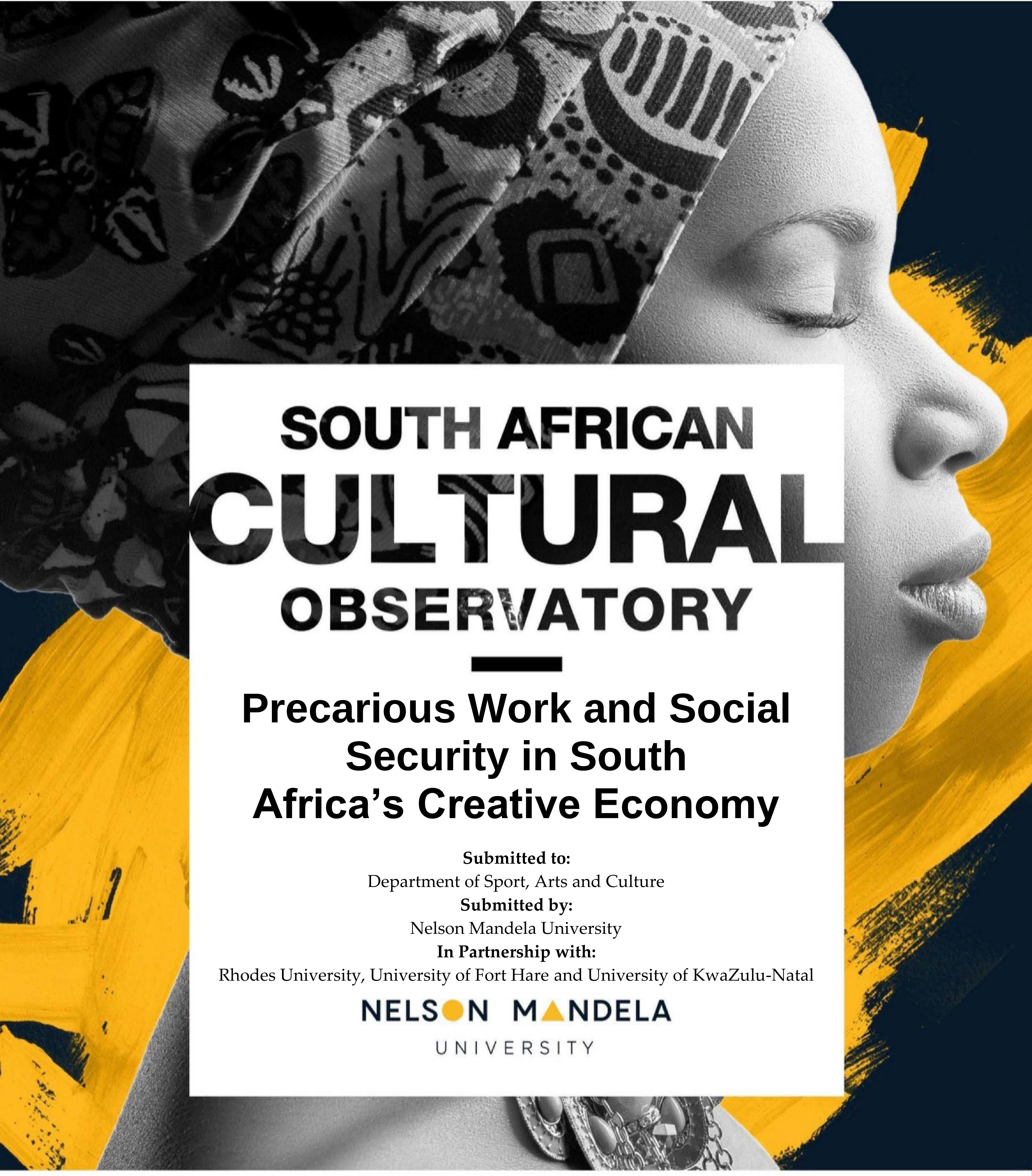

SOUTH AFRICAN CULTURAL OBSERVATORY

Precarious Work and Social Security in South Africa's Creative Economy

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

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South African Cultural Observatory

Report

Precarious Work and Social Security in South Africa's Creative Economy

Contents

Figures

Tables

Abbreviations

ACH	Arts, Culture and Heritage
AFS	Annual Financial Statistics
AI	Artificial Intelligence
AP	Associated Press
AR	Augmented reality
ASSITEJ SA	Association of Theatre for Children and Young People South Africa
B-BBEE	Broad-Based Black Economic Empowerment
BRICS	Brazil, Russia, India, China, and South Africa
CACNET	Community Arts Centres Network
CAGR	Compound annual growth rate
CAD	Canadian dollar
CAPASSO	Composers, Authors and Publishers Association
CATHSSETA	Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority
CC	Cultural and Creative
CCI	Cultural and Creative Industry
CCIFSA	Cultural & Creative Industries Federation of South Africa
CCSA	Copyright Coalition of South Africa
CD	Compact disc
CISAC	International Confederation of Societies of Authors and Composers
CSA	Cultural Satellite Account
CSG	Child Support Grant
CSO	Civil society organizations
CSA	Cultural Satellite Account
CWUSA	Creative Workers Union of South Africa
DALRO	Dramatic, Artistic, and Literary Rights Organisation
DBE	Department of Basic Education
DOL	Department of Labour
DSAC	Department of Sports, Arts and Culture
DSD	Department of Social Development
DTI	Department of Trade & Industry
DTIC	Department of Trade, Industry and Competition
EC	European Commission
EU	European Union
EUR	Euro
FANG	Facebook, Amazon, Netflix and Google
FET	Further Education and Training
FFA	German Federal Film Board
FIC	Fair Internet Coalition
GDP	Gross Domestic Product
GEMS	Government Employees Medical Scheme
GEPF	Government Employees Pension Fund
GST	Goods and Services Tax

GVA	Gross Value Added
HEI	Higher Education Institution
HRD	Human Resource Development
IEJ	Institute of Economic Justice
ILO	International Labour Organization
IO	Input Output
IPR	Intellectual property rights
ISIC	International Standard Industrial Classification
KSVF	Artists' Social Insurance Fund
KSVG	*Künstlersozialversicherungsgesetz* Artists' Social Security Structure Act
LDC	Least developed countries
MLC	Mechanical Licensing Collective
MMA	Music Modernization Act
MOA	Memorandum of Agreement
MR	Mixed reality
NAC	National Arts Council
NDB	New Development Bank
NEDLAC	National Economic Development and Labour Council
NGO	Non-governmental organisation
NSF	National Skills Fund
NSSF	National Social Security Fund
OECD	Organisation for Economic Co-operation and Development
OMC	Open Method of Coordination
PANSA	Performing Arts Network of South Africa
PESP	Presidential Employment Stimulus Programme
PMA	Personal Managers Association
RIS	Reimagined Industrial Strategy
RTP	*Rádio e Televisão de Portugal*
RWP	Revised White Paper
SA	South Africa
SACO	South African Cultural Observatory
SADA	South African Dance Alliance
SAGA	South African Guild of Actors
SAM	Social Accounting Matrix
SAMRO	Southern African Music Rights Organisation
SAPAHA	South African Performing Arts Health Association
SASCOC	South African Sports Confederation and Olympic Committee
SASFED	South African Screen Federation,
SAUCCIF	South African United Cultural and Creative Industries Federation
SDG	Sustainable Development Goals
SEF	Social Employment Fund
SEK	Swedish krona
SETA	Sector Education and Training Authorities
SIC	Standard Industrial Classification
SME	Small and Medium Enterprises

SNA	System of National Accounts
SOE	State Owned Enterprises
SRD	Special Covid-19 Social Relief of Distress Grant
STAND	Sustaining Theatre and Dance Foundation
STEAM	Science, Technology, Engineering and Maths
STEM	Science, Technology, Engineering and Maths
TADA	Theatre and Dance Alliance
TBF	Theatre Benevolent Fund
TDA	Theatre Dance Association
TDEASA	Theatre & Dance Employers Association
UBI	Universal Basic Income
UIF	Unemployment Insurance Fund
UK	United Kingdom
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
US	United States
USA	United States of America
VANSA	Visual Arts Network of South Africa
VAT	Value Added Tax
VOD	Video On-Demand
VR	Virtual reality
WIPO	World Intellectual Property Organization

Executive Summary

The exploratory research report on Precarious Work and Social Security in South Africa traverses a good deal of ground given its modest brief. It does point, however, to the need for extensive subsequent research and concomitant policy design. The various chapters of the report include a desktop analysis in regard to the literature review, the international and comparative policy context, and a discussion of select and strategic issues in respect of a consideration of the relevant South African policy context.
Empirical evidence was gathered from a number of strategic interviews as a well as a focus group session. A modest online survey was added to the research, and this returned useful findings and results. Furthermore, a conceptual modelling exercise related to the feasibility and logistics of a potential social security intervention by government was conducted. These specific and triangulated sources of information have informed the drafting policy recommendations. These are not exhaustive with the emphasis rather on practical and implementable suggested measures.

This study is divided into several chapters. The introductory section provides an overview of the issues, the nature and scope of the research undertaken, and a short summary of the composite chapters.
Chapter one provides an international literature review of select and strategic issues in regard to the intensification of precarity in the CC sector, the dynamics and contradictions thereof, and attempts by unions and alternative associational structures to respond to these long-standing and new conditions of work for artists and cultural workers and practitioners. The rather modest body of South African scholarship on the subject matter is also discussed.

Chapter 2 provides a compact discussion of this report's methodology and research methods. A mixed method approach is utilized which in this instance includes secondary data (desktop) research, quantitative economic modelling, and quantitative and qualitative fieldwork. A relatively extensive literature and policy review covers international trends and best practice; and provides analysis and insights in regard to South Africa’s experiences of precarity and efforts to ameliorate these. The quantitative work includes the online survey and economic modelling. The qualitative aspects include strategic interviews and a focus group session.

The discussion in Chapter 3 of the international and policy context and developments, including certain best practices cases, has also a literature review component in respect of the question of the status of the artist, and efforts to secure this by improving the working conditions of artists and cultural workers and developing and/or reasserting relevant social security measures.

Chapter 4 provides an overview of the policy context, and strategic developments and issues in South Africa. It considers the major economic trends, the impact of deindustrialization on the economy and society of the country including the constraints on the development of the creative economy. Recent DSAC policy and joint policy productions most particularly the Revised White Paper on Arts, Culture and Heritage, and the CCI Masterplan (a collaboration with the Department of Trade, Industry and Competition) are examined with particular emphasis in regard to their provisions to improve working conditions for artists and cultural practitioners and proposals for social security measures in the CC sector. The fragmented terrain in the CC sector for union and associational activities is also examined, and institutional initiatives noted.

Chapter 5 assesses 7 in-depth interviews with 18 selected stakeholders and one focus interview held with three representatives of DSAC. The interviews then focused on five themes: (i) Context of precarious and atypical labour in the cultural and creative sector; (ii) Artists' rights, business, associations and unionisation; (iii) Social security for artists and creative practitioners; (iv) government's role in provision of social security in CCI sectors; and (v) general observations and suggestions.

Chapter 6 analyses the data generate from the online survey. To get as much information from creatives themselves, a survey was sent to the SACO database of creatives consisting of 900 individuals or creative enterprises. To ensure wider coverage certain DSAC officials were requested to respond.

Chapter 7 models the salaries of the various skills levels of cultural workers and practitioners including in the informal sector. It draws on the specific methodology invoked to estimate the CCI Cultural Satellite Account. The UNESCO Framework for Cultural Statistics (UNESCO 2009) has been used as the touchstone to align the national data for international comparison. While the UNESCO Framework allows for six cultural and two related domains, only the six CCI domains are estimated for the purposes of this report.

Chapter 8 provides a set of policy recommendations based on the preceding research and the triangulation thereof. The bulk of these recommendations are practical in nature can be implemented in the shorter term. The concluding chapter rounds of the report, notes again the key findings and significance thereof, and anticipates future interventions in regard to precarity and social security in the CC sector in South Africa.

There are nine recommendations which provide a starting point for the Department of Sports, Arts and Culture in regard to addressing the related concerns of increased precarity and the need for a speedy response to the question of providing with due urgency social security underpinnings to the CC sector.

1. As a matter of urgency DSAC should look to engage directly with UNESCO and with the current UNESCO survey regarding the continued implementation of the 1980 Recommendation on the Status of the Artist.
2. DSAC should consider an exploratory meeting or colloquium between its BRICS partners either on a bilateral or collective basis on the postCovid19 interventions in regard to social security issues and schemes that are being considered, partly as a response to the depth of the socio-economic crisis in the creative and cultural sector in these countries.
3. DSAC should proceed rapidly in establishing a compact/small inter-government strategic reference task team comprising the appropriate specialised persons from relevant departments and associated state agencies. This team should include representatives from the Departments of Labour; Social Welfare; Trade, Industry and Competition (DTIC); and possibly a nominated representative of NEDLAC. It would seem advisable to include the key agencies of the Ministry of Finance, namely the national Treasury; and the South African Revenue Service (SARS) to be inclusion. Furthermore, consideration should be given to the inclusion of StatsSA to ensure that relevant national data for the requisite economic modelling exercises is available.
4. Establish a registry artists and cultural practitioners. In addition, the creation and effective use of a CCI database of creative industries (including micro firms) would seem to be a popular acceptable action step.

5. Create a large-scale digital platform in collaboration with the private sector for use by CCI firms and creatives that can be used to build positive relationships and the articulation of social and cultural capital in the CC sector.
6. The emphasis placed by UNESCO and the ILO on the importance of a country ensuring that the providing exemplary training, education and nurturing for its artists has been overlooked somewhat in a number of developing and even certain developed economies. In the South African context, the relative lack of design and articulation of a kind of training and ecosystem for artists and cultural workers is an area requiring policy research and related policy design. The recently approved Revised White Paper for Arts, Culture and Heritage, and the 2021 Masterplan for Cultural and Creative Industries also provide related policy suggestions on this matter.
7. There is a need to consider the various options to enhance the freedom of association in the CC sector in regard to collective bargaining, and the conceptualization of new forms of unions and unionization as per current international developments. A discussion with interested parties and stakeholders would be useful. The researchers would help in establishing a list of potential invitees.
8. There are a number of potential shorter-term options for government in terms of legislation and associated support measures. Firstly, the 2017 Revised White Paper (fourth edition) has been recently passed by government. It has a section which directly addresses the status of artists and cultural workers, and the question of social security. It also specifies existing understandings confirmed during the consultative and drafting processes, most particularly the cooperation with the Department of Labour (DOL). It is important that steps be taken to operationalise policy recommendations of the long awaited RWP. Secondly, consideration should be given to development of a pro forma contract for gig and self-employed workers in the cultural and creative economy in South Africa. In the third place a practical step would be to investigate the establishment of a dedicated unemployment insurance fund for creatives.
9. As evidenced by international cases and developments, the private sector, and particularly the financial institutions, are crucial players in the design, delivery and participation in social security measures and certain efforts to ameliorate precarity in the CC sector. DSAC should formalize a dialogue with key private sector representatives, most especially the major financial institutions to consider social security measures and to seek quick wins such as access to finance by contract CC workers and practitioners on matters such as mortgages and loans. Select state agencies may be added to this institutionalized dialogue. The structuring of a PPP arrangement on this particular matter with Treasury participation should be considered.

