and puts them in international context. Section 5 analyses the survey results to determine the early impact of the shutdown on the South African Cultural and Creative Industries and the strategies and adaptation methods being used to maintain their businesses, at least to some extent, in the early part of the crisis. The kinds of support that they are currently using and would find most helpful is also presented.

To assess the current South African situation, the research method was to use a carefully designed online survey which was distributed to all the CCI domains in South Africa. Distribution of the survey was supported by SACO, via the monthly newsletter, social media sites and the direct contact of CCI practitioners in the SACO database. Industry associations were also approached and requested to share the link to the online survey with their members.

Results show that the impact of the Covid-19 shutdown is not symmetric and each of the CCI domains experienced different consequences and expected recovery times. The total impact (without the induced impact) on total output of the Covid-19 shutdown on the CCIs is -R53,3 billion and their consequentially direct and indirect impact on the whole economy is expected to be -R99,7 billion in 2020.

Location:

https://www.southafricanculturalobservatory.org.za/download/comments/707/500e75a036dc2d7d2fec5da1b71d36cc/KDI_Measuring+the+Impact+of+the+Covid-19+crisis+on+the+CCI+sector

6.40. Measuring the impact of the COVID-19 crisis on the cultural and creative industries in South Africa: one year on

Author: Snowball, J. and Gouws, A. 2021. Measuring the impact of the COVID_19 Crises on The Cultural and Creative Industries in South Africa: One year on.

Institution: Rhodes University, South Africa.

In all countries, the cultural and creative industries (CCIs) have been negatively affected by the COVID-19 pandemic. Using results from an online survey (326 responses), key stakeholder interviews and macroeconomic modelling, this report investigates the medium-term impact of the lockdown on South Africa's CCIs. The survey included responses from freelancers (49%), employers (51%), formal (64%) and informal (36%) businesses.

According to the CCI poll, 66% of respondents claimed they would keep doing business online following the COVID outbreak. Few had successfully monetized internet material and demand was hampered by poorer households' lack of access to data and the equipment required to view content.

Moreover, a third of those polled (37%) had to rely on their funds or relatives and friends for help. To deal with the impact, employers terminated short-term employment contracts (39%) and shuttered operations (41%).

The CCI's are expected to contribute R46.9 billion to South Africa's GDP in 2021, down 44% from 2019. In 2020, the direct CCI production was R110.3 billion (compared to R223.4 billion in 2019).

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/803/1aa48fc4880bb0c9b8a3bf979d3b917e/Measuring+the+impact+of+the+COVID-19+Crisis+on+the+Cultural+and+Creative+Industries+in+South+Africa+One+year+on>

6.41. Mapping Study 2018: Research Report 1 (of 5): Employment in the Cultural and Creative Industries in South Africa

Snowball, J. and Antrobus, G. 2017. Employment in the Cultural and Creative Industries in South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa

This report used data from the Labour Market Dynamics Survey to determine the size of employment in cultural occupations and industries in South Africa in 2015. It made use of the UNESCO (2009) Framework for Cultural Statistics to define the sector. This includes people working in sectors traditionally classed as cultural or creative (such as fine art, performing art, film, museum, libraries, music, craft etc.) as well as the more commercial sectors (such as designers, architects, advertising and computer programming).

Analysis over time demonstrated what many other countries have also found – that the CCI's are volatile and very responsive to changes in the economy. Cultural occupations declined from making up 2.93% of all jobs in South Africa in 2014 to 2.52% in 2015. An estimation of employment in the cultural and creative industries (including cultural and support occupations) showed that 4.2% of jobs in SA are in the CCI's. If one includes all three parts of the creative trident, total cultural/creative employment in South Africa accounted for 6.72% of all jobs in the country, or just over a million jobs, in 2015.

Eighty percent of those in CCI occupations are Africans, Coloured, Indian or Asian. More than half of all cultural occupations are held by men (57%). A much higher percentage of cultural and creative workers have tertiary education (38%) than non-cultural workers (19.4%). Salaries for cultural occupations are also generally higher than for non-cultural occupations, which indicates that the sector can offer viable employment opportunities and decent jobs. Forty-three percent of cultural jobs are informal and more people are freelance or contract workers ("own account workers with no employees) compared to non-cultural jobs (32.5% compared to 8.3%). As found in other studies, cultural and creative occupations may thus offer more precarious employment than non-cultural jobs.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1033/e17184bcb70dcf3942c54e0b537ffc6d/Employment+in+the+Cultural+and+Creative+Industries+in+South+Africa+%286%29>

6.42. Mapping Study 2018: Research Report 2 (of 5): South Africa's trade in cultural goods and services with a focus on cultural trade with BRICS partners

Snowball, J. and Antrobus, G. 2017. South Africa's trade in cultural goods and services with a focus on cultural trade with BRICS partners. Research Report. SACO.

Institution: Rhodes University, South Africa.

This report set out to examine the growth and structure of South Africa's cultural and creative industries trade between 2007 and 2016, with a focus on the country's trade with its BRICS partners. It made use of the UNESCO (2009) Framework for Cultural Statistics to define the sector.

Like smaller, open, developing countries, SA imports more cultural goods and services than it exports overall (a trade imbalance). Cultural goods exports accounted for 0.46% of South Africa's total commodity exports in 2016, while cultural goods imports accounted for 0.66% of total commodity imports. However, cultural goods exports grew faster than cultural goods imports for much of the post-crisis period, reducing the country's trade imbalance in cultural goods markedly, particularly in the most recent period.

Within the BRICS countries, South Africa has a trade imbalance with Brazil, India and China, and a cultural trade surplus with Russia, which is driven primarily by Cultural and Natural Heritage exports. The promotion of higher value added CCI trade with South Africa's BRICS partners would fit well into the country's current trade and industrial policy framework. Intra-industry trade (IIT) is associated with greater value-added manufacturing trade and can be measured using an IIT index. Cultural domains that have significant trade values and also a higher level of IIT include Performance and Celebration, Visual Arts and Crafts and Books and Press.

Although the focus of this report was on trade in cultural goods, the "dematerialisation" of certain cultural products as a result of digital creation and distribution platforms is increasing the importance of cultural services trade. Cultural services exports were found to be important for the country in several sectors and this should be considered in South Africa's CCI strategy.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1034/bdb106a0560c4e46ccc488ef010af787/SAs+trade+in+cultural+goods+and+services+with+a+focus+on+cultural+trade+with+BRICS+partners+FNL>

6.43. Mapping Study 2018: Research Report 3 (of 5): Macroeconomic impact assessment and analysis of South Africa's Cultural and Creative Industry (CCI) and Creative Economy

Mosaka, D. 2017. Research Report 3 (of 5): The macroeconomic impact of the Cultural and Creative Industries in South Africa 2022. Research Report. SACO.

Institution: Conningarth Economists

In this study, the macroeconomic impact of the CCI sector in South Africa was determined by making use of the CSA that is embedded in the CCI SAM and the Macroeconomic Impact Assessment Model (MIAM).

From the reports analysis, it is clear that South Africa's CCI sector has a sizeable impact on the economy. The essence of the total macroeconomic impact results can be summarized as follows (all figures for 2016):

- The impact of the creative economy (which incorporates the CCIs and the ACH sectors) on the GDP of South Africa was approximately R232 977 billion;
- The usage of capital (directly, indirectly and induced) was estimated to be R74 billion;
- The CCIs sustained 685 886 job opportunities (direct, indirect and induced);
- The total impact on household income amounted to R145.6 billion, of which 15% was earmarked for lower-income households. Thus, of the total income generated directly and indirectly through the CCIs, a significant percentage reached the poor communities in South Africa;
- The annual fiscal impact of the CCIs amounted to approximately R61.5 billion per annum through direct and indirect taxes; and
- In terms of the effectiveness of the use of capital for job creation within the South African economy, the CCIs performed above the national average. This specifically relates to the average of the economy and the sector where the CCIs are mostly located, namely the community, social and personal services.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1035/a34bacf839b923770b2c360eefa26748/Macroeconomic+impact+assessment+and+analysis+of+SAs+CCI+and+creative+economy>

6.44. Mapping Study 2018: Research Report 4 (of 5): Provincial Location and Clusters of the Cultural and Creative Industries Sector in South Africa

Mosaka, D. 2017. Research Report 4 (of 5): Provincial Location and Clusters of Cultural and Creative Industries. Research Report. SACO.

Institution: Conningarth Economists

The report identified local and cultural and creative clusters from a provincial perspective. Clusters were analysed in terms of their contribution to GDP, employment and capital utilisation per domain.

The report concluded with a theoretical analysis of clusters, their formation and operation. The report further argued that more conventional methods of cluster analysis about the South African CCI sector should be considered. This is to be done with the aim to identify and quantify the linkages that exists between CCI activities within the CCI sector and possibly, more importantly, between CCI activities and activities in other sectors of the South African economy.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/736/6bc24fc1ab650b25b4114e93a98f1eba/Mapping+Study+-+Provincial+Location+and+Clusters+of+CCIs+-+Report>

6.45. Mapping Study 2018: Research Report 5 (of 5): Transformation, Ownership and Employment in the Cultural and Creative Industries

Mosaka, D. 2022. Research Report 5 (of 5): The macroeconomic impact of the Cultural and Creative Industries in South Africa 2022. Research Report. SACO.

Institution: Conningarth Economists

This report reprises much of the findings discussed in the previous four research reports. In terms of national employment, the report confirmed that, in 2016, the CCI employed roughly 1.7% of the total South African employed labour force (or just over 260 000 jobs). The “Design and Creative Services” domain was the biggest employer, employing roughly 47% of the total CCI workforce, followed by 17% in the “Audio-Visual and Interactive Media” domain. “Cultural and Natural Heritage” was recorded as the smallest domain, both at the national and provincial level.

In terms of transformation, the report found that, from 2010 to 2016, the highest national employment growth figures occurred within the Asian (18.12%) and African (10.51%) groupings. During the same period, the Free State was recorded as having the highest annual average growth of African jobs (26%), while the Western Cape was the worst performer (4%). The report also substantiated findings made in the rest of the mapping study that Black South Africans currently represent the most significant employment group, accounting for roughly 55% of total national employment in 2016, followed by Whites (28%), Coloureds (11%), and Asians/Indians (5%).

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1036/83fa5a432ae55c253d0e60dbfa716723/Transformation%2C+ownership+and+employment+in+South+Africa%E2%80%99s+cultural+and+creative+industry+%28CCI%29+and+creative+economy+%281%29>

6.46. Mapping Study 2020: Technical Research Report 1: Employment in the Cultural and Creative Industries in South Africa.

Snowball, J. and Antrobus, G. 2020. Technical Research Report 1: Employment in the Cultural and Creative Industries in South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa

This report forms one chapter of the SACO 2020 CCI Mapping Study.

The aim of the study was to analyse the number and proportion of people in South Africa who are employed in the cultural economy, as well as changes in the size, transformation, age, gender, education levels and working conditions of those in cultural occupations since the last mapping study, using official national data sets from Statistics South Africa.

New analysis of the Post-Apartheid Labour Market Series (PALMS), which covers a 20-year time-period, was also included.

Methods used to identify cultural occupations and industries are those set out in the UNESCO Framework for Cultural Statistics (FCS, 2009) and the recent UNESCO Indicators for Culture 2030, adapted for South Africa. Using the “cultural trident” method, findings showed that

creative economy employment has increased, from making up 6.72% of all jobs in South Africa in 2015 to 7.03% in 2017, which accounts for 1,14 million jobs.

Another important finding is that the number of cultural occupations continues to grow at a faster rate (7.1% between 2016 and 2017) than other jobs (2.3% growth between 2016 and 2017). The largest domain, in terms of employment, remains Visual Arts and Crafts (44%).

PALMS data showed that the domain with the fastest growth between the post-Apartheid era (Period 1, 1996–1999) and post the financial crisis (Period 3, 2010–2016) was Audio-Visual and Interactive Media, which also had the second highest average earnings (R21 000 per month in 2015 prices) for Period 3.

Cultural occupations are becoming more racially representative over time, with 84% of people in cultural jobs in 2017 being black (including African, coloured, or of Indian or Asian descent) compared to only 73% in Period 1.

Young people in cultural occupations are also more racially representative than older groups. In both cultural and non-cultural occupations, there has been a decline in informal sector employment since the last mapping study. 46% of people working in cultural occupations were in the informal sector in 2017.

A much higher proportion of cultural workers are freelance (34%) than non-cultural workers (10%).

Education levels of people working in cultural occupations remain higher than those in non-cultural occupations.

The PALMS data shows that there has been a particularly fast increase in the proportion of people in cultural occupations with tertiary education, from 17% in Period 1 to 27% in Period 3.