Discussion and action steps in regard to these policy proposals, and accompanying research, may lead to the consideration of further related and viable policy options.

Introduction

Precarious and atypical work within developed and developing economies has expanded discernibly since the early 1980s. The International Labour Organization (ILO) Centenary Declaration for the Future of Work, 2019, exhorted the ILO to redouble its efforts to 'developing and enhancing social protection systems, which are adequate, sustainable and adapted to developments in the world of work.'

In recent decades, the precarious nature of creative and cultural work has received growing coverage in the international academic literature. However, the significance and effects of such work have generally been neglected in policy and policymaking. However, with the advent of Covid-19 had an inhibiting effect on cultural and creative work across the world. Many jobs were lost in the Cultural and Creative Industry (CCIs), with live performance and venue-based firms particularly felt the brunt. This impacted artist mobility, access to markets and had a knock-on effect for the relevant value chains of suppliers and service providers. The craft sector, in particular, took systemic losses.

The disruption of the creative sector, most especially in regard to employment, has contributed to an interest by public and private sector bodies researching the effects of the pandemic on the creative and cultural industries. The collective international response to Covid19 has also seen some efforts in regard to establishing and/or improving social protection measures in the Cultural and Creative (CC) sector.

Terms of Reference

This study of precarious work and social security in South Africa's CCI is thus of great importance, as it seeks to provide information and data that can be used in by officials drafting policy recommendations. These recommendations can then provide a way forward for the initiation of sustainable social security measures for practitioners in the CCI.

The goals of this report are as follows:

(i) Undertake a review of the international context about precarious work in the CCIs and CC sector and related structural trends and responses.
(ii) Review and evaluate international trends and good practices on the provision of social protection of CC workers. This would include policy and legal frameworks in selected countries that have sought to extend social security to workers in the creative and culture sector to identify entry points and mechanisms for expanding coverage.
(iii) Review emerging efforts internationally by precarious cultural and creative workers to organize collectively, and the changing responses of concerned/interested trade unions in responding to the question of precarious creative and cultural work.
(iv) Discuss debates/scholarly contributions of relevant methodological approaches and models for the estimation of the economic costs of social security/protection measures in the CC sector/s.
(v) Consider recent efforts to address precarity in the cultural and creative sector in South Africa.
(vi) Estimate the costs of such interventions and quantify the impact of such interventions on both the national as well as the creative economy.
(vii) Provide a set of practical recommendations that could form the basis for a national discussion and draft policy.

Research methods used consisted of a mix of desktop, qualitative and quantitative approaches within the scheduled budgetary constraints for the report:

- A review of the international and South African literature (journal articles, policy papers and document, and industry reports) including the SACO Mapping Study and relevant SACO reports, to give background and context.
- Strategic interviews with select cultural and creative workers, relevant institutions and authorities.
- A quantitative review of the relevant employment data using the various Stats SA publications.
- A modest online survey run via the Survey Monkey platform.

The Need for Social Security in CCI

In the wake of Covid-19, there has been some signs of a rethinking of existing public policies in regard to the sector. However, there may well be a continued disjunction between a political championing of the creative economy and its economic potential, and the levels of public and private sector investment required. And the past 2-3 years has if anything seen the consolidation of the power and influence of the mega digital platforms, and their structuring of the new creative economy.

For certain scholars and commentators, Covid-19 has highlighted the effect of neoliberal imperatives in the creative economies, but in some instances provided scope for creative workers in certain locales and countries to look to organize collectively. Moreover, the questions of regulation and revenue accountability of the digital platforms within in the creative economy, may gain some purchase in time. These and other key concerns come together compellingly in the South African context and provide significant scope for expanded and new thinking in regard to the question/s raised and the subject matter discussed.

This study of the South African case is thus significant, as it looks to determine the policy constraints and considerations, the contradictions, and the way forward for the South African state in the sustainable advancement of a globally competitive and internationally recognised creative sector. A key aspect of this is how to approach the question of social security for creative workers, while confronting a range of institutional and fiscal constraints, mass unemployment and high levels of inequality both personal and structural.

Social security is among the set of human rights, but it has not been institutionalized sufficiently, especially in many developing countries. Artists and cultural workers and practitioners are well educated and trained in general yet often struggle in accessing social security protection and services. This is because many of them have irregular incomes, and work intermittently. Their employment status often fluctuates and their work and career are often conditioned by short-term contractual arrangements as well as geographical mobility (ILO 202; UNESCO 2020; SACO 2021; Johnson 2020; Shaunessy et al 2022).

COVID-19 Pandemic

The Covid-19 pandemic had a profound effect on the arts and creative sectors. It disrupted livelihoods and professional networks and saw a large portion of live events for performing and visual artists curtained or closed down. It accentuated the instability that for decades has plagued the workers and practitioners in Cultural and Creative sectors globally.

A wide range of countries put emergency measures in place to support artists and cultural practitioners. As the ILO argues (ILO 2021) these states have now an opportunity to build on temporary Covid-19 social protection measures, through long-term entitlements within a legal framework and in line with international social security instruments and guidelines. This allows people to count on such measures when they need them. Furthermore, social protection schemes should be comprehensive in nature and adapted to the social and economic realities that all workers have to confront. In addition, they should be innovatively conceptualized and designed, with financial solutions that can reach everyone concerned whatever their employment arrangements (ILO 2021).

South Africa's general response in regard to social security during pandemic primarily took the form of emergency relief measures. Included in the package were top-ups to existing social grants (R250 per month), a caregiver grant of R500 per month; a Covid-19 Social Relief of Distress Grant (R350 per month), a Temporary Employee Relief Scheme, and food parcels. The emergency relief measures were for a six-month period initially. The lockdown affected both the supply- and demand-side of the economy with around three million losing jobs or livelihood in the early stages of the process (Devereux & Van Den Heever 2020).

The pandemic underlined a major structural flaw in South Africa's social security system with little or no income support for unemployed or low-income people in the 18-59 age bracket. Those with no income and/or informal workers were not able to access unemployment benefits or temporary employee relief. There was mass application for the Social Relief of Distress grant, but at R350 per month it was insufficient cover for day-to-day living expenses (Devereux & Van Den Heever 2020). Millions applied for the special Social Relief of Distress grant, but R350 a month is not enough on which to live (ibid.).

As a number of academics and social security specialists have argued internationally, unemployment protection should be expanded to include all workers (ILO 2019; Devereux & Van Den Heever 2020; Dupper et al 2011). Among the policy lessons learnt from the Covid-19 responses globally and in South Africa is that it makes more logistical and administrative sense to link programmes to existing systems than trying to build new one (UNESCO 2020; Devereux & Van Den Heever 2020). With only around 7% of unemployed persons in the country formally covered by unemployment insurance, a revisiting and reform of existing but dated social security policies seems necessary. This should be part of a national consultative process.

Given the particularities of artists and cultural practitioners working conditions and status, and the strategic emphasis placed on the national creative economy by government, a more specific consideration of social security provisions for the CC sector would appear to be overdue.

South Africa and UNESCO Measures

There is a distinct policy line in this regard. Internationally, South Africa was one of the UNESCO member states and looks to align itself with the main UNESCO and other United Nations (UN) agencies on the matter of social security for artists and cultural professionals. As member state it has participated in certain of the UNESCO surveys and consultations on these aspects as embodied in the iconic 1980

Recommendation on the Status of the Artist measure, and the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions (UNESCO 1980; 2005). South Africa in its post-1994 democratic form is also a member of the ILO and has participated in a range of specific interventions, policy discussions, and awareness raising processes over the years.

The development and institutionalization of social security schemes for artists and creative practitioners has been a particular project of the current Department of Sports, Arts and Culture (DSAC) and its institutional predecessors since the mid-1990s. The 1996 White Paper on Arts and Culture which has remained in force until the recent acceptance by Cabinet of the revised 2017 White Paper for Arts, Culture and Heritage in 2021, devoted particular attention to this matter. This was similarly the case in the 2017 revised White Paper. In addition, the Master Plan for the Creative and Cultural Industries of South Africa, created under the auspices of the Department of Trade, Industry and Competition (DTIC), has likewise addressed this matter, and committed the government to the development of a coherent and viable social security intervention for the CC sector (DTIC 2021).

Furthermore, during the Covid-19 lockdown, emergency relief funds for artists and cultural practitioners were announced by the Minister of Sports, Arts and Culture in March 2020. The initial relief fund of R150 million was to assist artists, athletes, technical personnel and the 'core ecosystem' that supports them to soften the impact of the pandemic. The criteria for their support and identification of beneficiaries were finalized by DSAC in consultation with the:

- South African Sports Confederation and Olympic Committee (SASCOC) for the sports section; and
- Cultural & Creative Industries Federation of South Africa (CCFISA) for the artists and creatives sections.

The National Arts Council was appointed to manage the process for the arts and creative beneficiaries.

The relief measures were vital for the sector. A SACO study of the impact of the pandemic found that 90% of the live music industry had lost income and a quarter of artists indicated that they could not continue with any of their business during lockdown (SACO 2020).

There were distinct restrictions as to the artists and creative practitioners who could access the first tranche relief measure. The approved categories included:

1. DSAC-funded projects that had already entered into an Memorandum of Agreement (MOA) with the Department and the first tranche of payment had been affected;
2. DSAC institutions whose productions and events had been cancelled; and
3. cancelled non-DSAC funded projects a list of 25 productions and 15 live events had been identified (DSAC Media Announcement, 29 March 2020).

Second and third phases of funding followed, all drawn from the sum of R300m from the Presidential Employment Stimulus Programme (PESP) (Mafalo 2020). The third phase funding was accessible to the sports and creative industries workforce (individuals and organizations) without a regular salary source, or whose income had been severely disrupted (DSAC, Media Briefing, 21 February 2021).

The lack of income during the pandemic, and the allocation and administration of the Covid relief fund for artists and creatives drew the ire of many practitioners. There were sits in sit-ins in the National Arts

Council (NAC) head office in Johannesburg and protest at several of the offices of public arts agencies in certain other centres in the country including Bloemfontein and Kimberley (Mafalo 2020).

Globally, and in South Africa, Covid-19 seems to have exacerbated long-standing or structural weaknesses and risks in the CC sector and the profession/s. These include the increased risk of income instability and lower earnings, and the increased risk of ill health; longer periods of unemployment, and concerns in regard to parental leave, old age and care responsibilities (Johnson 2020; UNESCO 2020). The various state responses to these issues of precarity and social security during Covid19 suggest that reviews of national cultural policies need to address directly the development of specialized social security programmes for artists and cultural practitioners going forward.

Social security schemes for artists are predicated primarily on the idea of insurance with contributions paid into a fund by an artist, the state and/or employers. The fund then provides welfare payments to the artist or cultural practitioner for a variety of accepted categories (Johnson 2020; UNESCO 2020; ILO 2019).

Insurance funds can be managed by the state, public and private agencies. These can result in a variety of approaches to social security (ILO 2019; Johnson 2020).

A typology favoured by UNESCO among others includes four types of models or approaches (UNESCO 2015; Johnson 2020):

1. No coverage. Individuals will look to secure private insurance.
2. Integration into employment status. The artists or cultural practitioner is accepted into existing social security programmes for workers, and not categorized specifically as artists. Such a category could include the possibility of a Universal Basic Income (UBI).
3. State-sponsored, targeted schemes. Artists are included in a specific scheme which is sponsored by the state. These programmes or schemes run in parallel with (and may be informed by) schemes for other employed or self-employed people, but which make special adaptations for artists.
4. Non-state schemes. Artists participate in complementary or parallel schemes which can be administered by collecting societies, artists' unions, cooperatives, or other non-state organization.

These broad approaches lead to more variety in practice, with some nation states using a mix of them. Artists' contributions and the welfare payments can be determined by means testing or guaranteed. The amounts that artists are required to pay into the scheme/s in question may vary in regard to their earnings or be set at a particular rate (UNESCO 2015; Johnson 2020). By the same token, the payments received via the schemes can be guaranteed at a fixed rate or vary according to specified criteria (Johnson 2020; ILO 2019; UNESCO 2015).

Such kinds of interventions in South Africa and internationally would be reinforced with a progressive rethinking of national cultural policy, and developing a more reflexive understanding of the new creative economy.

The partial semantic shift from a more explicit cultural perspective to a more inclusive creative industries approach was indicative of the impact of new digitally oriented technologies. It was also an extension, popularization and monetization of cultural and artistic endeavour, especially creativity and innovation.

Although there is convergence in thinking regarding the nature and scope of the creative economy, there is fluidity in the understanding and classifications of the sector (Haines et al 2017).

The creative economy is attracting growing attention. It is a situated at the cross-roads of (Policy Circle 2022):

- economics - contributing to Gross Domestic Product (GDP);
- innovation - stimulating growth, competition, and economic development;
- social value - predicated on knowledge, human and cultural capital and innate talent; and
- sustainability - which relies on large reserves of creativity and intellectual capital.

The continued shift to a global economy with increased emphasis on creativity and innovation, and the evolution and expansion of digital delivery platforms are reshaping the trade and consumption of cultural goods (UNESCO 2016; 2022; Haines et al 2017) There is an accompanying dematerialization of a range of cultural goods. This is especially the case in regard to film and music, which are increasingly offered as portable and digital services as opposed to discrete physical products (ibid.).

The creative economy in formal terms is one of the world's fastest growing sectors. Creative industries generate employment and income, stimulate innovation and contribute to socio-economic well-being, and civic and progressive intellectual reflection (UNCTAD 2022; Policy Circle 2022). A recent study finds it contributing just over 6.1 % to GDP (Gross Domestic Product) with averages between 2% to 7% of national GDP internationally (Policy Circle 2022).

At UN estimate sees the creative economy generating annual revenues of over $2 trillion and accounting for over $2 trillion annual revenues and providing almost 50 million jobs worldwide. Women make up about half of the global workforce, and that these industries employ more people in the 15-29 age bracket than any other sector. Television and the visual arts are the largest sector in terms of revenue, with visual arts and music the largest industries in terms employment (UNESCO 2022). These figures would have been higher had not the 2019-20 Covid19 pandemic devasted the sector. However, there are signs of a turnaround. Also, new technological and associated social trends are seen as playing a key role in expanding and transforming further the sector.

The promotion of creative economy in developing countries is more frequently advocated as a distinct and substantive development option (UNCTAD 2022). Such interventions would require more data on the dynamics, actors and agencies operating in the relevant creative sectors and economy in the country in question, as well as the related design and implementation of 'innovative and multidisciplinary policy responses' (ibid.). Part of the policy challenge though is to balance the growth of the new creative economy and CCIs while maintaining and even extending established levels of public investment in the infrastructure and ecosystems for the traditional Arts, Culture and Heritage (ACH) sectors.

Martell has an essentially sanguine take on the digital transformation:

> "Since the 2000s…to a large extent, the prevailing idea among those responsible for public cultural policies, in foundations or even in the cultural industries and media, was a mistrust, if not a rejection, of digital technology. The transformation was initially believed to be temporary, no more than a epiphenomenon of culture. Then, as the digital transition became more assertive and long-term, the

> challenge was to control or regulate the internet, in order to “protect” culture. As a result, some industries — first and foremost music — lost precious years. While this mistrust or rejection still prevails today, entire sections of culture have gone digital and many actors, often younger ones, have maintained a positive stance towards the internet. The web has been thought of in terms of opportunities, not just threats.”

By contrast Australian academic Julianne Schultz (2016) writes about the threats to national culture posed by the tech giants, sometimes called the Fang phenomenon (Facebook [now Meta], Amazon, Apple, Netflix and Google. She argues that big tech poses serious threats to national culture.

> “In the Age of Fang, we need to find persuasive and creative ways to answer those who argue that the national and local are now irrelevant. In the Age of Fang, we’re all global citizens, which threatens to make national cultural institutions both more vulnerable, but also more important than ever” (ibid).

In addition, big tech is making vast surpluses from the marriage of culture with technology.

> “As a result we are seeing a massive redistribution of wealth from the cultural sector, where meaning is created, to the technology sector, which has figured out how to market, distribute, reach and make money out of it in ways the cultural industries never imagined possible…
> But this is different. What is at stake is more profound, with implications that encompass but go well beyond the commercial. The speed and reach of the technology these companies deploy now challenge the mechanisms of public administration, regulation and taxation that have been refined and developed over a century or more.”

With the creative economy situated at the intersection of creativity, culture and technology, its core components most notably the CCIs are leading consumer of new technologies. It is consequently susceptible to an ongoing reshaping by such technologies (Hall and Takahashi 2017). Recent and maturing mega tech-oriented trends which are disrupting how we produce and consume are Virtual Reality; Augmented Reality; Artificial Intelligence and Blockchain (McKinsey 2018: Isa 2017). There is also increased interplay between these technologies. This aspect has of late been described as ‘extended reality’ – a encompassing term that embraces virtual reality (VR), augmented reality (AR) and mixed reality (MR). As Marrs (2022) describes these constituent technologies:

> “In the very simplest terms, VR involves putting on a headset to enter a fully immersive, 3D digital environment, AR involves using a phone or glasses to overlay computer images on top of the real world, and MR can be a combination of both technologies.”

The renaming of the Facebook corporate business in June 2022 as Meta has been differentially interpreted by commentators and analysts. For some the decision was informed by slowing growth rates of Facebook, but for others a particular ambitious and probably visionary move. The new name, derived from the sci-fi term metaverse, was chosen to depict the company’s vision for working and playing in a world of virtual and augmented reality. As it is understood more broadly, the metaverse is an amalgam of VR, AR, as well as comprising sensorial tech and spatial computing (Kilzi 2022). For Abhik Choudhury (2021) chief strategist for Salt & Pepper Consulting, and tech commentator for Forbes India,

> “Meta changes everything. It is the metaphor of the infinity sign in its logo. From waltzing between the physical world and dreams with the help of augmented reality to dancing in the wilderness of a

made-up virtual reality with no creative curb." What the metaverse does signify is the expansion of the creative economy into new digital realms and with new forms of interaction between creative and cultural workers and the tech giants.

The New Tech Giants and the Creative Economy

The growth of the so-called tech giants has been dramatic. In the late 2000s, only Microsoft was listed as one of the biggest companies in the world as measured by market capitalization. Nowadays, the top five usually comprises Apple, Alphabet (the parent company of Google), Amazon, Facebook, and Microsoft. Of these Apple, Amazon, Google and Facebook, have come to dominate the digital (platforms currently utilized by the CCIs (Galloway, 2017 and 2018; Pillay 2018; Wu 2018; Brown 2021).

By early 2018 the tech Four had a market capitalization of $2.8 trillion (the GDP of France), a 24 percent share of the S&P 500 Top 50 (Galloway 2018). The tech quartet's contribution to revenue in the US is well below corporate averages on the S&P, and at dismal levels in most countries outside the US (ibid.). The revenue streams from the Tech Giants outside the US are modest. For instance, in Ireland Facebook paid just €30m in tax in Ireland on revenue of €12.6bn for 2016.

With the smartphones and tablets now constituting the nexus of a range of products and services for the new creative economy, the fact that Google Android and Apple iPhones dominate the operating system space and the mobile app market, is significant. By 2018, Apple took in over 90% of the global smartphone profits. Effectively then Apple and Google determine which businesses can reach their customers and on terms for such transactions (Hearn 2018). In other words, the tech giants are in a position to structure and inhibit significantly the nature and growth of the new creative economy (Brown 2021).

With the effects of the ongoing Russian-Ukraine War and the inflationary effects and disruptions to supply chains, the value of big tech companies dropped in 2022, most especially Facebook (Meta). In early 2023 there are signs of a recovery, with the market capitalization and market position as follows: Apple – $2.434 T (1); Microsoft -- $2.019 T (2); Google (Alphabet) – $1.214 T (3); Amazon – $1.020 T (4); and Meta Platforms – $465.19 B (Companies marketcap 2023).

Critics have stressed the large-scale destruction of jobs by the Tech Four (Apple, Alphabet/Google, MetaPlatforms; and Amazon). This includes buying or squeezing out competitors with hundreds of over 500 companies acquired by the Tech Four since 2018;in recent years, constituting barriers to entry to new tech initiatives (Alcantara et.al. 2021). In the recent past, Facebook/Meta and Google wereare seen as comprising a virtual duopoly (Fortune 2017) in online-adverting, with decreasing effective competition and regulation (Hearn 2018; Kelly 2018; Brown 2021), although Amazon is gaining a degree of market share (Koetsier 2018). Facebook and Google, generate over half the world's digital advertising revenue, which is the fastest-growing sector in the advertising industry. In addition, in 2018 Facebook and Google derived around 98% and 90% respectively from their advertising revenue (Kelly2018).

Amazon, presently handles more than 50% of money spent online, has been criticized directly for putting retailers such as Toys R Us out of business (Hearn 2018). As both the major e-commerce seller and largest on-line platform for third-partly sellers it occupies a most favourable position (ibid.). This situation has changed somewhat with the growing share of Amazon and Apple of online advertising revenue. In other words, the Tech Four now dominate online advertising (Joseph 2023). This effectively tends to crowd out a number of smaller companies and has a ripple effect on the creative work in this sub-sector internationally (ibid.).

Competition regulators are struggling to come to terms with this new economy but there have been some successful rulings in the EU and India (e.g. Prakash 2022). Governments in developing economies in particular will need to devote more time and resources to challenge such developments in the digitized creative economy, and to develop more in the way of home-grown alternatives. In addition, ensuring that the creative and cultural workforces are able to compete locally and hopefully internationally should be prioritized.

Conclusion

This introductory chapter sets the scene for this exploratory report and outlines the international context and the lingering after-effects of COVID-19 on the CC sectors in both developed and developing economies. The intensification of precarity among cultural workers globally, is this report notes, not unrelated to the impact of neoliberal interventions in the cultural and creative sectors and beyond, and the increased dominance of the large corporate digital platforms in the shaping of new forms of the creative economy. Despite the growing policy enthusiasm for the creative economy and its industries, there has been a pronounced decrease in many economies over the years in regard to investment in public cultural infrastructure and education. With disparities more evident governments will need to re-evaluate their cultural policies and take more seriously the voices and working conditions of artists and cultural practitioners.

Chapter 1: Literature Review – International and South Africa

Introduction

This compact literature review is complemented by a range of de facto reviews of scholarly, official and practitioner writings that are contained in the relatively extensive international and comparative policy sections. This particular chapter focuses primarily on select literature on the nature of work in the CC sector and includes material on precarity and other related trends, debates and discourses.

The Nature of Work and the CC Sector

A key paradox of the CCIs and the wider creative economy is that with a greater recourse to machines, robots and AI application the world will shed a range of jobs in coming decades (Dao et.al. 2017). Jobs in cultural work and the creative economy generally appear to be more resistant, but not untouched. Precarity will, if anything, become more pervasive and constitute a defining quality of cultural and other work. Indeed, it is likely the short-term contractual, under-paid and non-remunerated professional work will endure.

Trends about the nature of work in the cultural sector show relatively identifiable structural movements internationally. Jobs are often short-term, contractual, and intermittent. The hours are long and dynamics of work bulimic. The workers in the sector generally exhibit a significant degree of mobility and often show a love for the work, notwithstanding the likelihood of lower pay scales. Some researchers note a mix of bohemianism and entrepreneurialism in the outlook of a good percentage of their respondents (Gill and Pratt 2013). On an existential level there is a good deal of insecurity and concern about securing work and earning sufficient money (McRobbie 2015). Maintaining and upgrading their skill sets and overall expertise and professionalism are related concerns (Connor, Gill and Taylor 2015; McRobbie 2015; Gallagher 2015; Santos 2017, Gill and Pratt 2013).

Thus, there is a continued tendency by policy makers to under appreciate the exploitative nature of work in many parts of the creative economy. The twin imperatives of working on a project-by-project basis, with the accompanying coordination costs for each project, and future-oriented working, contribute to an intensification of work. Indeed, the flexibility in flexible work is attached to the job rather than the individual (Conor, Gill and Taylor 2015:11). There is a further tension between the intensification of work on the one hand, and relative informality that is widespread in the sector in terms of hiring practices. This can result in amounts of unpaid time being devoted to networking to develop and maintain a profile (ibid.). A related development is the increasing use of unpaid internships (Shade and Jacobsen 2015:190).

Class, Social Inequalities and Cultural Capital

Research has also underlined the great number of younger people in CCI sectors, gender inequalities, relatively high levels of education (Hennekam and Bennett 2017; McRobbie 2015; Snowball and Hadisi 2017) as well as in certain societies a relative lack of caring and familial responsibilities. The widespread incidence of precarity in the creative economy, along with the intensity of competition and a relative lack of regulation in the industries concerned, tend collectively to reinforce inequalities in regard to gender, race and class. For instance, a recent study by Sophie Hennekam and Dawn Bennet on women employed in creative industries in the Netherlands suggests the prevalence of sexual harassment.

Furthermore, many women see this as part of their occupational culture and a condition for career advancement (Hennekam and Bennett 2017). The recent controversy regarding the predations of Harvey Weinstein, a prominent Hollywood mogul, indicates the prevalence of such practices at the pinnacle of the United States (US) film industry.

Internationally, signs of the widespread play of precarity in the creative economy, the intensity of competition and a paucity of regulation in the industries concerned, are reinforcing inequalities with respect to gender, race and class. Race and class factors also condition the world of work allowing the persistence of inequalities. In a recent study of the Philippine film industry, on key aspects of that country's shift to more explicit promotion of a creative economy, Janine Santos (2017) comments on the differing and unequal access to cultural work and how those practitioners 'born to wealth' are far more likely to gain access to the creative industries. As the author observes: "Success in the Philippine creative industries is often for the bourgeoisie".

New research by the universities of Edinburgh, Manchester and Sheffield (O'Brien, Miles et al 2022) challenges the notion that there was once a "golden age" of social mobility within the creative sector in Britain and reveals deep-rooted class inequalities that have not evolved since the 1970s. This undercuts the popular belief that the cultural and creative industries in the United Kingdom (UK) are meritocratic; that recruitment is on the basis of talent regardless of social origin. Rather the employment profile of the cultural sector shows that those from more privileged backgrounds have generally dominated in past decades.

Indeed, since the 1970s, the proportion of working-class people in creative jobs has halved. Data from the Office of National Statistics reveals that 16.4% of creative workers born between 1953 and 1962 had a working-class background, but that had fallen to just 7.9% for those born four decades later.

The research suggests that the changes in the socio-economic makeup of cultural sector workers are not a result of increasing social closure. Rather, they reflect class restructuring and the increasingly middle-class – class structure of 21st century Britain. As the proportion of the working class within the wider population decreases, so does the proportion of people with a working-class background accessing creative jobs. For older generations of creatives from such working class backgrounds the situation appears to have deteriorated because they are increasingly surrounded by younger peers from the middle class.

But worryingly, it still remains the case that the chances of middle-class children acquiring a job in the cultural sector rather than elsewhere in the economy are four times more than those growing up in working-class households (ibid).

If this pattern of profoundly unequal access is not directly addressed, it will in turn condition the types of cultural expressions and narratives made available to the wider public. With fewer working-class people working in the CCI sector, the kinds of stories that will be told and circulated are likely to become increasingly disconnected from the experiences and interests of working-class people. The lack of improvement in social fluidity in the UK over the last fifty years or so, will also exacerbate inequalities of access in regard to issues of gender and ethnicity (ibid).

The authors maintain that efforts to arts more open and diverse have not yet gained tractions. Developing access courses is not sufficient. Rather, deep-rooted reforms in regard to career support and hiring and promotion practices in the creative sector are required (O'Brien, Miles et al 2022).

A recent Manchester University report on the impact of Covid19 on Black, Asian and ethnically diverse aspiring and current workers in the CC sector in the UK revealed that respondents had a negative experience in respect of:

- reduced financial stability and job security;
- impediments to entry, advancement and retention in the CC industries;
- continued forms of racial and religious discrimination within the industry; and (iv) effects on mental health (Ali et al 2022).

The degree of the impact of the covid19 pandemic was particular high with 48% of all ethnically diverse respondents articulating that they were either becoming financially unstable or needed immediate assistance. Moreover, 70% of all ethnically diverse respondents were concerned about job security, particularly those with longer experience in the sector (Ali et al 2022).

A 2017 survey by Taylor of cultural and creative workers, though utilizing UK data, has global implications. Via a quantitative web survey three main findings were established. Firstly, contrary to Richard Florida's thesis, the attitudes of the respondents overall were no more meritocratic than those of the general population (Taylor 2017). In the second place, the respondents with the most pronounced belief in meritocracy in the sector are located in the most privileged positions, most especially those who are the highest paid by the sector. Thirdly, the study reinforces qualitative research on the sector, emphasizing that the worst-rewarded workers are most conscious of structural inequality (ibid.). This suggests that access to the sector and individual career trajectories are not likely to change much (ibid.).

A study by Ashton & Ashton (2022) and a related popular one by Heidi Ashton (2022) examine further details and dimension of the play of class and cultural capital in the UK. They note that 93% of the population attend state-funded schools compared to 7% attending private-funded schools (ibid). Yet, citing research from the Creative Industries Policy and Evidence Centre, Ashton (2022) stresses that people from more privileged backgrounds are twice more likely to be employed in the cultural sector. In the music, performing arts and visual arts category, only 22% are from more working-class backgrounds compared with 60 % from more advantaged backgrounds. In addition, citing a Sutton Trust study, she also points out that 38% of the wealthiest individuals in TV, film and music sector/s, and 44% of newspaper columnists attended private schools (Ashton 2022).