The highest proportion of cultural jobs is still found in Gauteng (29.4%), followed by the Western Cape (18%) and KwaZulu-Natal (17%). Although they have much smaller overall shares of cultural employment, Limpopo (9.4% of cultural occupations) and Mpumalanga (7.7% of cultural jobs) both have location quotients of slightly above 1, indicating a potential for comparative advantage in the sector. Domains that are struggling are Books and Press, which has lost a considerable number of jobs since 1996 and Visual Arts and Crafts, which remains the largest in terms of number of cultural jobs but has the lowest average earnings of any domain.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/729/5751ec3e9a4feab575962e78e006250d/Employment+in+the+Cultural+and+Creative+Industries+in+South+Africa>

6.47. Mapping Study 2020: Technical Research Report 2: Technical Research Report 2: Cultural and Creative Industries Updated Satellite Account Embedded into a Social Accounting Matrix for South Africa 2019/2020

Mosaka, D. 2020. Technical Research Report 2: Technical Research Report 2: Cultural and Creative Industries Updated Satellite Account Embedded into a Social Accounting Matrix for South Africa 2019/2020. Research Report. SACO.

Institution: Conningarth Economists

This report is an updated version of the original Research Report 2: Cultural and Creative Industries Satellite Account Embedded into a Social Accounting Matrix for South Africa that was produced in December 2017.

Updating the CSA and MEIAM compiled in 2017 has involved incorporating 2018 data into this integrated modelling system and updating the various multipliers inherent in a SAM.

A later section of this report describes the various data sources used to obtain the latest available data for the model updating exercise.

This updated CSA and SAM-Based MEIAM report continues to include the full sections that describe the process used to compile the CCI CSA compiled in 2017 and to update it to 2018 prices as well as the process used to compile the 2016 CCI SAM and update it to 2018

The report provides a comprehensive description of the processes used to compile an updated CCI SAM for South Africa that incorporates an internal CCI CSA. The report concludes by presenting results produced by the updated 2018 CCI CSA for South Africa.

Location:

https://www.southafricanculturalobservatory.org.za/download/comments/725/82f2b308c3b01637c607ce05f52a2fed/Technical+Research+Report+2_CCI+SAM+and+CSA_2019+Update_Ver+1_3+Feb+2019

6.48. Mapping Study 2020: Technical Research Report 3: Macroeconomic Impact Assessment Modelling System and Macroeconomic Impact Analysis of the Cultural and Creative Industries

Mosaka, D. 2020. Technical Research Report 3: Macroeconomic Impact Assessment Modelling System and Macroeconomic Impact Analysis of the Cultural and Creative Industries. Research Report. SACO.

Institution: Conningarth Economists

This Research Report documents the results of the Macroeconomic Impact Assessment Modelling System and Macroeconomic Impact Analysis of the CCI.

This Research Report is a technical report.

The report argued for the consistent use of reporting table structure and layout.

The report documents how quantitative data has been drawn from primary and secondary data sources and identifies StatsSA and the South African Reserve Bank as having provided

the basis for the update of the macroeconomic impact assessment of the 'Arts and Culture Industry.

The report states that the analysis of the Cultural Satellite Account (CSA) and macroeconomic impacts of the Arts and Culture Industry draws upon official data provided by StatsSA. Economic indicators including revenues, costs of production and value-added are provided for several disaggregated industries. These are broken down according to the Standard Industrial Classification (SIC) framework that provides the underlying data collection framework for much of the economic data produced by StatsSA in the 2018 Annual Financial Statistics (AFS) report (Statistical Release P0021).

By identifying the activities within the Standard Industrial Classification (SIC) framework that constitute arts and cultural activities and using the corresponding figures for these activities from these datasets, it has been possible to measure the economic characteristics of the Arts and Culture Industry and its direct macroeconomic impacts upon the economy at a national level.

The multiplier impacts of the Arts and Culture Industry have been estimated using an updated Social Accounting Matrix (CCI SAM) for the South African economy with a 2018 base year. The CCI SAM has been used in conjunction with the Cultural Satellite Account (CSA) to determine the sectors from which the Arts and Culture Industry purchases its inputs, thereby tracing the industry's economic footprint through its supply chain relationships with other sectors; and generating output and employment data for these sectors, as well as increasing earnings and employee spending throughout the broader economy.

Making use of the CCI SAM, complimented by the CSA, is a process that is consistent with international best-practice in the application of SAMs/Input-Output Models to produce industry- level multiplier estimates.

The report also stated that the macroeconomic impact assessment undertaken was benchmarked against similar international and local studies.

Significantly, the report stated that the data for quantifying the value of spill over impacts from the Arts and Culture Industry to the wider economy are not readily available in South Africa, with the result that the results and conclusions presented in later sections of the report are based on systematic modelling using national statistics and a mixture of the qualitative intelligence gleaned from primary research, secondary research and from quantitative data that could be obtained from StatsSA.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/728/d4c2e4a3297fe25a71d030b67eb83bfc/Macroeconomic+Impact+Assessment+Modelling+System>

6.49. Mapping Study 2020: Technical Research Report: South Africa's international trade in cultural products: A focus on trade with the EU in a comparative regional setting

Snowball, J. and Antrobus, G. 2020. Technical Research Report: South Africa's international trade in cultural products: A focus on trade with the EU in a comparative regional setting. Research Report. SACO

Institution: Rhodes University, South Africa.

This report forms one chapter of the SACO 2020 CCI Mapping Study. The main goal was to analyse the structure and performance of South Africa's cultural goods trade with the European Union (EU) for the period from 2010 to 2018, with comparisons to trade with BRICS and the rest of Africa. The choice of the EU as the focus for this report is because, along with the rest of BRICS, Africa and North American Free Trade Area (NAFTA) countries, the EU is one of South Africa's most important cultural trading partners.

Like many small, developing economies, South Africa has an overall cultural goods trade deficit, with the value of cultural goods imports being more than cultural goods exports. However, cultural goods exports have grown faster than exports of other goods, while cultural goods imports have declined.

The cultural trade deficit has fallen dramatically since 2012. In 2018, South Africa's cultural goods exports were valued at US\$446.5 million, while the value of cultural goods imports was US\$469.8 million. The Visual Arts and Crafts domain makes up the largest share of South Africa's cultural goods exports, and in this domain the value of exports is more than the value of imports. The Cultural and Natural Heritage domain also has a trade surplus.

The largest share of South Africa's cultural goods exports go to NAFTA (33.2%), followed by the rest of Africa (23%), the rest of BRICS (22.1%) and the EU (15%). The largest share of South Africa's cultural goods imports come from the rest of BRICS (39.5%) and the EU (24%). In 2018, China was the single most important cultural goods trading partner for South Africa, accounting for 21.5% of the country's cultural goods exports and 36.3% of cultural goods imports.

Based on 2016-2018 averages, South Africa's cultural goods exports to the EU were US\$75.4 million, with cultural goods imports at US\$126 million, yielding a trade deficit of US\$50.6 million for this period.

The most important EU cultural goods trading partners for South Africa are the UK, Germany and Italy. South Africa has cultural goods trade deficits with the UK and Italy, but a cultural goods trade surplus with Germany.

Between 2010 and 2018 cultural goods trade, as a share of total bilateral trade, increased for South Africa's exports to the EU but decreased for imports from the EU because of the rising share of imports of cultural goods from China.

The most important domains for South Africa's cultural exports to the EU are Visual Arts and Crafts and Performance and Celebration. On the import side, Books and Press and Visual Arts and Crafts are the most prominent import domains from the EU and from the UK individually. In recent years, important export categories to the UK, Italy and Germany within this domain have included jewellery and fine art. Interestingly, South Africa also imports jewellery of various kinds from Italy.

Although SA has a cultural trade deficit with the world in Performance and Celebration, it has a cultural trade surplus in this domain with the EU. This could be an area for export promotion

with EU countries which could in turn reduce the country's overall deficit in this domain. While South Africa has an overall trade surplus in Visual Arts and Crafts, it has a small trade deficit in this domain with the EU. The trade flows in this domain are relatively significant and South Africa should both promote trade and possibly be more defensive in this sector.

For the regions analysed, South Africa's intra-industry trade index is highest with the EU at 27.3%, followed by the rest of Africa at 25.9% and BRICS at only 5%. In domains with significant trade flows, IIT is notable in Visual Arts and Crafts with the EU and the rest of Africa, Books and Press with Africa and to a lesser extent, Performance and Celebration with the EU.

Under current trade agreements, the EU currently has a significant margin of preference in CCI trade with South Africa over i) BRICS partners and ii) non-SADC African trading partners. However, cultural imports from SADC enter the country duty-free under the SADC FTA. South Africa performs comparatively well in a number of services sectors that are important for cultural services trade. These include "personal travel services", "advertising and market research services", "audio-visual and related services" and "other personal, cultural and recreational services."

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/722/c8ed21db4f678f3b13b9d5ee16489088/South+Africa+international+trade+in+cultural+products+A+focus+on+trade+with+the+EU+in+a+comparative+regional+setting>

6.50. Mapping Study 2020: Technical Research Report 4: Provincial Location and Clusters of Cultural and Creative Industries

Mosaka, D. 2020. Technical Research Report 4: Provincial Location and Clusters of Cultural and Creative Industries. Research Report. SACO.

Institution: Conningarth Economists

This Technical Research Report 4 is the fourth in a series of five reports that make up the specified deliverables of the updated 2020 economic mapping study. It is important to note that the methodological approach used in this 2020 study is similar to the approach used in the 2017/18 study, with the exception that the cluster analysis has been extended so that the mapping of this cluster analysis is also quantified for the various geographical locations involved.

Both the original 2017/18 and this updated 2020 study apply the same basic modelling structure for economic impact analysis of the CCI, with the principal difference being updated data inputs. The previous study relied to some extent on information from other Department of Sports Arts and Culture (DSAC) mapping studies. However, this current study is based mainly on new datasets sourced from StatsSA.

The focus of this Technical Research Report 4 is on the mapping of the CCIs in order to reveal the existing patterns of spatial clustering in terms of provinces, metros and selected cities. The CCIs, like other industries, are not evenly distributed across geographical areas, but can be spatially concentrated. CCIs tend to concentrate in provinces, cities and local areas and are significant drivers of creative and cultural activities. In most instances, CCIs connect to more

than one economic sector, especially in large Metropolitan areas. This report also presents a comparative analysis across the various CCI clusters.

Location:

https://www.southafricanculturalobservatory.org.za/download/comments/724/7f1171a78ce0780a2142a6eb7bc4f3c8/Technical+Research+Report+4_CCI+Provincial+Location+and+Cluster+Report_04+May+2020+-+%28v.2%29

6.51. Mapping Study 2020: Technical Research Report 5: Transformation, Ownership and Employment in the Cultural and Creative Industries in South Africa

Mosaka, D. 2020. Technical Research Report 5: Transformation, Ownership and Employment in the Cultural and Creative Industries in South Africa. Research Report. SACO.

Institution: Conningarth Economists

This report focuses on the topics of Transformation, Ownership and Employment in the CCIs in South Africa. As it can be deduced from the figure below, transformation has always been one of the major challenges facing the creating and culture industries amongst others.

This study endeavours to establish to what extent the CCIs in South Africa are moving towards more inclusive and racially diverse patterns in their ownership and employment profiles.

In conclusion, the report highlights that there is a gradual improvement in South Africa in ensuring that the Creative and Cultural Industries become more inclusive and conforms to the National Government Policy on Black Economic Empowerment.

To this degree, the report has noted a significant shift in terms of transformation across the CCI Domains, whereby Africans are a major beneficiary of employment opportunities. It is only at Books and Press whereby Africans are slightly underrepresented.

The report found that CCI sectors employed an estimated 277 357 workers in 2018, with Africans accounting for 50.7% of the total, followed by Whites (34%), Coloureds (9.5%) and Asians/Indians (5.8%). On a provincial basis, Gauteng is by far the largest provincial employer of (41.4%) of the CCI sectors with Western Cape accounting for 22% of the total. The smallest CCI sector employment in terms of the total (1.7%) occurs in the Northern Cape.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/723/08419be897405321542838d77f855226/Transformation%2C+Ownership+and+Employment+in+the+Cultural+and+Creative+Industries+in+South+Africa>

6.52. Mapping Study 2022: Report 1: The macroeconomic impact of the Cultural and Creative Industries in South Africa 2022

Snowball, J., Gouws, A., Burton, M., Cattaneo, N., Hadisi, S., Rogan, M., Vitshima, S., Xhoxho, T. and Scharf, M. 2022. Chapter 1: The macroeconomic impact of the Cultural and Creative Industries in South Africa 2022. Research Report. SACO.

Institution: Rhodes University & South African Cultural Observatory, South Africa.

This first chapter of the 2020 Cultural and Creative Industries Mapping Study estimates the macroeconomic contribution of the Cultural and Creative Industries (CCIs) to the gross domestic product (GDP) of the country, including the performance of the domains (using the UNESCO Framework for Cultural Statistics, 2009) over time. Information from official sources

as well as reliable national databases were analysed using Input-Output modelling and a Social Accounting Matrix adapted for the CCIs.

Using the rebased 2015 GDP data, the total Gross Value Added (GVA) of the CCIs was R161 billion in 2020. This represents just under 3% of South Africa's total economic production in 2020 and makes the sector approximately the same size as agriculture.