Government's professed intention of tackling elitism of the cultural sector, Ashton argues is undercut by its failure to deal with a fractured education system and deliberate policies of undermining the arts in state schools. This can be seen in the austerity drive and marginalization of arts-based subjects and the English Baccalaureate. The focus on 'core subjects' in state education and the introduction of the 'English Baccalaureate has led to a prioritization of science, technology and engineering, and maths (STEM) subjects. In contrast, private schools in the UK are investing heavily in arts and culture instruction. Of the 20 odd schools that were examined, they had collectively 33 theatre space for teaching and performances, with facilities often better those of even professional theatres. All twenty schools had dedicated provision for concert performances. Ninety per cent of the schools had dedicated rehearsal and music practices rooms. Furthermore, all schools had fine arts studies, which provided for specialist training in areas such as sculpture, ceramics, photography, and digital media (Ashton & Ashton 2022; Ashton 2022).

The Reproduction of North South Divides in the Creative Economy

Of greater significance was the fact that the facilities were supported and partnered with industry professionals and programmes. In addition, given the higher salaries offered by private sector schools, the teaching staff have industry experience and linkages. This facilitates up-to-date and skilled teaching, and allows future contacts for the learners, and reinforces cultural capital (Ashton 2022).

Kolbe (2021a), via a German case study, shows that certain progressive diversity initiatives in the Western classical music sector, though well intended can lead to the reproduction of elitism and 'race making', thereby helping secure the privileged positions of 'middle-class whiteness' (ibid.).

In a separate study (Kolbe 2021b) the complex ways arts institutions function in increased financialised neo-liberalism are traced via a series of interviews with gallery directors, museum curators, art consultants and artists. Increased austerity in public funding of the arts contributes to wider inequalities, pushing organizations and cultural workers to be entrepreneurial, embrace risk, be more self-interested and be more brand-conscious (Kolbe 2021b).

Ilka Eickhof (2021) in a popular piece highlights a different kind of intervention which reinforces the play of social and class inequality in developing economies. In a case study of Cairo, she notes how the 'social dynamics and ambivalences' that accompany European funding in the Global South through cultural diplomacy and agencies such as the British Council and Helvetica, reinforces certain structures of inclusion and exclusion in situations where many cultural practitioners compete for few opportunities from international funding institutions, given the relative paucity of local (Egyptian) funding. There is, she argues, a 'cookie-cutter' approach to cultural projects favouring 'certain aesthetics as well as accepted, uncontroversial content' thus reproducing 'an unquestioned consensus and sameness' (ibid). Artists are thus not able to find culturally inspired alternatives to the economic (neo-liberal) models with which they have to live (ibid.).

She notes how certain kinds of economic language, such as the discourse of 'creative industries', 'has seeped deep into the everyday in western Europe and is being imported into Egypt through funding' (ibid.). The concept of failure is one example of how such economic language has permeated the everyday. Examples of this phenomenon can be found in the CC sector in Cairo and Egypt more generally, with self-perception mediated by economic definitions of failure and success leading to self-exploitation. Thus, many cultural producers and knowledge workers are exposed to flexibility work times, voluntary work, illegal employment, all contributing to increased competition for scarce funds and employment. In addition, she points out, self-regulative labour can compound negative physiological and psychological effects (Eickhof 2017).

In many developing countries, the inequalities in regard to matters of gender, are persistent. For instance, according to an analysis by a Brazilian state organization, the percentage wage inequality between men and women is higher in the cultural sector than the collective percentage of all other sectors, with women in the cultural field in 2018, earning on average only 67.8% of men's salaries, as opposed to 82.8% in all other sectors (IBGE, SIIC 2018).

Complexities of Precarity

Morgan et al (2013) suggest that the subjective experience of employment insecurity in the CC sector may be more contradictory than is suggested in discourses on ‘fragmentation’ and ‘flexploitation’. They argue that the expectation of insecure employment has become something of an accepted state of affairs. This the authors suggest may reflect the impact of intergenerational changes in the general youth labour market and the prevailing nature of employment in creative industries during all the career stages. The articles draw on eighty life histories drawn from a region in Western Sydney (Australia) where there are high levels of unemployment and low socio-economic status. The perspectives of the young creative workers in question problematizes the assumption that such workers look to evade insecure work or search for the stable jobs of previous decades. They appear to have accepted the ‘vocational restlessness’ in their industries and take seriously the idea that not occupying one position for too long can have a liberating effect and inculcate adaptability. Thus, union campaigns underlining the ill effects of insecurity are significantly less likely to attract them.

Stuart Cunningham (2014) cautions on a too expansive invocation of precarity in regard to creative and cultural work. Using national data on the Australian creative economy at the time, he argues that early rhetoric around the CCIs often took overly seriously the romantic version of creative labour and the question of precarity, thus underestimating the complexity of employment in the expanding creative economy. What scholars writing about precarity in the creative economy tended to do, he contended, was to conflate creative employment with precarity with industry, assuming that the only significant location of creative labour is in the CCIs. The Australian figures at the time showed that in fact there were more creatives outside the creative industry sector than within it (ibid.).

Associationism, Collective Action and Trade Union in the CC Sector

The question of associationism, collective action and the viability of trade unions in the diverse CC sector is an area which is seeing a something of an upturn of interest in recent years, but there is still a relative paucity of work most especially in respect of developing countries.

Bethany Staunton (2020) considers the situation in regard to trade unions in the CC sector in the UK, focussing on the establishment and formalization of the Artists’ Union England (AUE) in 2016. She points out that trade unions have existed in the UK arts sector for some time and new unions have emerged. There are particular challenges for unions in a fragmented and shifting terrain. A major impediment is the lack of recognition and status accorded many artists. She cites Zita Holbourne, an artists and trade union organizer:

> “If you’re working in the arts, you’re very undervalued…There’s a complete disrespect towards artists, across the world. They’re expected to live off thin air, from the love of what they do. But imagine a world without art: it would be miserable.”

Staunton (2020) considers the rationale for the formation of the new AUE is that it fills the need for a union dedicated to representing professional visual and applied artists. The union’s membership is modest, and resources are limited. Its staff comprises solely of volunteers. Paid organizers are needed to grow the membership. The union, however, is showing signs of growth and seeks to gain recognition from established arts organizations and public bodies in order to negotiate collective agreements within the sector. In a precarious sector, Staunton notes, there is a certain cautiousness among artists in regard to labour activism. Members often don't want to appear too adversarial in regard to employers as it can impact on their work (ibid.).

Among the work undertaken by the AUE are in regard to organizations, firms and individuals reneging on contracts; rogue landlords leasing expensive studio facilities not meeting health and safety standards; and the financial difficulty of living solely from their art. In addition, a growing austerity in the country has hit the sector hard, with spending by local councils on art reduced significantly during the 2010s.

Hambleton (2018) notes that established entertainment industry unions are often perceived to be in decline in North America and internationally, given shifts in the nature of CC work, and thus requiring new forms of organizing. However, she shows how the International Alliance of Theatrical Stage Employees and Allied Crafts (IATSE), which champions the interests of precarious workers in the entertainment industries in North America, has in fact expanded its membership. As an older-style union this is not without significance. Notwithstanding a shift from seniority-based to skills-based hiring practices from the 1990s onwards including in the CC sector, IATSE has maintained and in cases increased its membership. This is partly because IATSE has managed to balance and deploy the seemingly opposing discourses of skill-based and seniority-based labour. The notion of hiring based on 'skill' proved an effective organizing strategy, but the intensification of labour in the precarious working conditions for IATSE employees, demanded a more entrepreneurial idea of labour (ibid.).

Curtin and Sansom (2016) show how the increased globalization of the film and television industry has gone hand in hand with increased precarity in the industry internationally. Among the better known of creative work sectors is that of the film and television industry. Historically, Hollywood has been the touchstone for both nationally and internationally for the industry. Hollywood also saw the emergence of the unionization of film and later television cultural workers. However, California now faces competition within the US and internationally. Regions such as Georgia and Louisiana have a right to work entrenched in state statutes and a suite of incentives to attract film makers and production. Other states and centres are also looking to attract this business. In addition, restructured film studios have increasingly been looking globally.

Although film and television workers have traditionally been categorized as among the creative sectors' elite industry workforce, the international restructuring of the US-led industry has impacted on such workforces in developed and developing economies. The impact on global neoliberalism in recent decades on the media industry through i.a. deregulation and privatization and the increased influence of transnational capital and associated technology developments including satellite, cable, internet and mobile communications has placed more pressure on national public and private media structures, and intensified competition between local and international providers (Curtin & Sanson 2016).

Producers have become increasingly adept at playing off one locale against the other in a ceaseless pursuit of the bottom line. The mobile and globally diffused mode of production is predicated on inter-regional competition, which undermines pay rates, benefits and job security for media workers globally. Workdays are often longer and productivity pressures more extreme. And it would appear that creative autonomy is being diluted. Not only has this added to the finance, physical, psychological strain on workers and families but it has also destabilized a number of independent businesses that have serviced the major studios. This is not to say that new opportunities are not being created, but rather that the socio-economic margins have been squeezed (Curtin & Sanson 2016).

A case study of creative workers and the industrial relations system in Italy, by Bellini et al (2018) suggests similar trends in most of the European Union (EU) member states. The authors note that notwithstanding their precarious situation and structural vulnerability, creative workers are often hesitant in joining trade unions and engaging in collective action. Trade unions have struggled in developing viable forms of organization and incorporating these in collective bargaining (ibid). There is also they note little in the way of studies of interest representation and industrial relations vis-à-vis CC workers (Bellini et al 2018).

Amanda Coles (2015) explores the contradictions in regard to the role that unions in Ontario, Canada play in the film and television association, FilmOntario. The notion of the creative economy is presented as an economic development strategy to the cultural workforce. Film Ontario has been successful in negotiating tax incentives and funding. And its success in policy advocacy is tied closely to union resources. Notwithstanding this, the unions' decision to work within creative economy discourse/s, and in association with the employers concerned, has inhibited core issues on the quality of work being articulated as one of the stipulated outcomes of the policy design process. In other words, the ideological and associational choices unions make as policy actors, when representing the collective voice of the (creative) working class, has determines the degree to which cultural labour problems are or can be understood as cultural policy problems (ibid).

Globalisation and the Cultural Worker

Kate Oakley (2016) argues that the discourse of the creative economy since the early 2000s is part of a depiction of 'globalization' that has run its course. Progressive cultural policy aims such as an increased cultural diversity, an ending of the barriers between 'high' and 'low' culture and the recognition of the importance of markets in cultural production have been absorbed and redeployed within a more circumscribed focus on jobs and growth. This has resulted in culture-led developments, and the CC sectors themselves, reproducing social and economic inequality across the world. A more international and pluralistic approach to cultural policy which takes account of inequalities in cultural work is imperative. By implication, there should be a more international interplay between cultural workers and activism and collective action on national, regional and international levels.

Oakley notes that while cultural workers are still inclined to identify with the disenfranchised locally and globally, the 'immanent critique of capitalism', which is seen to be bound up with the practice of culture, has in fact been supplanted by a more comfortable but more accommodating and hence destructive partnership with the state. While discourses of social justice offer progressive movements within the arts sector, these are illusory. Current approaches have failed to challenge meaningfully the entrenched power dynamics of the cultural sector. This failure should indeed be the beginning point for a 'self-reflexive' audit of the absence of progressive change in the sector. A self-reflexive approach is necessary as a corrective to the subversion of the progressive mind-set and the 'non-performative' psychopathy of the cultural sector. Without this kind of approach initiatives styled as culturally democratic are likely to reinforce structures and practices of exclusion (ibid).

Other writers have developed certain of these themes in recent years. For instance, it has been argued (Gilmore et al 2019) that despite increased emphasis in cultural policy discourse on the importance of engaging with ‘the local’, cultural policy research has tended to privilege the national and international spaces as the key sites for the realization of cultural policy. Such emphases means that the particularities and dynamics of inequalities within the CC sector at local and sub-regional levels can be neglected. Similarly, the connections between the local and global may remain underdeveloped (ibid) with too much focus on the role of the ‘city’ in the creative economy (ibid.).

Oakley et al (2017) consider the degree to which spatial inequalities reinforce other forms of social inequality in cultural labour markets, including cultural capital. It does so using the example of London, an acknowledged hub for the creative and cultural industries. Using pooled data from 2013 to 2015 quarters of the United Kingdom’s. Labour Force Survey they consider the social makeup of London’s cultural labour force, and reveal the extent to which, rather than acting as an ‘engine room’ of social mobility, London’s dominance in fact reinforces social class disparities in cultural employment.

A further factor is the underdeveloped state of professional associations and trade unions in many of the CCI sectors. Their relative absence impoverishes the collective sense of being a creative or cultural workers and in its place, there is a more inward-looking and individual outlook (Connor, Gill and Taylor 2015; 13). But there are signs that flexibly employed workers have begun to respond more coherently and collectively to the incidence of precarity in the CCI sector. Initiatives include collective organizations, campaigns, and mutual aid. The locus of these responses has been in the larger and more specialized CCI centres such as London, Montreal, Toronto and New York (de Peuter 2018). Also, those industries in the digital creative economy seem more influenced by such activities. Central to such efforts is the repurposing of digital platform and digital labour capacities in building collective actions and structures. Among the approaches and techniques used are name-and-shame protests by interns, and generally social media is spurring local labour activism (de Peuter 2018). The other interventions include looking to build labour solidarity among diverse workers across spatial localities. The Freelancers Union is one such example.

In advanced economies with a union tradition, social media has become important in organizing efforts by labour unions. In recent years Facebook, Twitter, Whatsapp and other social media platforms have been enlisted in organizing efforts to the increasing concern of employers. Such technologies allow workers to begin the initial stages of organizing and to discuss issues in their workplace. It also allows workers to coordinate with potentially allied national labour unions. Despite these efforts the levels of unionization in the CCI sector are low.

Despite the intensification of work and the play of precarity in the CCI sector globally, there has been an emergence in recent years of alternative approaches to cultural economic production and the associated work dynamics. In a study of the Berlin fashion industry, Angela McRobbie (2015) finds a number of cases of cultural industries informed more by social democratic practices than prevailing neo-liberal models, which she contrasts to centres such as London. Inter alia the notion of self-entrepreneurialism is significantly less important in discourses on creative work by fashion designers, associated cultural workers and policy makers. In Berlin, the fashion scene is informed strongly by a commitment to social projects with public support. Nevertheless, there are distinct limits to embedding such models on a broader scale. The policy imperatives of the policy elites of the majority of developing and emerging economies would appear to be less susceptible to such interventions. This is due in part to the public costs of such interventions. However, there are signs internationally of the closer interaction between social enterprises and the CCI sector.

Emergence of New Forms of Activism

Increased activism during the Covid-19 pandemic and in the immediate post-Covid period, have introduced new dynamics into our understanding of the work and experiences of artists and cultural practitioners globally, and the disjunction between the declining fortunes and other corporate and state agencies operating within and on the shifting borders of the creative economy. Roberta Comunian & Lauren England (2020), via a meta-analysis of survey and research projects on the effects of C-19 on the creative and cultural industries in the UK, raise several pertinent points. They note the disjunction between a fairly wide acknowledgement in academic literature of the existence and persistence of substantial levels of precarity in creative and cultural work, and the seeming invisible nature of such a phenomenon in 'the eyes of policy and policymaking'. Comunian and England (2020) chart the common concerns in relation to visible and invisible issues that require addressing. They find that the major issues are both structural and have been constituted over and extend beyond this particular pandemic. New approaches by the state, industry and other stakeholders are required to deal with the question of precarity in the CC sector (ibid).