As found in previous mapping studies, the largest domains in terms of contribution to GDP are Design and Creative Services and Audio-Visual and Interactive Media. The dominance of these domains is expected, since they create cultural and creative content used in film and television, video games, fashion design, architecture and advertising.

The next largest domains are Visual Arts and Crafts (R23.4 billion in 2020, 15% of the contribution to GDP) and Books and Press (R21.5 billion in 2020, 13% of the contribution to GDP). These are followed by the smaller domains of Performance and Celebration (6%) and Cultural and Natural Heritage (4%).

Looking at the growth rates between 2018 and 2020, the impact of the slowdown in the economy during 2019 and the COVID-19 lockdowns have resulted in all sectors showing some decline. The most negatively COVID-19 impacted domains are the Visual Arts and Crafts (-2.13%) and Books and Press (-1.81%) which together account for nearly a third of CCI output and employment.

As found in previous mapping studies and in the international literature, the creative economy grows quickly when the economy is doing well but tends to decline more quickly than other sectors when economic growth slows. The CCIs generally performed better in 2017 than the South African economy. However, the growth rate for the sector slowed down relative to the South African economy from 2018.

Type II output multipliers show the backward and forward linkages of a sector to the rest of the economy. All the CCI multipliers are between 3.7 and 4.3, indicating that new spending in the sector can be expected to have large knock-on impacts in the rest of the economy.

An innovation of this report is the calculation of the Gini coefficient for each domain's contribution to household income. The Gini coefficient is an indicator of inequality, where a higher coefficient indicates more inequality. The domain with the most unequal distribution of income is Visual Arts and Crafts. This domain includes both fine artists whose works sell internationally, often for very high prices and crafters who may be operating informally on a small scale. Half of the poorest households in this domain earn only 8% of total income. Audio-visual and Interactive Media has one of the lower Gini coefficients in the sector. In general, however, the CCIs have a more equal distribution of income than for South Africa as a whole.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/983/6aab1270668d8cac7cef2566a1c5f569/Chapter+1+Macroeconomic+impact+of+CCIs+in+South+Africa>

6.53. Mapping Study 2022: Report 2: Employment and transformation in the Cultural and Creative Industries in South Africa 2022

Snowball, J., Gouws, A., Burton, M., Cattaneo, N., Hadisi, S., Rogan, M., Vitshima, S., Xhoxho, T. and Scharf, M. 2022. Chapter 2: Employment and transformation in the Cultural and Creative Industries in South Africa 2022. Research Report, SACO.

Institution: Rhodes University & South African Cultural Observatory, South Africa.

This report forms one chapter of the SACO 2022 CCI Mapping Study. Aims were to analyse the number and proportion of people in South Africa who are employed in the cultural economy, as well as changes in the size, transformation, age, gender, education levels and working conditions of those in cultural occupations since the last mapping study, using official national data sets from Statistics South Africa.

A special focus of this report is the impact of the COVID-19 pandemic on cultural and creative industry workers in 2020. Methods used to identify cultural occupations and industries are those set out in the UNESCO Framework for Cultural Statistics (UNESCO, 2009) and the recent UNESCO Indicators for Culture 2030, adapted for South Africa (Hadisi and Snowball, 2016).

Using the “cultural trident” method, findings showed that cultural occupations increased from 380 000 in 2017 to 385 500 in 2019. The whole creative economy (including non-cultural support occupations) accounted for 1 million jobs in 2019, which represented 6% of the workforce in South Africa.

Creative occupations in South Africa are showing continued transformation, including Black African, Coloured and those of Indian/Asian origin, 86.7% of people working in cultural occupations in South Africa are black (compared to 83.6% in 2017). The profile of those in younger age groups is also more representative than older people in cultural occupations.

The largest domain, in terms of cultural occupations in 2019, continues to be Visual Arts and Crafts (44.5%), followed by Intangible Cultural Heritage (22.5%), Design and Creative Services (13.4%) and Books and Press (12.4%). The provinces with the largest proportions of cultural occupations are Gauteng (32%), KwaZulu-Natal (18.2%) and the Western Cape (14.4%) as also found in previous mapping studies.

However, as found in other studies on the impact of the COVID-19 pandemic on creative economy workers in South Africa (SACO, 2021) and internationally, young and emerging (early career) cultural workers are more vulnerable to disruptions and job losses than older, established creatives. To ensure the continued transformation and sustainability of the sector, it is important to provide support especially to young creatives.

More workers in cultural occupations are men (57.3%) than women (42.7%), which is very similar to the gender distribution in non-cultural occupations. As noted in previous reports and mapping studies, the significant under-representation of young women in cultural occupations compared to young men is a concerning trend.

A much greater proportion of people in cultural occupations work in the informal economy (46.3% in 2019) than those in non-cultural occupations (29.8%). Cultural occupations are also more likely to be freelance “own account” workers (34.5% of cultural occupations compared to 9.5% of non-cultural workers). Both these characteristics make those in cultural occupations more vulnerable to shocks, such as the COVID-19 lockdown.

QLFS data showed that cultural occupations suffered larger relative decreases in the number of jobs in 2020 than non-cultural occupations: by Quarter 4 of 2020 there were 295 000 people working in cultural occupations, compared to 380 000 in Quarter 4 of 2019 (a 22% decline in cultural occupations, or 85 000 jobs lost between Q4 of 2019 and Q4 of 2020). However, although there are fewer women overall working in cultural occupations and

industries, women in cultural occupations were not as negatively affected by the crisis as men: while cultural jobs for both men and women declined in 2020, compared to 2019, the decline was steeper for men (a year-on-year drop of 25%) than for women (a year-on-year drop of 18.9%).

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/986/fe7ee8fc1959cc7214fa21c4840dff0a/Chapter+2+Employment+and+Transformation>

6.54. Mapping Study 2022: Report 3: South Africa's Cultural Goods Trade with a focus on the US-Mexico-Canada (USMCA) Bloc and SADC in Comparative Perspective and the Impact of the COVID-19 Pandemic 2022

Snowball, J., Gouws, A., Burton, M., Cattaneo, N., Hadisi, S., Rogan, M., Vitshima, S., Xhoxho, T. and Scharf, M. 2022. 2022. Chapter 3: South Africa's cultural goods trade with a focus on the US-Mexico-Canada (USMCA) bloc and SADC in comparative perspective and the impact of the COVID-19 pandemic 2022. Research Report. SACO.

Institution: Rhodes University & South African Cultural Observatory, South Africa.

This report examines South Africa's international trade in cultural goods and services, using local and international data sources. The focus is on the US-Mexico-Canada (USMCA) bloc and SADC in comparative perspective, and the impact of the COVID-19 pandemic.

In 2020, South Africa's cultural goods exports were worth US\$316.46 million, and made up 0.37% of the value of all South Africa's commodity exports. Until 2018, cultural goods exports had been growing strongly, making up 0.47% of South Africa's total commodity exports (US\$448.86 million) in that year. As with GDP growth (Chapter 1) and employment (Chapter 2), the economic slow-down and the impact of COVID-19 have had a negative impact on cultural goods exports. Cultural goods trade contracted more sharply than total commodity trade on both the export and import side for 2018–2020.

Like many small, open economies, South Africa had a cultural goods trade imbalance, with the value of cultural goods imports being more than the value of exports. However, cultural goods imports have been declining recently and for the first time in 20 years, South Africa had a positive cultural goods trade balance for some quarters in 2020 and 2021. While cultural goods exports initially appeared to recover more quickly after the hard lockdown, they have not yet reached pre-pandemic levels.

Visual Arts and Crafts, Books and Press, and Performance and Celebration are the most significant domains for South Africa's cultural goods trade. South Africa has a trade surplus in Cultural and Natural Heritage trade, and in Visual Arts and Crafts. The largest cultural trade deficits by domain in both periods were in Performance and Celebration and Books and Press.

In 2019, South Africa had a significant cultural goods trade surplus with USMCA (of US\$111.64 million) and with SADC and the rest of Africa (US\$62.35 million and US\$12.6 million respectively). The USMCA bloc has become an increasingly important destination for South Africa's cultural goods exports in Visual Arts and Crafts, Cultural and Natural Heritage and Performance and Celebration domains. Visual Arts and Crafts exports to USMCA increased in 2020, as did Books and Press. South Africa's cultural goods exports to SADC also increased in 2020, during the COVID-19 pandemic. Exports to SADC grew in the Performance and Celebration domain and in Books and Press.

Trade complementarity indices (TCIs) are used to assess the potential for trade expansion between trading partners. South Africa's Export TCI with the USMCA (47.20%) exceeds that with SADC (35.79%) by nearly 12 percentage points. However, the country's export TCI with the EU is even greater at 65.07%.

South Africa has a low Import TCI with SADC, which suggests that the region does not produce enough of the range of cultural products that South Africa imports. There is a need to build productive capacity in the CCIs in the SADC region and to address non-tariff barriers, infrastructure constraints, transport costs, financing and information flows.

Growing digitisation has increased the importance of services trade in the CCIs. CCI services exports grew strongly in several domains, including Audio-visual and related services until 2019.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/987/df6d2338b2b8fce1ec2f6dda0a630eb0/Chapter+3+International+Trade+in+Cultural+Goods+and+Services>

6.55. Mapping Study 2022: Report 4: Provincial Profiles: Cultural and Creative Industries in South Africa 2022

Snowball, J., Gouws, A., Burton, M., Cattaneo, N., Hadisi, S., Rogan, M., Vitshima, S., Xhoxho, T. and Scharf, M. 2022. Chapter 4: Provincial Profiles: Cultural and Creative Industries in South Africa 2022. Research Report. SACO.

Institution: Rhodes University & South African Cultural Observatory, South Africa.

The size and composition of the creative economy at a provincial level is an important aim of the mapping study since much cultural policy is applied sub-nationally. This report augments Report 1 (The macroeconomic impact of the Cultural and Creative Industries (CCIs) in South Africa), Report 2 (Cultural Employment and Transformation) and Report 3 (International Trade in Cultural Goods and Services).

This report highlights the size and composition (according to the domains set out in the UNESCO Framework) of the CCI contribution to the gross domestic product (GDP), its labour force as well as CCI exports.

As found in previous mapping studies, the largest domains in terms of contribution to GDP are Design and Creative Services, and Audio-visual and Interactive Media. The dominance of these domains is expected, since they create more commercial cultural and creative content which is used in film and television, video games, fashion design, architecture and advertising.

Gauteng contributes 36.3% to South Africa's CCI Gross Value Added (GVA) which is the highest contribution from any province. The other two provinces that are substantial contributors are the Western Cape (17.4%) and KwaZulu-Natal (15.6%). All provinces, including these three, have the potential to increase the production of the CCIs and their contribution to the provincial economy.

CCI employment was analysed per province using the cultural trident approach with data collected by Statistics South Africa's (Stats SA) Quarterly Labour Force Survey 2019 (the most recent annual data at the time of writing). The creative economy employment still makes up a relatively small percentage of the South African workforce (6% in 2019). The provinces with

the largest CCI employment shares are Gauteng (29.4%), Western Cape (18%) and KwaZulu-Natal (17%).

The three leading provinces in terms of production of CCIs are also the three provinces that export most. The Western Cape is responsible for approximately 53% of South Africa's CCI exports, followed by Gauteng (32.4%) and KwaZulu-Natal (10.9%). Again, there is potential for the provinces, especially those that border on other African countries, to increase cultural goods. The Northern Cape's largest market for CCI exports, for example, is Namibia.

South Africa's culture and creativity have important intrinsic and social values, as well as the economic ones discussed here. Provinces each bring their own richness to the sector and regional differences need to be explored to determine where additional CCI production can be encouraged, especially where it leads to employment and exports.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/989/a1140a3d0df1c81e24ae954d935e8926/Chapter+4+Provincial+Profiles>

6.56. Mapping Study 2022: Report 5: The South African Creative Economy in Historical Context 2022

Snowball, J., Gouws, A., Burton, M., Cattaneo, N., Hadisi, S., Rogan, M., Vitshima, S., Xhoxho, T. and Scharf, M. 2022. Chapter 5: The South African Creative Economy in Historical Context 2022. Research Report. SACO.

Institution: Rhodes University & South African Cultural Observatory, South Africa.

An important part of understanding the creative economy is the ability to track developments over longer time periods. Report 5 of the Mapping Study provides longer-term analysis of the contribution of the Cultural and Creative Industries (CCIs) to South Africa's GDP, employment and transformation, and international trade in cultural goods.

Data is from a variety of national and international databases that provide reliable national data over time (further described in Reports 1, 2, and 3 of the Mapping Study).

The direct contribution of the CCIs to the GDP of South Africa increased steadily from 1996 (2%) to a high of nearly 3% in 2010. The financial crisis of 2008/9 and the slowing growth rate of the overall economy have also resulted in a decline in CCI growth rate. In terms of GDP contribution, the largest and fastest growing domains are Audio-visual and Interactive Media and Design and Creative Services. As expected from domains with higher levels of cultural and intrinsic value, the contribution of Performance and Celebration and Cultural and Natural Heritage is lower, but they have maintained a steady growth rate over time. Of concern is that two of the larger domains, Books and Press and Visual Arts and Crafts, have declining GDP contributions since 2012.

In 2008, before the financial crisis, cultural occupations provided 475 000 jobs (2.6% of the workforce). The following year saw a significant decrease which reached a low point in 2015 with 323 500 people in cultural occupations (2% of the workforce). Since 2015, there has been significant recovery, although never reaching the pre-financial-crisis levels. The largest domains in terms of employment are Visual Arts and Crafts and Books and Press. Of concern is that, as with their GDP contributions, the number of people employed in these domains is declining over time. Although the gender bias is still evident, there is some evidence of ongoing transformation: The percentage of Black (including Black African, coloured and

people of Indian or Asian origin) in cultural occupations has increased over time. There has also been a remarkable increase in the proportion of people in cultural occupations with tertiary education over this period, from 19.7% in 2005–2009, to 27.2% in 2015–2018.

International trade in cultural goods also fell sharply in response to the 2008/9 crisis, although the recovery (particularly of exports) was quick. For the first time in the last 20 years, South Africa had a cultural goods trade surplus in 2020. Cultural goods exports rose as a share of total export earnings from 2012 (0.25%) to 2018 (0.47%), declining to 0.37% in 2020.

Contrary to their declining share of GDP and employment, cultural goods exports are dominated by Books and Press and Visual Arts and Crafts (although the latter has been falling since 2018). These were also the largest import domains. Although smaller, the Cultural and Natural Heritage domain shows a consistent trade surplus over time and Performance and Celebration has shown remarkable growth.

South Africa's largest trading partner of its cultural goods exports in the last 20 years is the US, followed by the UK, although the latter is becoming less important over time, as the importance of the African continent and China rises. Cultural goods imports are sourced mainly from the same three countries (US, UK and China). While South Africa has a cultural goods trade surplus with the US over most of the period studied, it has a large and growing cultural goods trade deficit with China.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/990/4fac9ba115140ac4f1c22da82aa0bc7f/Chapter+5+Creative+Economy+in+Historical+Context>

7. Theme 6: Innovation and Technology

This theme focusses on innovation and the development of new technologies which contributes and/or enhances the competitive and comparative advantages of the South African Arts, Cultural Heritage and Creative Economy.

7.1. The overlaps between the Digital and Creative Sectors: Innovation and Technology in the Creative Economy

Snowball, J., Tarentaal, D., Van der Linde, J.C., Waelde, C., Nwauche, E., and Sapsed, J. 2019. The Overlaps Between the Digital and Creative Sectors: Innovation and Technology in The Creative Economy, December 2019

Institution: Rhodes University, South Africa, Nelson Mandela University, South Africa, Coventry University, UK.

Despite the growing interest in the contribution of CCI to growth and job creation in South Africa, innovation is still mostly focused on STEM (science, technology, engineering and mathematics) sectors, with little existing research on how digital technology has influenced innovation, particularly in the increasingly evident overlaps between the digital and creative sectors and how such firms create, use and protect their intellectual property.

A pilot study of CCIs operating in the Cape Town metropolitan area cluster in South Africa was conducted. The research design was based partly on a similar study conducted in the UK in the Brighton cluster (Sapsed and Nightingale, 2013), which enabled interesting international comparisons.

The results of the study show strong evidence of a cluster of CCI firms in Cape Town that are “fused”, that is, they combine digital technology with creative inputs to produce goods and services. They are also an interdisciplinary cluster with high levels of innovation in business processes, goods and services.

More than a third of firms are start-ups, that is, they have been founded in the past 5 years. While most firms are small (median number of employees was 4 and 23% were owner operated with no employees) they have the ability to draw on a wide range of external skills around specific projects (median of 5 freelances employed per firm in the previous financial year). This business model allows them to be agile and productive in the volatile, project-based world of the CCIs.

Although fused firms in the Cape Town cluster are not yet showing the superior growth performance found in the UK, results suggest that the Draft Science, Technology and Innovation policy of South Africa, currently very heavily biased towards STEM sector firms, could profitably include the CCIs. This is particularly the case for sectors like the Design and Creative Services and Audio-Visual and Interactive Media domains, which are most likely to use innovative technologies and contribute the largest share of the creative economy’s part of GDP.

Similarly, the current South African White Paper on Arts and Culture could pay more attention to a broadened definition of “innovation” and offering support to firms combining digital technology and creative inputs. A suggestion is made that the current Arts and Culture

Venture Capital Fund be used to finance digital innovations and to offer support in registering innovations so that IP can be more effectively protected and capitalised on.

Although the ownership and employment demographics of firms in the Cape Town cluster were not representative of the population, fused firms were more likely to be inclusive and diverse, both in terms of ownership and employees, than unfused firms. Support for these kinds of firms would thus also further the social justice and transformation agenda.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/677/71a3cb155f8dc89bf3d0365288219936/Overlap+between+the+digital+and+creative+sectors>

7.2. The Challenges of Pivoting to Digital: The COVID-19 Shut Down and Cultural Festivals and Events

Snowball, J. 2021. The challenges of pivoting to digital: The COVID-19 shut down and cultural festivals and events. Research Report. SACO.

Institution: Rhodes University, South Africa.

The COVID-19 lockdowns imposed during 2020 to contain the pandemic have negatively affected all the domains of the Cultural and Creative Industries (CCIs).

The main aim of the research was to investigate the impact and effectiveness of the pivot to online operation of South African cultural festivals and events for organisers, artistic producers and audiences because of the COVID-19 lockdown.

The research methods included key stakeholder interviews with 13 South African festivals that had shifted their productions online because of the COVID-19 lockdown in 2020 as well as an online audience survey of people who had participated in such online cultural festivals or events.

An important finding is the extent to which those festivals with resources were able to support artistic producers through things like providing facilities for filming and studio-space for “live” performances and providing skills training and advice for the shift to online delivery.

Going forward, it is recommended that events that have shifted online be supported to develop their international competitiveness.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1007/d7322ed717dedf1eb4e6e52a37ea7bcd/The+Challenges+of+Pivoting+to+Digital+The+COVID-19+shut+down+and+cultural+festivals+and+events>

8. Theme 7: Intellectual Property

This theme focusses on the critical need to maintain and enforce Intellectual Property Rights to ensure the viability and competitiveness of the sector.

8.1. Intellectual Property in the Cultural and Creative Industries

Connor, T. 2017. *Intellectual Property in the Cultural and Creative Industries. Publication Report.* SACO.

Institution: University of Fort Hare, South Africa.

This study primarily comprised of desk-based research and presents a synthesis and analysis of the wealth of existing literature on the complex and intertwined fields of Intellectual Property and the Creative and Cultural Industries in South Africa.

The report outlines key areas of contention both globally and locally in these fields, taking cognizance of the importance of viewing South Africa as a developing country and thus affected by the developing/developed polarities in global trade and IPRs, but also recognizing the particularities of the South African context as an emerging economy with strong legal and financial infrastructure.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1002/fba9d88164f3e2d9109ee770223212a0/Intellectual+Property+in+the+CCIs+-+Report>

8.2. Policy Implications of Changes in the Intellectual Property (IP) Legislative Environment and the Possible Impact Thereof on the Emerging 4th Industrial Revolution

Shumba, T. 2019. *Policy Implications of Changes in The Intellectual Property (Ip) Legislative Environment and the Possible Impact Thereof on the Emerging 4th Industrial Revolution. Research Report.* SACO.

Institution: University of Fort Hare, South Africa.

This research report examines the policy implications of changes in the Intellectual Property (IP) legislative environment and the possible impact thereof on the emerging 4th Industrial Revolution.

It reviews the current and emerging legislative environment pertaining to IP; provides a brief overview of the 4th Industrial Revolution; exposes policy implications of the current and emerging legislative environment pertaining to IP; and further addresses the policy implications, requirements and impacts of the current and emerging legislative environment for the realisation of the 4th Industrial Revolution.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/662/be3159ad04564bfb90db9e32851ebf9c/Policy+Implications+of+Changes+in+the+Intellectual+Property+%28IP%29+Legislative+Environment+and+the+Possible+Impact+Thereof+on+the+Emerging+4th+Industrial+Revolution>

8.3. Fair Use Versus Fair Dealing: Implications for the Cultural and Creative industries

Nwauche, E. 2019. Fair use versus fair dealing: Implications for the Cultural and Creative Industries. Research Report. SACO.

Institution: University of Fort Hare, South Africa.

In the aftermath of the Copyright Amendment Bill (CAB), which is a consequence of the amendment of the Copyright Act 1978, this research report investigated whether the two types of exceptions and limits in copyright, fair dealing and fair use, is appropriate for South Africa (CA 1978). As an exception and limitation, section 12A of the CAB, which allows for fair use of copyright works, will replace section 12(1) of the CA, which allows for fair dealing with copyright works.

The inadequacies of the Copyright Act 1978 in general and the fair dealing provision to provide adequate access to copyright works, promote and protect human rights and effectively respond to the challenges of the digital era led to the introduction of the Copyright Amendment Bill (CAB) and the fair use clause. The inadequacies of the fair dealing provision CA 1978 stem from the fact that the fair dealing provision contains a closed list of exceptions and limitations. Any use for which fair dealing is claimed must fall within these enumerated purposes before the fairness of the use is determined.

Any reform of the fair dealing provision that increases the purposes for which fair use is claimed will not remedy a fundamental defect of the limited capacity of fair dealing provisions to ensure that human rights issues are addressed.

Countries such as Canada and the United Kingdom have responded to the limited effect of fair dealing by the development of a user's right and the public interest defence respectively.

The introduction of the fair use clause in the CAB has generated considerable controversy of supporters and opponents. Opponents of the clause raise many legitimate concerns including the fact that the clause will lead to loss of revenue, a shrinking of the value of the copyright industries and constitute arbitrary deprivation in breach of section 25 of the Constitution.

Proponents of the fair use clause point to the catalytic effect that the fair use clause will bring to South Africa's copyright industries enabling all stakeholders to engage in transformative and other uses that will lead to more creative works that will increase the value of the sector and its contribution to the South African economy. Fair use is part of the copyright regimes of the United States, Israel, Taiwan and the Philippines.

The open-ended nature of the fair use clause and its catalytic feature make the fair use clause ideal for the cultural and creative industries (CCIs) in South Africa. To address many of the legitimate concerns of stakeholders, it is important to elaborate on the jurisdiction practice and procedure of the Copyright Tribunals to deliberate on disputes about fair use in an informal and less expensive manner. To further guide negotiations about fair use, as well as assist the Copyright Tribunal, the Department of Arts and Culture should assist different copyright sectors to engage and produce standards of best practices in fair use.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/676/dc6a70712a252123c40d2adba6a11d84/Fair+Use+versus+Fair+Dealing+Implications+for+the+Cultural+and+Creative+Industries>

8.4. Copyright: Public and stakeholder perceptions and concerns on current copyright and performers legislation and proposed amendments

Shange, N. 2021. Copyright: Public and stakeholder perceptions and concerns on current copyright and performers legislation and proposed amendments. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The main goals of the research are to:

- Provide an overview of the current documented positions being taken by parties supporting and opposing the legislation (including but not limited to “fair use versus fair dealing” as well as retrospective clauses) being held by stakeholders within and outside of the Cultural and Creative Industries);
- Identify the key points of agreement and contention;
- Identify the possible economic impact of the proposed implementation based on the points of agreement and/or contention;
- Identify which positions are the most beneficial to the South African economy and the Cultural and Creative Sector; and,
- Propose a consolidated DSAC policy position.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/995/2bcab9d935d219641434683dd9d18a03/COPYRIGHT+-+Public+and+stakeholder+perceptions+and+concerns+on+current+copyright+and+performers+legislation+and+proposed+amendments>

Theme 8: Education and Training

This theme quantifies and/or analyses the current and potential roles, requirements and impacts of cultural and creative education in enhancing capacity and thus contributing towards increased economic growth and competitiveness.

8.5. Artists in Schools

Gouws, A. 2018. Artist in Schools. South African Cultural Observatory. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

This report assessed the Artist in Schools intervention (AiS). The report defined the purpose of the AiS and analysed its implementation structure and institutional framework. The scope of the programme was detailed in a spatial analysis and an analysis of opportunities and beneficiaries.

The report high-lighted the importance of teaching art and the role of arts and culture in society and more specifically the value of art in schools.

Location:

<https://www.southafricanculturalobservatory.org.za/download/1040>

8.6. An Audit of Sport-Related Post-Schooling Training Programmes in South Africa

Bob, U. and Gouws, A. 2021. An Audit of Sport Related Post-Schooling Training Programmes in South Africa. Research Report. SACO

Institution: University of KwaZulu Natal, South Africa and Nelson Mandela University, South Africa.