Vlassis and De Beukelaar (2018) internationalize elements of this theme. They argue that since the early 2000s, a number of international government organizations have championed the notion that the creative economy constitutes a 'feasible development option'. Most prominent in this regard have been the United Nations (UN) agencies, UNCTAD, the UNDP and UNESCO. Thus, UNCTAD and the UNDP took the lead in preparing the 2008 and 2010 Creative Economy reports, while the UNESCO and the UNDP took joint responsibility for the 2013 report.

Overall, there has been a quite systematic interaction with other international government organizations as well as with certain bilateral agencies such as the British Council. These interactions have helped globalize the 'creative economy' policy agenda by conditioning and 'harmonising' the policy responses of developed and developing economies on the matter. These interventions have also sought to create new forms of creative industry governance (ibid).

Despite the increased interest worldwide in CCIs and cultural and creative workers there is still a relative paucity of research in regard to issues and trends in regard to collective associational behaviour, use of collective bargaining and recourse to unionization]. This is particularly the case in developing societies, including South Africa.

A European Commission (EC)-funded study of Industrial Relations in Creative Sectors by Alberto Gherandini (2017) notes that in regard to cultural workers in the EU region, the recourse to collective action and bargaining, and unionization is modest at best. However, the identification of the traditional social partner organisation of creative workers at national et European level is not an easy task.
Gherandini suggests that vulnerable creative workers 'barely use' either collective action or traditional industrial relations tools in order to overcome the risks of the markets and to safeguard their interests. This in turn is related to the decline of the power of the unions in the early decades of the 21st century and a tendency to focus on the 'insider' dimension of a dualized labour market (ibid.). A further cause is

the low propensity of the younger generation to join parties and representative organizations. However, the author points out, the identification of the traditional social partner organisation of creative workers at national et European level is not an easy task.

Gherandini (2017) stresses that cultural workers are not acquiescent or passive agents in regard to the prevailing social structures. Rather workers adopt mixed strategies. For one, creative workers may opt for an individual strategy that seeks to protect and enhance their creative reputations and their portfolio-based careers as a means to ensure continuing work within the industry. Secondly, in some institutional settings such as Denmark, or some specific subgroup, such as journalists, workers may be substantively unionised and involved in industrial relations. In other cases, creative workers, may not opt for either individual nor collective approaches; rather, new forms of collaboration have emerged or become more apparent. These include partnerships among professionals co-located in co-working spaces; virtual professional communities; and social media identity movements.

Among the study's main conclusions is that while emerging creative industries, such as the new media, present a lack of long-standing traditions and institutions they can be a fruitful field for work unionisation (ibid. 30).

South Africa and Studies of Precarity in the CC Sector

Studies on the play of precarity and the implications thereof in the South African context are modest at best. However, there have been some useful studies of late that provide collectively and individually a number of insights.

Ben Scully (2016) in a critique of Guy Standing, argues that while precarity in the world of work has come to be conceptualized as a global phenomenon, there has been on the whole a tendency to deploy a 'somewhat simplistic assumption of global convergence' (Scully 2016: 160). Although precarious work has been on the rise globally, there are real differences in the histories of work and work between the economies of the Global North and South (ibid.).

Scully argues that the narrative which contrasts current situations of precarity to a secure past is not accurate for many workers in the Global South. Precarious work has been a long-standing institution in the Global South although the impact of neoliberalism and globalization are important in the periodization of the restructuring of global labour. The erosion of work security and the "old" politics of labour from the early 1980s to the present has been well charted by Standing and others. During the same period in the South, there has been an emergence of new forms of labour politics by means of which workers contested precarity within and without the workplace. Social movement unionism noted by Seidman (…) in Brazil and South Africa was part of these processes. Subsequent research has shown that such forms of activism were times of innovation and increased militancy for workers in a number of developing countries (Scully 2016). These late 20th century developments faced increased challenges in the early decades of the 21st century. Nevertheless, there are still continuities with old style labour politics through industrial strikes and union recruitment. There have also been new forms of collective action by structurally vulnerable workers (ibid.)

While there have been a range of work about precarious labour in South Africa (e.g. Barchiesi 2008; Ewinyu, A, Masikane, F & Webster, E (2021); Anwar & Graham 2022; Raniga 2022; Brandt 2022) there is a rather modest scholarship on precarity in the cultural and creative sectors.

Books by Louise Meintjes (2017 and Sarah Ives (2017) on the tangled history of Zulu Ngoma dance performances, and Rooibos production respectively, show how cultural products are bound up by the structural violence in South African society, past and present, and restructured by local and global value chains. As reviewer Aran Mackinnon (2018) notes of the two texts:

> "The authors emphasize the historical and current precariousness of the majority of South Africans who struggle to make a living in the country… It is … this very precarity that defines and makes possible the essence of the cultural resources that people draw upon." (ibid).

A range of studies by the South African Cultural Observatory have provided important statistics and accompanying analyses of the dynamics of precarity in the creative and cultural sector. The most recent round of mapping studies of the Observatory have placed an increased emphasis on this dimension.

The Covid19 pandemic has both revealed and exacerbated the prevalence of precarity in the relevant labour markets. South African Cultural Observatory (SACO) provided two reports – one an initial scan of the scale and effects of the early effects of the pandemic and a later study, one year on from the initial study, and which provided a more effective take on the short and longer-term effects of the pandemic one year on. (SACO 2022).

A general overview of employment in the cultural and creative industries by Hadisi and Snowball (2017) while not focussing specifically on the question of precarity, does provide useful insights.

i. They find that the workforce in cultural occupations in South African is somewhat less racially diverse than that in non-cultural occupations, but there are relatively large differences between the cultural domains (ibid).
ii. There is a slightly higher proportion of men working in cultural occupations than women (%51.7% to 48.3%). But this is higher than in the non-cultural occupations here men comprise 52.5% of employed persons (ibid).
iii. Between 2008-2013 formal sector employment constituted a greater percentage of cultural jobs than informal sector employment. However, significantly formal CC sector employment declines from 2012, while the corresponding numbers of informal sector jobs increase.
iv. From 2014 the informal sector comprises a greater proportion of jobs than the formal sector.
v. During the same period, the percentage of persons in cultural employment who work for someone decreases, while the percentage of 'own account' or freelance workers increases (Hadisi & Snowball 2014).
vi. Cultural employment grows fasters than non-cultural employment but is more volatile and more affected by economic downturns.
vii. There is some evidence that cultural occupations are not as open or meritocratic as might be desired.

Overall, these findings are indicative of the international trend to increased precarity in the CC sector labour market in South Africa.

In terms of case studies, Snowball and Mapuma (2021) examine a set of micro-enterprises making bespoke garments for customers using a particular South African textile termed Shweshe. Internationally economies CCIs can play an important role in national economic development. In South Africa, as no doubt in many other developing economies, cultural firms tend to be small and employment is precarious, with a high level of informality and freelance work. The findings of the study indicate that the informality of the business does not have a particularly large impact statistically on turnover all other things equal. This suggests that the informal business model may be a self-conscious and rational choice for firm owners operating in a cultural sector with a project-based orientation, rather than an enforced survivalist strategy (Snowball & Mapuma 2021). Nevertheless, Employment creation is, however, greater for those micro-enterprises operating in the formal sector, suggesting that there may still be benefits to formality for some firms (ibid).

Farmer (2021) provides an ethnographic study of the work and lifestyles of a community of indie game creators in Cape Town and provides material and insights into the complexities of precarious labour in the creative industry sector in South Africa. She argues that these game creators try to 'evangelize' their craft, by looking to grow their sub-sector of the industry by attracting additional creators and consumer, by developing networks, and establishing their careers by creating distinct cultural products. This enables them to better adapt to precarity and financial insecurity. In addition, given that the bulk of these game creators come from a particular ethnic and generational group, and they are able to leverage cultural capital. Importantly, as Farmer (2021) points out, they also tend to eschew mainstream expectations and conventional criteria for success (ibid.).

Conclusion

This international and comparative literature review has focussed on the dynamics of precarity in the cultural and creative sectors. It notes that there are often class, ethnic factors and the mobilization of cultural capital in regard to entry and career progression in the sector, the particularities of which would appear to vary with regard to the country or region in question.

There are also North-South dichotomies at play in areas such as international donor relationships with local cultural and creative economies. We have seen as well that precarity has deepened in creative economies worldwide. And as a range of scholars argue such developments can be tied with the increased deregulation of the world economy and the erosion of state and union protection of cultural workers.

The development of transnational platforms and large corporate entities has eroded in a number of respects the options open to local firms in the creative and cultural economy. Nevertheless, as some scholars argue the occupational complexities and the heterogenous and shifting nature of the creative economy needs to be taken into account.

Certain sets/groups of cultural workers and practitioners see the precarity as a given and look to negotiate and even exploit the opportunities. And some such workers have the networks, cultural capital and an outlook that welcomes a variety of work and experience as opposed to more corporate and structured occupational satisfaction.

Nevertheless, there has been a discernible intensification of work and increased insecurity in swathes of the cultural and creative economy globally, and an accompanying erosion of traditional public spending on arts and culture. More reflexive and innovative interventions are required globally to reinforce the status of the artist and cultural workers and to ameliorate working conditions through some coherent social security measures.

Chapter 2: Methodology and Research Methods

Introduction

This research used a substantive mix of research methods in conducting this outcome evaluation. This included secondary data (desktop) research, quantitative and qualitative fieldwork. This chapter provides a compact discussion of this report's methodology and research methods. The research is of a mixed methods nature. It has a substantive desktop literature review. The review comprises a historical and international dimension and includes a modest but not inconsequential body of literature on the South African dimension of the precarious nature of CCI-work. In addition, it provides an international and South African policy context.

Quantitative analysis[1]

Until recently, there was no Cultural Satellite Account (CSA) for South Africa that Stats South Africa (SA) had compiled. The initial CSA was prepared by a firm of economists appointed by the SACO. In 2021, Rhodes University assembled a team to develop an in-house CSA. Developing a CSA for South Africa and incorporating this into a Social Accounting Matrix (SAM) or Input Output (IO) macroeconomic impact assessment model is an internationally well-established concept.

The Input-Output Table

An IO table focuses on the interrelationship between industries in an economy with respect to the production and uses of their products and the products imported. Generally, the **IO** framework is represented in a table. In this form, the economy is viewed as each industry listed across the top is a consuming sector and down the side is a supplying sector.

Table 1: Basic Input-Output Transactions Table

		Producers as Consumers								Final Demand			
		Agric.	Mining	Const.	Manuf	Trade	Transp	Services	Other	Personal Consumption Expenditure	Gross Private Domestic Investment	Govt. Purchases of Goods and Services	Net Export of Goods and Services
Producers	Agriculture												
	Mining												
	Construction												
	Manufacturing												
	Trade												
	Transport												
	Services												
	Other Industry												
Value Added	Employees	Employee Compensation								Gross Domestic Product			
	Business Owne	Profit-type income and capital consumption allownace											
	Government	Indirect business taxes											

Source: Miller and Blair (2009:3)

Although most industries will provide goods and services for final consumption, they will also provide inputs into the production process of other industries. Besides buying inputs from other industries, producers need labour and capital to produce the goods and services. In addition, firms may receive subsidies or be

[1] This section is based on the methodology used in the SACO Mapping Study

required to pay taxes. Companies would also import part of their input for production in an open economy. The 'recipe' for the manufacture of an industry's products or services can be seen in each column.

Similarly, firms will produce products that will be used as inputs for production in other industries. They will supply goods and services (final demand) for consumers, investors and the government. They will also provide goods and services to foreign markets.

As discussed above, the **IO** table shows how the GDP for a country is calculated using the production method, the expenditure method and the income method. The table shown above includes only a few industries. Many **IO** tables have considerably more industries listed. However, the greater number of industries, the more complex and complicated it becomes to 'balance' the table, bearing in mind that the three methods used to calculate the GDP must arrive at the same value.

Table 2: A Highly Simplified Input-Output Accounting Framework

	Industries	Net final demand	Total output
Industries	F	Y	X
Value added (Primary inputs)	V		
Total input	X		

Source: United Nations (1999:4)

Although the table makes it easier to grasp the economic concepts behind the analysis, an **IO** model primarily consists of a system of linear equations. Each equation describes the distribution of an industry's product throughout the economy.

Leontief introduced the assumption of fixed-coefficient linear production functions relating to input used by industry. These matrices, including the F-matrix, are shown above.

These relationships for a basic three-sector model can be written as follows:

$$a_{11}X_1 + a_{12}X_2 + a_{13}X_3 + Y_1 = X_1$$
$$a_{21}X_1 + a_{22}X_2 + a_{23}X_3 + Y_2 = X_2$$
$$a_{31}X_1 + a_{32}X_2 + a_{33}X_3 + Y_3 = X_3$$

Equation 1

In matrix form, these equations can be written as:

$$[a_{11}\ a_{12}\ a_{13}\ a_{21}\ a_{22}\ a_{23}\ a_{31}\ a_{32}\ a_{33}\ ][X_1\ X_2\ X_3\ ] + [Y_1\ Y_2\ Y_3\ ] = [X_1\ X_2\ X_3\ ]$$ *Equation 2*

However, in any economy, there are considerably more than three industries, and the more general way of denoting these is as follows:

$$a_{11}X_1 + a_{12}X_2 + \cdots a_{1n}X_3 + Y_1 = X_1$$
$$a_{21}X_1 + a_{22}X_2 + \cdots a_{2n}X_3 + Y_2 = X_2$$
$$\cdot + \cdot + \cdots \cdot + \cdot = \cdot$$
$$a_{n1}X_1 + a_{n2}X_2 + \cdots a_{nn}X_n + Y_n = X_n$$

Equation 3

In matrix form, this is denoted as:

$$[a_{11}\ \cdots\ a_{1n}\ \vdots \ddots \vdots\ a_{n1}\ \cdots\ a_{nn}\ ]X_1\ \vdots\ X_n\ + Y_1\ \vdots\ Y_n\ = X_1\ \vdots\ X_n$$ *Equation 4*

Table 3: Technical Coefficients of an IO Table (Matrix A)

		Buying sector				
		1	…	j	…	n
Selling sector	1	a_{11}	…	a_{1j}	…	a_{11}
		⋮		⋮		⋮
	i	a_{i1}	…	a_{ij}	…	a_{in}
		⋮		⋮		⋮
	n	a_{n1}	…	a_{nj}	…	a_{nn}

Using matrix notation, it is usually written as:

$$AX + Y = X \qquad \textit{Equation 5}$$

This relationship is the basic **IO** system of equations, where:

- Matrix A is the **IO** coefficient matrix;
- Matrix X is the output vector; and
- Matrix Y is the net final demand vector.

The solution of an **IO** model is described below.

Final demand (Y) consists of the household, government and rest of the world sectors. Value added (V) to the producing sector consists of the returns to factors of production (capital and labour) that receive interest and wages.

IO tables and associated models are generally constructed from observed data for a particular area. This area often refers to a nation: it could also refer to sub-national areas. The data are also collected for a given period of time, usually a year. Although theoretically, the **IO** table applies to units of production, this is impractical, and it is generally presented in monetary terms.