The sports sector is a key contributor to the Gross Domestic Product (GDP) in South Africa, with the potential to contribute economically and to promote social interactions and cohesion. For the sports sector to meet its full potential to address socio-economic challenges facing South Africa, it is important to understand the skills and training as well as the research landscape in the country. To ensure that training and research for the sports sector within the higher education sector is fit-for-purpose and responsive to the needs of the sports sector, understanding current training and research in higher education is an important first step to inform programme and curricula review and redesign.

A desktop study approach was adopted to examine policy documents, research reports and academic sources. The key component of the research was a website audit of training qualifications/programmes at all 26 public universities as well as selected TVET colleges (6) that examined sports-related qualifications and programmes (including modules and module content) in university and TVET College prospectus and handbooks sourced from the internet. There were no programmes and/or information available on the TVET websites and for 8 of the universities on sports-related offerings.

The main themes emanating from the literature review are that current research on sports education focuses on skills and training in schools or relatedly training of physical sports educators at higher education institutions, including examining teaching and learning styles.

Sport management is a key focus in the literature. Experiential and work integrated learning opportunities are also regarded as important. There is an increasing recognition of the importance of the sports sector to contribute to economic growth and job creation (especially given high levels of self-employability) as well as the need to focus training on career and business management skills as well as the development of personal skills and attributes. Graduate employability and skills development are also noted in the literature. An emerging theme is that of technology impacts. The limited published research that specifically looks at skills and training that focuses on the sports sector in the context of post-schooling qualifications/programmes in South Africa reinforces the need for the landscape audit.

The audit reveals that there is a range of qualifications and modules offered, mostly linked to undergraduate and master's degrees. The limited number of certificate and diploma courses on offer are of concern, since these types of qualifications are important to address the professional and technical training needs of the sports sector.

The SciVal analysis revealed that the number of scholarly outputs in relation to sport, leisure and recreation have been steadily increasing in South Africa. However, of concern, is that despite the increase in the number of publications, the citation count has declined.

Future research should assess the number of students enrolled in programmes and whether the tertiary education sector (including TVET colleges and private institutions) is meeting the needs of the sports sector. The lack of research training and WIL integrated learning should also be addressed. In this regard, it is recommended that higher education institutions engage with sports sector stakeholders to develop opportunities for work integrated learning/internships and to be responsive to the changing needs and demands of a highly variable sports sector.

Location:

https://www.dropbox.com/search/personal?path=%2FSACO+2+-+Deliverablesandpreview=id%3AL7goMirkSSAAAAAAAAM5wandquery=An+audit+of+sport+%E2%80%93+related+post-schooling+training+programmes+in+South+Africaandsearch_session_id=82599817760226804202348914027479andsearch_token=OrKl8IMsxzJDKmP3bVVewPEv0VvQ31laBrZkpAuE6U8%3D

9. Theme 9: Social Cohesion and Nation Building

This theme focusses on production knowledge, data and methodologies required to quantify, analyse and track Social Cohesion and its impact on nation building.

9.1. Developing a Measure of Social Cohesion for South Africa

Bradshaw, G. and Stindt, C. 2017. Developing a measure of social cohesion for South Africa. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

This report proposes the use of an internationally benchmarked approach to and index of Social Cohesion for South Africa. The index intends to enable the Department of Arts and Culture (DAC) to measure its progress in respect of the achievement of Social Cohesion, both longitudinally of time, as well as in comparison to the performance of other, similar countries.

The study provided an overview of role and importance of culture in social cohesion whilst providing a summary of writing pertaining to social cohesion in South Africa. The study defined an approach for developing social cohesion indicators, which informed the proposed South African Index for Social Cohesion.

The report argues that this index will provide a more efficient alternative to the current set of 23 indicators within the Department (and 88 within government as a whole) as found in the National Development Indicators (DPME, 2014).

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/692/e555ebe0ce426f7f9b2bef0706315e0c/Social+Cohesion+Indicator+-+Report>

10. Theme 10: Libraries, Archives, Museums and Heritage

This theme focusses on issues pertaining to libraries and archives, including the full spectrum of services, use, location and content of libraries and archives. This theme also deals with issues pertaining to the relevance, scope and impact of heritage

10.1. Quantifying the State of South African Museums from a Supply Side Perspective

Snowball, J., Vitshima, S., Xhoxho, T. and Van der Linde, J. C. 2019. Quantifying the State of South African Museums from a Supply Side Perspective. Research Report. SACO.

Institution: Rhodes University, South Africa.

The aim of this report is to provide a succinct supply side overview of museums in South Africa, and some of the important issues and debates in the sector.

The main contribution of the report is an audit of public and private museums, and analysis of their spatial distribution using Geographic Information Systems (GIS) mapping techniques. Data on population density is combined with the mapping of museums to comment on issues of equity (in terms of the spatial distribution of museums by province) and access.

A total of 327 museums were identified and mapped. The spatial analysis compared the provincial spread of museums to population size. The Western Cape has the largest proportion of museums (25%), followed by the Eastern Cape (18%) and KwaZulu-Natal (18%). Gauteng has the largest population, but only 11% of museums.

Outside of the metropolitan areas, clustering occurs around some smaller towns and cities, which are associated with other cultural institutions, such as universities, festivals and/or colonial era cultural and industrial history.

Implications are that, if the establishment of new museums is considered, locating them in Gauteng and KwaZulu-Natal would facilitate both more even spatial distribution and access.

The report also addresses issues relating to how museums of the future may operate in the Fourth Industrial Revolution and the benefits and challenges in digitising archives and artefacts. A list of policies and associations related to how museums function in South Africa is provided, as well as a quantitative analysis of museum financing from national government over time.

To provide some deeper context, a few selected case studies were examined, including national and regional museums: Robben Island Museum (Western Cape), Ditsong Museums of Cultural History (Gauteng), National Museum Bloemfontein (Free State) and The Red Location Museum (Eastern Cape).

Some policy suggestions are made based on the findings. These included considerations of how museums could diversify their funding streams to promote financial sustainability, while maintaining access (free entry) for South Africans, if possible. Building on a recommendation in the Revised White Paper on Arts and Culture (2018) it is also suggested that all museums should be required to report on multiple indicators that could be used in efficiency studies.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/643/9b698eb3105bd82528f23d0c92dedfc0/Quantifying+the+State+of+South+African+Museums+from+a+Supply+Side+Perspective>

10.2. Heritage skills and DSAC bursary

Ncwadi, R. 2021. Heritage Skills and DSAC bursary. Research Report. SACO

Institution: Nelson Mandela University, South Africa

The research report evaluates the impact of heritage bursaries disbursed by the Department of Sport, Arts and Culture (DSAC) between the years 2015-2019.

The data offers detailed insights into the status of heritage education in South Africa and ways in which a few relatively achievable changes can significantly leverage the current programme for greater impact, as well as alleviate some ongoing challenges through coordinated efforts with tertiary education institutions.

Key findings from the report suggest that:

- Heritage education in South Africa has substantial potential for greater integration and networking with the professional sector.
- The DSAC Heritage Bursary Scheme is the most visible in South Africa with regards to funding support for heritage studies.
- The DSAC Heritage Bursary Scheme is well placed to leverage DSAC systems and networks for greater access and professionalisation within the bursary scheme.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1009/31b3b31a1c2f8a370206f111127c0dbd/The+impact+of+the+heritage+bursary>

11. Theme 11: Management of Artefacts

This theme focusses on the management of artefacts, as well as quantifying the significance and location of South African artifacts that are located abroad under the custodianship of external heritage and/or historical institutions.

11.1. The value of the Repatriation of South African Museum Artefacts: Debates, Case Studies and a Way Forward

Snowball, J. 2020. The Value of The Repatriation of South Africa Museum Artefacts: Debates, Case Studies and a Way Forward. Research Report. SACO.

Institution: Rhodes University, South Africa.

Following the UN article 11 of the Declaration on the Rights of Indigenous Peoples (2007), there has been increasing pressure on western museums to return artefacts obtained during colonial times to their originating African countries.

This report sets out the results of an investigation of the strategic policy and implementation problems relating to the repatriation of South African cultural artefacts from museums and galleries around the world. The investigation provides an overview of the salient academic literature and legal landscape as well as the outcome of an online survey and focus group discussion. This benefitted from the input of key informants drawn principally from the museum and cultural organization ecosystem in the Republic of South Africa.

The key arguments for retaining the global status quo in cultural artefact distribution centre on arguments that support or challenge the concept of the “universal museum”. These arguments are premised on providing global access and security to previously plundered cultural artefacts from other countries. How cultural values are formed and categorised are shown to underpin the legal, economic and moral arguments concerning repatriation. South African museum professionals felt strongly that repatriation requests should consider the context in which the artefact was obtained, as well as its cultural, historical, educational and aesthetic values.

Location:

<https://www.southafricanculturalobservatory.org.za/download/716>

12. Theme 12: Policy Development, Planning and Implementation

This theme focusses on measuring and/or ensuring optimal alignment of evidence-based policy, planning and implementation interventions across the Arts, Heritage, Cultural and Creative Sectors across the public and private sectors.

12.1. Rural Cultural Policy in South Africa: Analysis Parameters and Definitions

Connor, T. 2016. Rural Cultural Policy in South Africa: Analysis, Parameters and Definitions. South African Cultural Observatory: Gqeberha, South Africa

Institution: University of Fort Hare, South Africa.

This report analyses and assesses rural cultural policy in South Africa and focuses specifically on defining how cultural policy applies to rural areas and what form of cultural policy will be most suitable for the South African context.

The report critically assesses the standard approach towards cultural policy, which is (in part) based on the approach that cultural and creative industries are vehicles for development.

The report found that more work is needed regarding the rural cultural sector, for three reasons: (a) rural policies are often not visible enough in local government practice and are subsumed under different departments and various private and public development agencies, (b) rural creative industries and heritage practitioners are located in the informal sector and therefore less visible, and (c) rural cultural and creative industry development for rural areas mostly takes place in urban zones.

To assess regional dynamics, the report develops a basic profile of CCIs in each province in South Africa, using datasets from SACO and DAC, the South African Heritage Resource Agency, and StatsSA.

The report finally contends that cultural policy encompasses far more than the creative and cultural sector alone, but includes heritage and more particularly, intangible and tangible rural heritage and tourism. As a result, the report suggests that cultural and heritage policy in rural areas of South Africa should be approached as a collaborative process which should be present in all facets of local government planning and link up more pertinently with private sector entities.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1005/2387337ba1e0b0249ba90f55b2ba2521/Rural+Cultural+Policy+-+Report>

12.2. Policy implications of the 4th Industrial Revolution for the Cultural and Creative Economy

Adendorff, C., Lutshaba, U., Shelper, A. & Setipa, T. 2017. Policy Implications of the 4th Industrial Revolution for the Cultural and Creative Economy. South African Cultural Observatory: Gqeberha, South Africa

Institution: Nelson Mandela University, South Africa.

This report contains an analysis of the main megatrends that will shape the future of the cultural and creative industries within the 4th Industrial Revolution.

The report proposes three alternative scenarios adapting to the 4th Industrial Revolution towards 2030, with a specific focus on the implications for the cultural and creative industries, as well as recommended areas for action for decision-makers including policy makers, the public/private sectors, the global donor and cultural and creative industry development communities involved.

The proposed scenarios can be adapted within the local context and used in local strategic planning, long-term needs assessments, optional appraisals, programme and project implementation reference points, as well as indicators to identify potential risks to develop mitigating actions to overcome possible identified limitations that might exist for the future workforce within the 4th Industrial Revolution towards 2030.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/662/be3159ad04564bfb90db9e32851ebf9c/Policy+Implications+of+Changes+in+the+Intellectual+Property+%28IP%29+Legislative+Environment+and+the+Possible+Impact+Thereof+on+the+Emerging+4th+Industrial+Revolution>

12.3. The Establishment of the Film Sector as a Catalyst for Economic Growth in South Africa: Toward a Sallywood – Framework

Shelver, A. 2018. The Establishment of the Film Sector as a Catalyst for Economic Growth in South Africa: Toward a Sallywood – Framework. South African Cultural Observatory: Gqeberha, South Africa

Institution: Nelson Mandela University, South Africa

This report analyses the potential of the South African film industry to be a driver of development and growth, including an analysis of existing strengths and challenges, with a view to the development of a business plan for the sector.

The proposed business plan is comprehensive and flexible so that priorities can be evaluated and various interventions can be delayed or accelerated. Sequencing is important and the business plan ensures that interventions are sequenced in a logical, organised way.

The South African Film Industry Business Plan is based on a wide-ranging and critical review of international and national data and research, as well as consultations with film industry practitioners and policy makers. It is based on “foundational layers”, “pillars” and an apex of goals and impacts. These largely correspond to the value chain.

Location:

(<https://www.southafricanculturalobservatory.org.za/download/comments/747/8d317bdcf4aafcf22149d77babe96d/The+Establishment+of+the+Film+Sector+as+a+Catalyst+for+Economic+Growth+in+South+Africa+Toward+a+Sallywood+%E2%80%93+Framework>)

12.4. Unlocking the growth potential of the online gaming industry in South Africa: challenges and opportunities

Snowball, J., Tarentaal, D. and Nathoo, D. 2019. Unlocking the Growth Potential of the Online Gaming Industry in South Africa: Challenges and Opportunities. Research Report. SACO.

Institution: Rhodes University, South Africa.

This research identified 54 gaming or gaming and animation companies in South Africa. Nearly half (48%) are based in the Western Cape.

The most used gaming release platform is still PC, which may be a future constraining factor, given the international shift to mobile along with high data costs in SA. There is considerable overlap between gaming and animation with 46% of companies producing games also doing animation work.

Given turnover data provided in a detailed online survey, it is estimated that the turnover for the gaming and animation industry in the 2017/8 financial year was R476 million, of which R198 million was attributed to gaming and hybrid companies. This is a considerable increase from the R100 million revenue for the gaming industry in 2015 found in a previous study (IESA, 2016).

The South African gaming and animation sector currently create 1225 direct jobs, of which 457 are in the gaming sector. A challenge for the gaming and animation sector is transformation – most people working in the sector are white males. Part of the reason given for this is that the sector is still perceived to be a risky and unstable sector, so that it is not recognised as a viable career path by many.

Support for the technical training required was suggested, as were tax breaks for smaller companies to encourage more start-ups. Advantages identified by those in the industry included: Unique African stories and cultural diversity; Lower production costs that enable international service work; A significant pool of talent and skills; The high quality of the work produced; and Access to advanced production and infrastructure.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Unlocking+the+growth+potential+of+the+online+gaming+industry+in+South+Africa%3A+challenges+and+opportunities&search.x=22&search.y=40&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

12.5. The potential of “Creative Cities” for Regional Development in Non-Metropolitan Areas: The case of the Makhanda Creative City Project

Bob, U. and Gouws, A. 2021. Creative cities in metropolitan areas: Implications for the South Africa CCI. Research Report. SACO

Institution: University of KwaZulu Natal, South Africa and Nelson Mandela University, South Africa.

A ‘creative city’ is a socio-economic term used to describe cities that foster and develop cultural and creative economic activity. The growing realisation that the cultural and creative industries (CCIs) can contribute to job creation and economic growth has focused attention on the role of creative cities in regional development strategies. However, studies to date have mostly focused on large metropolitan areas.

The Creative City development project in Makhanda was launched in January 2014 by the National Arts Festival office, in partnership with local government and international funders. However, Makhanda is a small city, situated in one of the poorer provinces in the country.

The goal of this research was thus to make an objective assessment of the extent to which the Makhanda Creative City project has been successful in terms of meeting its own goals and as a regional development strategy. Research methods included document analysis, international comparisons and key stakeholder interviews.

Results showed that the project thus far has been successful in key areas, particularly those related to building social cohesion in the city and starting to break down historical spatial divides. It has also provided several platforms for local artists and performers to showcase their work. There has been considerable inter-industry spillover within the cultural sector.

However, the project has not yet developed the networks with local non-cultural businesses that could foster mutually beneficial intra-industry spillovers. It has also not yet created the number of jobs in the cultural and supporting industries set out in its original plan.

It is concluded that, for creative cities to be used as an effective regional development strategy in non-metropolitan areas, strategies are needed to offset the lack of agglomeration economies found in larger cities, both on the demand and supply sides.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Creative+cities+in+metropolitan+areas%3A+implications+for+the+South+African+CCIsandsearch.x=22andsearch.y=17andcx=008312365418257951562%3Ahmci6huvty4andcof=FORID%3A11andcref=andie=utf-8>

12.6. Toward a South African Book Development Policy

Gouws, A. 2019. Toward a South African Book Development Policy. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The South African book industry is one of the most vibrant in Africa, with the potential to be a global influence. To effectively maximise the potential of the book business, an integrated national plan supported by a National Book Policy as a legal framework is required.

Literacy and reading are the lifeblood of any modern society. Reading will not only improve the level of literacy but will also contribute to personal development, socio-economic development, nation building and even social cohesion.

The South African book sector is the most thriving in Africa and has got a potential to be a force to be reckoned with internationally.

For the full potential of the industry to be realised, it is imperative that the book sector is declared as one of the national priorities.

There is a need for an integrated national strategy, supported by a National Book Policy as a legislative framework, to fully exploit the potential of the book industry.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/637/a532400ed62e772b9dc0b86f46e583ff/Toward+a+South+African+Book+Development+Policy>

12.7. The Nexus Between Arts, Culture, Heritage, Tourism and Sports – Policy Implications

Bob, U., Lutshaba, U. and Gouws, A. The nexus between arts, culture, heritage, tourism, and sports – Policy implications. Research Report. SACO.

Institution: University of KwaZulu Natal & Nelson Mandela University, South Africa.

This paper draws on relevant literature and documents to examine the nexus between the arts, culture, heritage, tourism and sports; with special focus on policy implications. This is timely given the recent mergers of the National Department of Sports and Recreation (DSR) with the Department of Arts and Culture (DAC) into the Department of Sports, Arts and Culture (DSAC) which is indicative of the growing recognition of the relationships as well as potential to enhance socio-economic opportunities associated with the arenas of arts and culture (which includes heritage) and sports, as well as the tourism sector. A desktop study was primarily used to examine policy documents, research reports and academic sources.

Key themes and debates emanating from the desktop study were highlighted. The main aspect related to influential factors such as economic, socio-cultural and political dimensions.

Current projects and programs aimed at fostering relationships between arts, culture, heritage, tourism and sports are also discussed. Activities and programs associated with the Moses Mabhida Stadium is used to illustrate how a specific facility (in this case a stadium) can have sports, cultural and tourism activities. This indicates the potential for synergistic relationships. Reference is also made to Velez's (2016) study that examines the effectiveness of arts and sports programs in the construction of positive peace in South Africa.

A key focus of the paper is on policy aspects. Barriers to the integration of the sports and arts are noted which include the status of these sectors, the profile of specific genres/types of activities and weak policies. A brief overview of the main national policies (White Paper on the Development and Promotion of Tourism in South Africa; Revised White Paper on Arts, Culture and Heritage; and White Paper on Sport and Recreation for the Republic of South Africa) as well as selected provincial departmental documents is undertaken to note cross-collaboration references and limitations. There is limited reference in each of the policies to the other sectors. Tourism in particular does not prioritize cultural and sport tourism. Additionally, and more importantly, although nationally and in most provincial departments sports, arts and culture are merged, policies reflect little integration and synergies. Broader societal imperatives are highlighted in all policies that include job creation, poverty alleviation, safety and security and social cohesion and inclusivity. Sustainability considerations are also noted.

The report also presents recommendations for policy formulation and review as well as key aspects for a policy framework. The configuration of DSAC creates opportunities to align and integrate linkages between arts, culture, heritage and sports. There needs to be increased collaboration to acknowledge, understand, plan for and realize the tourism potential (and

thereby economic opportunities) associated with the arts, culture, heritage and sports sectors.

At national and provincial levels advisory and/or technical committees should be set-up to foster linkages and collaboration that promote relationships and champion interventions and programs. A policy framework should include undertaking a needs assessment, further examination of policy gaps, stakeholder identification and consultation/engagement/participation, identification of a policy custodian and development of a monitoring and evaluation system. Areas for further research are also identified which include socio-economic impact studies of programs and activities, examining sub-categories and assessing social and heritage benefits which remain under-researched compared to economic benefits.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=The+nexus+between+arts%2C+culture%2C+heritage%2C+tourism%2C+and+sports+%E2%80%93+Policy+implications.&search.x=14&search.y=23&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

12.8. The Development of a South African Cultural Export Strategy

Gouws, A. 2020. The development of a South African export strategy. Research Report. SACO.

Institution: South African Cultural Observatory, South Africa.

South Africa has a rich and diverse cultural heritage and has produced many gifted artists. Culture, besides its immense non-material significance, is a valuable economic asset and can be exploited to the benefit of all South Africans. Many artists have become internationally successful and contribute to South Africa's export earnings.

South Africa's exports are not meeting the targets set out in South Africa's strategic plans and clearly there is an imperative that exports, including the export of CCIs, must increase.

The aim of this report is to prepare a discussion document that can be used for engagements with stakeholders so that a National CCI Export Strategy can be drafted for South Africa.

This document provides an analysis of South Africa's current export of CCI products and services. The report found that South Africa has a well-developed export development and promotion regime and where possible, this should be used in the development of a CCI Export Strategy. It also states that a monitoring and evaluation framework is proposed that includes an impact statement for the proposed CCI export strategy, strategic outcomes, strategic outputs as well as indicator descriptors.

Location:

<https://www.southafricanculturalobservatory.org.za/download/705>

12.9. Indigenous Knowledge as Content for the Cultural and Creative Industries

Moyo, P. 2020. Indigenous knowledge as content for the cultural and creative industries. South African Cultural Observatory: Gqeberha, South Africa

Institution: Fort Hare University, South Africa.

The overarching aim of this research report is to explore how cultural and creative industries practitioners who utilise or are interested in using indigenous knowledge as a primary knowledge or data source to produce their goods and services can engage with the indigenous knowledge system policy and regulatory frameworks governing indigenous knowledge in South Africa.

In the legal arena, the study found that there are various legal, institutional and social requirements in place to not only preserve indigenous knowledge for indigenous communities but equally to ensure that the commercial exploitation of such is not detrimental but beneficial to the indigenous communities.

The Intellectual Property Laws Amendment Act of 2013 and the Promotion, Development and Management of Indigenous knowledge Act of 2019 on a broader scale sets out the legal requirements of how indigenous knowledge should be registered and how intended users should enter into benefit sharing agreements with indigenous communities. The purpose is to ensure that any commercial exploitation of indigenous knowledge does not happen without benefit to the community. Various mechanisms and institutions are set up by law to ensure transparency, efficiency and recording of indigenous knowledge.

The Intellectual Property Laws Amendment Act of 2013 establishes a National Council in respect of indigenous knowledge, a National Database for the recording of indigenous knowledge and a National Trust and Trust Fund for purposes of indigenous knowledge.

The Promotion, Development and Management of Indigenous knowledge Act of 2019 creates community representatives through trustees who are appointed by the curator. The curator is appointed by the Minister and is responsible for the control of the Registration Office, subject to the directions and instructions issued by the Minister or the Director-General as delegated by the Minister.

Unfortunately, both these crucial two pieces of legislation are yet to come into force. Therefore, presently any recourse for the management of indigenous knowledge for the benefit of indigenous communities must be found in the existing traditional forms of intellectual property protection and promotion. Further, since these are national approaches, the absence of a multilateral system deprives indigenous communities of any guarantee of the same legislative benefits when the IK is commercially exploited beyond national borders. It is therefore important for authorities to pursue multilateral approaches in line with national developmental plans to protect local indigenous knowledge.

Location:

(<https://www.southafricanculturalobservatory.org.za/download/comments/698/99bcfcd754a98ce89cb86f73acc04645/Indigenous+Knowledge+as+Content+for+the+Cultural+and+Creative+Industries>)

12.10. The role of Live Music Venues in Promoting and Developing South African Artists

Moyo, P., Nzima, D., and Petshwa., T. 2020. The Role of live music venues in promoting and developing South African Artists. Research Report. SACO

Institution: University of Fort Hare. South Africa.

This research followed a qualitative methodological approach. Primary data was collected through semi-structured interviews with, among others, live music venue proprietors, music managers, promoters and artists. Further, various experts who are directly and indirectly involved in the music industry were also interviewed. In addition, secondary data was collected from different sources that include technical reports and academic and applied research publications.

The key findings through interviews show that the live music scene in the country is not in a very good state. Live music venues are not doing very well in promoting and developing artists because of various constraints. There are not enough live music venues that host regular live performances. The situation is worse in rural areas as there seems to be a disproportionate concentration of active venues in metropolitan provinces of Gauteng and the Western Cape.

In provinces such as Kwa-Zulu Natal and the Eastern Cape, artists are battling for space to perform. Data from interviews show that most of the artists perform in restaurants, bars, taverns and jazz centres. Most of these venues are poorly equipped as they were not designed for live music performance as they do not have enough equipment such as sound systems and instruments necessitating artists to bring their own equipment.

The study also found that live music venues are struggling to attract paying audiences because of the challenges in promotion and publicity. This limits their ability to guarantee a decent returns for artists, especially those who depend on gate takings.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/799/28267ab848bcf807b2ed53c3a8f8fc8a/The+Role+of+Live+Music+Venues+in+Promoting+and+Developing+South+African+Artist>

12.11. Realising the potential of the Cultural and Creative Sectors: Framework for their Rapid and Sustained Recovery

Gouws, A. and Liebenberg, F. 2020. Realising the Potential of the Cultural and Creative Sectors: Framework for Their Rapid and Sustained Recovery. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The purpose of this report is to propose interventions to guide the recovery and repositioning of the South African Cultural and Creative Economy, in response to the COVID-19 pandemic and resulting recession in South Africa.