The discussion above referred to a closed economy and therefore did not include international trade (imports and exports). This is necessary because very few industries produce goods or services without using some imported components.

Social Accounting Matrix

A SAM, much like an IO, is a conceptual framework that represents all economic transactions flows taking place within an economy in a single year thus giving a comprehensive static picture of the economy. Unlike the IO, it is extended to include non-national accounting flows. These include the flows between households, firms and government.

Table 4: A simple Social Accounting Matrix

	Firm	**Household**	**Government**	**Rest of Economy**	**Net Investment**	**Total (Received)**
Firm		C	G_F	$(X-M)_K$	I	$C+G_F+(X-M)_K+I$
Household	W		G_H	$(X-M)_C$		$W+G_H+(X-M)_C$
Government	T_F	T_H				T_F+T_H
Rest of Economy	$(X-M)_K$	$(X-M)_C$				$(X-M)_K+(X-M)_C$
Net Investment		S_H	S_G			S_H+S_G
Total (Expended)	$W+T_F+(X-M)_K$	$C+T_H+(X-M)_C+S_H$	$G_F+G_H+S_G$	$(X-M)_C+(X-M)_K$	I	

Source: https://en.wikipedia.org/wiki/Social_accounting_matrix

SAMs are square (having the same number of columns as rows) because all institutional agents (Firms, Households, Government and 'Rest of Economy' sector) are both buyers and sellers. Each cell shows payment from its column account to its row account.

Much like the IOs columns denote expenditures (buyers), and rows correspond to receipts (sellers). A SAM does not include the rationale that determines the technical relationships that generated its values. No general behavioural relationships are included.

Splitting the Sectors

In this study, sectors and subsectors were assigned to domains using information from the guidelines provided by the UNESCO Framework for Cultural Statistics (2009), sector-specific research and information, and previous SACO mapping studies. Where specific sectors contained CCI components, but not entirely, use was made of other documents, including Stats SA's Annual Financial Statistics (AFS), surveys and other research to determine ratios that were used to split these sectors into the specific CCI domains and non-CCI sectors. A conservative approach was used to ensure that the CCI was not overestimated. The original totals were compared to the new total to ensure that there was no double counting or inadvertent exclusions.

In principle, the F-matrix should be split according to the turnover of CCI sub-industries. The value-added matrix, or V-matrix, should be divided according to the returns of the factors of production (compensation or Gross Value Added [GVA]). The Y-matrix, representing final demand, can be divided using either the total turnover or output or the proportion of CCI products and services purchased by households, government, or exports.

Splitting the V-matrix (Input Requirements by Each Industry)

Before estimating each of the CCI technical coefficients, it is necessary to divide each cell in the matrix, F_{ij}, so that it represents the CCI components of those industries. Each cell is split, where applicable, into CCI and non-CCI components.

$F_{iujv} = F_{ij} \times u \times v$ Equation 1 where:

- F_{ij}= represents the requirements of industry i of industry j's products prior to separating the CCI products from the non-CCI products;
- F_{iujv} = represents the new requirements of industry i of industry j's products after separating the CCI products from the non-CCI products;
- u = The proportion of CCI output in the buying industry; and
- v = The proportion of CCI output in the selling industry.

Calculating the technical coefficients is done the same way as discussed above, i.e.:

$$x_{iujv} = \frac{F_{iujv}}{X_{iu}}$$ *Equation 2*

To keep it simple, the technical coefficients will be simply referred to as x_{ij}.

Splitting the Net Final Demand Matrix

A similar procedure to the one described above was followed to derive a new net final demand matrix, or Y-matrix. To keep the figures consistent, turnover figures from the AFS were used where possible, and estimates were made for the other sectors where this was not possible.

$F_{iujv} = F_{ij} \times u \times v$ Equation 3

where:

- F_{ij}= represents the requirements of industry *i* of industry *j*'s products prior to separating the CCI products from the non-CCI products;
- F_{iujv} = represents the new requirements of industry *i* of industry *j*'s products after separating the CCI products from the non-CCI products;
- u = The proportion of CCI output in the buying industry; and
- v = The proportion of CCI output in the selling industry.

Splitting the Value-Added Matrix

The value-added matrix, V-matrix, was split according to the net profit before providing for company tax and dividends (for the gross operating surplus row) and employee costs (for the compensation row).

$F_{iujv} = F_{ij} \times u \times v$ Equation 4

where:

- F_{ij}= represents the requirements of industry *i* of industry *j*'s products prior to separating the CCI products from the non-CCI products;
- F_{iujv} = represents the new requirements of industry *i* of industry *j*'s products after separating the CCI products from the non-CCI products;
- u = The proportion of CCI output in the buying industry; and
- v = The proportion of CCI output in the selling industry.

The New South African IO Table

A new South African **IO** table was derived using the methods described above, giving an **IO** table comprising 100 industries. With additional data, it would probably be possible to disaggregate further. One disadvantage of the new **IO** table is the fact that it does not make provision for the informal sector. Since many CCIs are in the informal sector, this could be a problem if they were substantially different from the CCIs in the formal sector. It would be possible for the current 100 x 100 South African CCI **IO** to be further split into small, medium, and large enterprises[2] with data from the AFS. Unfortunately, the

[2] According to the National Small Business Amendment Act, 2004.

sectors are not disaggregated enough to do this meaningfully. Nevertheless, other survey data was used to estimate the employment according to skill level and the degree of formality or informality of labour.

Scenarios

The Cultural Satellite Account (CSA) for South Africa and incorporating this into a SAM or IO macroeconomic impact assessment model will be used to measure the impacts based on the assumptions that have been estimated from the qualitative research.

The CSA will also provide information on the number of skill, semi-skilled, unskilled and informal workers per CCI domain.

Vulnerability Index

SACO has prepared two research reports on the impact of Covid-19 on the CCIs ("Measuring the impact of Covid-19 Crisis on the Cultural and Creative Industries in South Africa: An early assessment" in May 2020; and "Measuring the impact of the Covid-19 Crisis on the Cultural and Creative Industries in South Africa: One year on" in June 2022).

In both of these reports a vulnerability index for each of the six UNESCO domains was estimate. This information will be used to evaluate the precarity of CCI workers. This was done using the information on the characteristics of each domain, as well as using information from the survey that showed the significance of each of the characteristics. The characteristics are weighted most heavily for face-to-face production (score out of 5), second most heavily for freelance operation (score out of 3) and least for informal operation (score out of 2), based on the size and statistical significance of the Pearson's R analysis.

Quantitative modelling and estimation of the multipliers for the various domains and the impact of the loss of the CCIs to the South African economy is undertaken.

Policy development and implementation can only be subjected to macroeconomic impact assessment if suitable macroeconomic impact assessment models are available.

Qualitative work

Qualitative research was undertaken. This included a number of interviews (21 interviewees in 18 interviews and one focus group) In addition qualitative research was done via on online survey to which 141 people responded.

Prior to starting with fieldwork, the team undertook a rigorous review of existing literature and documentation available on developments in precarity of the creative industries.

Fieldwork – Quantitative and Qualitative and Sampling

The empirical research consisted of quantitative and qualitative methodologies, listed below.

- Surveys were prepared with a balance of closed, categorical questions and open-ended questions.
- Site visits.
- Semi-structured interviews, and individual discussions.

The team developed a Fieldwork Guideline document, and an informal briefing session was held for all researchers in preparation for fieldwork. The purpose of these was to ensure that the team followed a uniform approach.

Survey Questionnaires

A survey was administered from 3 November 2022 and closed on 12 December 2022. It consisted of 27questions, and the 141respondents took approximately 16 minutes on average to answer the questions.

The electronic platform, SurveyMonkey©, was used to develop, distribute, and collate survey results. Through the use of this platform, we could guarantee the anonymity of the respondents.

A copy of the questionnaire can be found in Appendix 5.

Ethical Considerations

All respondents were required to give consent before completing the survey.

Conclusion

This chapter provided a discussion of the research methods employed in the report. The research essentially comprises a mixed methods approach. The report has a substantive literature review which includes a comprehensive review of the international and comparative literature discussing precarity. The report provides an international and South African policy context based primarily on a desktop analysis.

This chapter then provided an overview of the quantitative description, modelling and estimation of the economic opportunity costs of the precarity of creative workers.

The empirical quantitative aspects were also outlined. Firstly, the approach to the empirical study of the contribution of language to South Africa's GDP was discussed. This exercise builds on a profile and mapping of employees in language occupations. This work is based on the Labour Market data series of Stats SA, which commenced in 2008. The information on language occupations per SIC was used to determine the weighting employed in a SAM or IO approach to extract the language-value-added component per Standard Industrial Classification (SIC).

Chapter 3: International Context and Policy - International Best Practice Examples

Introduction

This chapter considers the international and comparative context and policy issues regard the intersecting trends and discourses in regard to precarious labour and social security and insurance provision in the CC sector nationally and globally. The international section is divided into several sub-sections. The first sub-section considers the question of the status of the artist discussions and policy productions and initiatives set in motion through the iconic 1980 Recommendation on the Status of the Artist of UNESCO and approved by the majority of its member states. The policy lineage of the 1980 Recommendation and the subsequent UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions considered and associated developments are assessed.

The 1980 Recommendation establishes the right of artists to have the same similar social and economic rights as other citizens, which includes having the same right of access to the social security and social welfare regimes of the country or member state in question. Establishing the social and economic rights of artists entails grasping the central role of artists in society and the importance of ensuring that they have free and unfettered movement and expression to contribute individually and collectively to the 'high seriousness' and advanced and timeless heights of art at national and international levels, past and present. The chapter then examines the constituent aspects of the status, socio-economic rights and select international developments and practices regarding these. The nature, scope and variety of the responses of developed and developing countries in regard to the question and implementation of various state and certain non-state social security schemes and projects are covered.

A range of institutional and political economic issues impacting on the cultural and creative sector and its artists and practitioners world-wide is assessed and strategic debates and issues assessed. These range from intellectual property rights and the more specific issues regarding artistic copyright in the relevant CC sectors and sub-sectors. The impact of the digital transformation; the question of the power and wealth of the digital platforms and their fusing of culture and digital technology is examined. In addition, the structural issues of artists immiseration and remuneration are problematized and discussed. Key aspects of artists socio-economic rights as well as developments and impediments to their international mobility are highlighted. Furthermore, the notion of the freedom of association and the question of collective bargaining, unionization and other forms of social and collective action are raised.

UNESCO: 1980 Recommendations Concerning the Status of the Artist

In looking to situate and define an artist the 1980 UNESCO Resolution took a broad view of the matter:

> "`Artist' is taken to mean any person who creates or gives creative expression to, or re-creates works of art, who considers his artistic creation to be an essential part of his life, who contributes in this way to the development of art and culture and who is or asks to be recognized as an artist, whether or not he is bound by any relations of employment or association."

The scope of application is seen as embracing all artists as stated above "irrespective of the discipline or form of art practiced by such artists". Significantly, it anticipated the impact of the digital revolution and the emerging reification and commoditization of intellectual property (Standing 2016), by including inter alia all creative artists and authors that fell within the terms and meaning of the Universal Copyright Convention as well as the Berne Convention for the Protection of Literary and Artistic Works. It also included performers and interpreters as covered by the Rome Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (UNESCO 1980).

The notion of 'status' was linked to 'the regard accorded to artists' within a particularly society reflecting the importance attributed to the role and activities they were called upon to perform. It also entailed the recognition of fundamental liberties and rights, which included 'moral, economic and social rights, with particular reference to income and social security, which artists should enjoy' (ibid.).

Guiding principles for the member states included the following considerations and injunctions.

- Firstly, given the acknowledge importance of art in reflecting, preserving, and enriching cultural identity and spiritual heritage of societies, should be committed to 'ensure that the population as a whole has access to art' (ibid).
- Secondly, all activities highlighting the activities of artists in regard to cultural development, including in the spheres of mass media and educational and leisure, should be encouraged.
- Thirdly, it was the duty of states to defend, protect and assist artists in the exercise of their artistic endeavour and creativity.
- Fourthly, it was vital to ensure, through legislative means, if necessary, that artists would have both the freedom and right to form trade unions and professional organizations 'of their own choosing' and to become members of such organizations. These organizations could represent artists in the making of cultural policy as well as employment policies. In the latter instance, this would include matters such as the professional training of artists, and the determination of the conditions of work of artists.
- In the fifth place, at the various levels of national planning and most particularly in the cultural field, states should look via 'close coordination' of policies in fields such as culture, employment, and education to shape a policy for the provision of assistance and 'material and moral support' for artists and creatives and to help the public appreciate their work. The conditions of work should be such that opportunities are provided for those desirous of devoting themselves to their artistic activities on a full- time basis. The provision of such assistance and support should not prejudice their rights under copyright legislation, including resale rights when this aspect does not constitute part of copyright.
- Sixthly, to ensure freedom of expression and communication as a prerequisite for the variety of artistic endeavours, states should ensure that artists are accorded the full protection in this regard in line with international and national legislation on the question of human rights.
- The seventh principle is that states should ensure the relevant conditions and institutional environment is in place to allow artists to participate to the full either individually or via their particular associations or trade unions in the communities in which they produce their art.

Towards the 2005 UNESCO Convention

UNESCO and the UN group of agencies more generally, subsequent to the 1980 Recommendation and the 2005 Convention have set in play several initiatives regarding the status and protection of artists.

One of the more important measures has been the restructuring of the 1958/9 UNESCO-Aschberg

Programme. Originally established to support international exchange transactions in regard to artists, the programme has been expanded (since 2017/in recent years) in the wake of increased concern about growing inequalities in terms of the creative economy. It now supports national policies and measures, which include preferential treatment, to encourage preferential treatments for a more balanced flow of cultural goods and services globally, and to support the mobility of artists and cultural professionals most especially from the Global South. This derives primarily from Article 16 of the Convention which comprises/incorporates a particular strong and even binding commitment. The Article emphasizes:

> "Developed countries shall facilitate cultural exchanges with developing countries by granting, through the appropriate institutional and legal frameworks, preferential treatment to artists and other cultural professionals and practitioners, as well as cultural goods and services from developing countries." (UNESCO 2005)

The Programme is contributing to such work through a range of interventions such as technical assistance to revise trade and investment agreements; advocacy; bespoke training; as well as research on preferential treatment. Recent calls for projects have focussed on areas such as assisting policy makers and government institution in adapting and/or creating policies, laws, regulations protecting and promoting the status of the artist in line with the 1980 Recommendation and 2005 Convention *the Protection and Promotion of the Diversity of Cultural Expressions*. Other key items for funding is the construction or reinforcement of the monitoring and inclusive planning and reporting capacity of member states in respect of the status of the artist and cultural professionals. These exercises include intersectoral research; capacity building; evidence-based consultations and dialogue with relevant government and civil society organisations (CSOs). A further key emphasis is the enhancement of public understanding of the central role of artists and cultural professions for the creative economy, artistic freedom, cultural diversity – all aspects tied in turn to innovative communication and advocacy initiatives as well as creative partnerships.