The policy intent of the Framework is to accelerate recovery within the sector by stabilising, consolidating, expanding and “sustaining the socioeconomic development trajectory of the

South African Cultural Sectors to levels which exceed the targeted national growth rate as defined in the National Development Plan.”

The report articulates design principles of the framework, which aims to achieve sustainable recovery and repositioning of the South African Cultural and Creative Sectors through a range of integrated interventions.

The Framework also articulates a range of proposed implementation interventions which define:

- targets to be achieved;
- targeted beneficiaries;
- implementation action or “tasks;” and
- lead agencies and stakeholders which are to be held accountable or who need to be consulted and/or need to be informed.

Location:

<https://www.dropbox.com/home/SACO%202020-%20Deliverables/Year%203/2.%20Champion%20Evidence/Q3?preview=REALISING+THE+POTENTIAL+OF+THE+CULTURAL+AND+CREATIVE+SECTORS+-+FRAMEWORK+FOR+THEIR+RAPID+AND+SUSTAINED+RECOVERY.docx>

12.12. Policy Research Report on Options for South Africa’s Cultural and Creative Industries in Bilateral and Multilateral Trade Agreements

Gebe, V., Bono, L., Matoti, N., Mhlonyane, A. and Sankoloba, P. 2021. Policy Research Report on Options for South Africa’s Cultural and Creative Industries in Bilateral and Multilateral Trade Agreements. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The study primarily focusses on the implications of the African Continental Free Trade Area (AfCTFA) for the CCIs and preparation of industry participants for the period of free trade expected to follow. However, general aspects of international multiparty and bilateral trade negotiations are included where these contribute to the study objectives.

In addition, the study examines general areas of knowledge and skills required to participate in international trade.

The main findings of the study were:

- South Africa has a trade deficit in cultural goods trade. This narrowed after 2014 due to both accelerating growth in cultural goods exports and low or negative import growth. Notable growth occurred in Visual Arts and Craft, while significant declines occurred in imports in the Books and Press and Audio-visual and Interactive Media domains which are affected by digitisation.
- The rate of cultural export growth in cultural goods has exceeded growth in total commodities since 2011.
- Among the domains, South Africa’s trade deficit has improved significantly in Visual Arts and Crafts, although the only domain with a surplus in total cultural goods trade is Cultural and Natural Heritage. This is a domain with a relatively small value. The

report further pointed out that Cultural and Natural Heritage goods are free from tariffs and therefore already not limited by regulated barriers to trade.

- Exports of South African cultural goods were found to be highest to Namibia and Botswana, followed by Kenya, Nigeria and Ghana. The highest imports were found to be from Botswana, Namibia, Kenya, Egypt, Nigeria and Ghana.
- Among the countries examined, the domains with the highest exports from South Africa were Books and Press, Visual Arts and Crafts and Performance and Celebration. The most significant import domains were Visual Arts and Crafts, Books and Press and Cultural and Natural Heritage.
- Growth in cultural exports was highest to Ethiopia, Kenya and Zambia, while positive import growth occurred in the cases of Namibia, Zambia, Botswana and Ghana.
- South Africa was found to hold a surplus in cultural goods trade among all the African countries studied, except for Egypt. The highest surpluses were with other Southern African Development Community (SADC) members. These were Namibia, Botswana and Zambia.
- In terms of cultural goods trade as a share of total bilateral trade with South Africa, the leading countries were Namibia and Ethiopia, while Kenya, Botswana, Egypt and Ghana led cultural goods imports. Kenya and Botswana appeared as the most significant competitors to retention of positive trade balances.

A notable recommendation arising from the report was that the profile of the cultural goods trade should be raised in the AfCFTA. A defensive approach was further explained to mean that a cautious approach should be taken to regional liberalization in the sub-sectors concerned, rather than that tariffs should be raised. The study further called for the establishment of a bilateral services trade database for those sectors in which cultural trade is conducted, as this would recognize the growing significance of digitization in some sub-domains, such as film, music and books.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/1039/27ed0fb950b856b06e1273989422e7d3/POLICY+RESEARCH+REPORT+ON+OPTIONS+FOR+SOUTH+AFRICAS+CULTURAL+AND+CREATIVE+INDUSTRIES+IN+BILATERAL+AND+MULTILATERAL+TRADE+AGREEMENTS+1>

12.13. The Development of a South African Cultural Export Strategy

Gouws, A. 2020. The development of a South African cultural export strategy. Research Report. SACO.

Institution: Nelson Mandela University, South Africa

This research reveals that many policies and institutions in South Africa promote exports and exporters. Most of these policies and institutions support all products and services, but some target small enterprises, a certain geographic area, or a specialised industrial sector.

The CCI Export Strategy should take advantage of current policies and organisations because the worldwide creative industries (CCI) industry is rapidly expanding.

South Africa's CCI commerce is minor in comparison to global CCI trade, but it has room to grow.

Cultural tourism is a service export that should also be promoted, rather than a conventional export.

South Africa has several export-oriented initiatives, policies, organisations and tools. The emphasis should be on retaining and growing existing CCI exporters. Export councils, in collaboration with the Department of Sports, Arts, and Culture, can make online assessment tools more accessible.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=The+development+of+a+South+African+cultural+export+strategy&search.x=0&search.y=0&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=andie=utf-8>

12.14. Creative Cities in Metropolitan Areas: Implications for the South African CCIs

Bob, U. 2021. Creative cities in metropolitan areas: Implications for the South African CCI. Research Report. SACO,

Institution: University of KwaZulu Natal, South Africa.

There is increasing interest in the concept of creative cities, with the number of cities embracing the notion of being a creative city, growing as well. The creative city concept aligns directly with urban development strategies and local economic development planning, intended to improve growth through cultural and creative activities.

This study critically examines current scholarly literature on creative cities generally and in South Africa specifically, focusing on opportunities and challenges and socio-economic benefits associated with creative cities. A desktop study approach is adopted that examines policy documents, research reports and academic sources.

The main public investments in creative cities are infrastructure, provision of land and space for cultural and creative purposes, and financial incentives. Key challenges associated with creative cities are the levels of participation of different groups, bias in terms of types of cultural genres/forms supported, creating conducive environments, infrastructural limitations, policy and institutional support, funding and resource allocation, social inequalities and conflict and undermining the intrinsic value of creativity. The Coronavirus 2019 (COVID-19) pandemic reinforced challenges as well as revealed new opportunities and responses within creative cities.

In the South African context, it is evident that different sizes and types of cities/towns are embracing the concept of creative cities in South Africa. Of concern is that none had creative city-specific policies in the three main UNESCO listed creative cities and there was limited reference to creative cities in the Integrated Development Plans. Implementation challenges in South Africa are also identified, including policy development and alignment, raising awareness about creative cities, understanding and responding to inequalities and accessing funding and reliable information. These challenges are not unique to South Africa. A “creative cities culture” exists in South Africa and its evolution and foci align to international trends.

The main recommendations emanating from this study is the importance of creative stakeholders being at the centre of decision-making processes. In the wake of the COVID-19

pandemic, technological advancements and integration need to be considered. Understanding the unique strengths and creative attributes in specific cities are important for branding and marketing.

The main contribution of this study is the development of a framework to measure and monitor the performance of creative cities in South Africa, drawing on Yum's (2020) creativity index (3Ci - creative class, creative infrastructure and culture) which is an extension of the 3Ts (Talent, Technology and Tolerance) index and the multidimensional index proposed by Rodrigues and Franco (2018).

The indicator framework is important to inform an audit or baseline information to be collected for the three UNESCO recognised creative cities in South Africa as well as assist other cities/towns as well as the Department of Sports, Arts and Culture (DSAC) to assess the potential to be positioned as a creative city. Finally, research recommendations are also forwarded in relation to examining cultural workers in creative cities and the application of the proposed monitoring framework.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Creative+cities+in+metropolitan+areas%3A+implications+for+the+South+African+CCIs&search.x=22&search.y=17&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

12.15. The implications of the Protection of Personal Information Act (POPIA)

Bob, U. 2021. The implications of the Protection of Personal Information Act (POPIA) on the Cultural and Creative industries (CCIs) in South Africa. Research Report. SACO.

Institution: University of KwaZulu Natal, South Africa.

The Protection of Personal Information Act (POPIA) No. 4 of 2013 (Republic of South Africa, 2013) came into effect on the 1st of July 2021. In the South African context, personal information is a sub-right of the right to privacy encapsulated in Section 14 of the Constitution.

The protection of personal information has been a focus of academic discourse and debate for decades and in the South African context, there has been an increase in publications in recent years focusing on POPIA.

There are several implications of POPIA for the CCIs. Because CCIs are diverse, the different sub-sectors and genres are likely to experience different levels of impacts associated with POPIA.

POPIA compliance is a legal obligation for all sectors and individuals, including seeking consent when collecting and processing personal information. The conditions for the CCIs that need to be met are accountability, process limitation, purpose specification, further processing limitation, information quality, openness/transparency, security safeguards and data subject participation.

Key aspects that need attention is the formulation of a Code of Conduct for the CCIIs. This can take advantage of the position in POPIA that responsible parties will not need to apply for prior authorisation to process information if an approved Code of Conduct by the Regulator is in place.

Providing information to demonstrate compliance is also a visible way of demonstrating POPIA compliance such as placing notifications on company/organisation websites/social media platforms and any forms where personal information is collected and seeking consent when information is collected (including notifying persons of when and how information will be used and maintained/protected). Data privacy notices also need to be visible. Data management, especially where personal information is collected, is critically important to comply with POPIA. Data security measures to protect personal information need to be developed and maintained.

The DSAC together with organisations representing the CCIIs should engage with the Information Regulator to ensure compliance. Dissemination of information and training, where required, should be a key focus to consult with the sector and assist as needed.

Location:

[https://www.dropbox.com/search/personal?path=%2FSACO+2+-+Deliverablesandpreview=id%3AL7goMirkSSAAAAAAM7Aandquery=The+implications+of+the+Protection+of+Personal+Information+Act+\(POPIA\)+On+the+Cultural+and+Creative+Industries+\(CCIs\)+in+South+Africa.andsearch_session_id=95520000077314650935869968798716andsearch_token=OrKI8IMsxzJDKmP3bVVewPEv0VvQ31laBrZkpAuE6U8%3D](https://www.dropbox.com/search/personal?path=%2FSACO+2+-+Deliverablesandpreview=id%3AL7goMirkSSAAAAAAM7Aandquery=The+implications+of+the+Protection+of+Personal+Information+Act+(POPIA)+On+the+Cultural+and+Creative+Industries+(CCIs)+in+South+Africa.andsearch_session_id=95520000077314650935869968798716andsearch_token=OrKI8IMsxzJDKmP3bVVewPEv0VvQ31laBrZkpAuE6U8%3D)

12.16. A Feasibility Study on a State-Owned Publishing House and an Online Book Purchasing Portal

Le Roux, E. 2021. A feasibility study on a state-owned publishing house and an online book purchasing portal. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

This report evaluates the feasibility of establishing a state-owned publishing house in South Africa, as well as an online book purchasing portal.

The report makes proposals to alleviate existing limitations in the book sector in South Africa which have implications for the publishing industry.

The book sector in South Africa performs a crucial social role. Books are a vital source for information, education and entertainment; they express the nation's distinct national identity and rich cultural diversity; and, help to preserve indigenous knowledge and heritage.

The report finds that, as in most other countries surveyed, while there are potential benefits to state intervention in and support for the publishing industry in South Africa, there are likely to be more negatives than positives from establishing a state-owned publishing house. The effects could be most detrimental for SMME and black-owned publishers, who are financially precarious and would not be able to cope with added competition.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/992/860320be12a1c050cd7731794e231bd3/A+feasibility+study+on+a+state-owned+publishing+house+and+an+online+book+purchasing+portal>

12.17. Economic Scenarios for the Books and Publishing Domain in South Africa

Gouws, A. 2021. Economic scenarios for the books and publishing domain in South Africa. Research Report. SACO.

Institution: Nelson Mandela University, South Africa

The purpose of this research is to suggest possible scenarios to all CCI stakeholders (including all three spheres of government) and proposed guidelines for better planning and recommending uses of strategic foresight (or forecasting) in decision making and policy making.

The study found that the publishing sector is declining slowly in relative terms. The nature of the “book” is changing as more eBooks become available, but the book will not disappear soon, even though foreign competition is having an impact.

The report also found that the sector has transformed, however more needs to be done. More new black publishers need to be established each year.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/998/9ab0d88431732957a618d4a469a0d4c3/Economic+Scenarios+for+the+Books+and+Publishing+Domain>

13. Theme 13: Living Human Treasures

This theme focusses on generating data and knowledge associated with Living Human Treasures (LHT).

No reports were produced pertaining to this theme.

14. Theme 14: International Relations and Cultural Diplomacy

This theme focusses on the role, importance and contribution of the sector towards advancing international relations and trade.

14.1. Cultural Seasons Framework

Liebenberg, S. 2017. Cultural Seasons Framework. Chief Directorate: International Relations – Strategic Priority Area 7 – Cultural Diplomacy. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

Cultural Seasons represent one of the implementing mechanisms being employed by the Department of Arts and Culture (DAC) in pursuit of its cultural diplomacy objectives.