Over the decades UNESCO looked to track the degree of adherence and implementation of the 1980 Recommendation and the related aspects of the 2005 Convention. In more recent times, there were attempts to survey member states. Previous consultations were carried out in 2011 and 2015, with member states, and relevant non-governmental organisation (NGOs) and international NGOs involved (p8).

The question of the implementation of the 1980 Recommendation (and areas of elaboration by the 2005 Convention) a key criterion is the need to secure a continuing improvement of the social situation of artists (p67). To reiterate, artists experience significant social challenges from low and inconsistent income and job security; little or even no social protection coupled with at best limited access to benefits usually accorded employees. Indeed, in certain countries and regions, artists may not have any social benefits. This is usually because the state in question has not the economic capacity and associated political will to provide programmes, or because war and/or conflict has inhibited the development and/or maintenance of such programmes and interventions (ibid.).

UNESCO Global Surveys 2018 and 2022

The most recent and substantive effort [assessment of the implement of the 1980 Resolution and associated UN interventions was undertaken in a global survey initiated in 2018 and 2022 respectively.

A new global consultation on the implementation of the 1980 Recommendation concerning the Status of the Artist was launched in 2022 with the results due to be released in late/second half 2023. This current consultation has three key aims and objectives listed below.

- Map and monitor the policies, measures and initiatives implemented by Member States, NGOs and international NGOs to support the status of the artist.
- Identify challenges and opportunities faced by Member States, NGOs and international NGOs in the implementation of the 1980 Recommendation, and their specific capacity-building requirements in revising existing laws and policies or implementing relevant initiatives: and
- Collect and share best practices that illustrate how the provisions of 1980 Recommendation can be translated into effective policies and measures to support artists and the emergence of sustainable cultural ecosystems.

The survey provides an important picture of the shifts in national and international CC sectors most particularly in regard to the dynamics of the experiences of artists and creatives. This study, consolidated by the 2005 Convention Secretariat, is based on an analysis of submissions to the 2018 global survey on the implementation of the 1980 Recommendation concerning the Status of the Artist by UNESCO Member States, NGOs and international NGOs. The survey looked to address key and key issues and growing concerns, most particular in regard to the disruptive impact of the digital transformation of the sector; the growth of transnational mobility and the effects on human rights and fundamental freedoms ranging from socio-economic rights, gender equality and the maintenance of freedom of artistic expression. (p 8)

UNESCO 2018 Survey – Findings

The response to the UNESCO survey was modest, though the report is reinforced by desk research. It presents an insightful overview on developments regarding precarity and especially social security issues vis-à-vis artists and cultural practitioners on the eve of the C19 epidemic.

What was surprising to the research team was the extent to which artists 'are actually often absent from the various cultural policies or programmes that are referred to' from cultural expressions, arts institutions, to cultural entrepreneurship and cultural and creative industries (p12 or p9?).
Notwithstanding, the report contains invaluable information that can help recentre artists and creative professionals within the 'heart of cultural policy making' (ibid.).

The survey showed that while the number of member states with specific legislative frameworks catering for artists issues, through explicit legislation on the status of the artist, the majority of states focus on specific measures channelled through their national cultural policies. The consequences are of concern:

> This means, unfortunately, that the decades-long calls for integrated or transversal approaches to the status of artists legislation that would involve the ministries of labour, social affairs, culture, education, communication, foreign affairs and justice, taxation and domestic affairs have been left unheard by the majority of countries around the world (p9).

However, discernible progress has been made in certain key areas. Firstly, new or revamped copyright laws and tax measures have been put in place that seek to ensure that remuneration for artists is fairer and more equitable in the pervasive digital environment. Secondly, for the first time, new programmes in some countries of the Global South have for the first time extended social benefits for artists. These include health insurance and medical care, retirement pensions, and even unemployment insurance. Thirdly, multilateral and regional economic agreements, in Latin America, Asia and in Africa, appear to have contributed to certain improvements in travel and work opportunities for artists. Impediments remain, such as prevailing visa regulations that prohibit any form of paid work. Fourthly, there are some positive moves in regard to addressing gender equality as well as the question of women's empowerment. Certain of the new programmes stipulate equal pay for equal work. There are modest signs of shift to a commitment to a fifty-fifty balance in regard to creative decision-making positions by 2030 (p10).

To reiterate: The thrust of the 1980s Recommendation to not the granting of special privileges to artists but rather to provide them with rights that are analogous with other socio-professional groups whose work embodies particular features and qualities that require support from special measures. Such initiatives are a means of addressing the continued lack of decent (and sustainable) employment opportunities as emphasized in Sustainable Development Goal 8 in the cultural sector stemming from reduced public financing of cultural institutions (often rationalized as austerity measures), and the wholesale digitization and heightened commodification of cultural expressions in the various phases – production, distribution and consumption (p13).

UNESCO 2018 Survey – Findings on Legislation and Related Developments

Survey confirms that a minority of states have introduced comprehensive legislation. The numbers of such states are increasing, but the inter-institutional and transversal of such legislation is time consuming, and progress is often slow. Thus, certain of the states that have begun such legislation are finding it time consuming and cumbersome.

The central aim of status of the artist laws is to conceptualize and categorize who is an artist via the establishment of a registration system. This regularizes artists' status as a professional and acknowledges the atypical nature of their work. Most of these legal frameworks provide for the recognition of artists' associations and their authority to negotiate agreements on matters such as working conditions and compensation. The more thoroughgoing of legal frameworks incorporate a variety of specific policies and measures tailored to the particular challenges faced and circumstances experiences by artists.

Certain members have set up special taxation arrangements for the particular conditions of artists work and income flows. These include Algeria, certain established EU countries, such as Austria, (a number of former socialist Soviet countries), including Montenegro, Slovenia and Lituania. Introduced in 1969, Ireland's long-standing Artist Exemption Scheme is probably the best known. In 2011 it was capped at E 40,000. This was raised to Euro 50 000 per annum in 2015. The scheme covers books and writings, plays, musical compositions, paintings or other similar pictures, and sculptures that are original and creative, and have recognised cultural or artistic merit. [If it doesn't have cultural or artistic merit either one is acceptable.[3]

[3] A work or art is considered to have cultural merit it enhances one or more aspects of national or international culture through its form and/or content. To constitute artistic merit it should enhance to a significant degree the canon of work in the relevant category in its quality of form and/of content

In the province of Quebec in Canada there are a number of tax-related innovations. These include an ability to buy an income-averaging annuity, which allows the artist to spread evenly over a maximum period of seven years, tax due on artistic incomes in excess of CAD (Canadian dollar) 60 000 received in a particular year. There is also an inducement for belong to a union or professional industry body.

Legally an artist can claim a non-refundable tax credit in relation to their employment during a years in regard to union, professional association dues or other dues such as those paid to a parity or advisory committee, or the contribution to a recognized employee association (Revenue Quebec 2022).

Two examples from western Europe, the UK and Norway, indicate the differences in approaches to artist social security in economies of the Global North. The UK is among the lowest contributors among comparative European countries in regard to GDP contributed towards culture. In 2019 the figure was around 0.3 Per cent (Jansen 2019). This was despite the UK being one of leading protagonists of the policy argument that culture generates significant profit for the national economy. In 2019 £409 million per year was allocated to 829 organisations and projects across England in grants and funds awarded by Arts Council England for every year until 2022. This amount to only the equivalent of £14 per person, per year (ibid.).

By contrast in Norway, given the pioneering approach to arts funding, individual artists are awarded stipends from government – a programme that runs alongside the more traditional kinds of public grants and funding that are channelled to museums, galleries and artist-operated spaces and entities (Jansen 2019). For instance, the visual arts sphere in Norway is sustained largely by public funds with the commercial sector being relatively modest as there is not a particularly large one given the modest number of collectors in the country. The lack of a competitive market such as the one underpinning London's international art world, but this does provide more freedom of experimentation.

Legislation on Tax

In a number of states, especially in the Global North, artists are either exempted from consumption taxes such as Value Added Tax (VAT) Goods and Services Tax (GST), or are given a preferential rate. There is no uniform system so there is such benefits are uneven distributed and sometime difficult to access (UNESCO; Johnson… and ….). Indeed, in some instances there may even be a variance between differing cultural sectors within a particular country (ibid). With a progressive tax rate, this is adversely affecting the artists in question. This means that artists pay more taxes than if the same total income had been divided equal of the period of the actual work. Thus, averaging the income can be a useful tool/mechanism to reduce the tax. A number of countries such as the UK and Western European states like Germany, France, Hungary, the Netherlands, Spain, and Scandinavian countries and certain new EU members such as Bulgaria, Czechia and Lithuania have income averaging measures. Commonwealth countries such as Canada (in Quebec) and Australia also have such measures in place.

Legislation on Social Benefits

The recognition of artists as workers in effect accords them similar social, economic and politico-legal benefits, while at the same time acknowledging their particularities of their work. In a range of countries artists who are struggling and under socio-economic duress, should benefit from publicly funded systems that support all citizens whatever their occupational status. However, in some instances, it makes sense for the artists' special circumstances to be considered through provisions that enable artists to create and sell their work and through special programmes adapted to artists.

In Austria the question of the status of artists is one of the central pillars in the guidelines of the Federal Arts Promotion Act.

Two laws, the Artists' Social Security Fund (2000) and the Artists' Social Security Structure Act (KSVSG) (2011) which establish social security programmes for artists. The sources of funding are derived from the state, the artists, and their employers. The progressive coalition ushered in after the September 2019 general election provided for a more coherent cultural policy 'to create the best possible framework conditions for artists and cultural workers as well as for the cultural institutions; enabling innovation, planning security and social support for artists; the promotion of cultural education as a factor of personality development; and strengthening the culture of commemoration' (Compendium 2020: 6).

The Artists' Social Insurance Fund (KSVF) was established for self-employed artists, allocating grants for their social insurance contributions. It also provides benefits in instances of particular hardship. Eligibility for the KSVF is via registration and insurance from the Social Insurance Institution for Commerce and Trade (SVA). The 2011 Artists' Social Insurance Structure Act widening the SVA's legal responsibilities to include all social security inquiries. SVA offices counsel and advise artists and provide detailed information on contributions, pension, and health, accident, and unemployment insurance. And in 2015 special legal advisory service for artists was revived (Compendium 2020; ibid…).

German Artists' Social Security Act

The German Artists' Social Security Act (*Künstlersozialversicherungsgesetz*, *KSVG*) came into effect in 1983. It was informed in part by the 1980 UNESCO Recommendation. Since its inception it has constituted a special form of insurance support for artists and writers. Self-employed musicians, art educators and performers were obliged to be insured in the statutory health insurance scheme before this measure.

However, it had become clear that the comparatively low wages of artists meant that they were insufficiently protected from the risks of illness and old-age poverty. The 1983 scheme was predicated that the particular character of artists' and writers' work renders them substantially dependent on users of their services -- particularly marketing and sales firms. The relationship is in effect similar to the relationship between employers and employees. Companies that make use of artistic services have thus been obliged to contribute to the Artists' Social Security Fund (*Künstlersozialkasse)*. The state pays an additional federal subsidy to compensate for the challenges of collecting contributions from private users of artistic services. Self-employed artists thus have to pay only half of their contributions to the statutory health insurance, pension and schemes. Since 1995 this percentage has been extended to long-term care insurance schemes.

Self-employed artists and writers are eligible for the Artists' Fund if the fulfil three key conditions:

- They are practising their artistic profession commercially, not temporarily, and do not have more than one employee;
- The applicant's artistic work fits into the occupation definitions: The Artists' Social Security Act defines artists as those who create, practise or teach music, or applied or visual arts. Writers are defined as those who work as authors, journalists, publish in any other form or teach journalism. Due to the fast-changing nature of the arts, the fund continuously updates the list of eligible occupations. In case of ambiguity, the Federal Social Court of Germany i asked to judge the individual case.
- They earn at least Euro (EUR) 3 900 from their artistic or publishing work per year, with the

exception of recent market entrants who pay low fixed monthly contributions for the first three years.

All those covered by the Artists' Social Security Fund have full entitlement to insurance for the three main social security risks:

- Statutory pension insurance, covering old age, invalidity and surviving dependents;
- Statutory health insurance, including maternity allowance;
- Statutory long-term health-care insurance (Tobsch & Eichorst 2018).

UNESCO 2018 Survey – Findings on Select Developing Countries

Status of Artists law in recent years have been developed and/or under development in several countries. These include developing economies such Bolivia, Mauritius, Comoros, Namibia, Djibouti Such laws entail extensive consultation with cultural and creative practitioners, and comprehensive and complex interaction and cooperation between government ministries. For instance, the development of a Status of the Artist legislation which started in 2017 was still ongoing two years later (UNESCO 2019).

While the numbers of states instituting status of the artist legislation the majority of states have concentrated on legislation targeted at introducing specific and tailored provisions for artists. This is particularly the case in the Latin American; EU and North Africa regions (ibid). There are in a number of states specific laws pertaining to the registration of artists which run alongside regulations governing social security programmes. These enable (to a lesser or greater degree) the provision of benefits to various kinds of artists. Such benefits are usually predicated on public subsidies and often with supplemented/complemented by contributions from the artists and employers.

UNESCO 2018 Survey – Findings on Africa

Among the most synoptic of the Status of the Artist legislation is that of Morocco which was first put in place in 2003. It includes a substantive suite of practical provisions. These embrace the identification and registration of artists; the need for a written contract between the employer and the artist the terms of which should take cognizance of minimum wage requirements, and the specifying of the level of remuneration and termination criteria and processes. Furthermore, performing artists with term contracts are formally specified as employees entitled to protection under labour law.

The Moroccan legislation also allows artists the rights to form professional associations and to negotiate and finalize collective bargaining agreements. Further measures are directed at health and safety challenges facing certain of the artistic professions; specifying the conditions of employment of children in the arts and entertainment industry; and regulating the spheres of operation of talent agents and managers and their rates. (ibid. p15).

In the 2010s a number of West African countries initiative processes to develop Status of the Artist legislation. These acknowledge the professional status of the artists and include supplementary measures. Senega, after a long process, completed a draft Status of Artist Law applying to artists and cultural professionals. The aims and objectives include a recognition of the central role of the arts; protection of the artistic freedom of expression; recognizing artists' association; upgrading training; improving the scope and compliance in regard to copyright and neighbouring rights and improving working and welfare conditions of health. Main features of the law include a presumption of employee status; the inception of a social security scheme for artists; a clearing house for artists; and a special tax system (ibid).

Artists such as film stars, especially in the Hollywood and Bollywood arenas can generate high income. This is similarly the case for leading and popular figures in the performing and visual arts, in literature and other established cultural sectors. However, this tends to obscure the political economy of stardom. The major source of subsidy for the arts is not from the public or private sector or individual patrons as a whole; this is in fact contributed by the artists themselves in the form of unpaid and underpaid and poorly paid labour. Evidence from Northern economies highlights the following issues: (i) Artists tend to be well-educated but generally earn between 20-30% less than other workers. (ii) In addition, the payments received are often not structured in a regular and uniform set of disbursements but can come in the form of lump sum and/or ad hoc payments. (iii) Artists are often reliant on more than a single revenue flow, but rather multiple forms of payment. Empirical and anecdotal evidence from other regions and developing economies tend to support this analysis (ibid.).