In this regard, the use of Cultural Seasons is based on the dual policy imperatives to (i) profile and (ii) strengthen multi-and bi-lateral relations in accordance with the South African National Interest through the application of cultural diplomacy.

Within the field of international relations, cultural diplomacy is considered a key diplomatic mechanism used by governments to advance their national interests, through culture penetration.

The report presents a Cultural Seasons Framework which has been developed to ensure optimal strategic alignment and the effective and efficient implementation of Cultural Seasons.

As a framework that is being applied in a dynamic operating environment, this framework also serves as a decision-support tool that can be used to develop customised interventions.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/997/ec5aa0b7846082a2415f0902f0da88f2/Cultural+Seasons+Framework>

14.2. Proposed Policy Framework for Cultural Diplomacy in South Africa

Liebenberg, S. 2017. Proposed policy framework for Cultural Diplomacy in South Africa. Research Report. SACO.

Institution: South African Cultural Observatory, South Africa

Within the current field of international relations, there is little dispute that cultural diplomacy is a key diplomatic tool used by governments to advance their national interests.

The purpose of this document is to translate the main findings of the SACO baseline report into a government-wide policy framework to advance cultural diplomacy in South Africa. South Africa currently lacks a coherent policy on cultural diplomacy.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/996/0b8aff0438617c055eb55f0ba5d226fa/Proposed+Policy+Framework+for+Cultural+Diplomacy+in+South+Africa>

14.3. Quantifying the Value and Impact of Cultural Seasons

Gouws, A. and Verster, B. 2019. Quantifying the value and impact of cultural seasons. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

Within the field of international relations, it is recognized that cultural diplomacy is a key diplomatic tool used to advance the national interests of governments. Globalization links people, cities, regions and countries closer together and that has led to lives being intertwined with people in all parts of the world. Globalization has an impact on how diplomacy is executed and stresses the importance of cultural diplomacy.

The purpose of the report was to quantify the value and impact of Cultural Seasons. In this regard the report found that it is difficult to evaluate Cultural Season because of intrinsic and extrinsic value that is inherent in both arts and cultural development and diplomacy.

The report argued that intrinsic values may well have borne more fruit, but that extrinsic outcomes including trade of cultural goods, tourism and foreign direct investment, has produced little evidence of the impact of Cultural Seasons. However targeted planning and better coordination could yield better outcomes

Location:

14.4. Determining the Feasibility of Establishing South African Cultural Centres as a Means of Advancing South African Cultural Diplomacy

Liebenberg, S. 2021. Determining the feasibility of establishing South African Cultural Centres as a means of advancing South African Cultural Diplomacy. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The evidence and arguments given in this research study led to the conclusion that cultural diplomacy, as an extension of public diplomacy, provides the South African government with an asymmetrical power to achieve its strategic national interest. The exponential expansion in the use of public diplomacy, cultural diplomacy, cultural centres and the so-called "competition for soft power" attest to this.

The South African government, on the other hand, has struggled to formulate a cultural diplomacy plan that has received widespread approval. This results in a policy vacuum that separates policy from national interest, preventing the most effective deployment of soft power across public and cultural diplomacy areas. Because of the absence of policy and strategic agreement and commitment, the deployment of cultural centres and hence the practise of cultural diplomacy, is not possible under present policy and strategic conditions.

As a result, establishing cultural centres is extremely difficult, if not impossible. However, if South Africa addresses the current policy vacuum, the deployment of cultural centres will be a viable policy tool for advancing the country's interests.

Location:

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15. Theme 15: Training, Skills Development and Transformation

This theme focusses on quantifying accurate data pertaining to employment, training, skills, and the state of transformation within the Arts, Heritage, Cultural and Creative Sectors.

15.1. The Employment of Youth and Women in Cultural Occupations in South Africa

Snowball, J., Hadisi, S., Ndhlovu, R., Van der Linde, J.C. 2019. The Employment of Youth and Women in Cultural Occupations in South Africa. Research Report. SACO.

Institution: Rhodes University, South Africa, Political Economy Southern Africa, South Africa, Nelson Mandela University, South Africa.

The study analyses the 2016 Statistics South Africa Labour Market Dynamics Survey (LMDS), using the UNESCO Framework for Cultural Statistics (2009) to identify cultural occupations and cultural industries. The LMDS sample is designed to be representative at national and provincial levels and covers the entire national population aged 15 years and over. The sample size is roughly 33 000 dwellings per quarter (132 000 observations).

Results showed that the creative economy in South Africa (including both cultural and non-cultural support jobs in the CCIs) provided employment for 6.94% of the working population in 2016, an increase from 6.72% in 2015.

Youths make up 35% of cultural employment, which equates to 379 000 jobs. Youth who work in the cultural sector are, however, more likely to be employed informally (47.2%) than youth working in non-cultural jobs (33.6%). While not yet representative of the population demographics, the majority of those in cultural occupations are black African (73.2%), coloured people (9.3%) and people of Indian/Asian origin (3.3%). People in cultural occupations in South Africa are older than those in non-cultural occupations: 34.6% of cultural workers and 39.3% of non-cultural workers fall into the youth category

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=The+employment+of+youth+and+women+in+cultural+occupations+in+South+Africa&search.x=15&search.y=24&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&oref=andie=utf-8>

15.2. Youths in the Craft Sector: Socio-Economic Opportunities and Challenges in the Eastern and Western Cape

Snowball, J. 2018. Youths in the Craft Sector: Socio-economic Opportunities and Challenges in the Eastern and Western Cape. South African Cultural Observatory: Gqeberha, South Africa

Institution: Rhodes University, South Africa.

This research found that the motivations for youth involvement in the crafts sector vary. These include creative expression, entrepreneurship, livelihood diversification, poverty alleviation and community development imperatives. Some youths entered the craft sector because of failure to penetrate their preferred industries.

Upon entering the sector, youths are predominantly sourcing capital from family members and social networks to procure required organic and synthetic inputs. This small start-up capital is in the form of soft loans with repayment expected upon generation of first sales income. Given their small capital, the majority cannot afford to rent or own manufacturing or office space. They are thus manufacturing from home (in the backyard), in open public spaces and in local community centres.

Eastern Cape youths are also assisted by the provincial and local governments through Craft Hubs. For example, the Mthatha Craft Hub has been very instrumental in enhancing the skills of the youths through product quality enhancement, enterprise development and marketing. The Hub assists registered youths in studying market trends to produce those items that are in demand.

Youths are facing a myriad of challenges in the sector. These include financial constraints, lack of manufacturing space, limited specialised craft skills, limited marketing skills, lack of adequate information about the business elements of the sector, highly competitive local market and slow uptake of new technology to enhance product quality at low cost.

The report recommends that to address these challenges, (a) the private and public sector should avail more start-up capital for organic and synthetic inputs and equipment (b) there should be further specialised skills development and training in order to equip youths with relevant craft knowledge, e.g., product quality development, business skills, marketing, branding and sales (c) affordable and secure product manufacturing space should be made available (d) technology adoption for innovation, improvement of product quality and lowering costs should be prioritised by the youths (e) there should be enhanced marketing of local craft to both local and international consumers so as to generate more profits for the youth (f) youths in craft should be encouraged to register their small businesses and run them formally. This will require requisite training, capacity building and financial assistance.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/653/ea339c4d89fc102edd9dbdb6a28915/Youths+in+the+Craft+Sector>

15.3. Language studies bursary scheme research report

Ncwadi, R., Kolisi, N., Vitshima, S. and Xhoxho, T. 2019. Language Studies Bursary Scheme Research Report. Research Report. SACO.

Institution: Nelson Mandela University, South Africa.

The aim of this research was to assess the impact of DAC Language Studies Bursaries on the students who received bursaries during the period 2015 to 2018.

The Department of Arts and Culture is responsible for protection, preservations and support of the South African Arts, Culture, and Heritage. To this end, bursaries were allocated and made available to students during the previously mentioned period to help the students complete their studies.

A structured questionnaire was used as a method of data collection. Two methods of data collection were applied, namely, emails and telephonic surveys. No sampling framework was formulated.

One hundred and ninety-four (194) students were listed and only 94 could be reached and interviewed successfully. The findings show that a large majority of the recipients were females. The results further show that many the recipients were in their mid-40s at the time of taking up the bursary. The mean age of the respondents is 42 years. Many recipients were black compared to other races. More than half of the recipients were registered for higher degrees, namely, Honours and Masters' Degrees with less than 10% registered for undergraduate degrees.

With respect to geographical location of the respondents, there is a noticeable change of locations from either the villages to the townships or from the townships to the suburbs. Nonetheless there is no strong evidence to suggest that these movements were due to accessing bursaries for their studies. There is also no strong evidence to suggest that the employment of these students is a direct consequence of access to bursary.

Notwithstanding, it can be concluded that access to the DAC Language Studies Bursary Scheme provided good opportunities to the students to qualify with higher degrees which would have a positive effect in their communities. A situation which would not have been possible had it not been for the bursary. A much more holistic support programme for students is recommended.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/642/291597a100aadd814d197af4f4bab3a7/Language+Studies+Bursary+Scheme+Research+Report+%E2%80%93+Nelson+Mandela+University>

15.4. Youth, Women and People Living with Disabilities: The Status of Women in the Audio-Visual Sector

Bob, U. and Munien, S. 2019. Youth, women, and people living with disabilities: The status of women in the audio- visual sector. Research Report. SACO.

Institution: The University of Kwa-Zulu Natal, South Africa.

The audio-visual sector is crucial for cultural preservation, employment creation and overall economic growth. There is widespread agreement that the sector is controlled by men and that gender inequities are rampant.

The study found that women are under-represented and stereotyped in the audio-visual industry, as are other socio-demographic groups. In the audio-visual industry, there are significant gender disparities in terms of the number of women working and occupational segregation.

Female-dominated sectors have lower-paying, lower-profile jobs with little to no decision-making authority. The glass ceiling effect affects women as well, with fewer women holding leadership and directorial roles.

Location:

<https://www.southafricanculturalobservatory.org.za/search?q=Youth%2C+women+and+people+living+with+disabilities%3A+The+status+of+women+in+the+audio-+visual+sector.&search.x=27&search.y=25&cx=008312365418257951562%3Ahmci6huvty4&cof=FORID%3A11&cref=&ie=utf-8>

15.5. Youth, Women and People Living with Disabilities: A Landscape Assessment of the CCI's Readiness to Address the Needs of Persons with Disabilities

Bob, U. 2020. Youth, women and people living with disabilities: A Landscape Assessment of the CCI's readiness to address the needs of persons with disabilities. South African Cultural Observatory: Gqeberha, South Africa

Institution: University of Kwa-Zulu Natal, South Africa.

This study focuses specifically on examining the opportunities and challenges experienced by people with disabilities in relation to the CCI. A desktop study approach was used to examine policy documents, research reports and academic sources. The desktop study was complemented by an assessment of selected CCI-related venues and facilities.

The literature shows that CCI has considerable socio-economic benefits but that these are not equally beneficial to all groups. For persons with disabilities, there are several barriers with groups being differentially culturally engaged. Disabilities combined with other forms of disadvantage (such as race, gender, age, income and levels of education) also impact on participation in the CCI.

Studies also note the 'disability culture', which broadly refers to the shared values/norms, experiences, behaviours and beliefs evident among persons with disabilities. CCI also has the potential to provide spaces for persons with disabilities to interact as well as co-experience and co-produce products and activities.

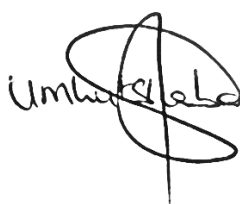
The importance of recognising, understanding and responding to different types of disabilities are also highlighted. Persons with disabilities face inequalities in the CCI in various ways with the primary forms being barriers/challenges in relation to employment and the lack of opportunities and infrastructural impediments that limit access and experiences in terms of consuming offerings and attitudinal barriers of not feeling as if they belong, lack of accessible information, resource and funding constraints and content and the representation of persons with disabilities.

In terms of access to venues and facilities, the key issue arising from the audit undertaken is that most venues and facilities do not state services and support provided for persons with disabilities on their websites. Additionally, the focus tends to be almost exclusively on physical disability, specifically wheelchair parking availability and wheelchair friendly design. Other types of disabilities, such as visual and hearing impairment, are rarely considered.

Location:

<https://www.southafricanculturalobservatory.org.za/download/comments/704/f64eac11f2cd8f0efa196f8ad173178e/Youth%2C+women+and+people+living+with+disabilities+-+A+Landscape+Assessment+of+the+CCI%E2%80%99s+Readiness+to+Address+the+Needs+of+Persons+with+Disabilities+%282%29>

APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY – SACO Bibliography of CCI Publications – 30 June 2022

	NAME	TITLE	SIGNATURE	DATE
Prepared and recommended by:	<i>Unathi Lutshaba</i>	<i>SACO Executive Director</i>		30 June 2022
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