Survey Findings on National Cultural Policies

Although a number of states have particular policies and measures that address specifically the unique situation of artists, many countries, such as South Africa, still tend to embed status of the artist policies and pronouncements in their national cultural policies. However, cultural policies while extensively and formally addressing the cultural and artistic institutions and expressions, are quite often less than explicit in their acknowledgement of the status of artists and the commitments and obligations due to them (ibid; ILO 2019).

While artists' economic models are changing, so are other areas of cultural policy. For example, public subsidies for culture are tending to decrease, not only in the United States, but also in countries where they appeared to be more robust, such as Belgium, Germany and even France (Feder & Katz-Gero, 2015). Similarly, fiscal policies are also changing (Rosenstein, 2019).

Jamaica

Apart from defining what the Jamaican culture is, the policy will help in identifying a fund that will assist in streamlining the work of practitioners and the crafting of a specific framework that promotes economic viability of cultural and creative industries.

In 2018 the Jamaican Government stated that it was in the end stages of formulating a reworked National Policy on the Culture and Creative Economy of Jamaica. The policy would establish an enabling environment for the creative sector. The revised policy recognizes the need to provide artists with improved control of their own creations and revenues. It encourages the more extensive restructuring and modernisation of institutions responsible for professional training in the arts, and emphasizes the importance of international agreements to attract foreign expertise and investment in CCIs. It also looks to partnerships with local and foreign artists, co-production agreements and residencies to develop Jamaican artists. Furthermore, the Jamaican Ministry of Culture, Gender, Entertainment and Sport provides an e-registry of entertainment practitioners and companies to enable improved communication and counsel on matters such as copyright matters, and related e- commerce aspects. Key issues addressed are the question of the promotion of social health and national well-being and the repositioning of culture in education.

Kenya

In recent years Kenya has look to draft and review a revised national cultural policy on culture and heritage extending the existing 2009 policy. The revised one would be more closely aligned with the country's constitution and to the relevant UNESCO Conventions that it has ratified (UNESCO 2016; ibid). The revised draft policy proposes certain strategies and measures that will allow for the protection and promotion of culture as well as the development of the CCIs.

Among the core features are the establishment of a national culture council and an endowment fund for culture. The drive for a revised national cultural policy has run alongside a series of discussions and consultations around the Culture Bill which begun in 2014. While the Bill has yet to be submitted to Parliament the discussions have been more self-consciously broad-based (Sidang 2022 and ibid).

Pakistan

In mid-2018 the Pakistan government announced the first ever National Film and Cultural Policy. The policy formally accorded the status of an industry to the film sector, and the institutionalization of a Film Fund and financial assistance to young film producers. film finance, and an academy and network of film studies.

There was also an inclusion of artists in the associated health scheme for the industry. More generally, an Artist Assistant Fund would focus on the welfare of artists. The new national policy was conditioned by the organized involvement of over 500 participating artists in drafting a series of recommendations that were approved by the outgoing government. These preceded a framework for implementation. The recommendations included the uplifting of the visual arts; relevant educational reforms and artists' welfare. Also, the cultural policy foresees a constitutional guarantee of the quintessential right to the freedom of peaceful artistic expression in all forms of art (The News (International), 31 May 2018; The Express Tribune, 8 June 2018). The idea of international exchange of ideas was somewhat compromised by resolutions stressing the the primacy of Pakistan cultural production and films and cultural expressions, notwithstanding the commitment to national diversity (ibid).

France

In the 1960s, France developed a special and sophisticated policy for dealing with workers such as artists and technicians who confronted significant uncertainty in their employment conditions. This regime has provided income support most especially for performing artists during phases of unemployment. The scheme came to represent the French commitment to the status of the artists, most particularly the performing arts and associated cultural workers. It also was seen as recognizing that the arts labour market was a distinctly precarious one in terms of the lack of continuous work and fluctuating incomes.

However, even this well-known mode of income support has come under pressure in recent decades with increased unemployment and the increased influence of neo-liberal policies in arts and culture investment (Mitchell 2017). In recent years, French artists and cultural practitioners have become openly concerned about the deterioration of their socio-economic status and rising impoverishment. Under pressure, the French Ministry of Culture commissioned in 2019 a policy-oriented reflection on the nature and status of the arts and the linked act of creation in the next two decades (French Ministry of Culture 2019).

For a considerable number of artists the gap is widening between the time devoted to creative work and the income derived from this pursuit. There is a varied return from the sales of works by creators (from graphic designers, painters, sculptors to musicians and producers of audio-visual work. There is a long tail with only a small percentage (around 2-3%) having income above Euro50 000 in 2017 (French Ministry of Culture 2019). Around three quarters received below Euro5 000 per annum. (ibid.). While carried out on a ring-fenced bases, the scheme for artists has been linked to the general social security system which covers employees. While the contribution are at the same level as the general scheme the equivalent of the employer's share was around 1.1 per cent. This was lower than the 27.5 per cent for social security contributions for the general scheme (French Ministry of Culture 2019).

The reform process aims at reinforcing the particular characteristics of the existing scheme by guaranteeing the 'best access to social rights' which comprise the validation of quarterly retirement, daily allowances and retirement aspects. In addition, the modernization of the management of the scheme for the benefit of its users was accelerated with the collection of contributions shifted to the Central Agency of Social Security Organizations. The collection of old-age contributions by means of withholding tax from artist-authors who declare their income in the form of wages and salaries can be maintained via a deferral of rights but also a cap on old-age contribution. The cap applies to persons insured for social security whose artistic income exceeds the social security ceiling (€39,732 for 2018). From 2020 all declarants under the tax regime for non-commercial profits will have their contributions raised by +15 per cent to achieve greater parity between (i) the employees under the general scheme where artist-authors declare their income in salaries and wages for tax assessment and for which contributions are based on gross income (gross salaries or authors paid by broadcasters); and (ii) artist-authors declaring their income as non-commercial profits (which corresponds to net income). (ibid)

Notwithstanding these developments there have been protests and ongoing activism against the Macon government in recent years regarding the experience by a range of artists at the impact of neoliberal approaches to questions of pension and unemployment benefits. In early 2020, for instance, there was a mobilization of arts workers as part of a strike against retirement pensions reform in the country (Põldsam 2020). Art on strike (art en grève) was set up on the eve of the first protest against the retirement pension reform of the together in the protest in Paris under the banner 'art en grève'. The protests to other cities in France, where independent 'art en grève' corteges organized local protests (ibid.).

Artists and the Impact of the Digital Economy

At both international and national levels, the economic and social status of artists has changed since the 1980 Recommendation. Although the 1980 intervention was distinctly prescient in drawing close attention to the apparent and dawning impact of new technologies, the dynamics of digital transformation of global and national economies and the associated cultural and creative economic spheres/spaces has seen paradigmatic shifts. And while the 2005 Convention took good stock of the ongoing digitization of the creative economy, subsequent events have stressed the need for reflexive and continuous monitoring, evaluation and adapting to changing circumstance. As the same time the play of neo-liberalism and its entwining with new economic forms of globalization has been evident and subject to significant scholarly commentary and analysis.

With the digital shift, from the 1980s onwards, artists changed the ways and means of cultural expressions. Musicians increasingly looked to synthesizers and the equipment to record or store their work electronically was generally less costly than via physical media such as vinyl records, cassettes, and compact discs (CDs) (which were in part digital in their music encoding). Filmmaking was streamlined and costs reduced by the advent of advanced hand-held cameras with sound and editing capacity. New software programmes decreased the length and costs of production in fields such as publishing and other related cultural sectors (Martell 2021; Haines 2017).

As with the advent of the camera in the 19th century, computers and digital technology have reshaped the landscape of the visual arts (Simmons 2019; Haines et al 2017; …). Some artists use digital technology to extend the scope of creative possibilities. Computers facilitate the creation and manipulations of still images and animation. Despite its drawbacks, technology has opened up further opportunities for artists and increased the variety of techniques artists are able to access (Simmons 2019). Artists can digitally 'paint' on an iPad as opposed to canvas with a paintbrush and paint. The advent and proliferation of the smart phone the advent of the smart phone has allowed an extension of such activities. Seymour Simmons (2019) stresses, however, the need to retain non-mechanical means of practising visual arts, and the education of such skills:

> As an alternative to, or at least a complement to, the excitement of finding out how close we can get to creating "machines as artists," our efforts, especially as educators, might be better turned to using whatever means are available to help learners develop their non-mechanical human nature to its fullest.

Central to the digital disruption of culture has been the development and diversification of the internet especially since the 2000s. This has had a profound effect on cultural expressions and cultural policy. Indeed, the internet and associated platforms has become the route by which creative products and services are produced, marketed and disseminated and consumed. These include all kinds of music, books and magazines, film and television, radio stations and programmes, videos, and photographs, and newly innovated products. All cultural sectors have been reshaped by the advent of the internet. Not only have the modes of production, dissemination and consumption been changed, but also the cultural practices of the public, the institutions, and its use of leisure time (Martel 2021).

Mini-Case Study: The Disappearing Archives

In June 2022, 22,000 stories posted by The Hook, a Charlottesville (US) weekly newspaper, disappeared from the internet.

The Hook was established in 2002 and operated for 12 years. It prided itself on being a local newspaper, printing incisive stories about environmental concerns, politics, corruption and criminal matters. During its existence, The Hook won three top prizes for 'journalistic integrity' and 'community service'.

Amongst the important articles published by The Hook, and discussed (online) by the community for many years, is the story of a 1959 'plane crash in central Virginia, and the story of a 1982 Virginia road trip gone wrong. The collective loss of these news articles and features, in cultural and historical terms, is incalculable. The archive was a repository of a community's history, and a record of its discussion forums and blogs.

Former staffers believe that an anonymous buyer bought the newspaper's archive so that people would no longer be able to find specific articles that reflect badly on a few prominent individuals. In this regard, reference is often made to the case of Curtis N Ofori, who in 2004 was accused of raping a student at the University of Virginia. Ofori is now a Washington-based investment banker and accountant, who has long tried to remove all references to his story from the internet.

The Washington Post, which reported on this disappearance of stories, notes the irony that the technology we have today, to preserve information on the one hand, makes it exceptionally vulnerable on the other. “Information was safer when we wrote it on stone.”

Policy Implications
Social security is not only about securing the wellbeing of individuals working in the CCI, it should also encompass securing and preserving communities’ collective heritage.

Music

Music was the first major cultural sector to be impacted by the internet distribution and consumption (Lozic 2020; Martel 2021). Traditional business model was predicated on the sale of physical recordings via vinyl, cassette tape or CD. Radio made music more widely available. The development of the MP3 format which allowed the digital compression of music facilitated easier copying and sharing. The release of the iPod in the early 2000s and then iTunes allowed individual songs to be purchased at a cheaper price than the traditional album. Streaming services followed. (Lozic 2020; Desmondhalgh 2021).

These shifts were seismic. The turn of the century saw the beginning of a decline in the music industry’s revenue. Digitization and the convergence of production and distribution processes have contributed to illegal loading and sharing of music (Lozic 2020; Lawrence 2019). Over time global music corporations have had to restructure their business models. Between 1999 and 2014 global music revenues declined by around 44 per cent (ibid). While a turnaround in the fortunes of the traditional music corporations has been achieved and revenues grown, the revenue remains below the levels of 1999. And the greater portion of the global revenues is derived from digital sales and streaming. The turnaround in revenues have not matched the decline in CD and record sales. The artists’ tour has become one of the ways for artists to generate revenue for themselves, though the C19 epidemic inhibited such initiatives. While the major stars remained generally profitable for many musicians and associated creative professionals the pickings were slim (Lawrence 2019, additional reference).

In the late 20th century revenue was generated largely by sales of CDs in shops with radio, television, cinema and games providing exposure and publicity and supplementary rights income. From 2015 was generated primarily by streaming and advertising. Media are still involved in promoting music, and recording and song rights are still owned by recording and publishing companies. Rights holder now licence their recordings and songs to music streaming services who in turn pay the rights holders, and who then in turn pay the musicians contracted to them. The situation is complex as Hesmondalgh (2021) points out. Revenue is still paid to musicians and new digital modes of production and distribution available to them. However, a key point is that the key beneficiaries are the major stars, and that disproportionately low fees are received by musicians. For example, a 2019 member survey by the Ivors Academy and Musicians’ Union of the UK, found that 82% of professional musicians made less than less than £200 that year from streaming, while only 7% made more than £1 000.//In 2018 the International Music Council noted that around 5% of artists were receiving 95 % of the royalties, with previous estimates showing 20% of artists receiving 80% (Cited ibid.).

This suggests that there is insufficient diversification through the new digital channels, and an attenuation in the diversity of music. Furthermore, there is extensive concern among musicians and associated professionals at the low percentages of royalties paid. Some musicians, singers and composers have gained new audiences but the major actors in the music industry still maintain a hegemonic position. The massive growth in the big digital platforms. Big tech (Facebook, Amazon, Netflix and Google [FANG]) has contributed to the global music industry problem and related challenges in other cultural sectors.

The ‘value gap’ in the new music sector has come to represent this structural problem, and points to the disjunction between the value that streaming platforms generate from musical content and the revenue derived by those who create and/or invest in the making of the content in question. The global growth in digital music streaming has reinforced the value gap (Lawrence 2019; Lozic 2020). Matters have been exacerbated by outdated legislation such as the United States of America’s (USA) Digital Millennium Copyright Act and similar statues of other countries which include ‘safe harbour’ provisions that shield in particular the more dominant and US based music-streaming services from copyright-infringement liability (Lawrence 2019).

Safe harbour protection provides streaming services with leverage in licence negotiations with copyright holders. For Lawrence (2019) there is a two-stop solution: The first step would entail the revision of the World Intellectual Property Organization (WIPO) Copyright Treat in such a way as to obligate member states to comply by restricting the scope of domestic safe harbour provisions. The second step suggests that the current music-licencing framework be restructured (ibid.). In regard to the first step at least, the power and corporate dynamics behind the establishment and operations of the WIPO, as dissected by Guy Standing (2016), suggest that the hegemonic influence of the US, the large multinationals, should not be underestimated in suggestions for a reform of the WIPO.

Publishing

The publishing industry has also been impacted by the digital transformation, with the publishing industry taken on more digital features as e-readers, audiobooks and other forms of digital media encroach on traditional homogenous print media type (McGlone & Fazil 2021). In 2021, for example, its was estimated that the digital publishing sector would grow at around compound annual growth rate (CAGR) 8.1% -- more than the publishing industry as a whole (8.4% vs 0.3%). (Statistica n.d). With this shift to digital media comes challenges and opportunities for incumbent businesses who face three key sets of trends and challenges (McGlone & Fazir 2021).

The first of many challenges that businesses must overcome to thrive in this dynamic environment is the issues associated with maintaining a digital infrastructure for the distribution and publishing of books and media. Maintaining a dual infrastructure model - an infrastructure for physical print and virtual infrastructure for digital copies can incur a higher cost to the firm, especially with the simultaneous rise of final stage distributors such as Amazon who hold monopsony power and can drive down the price publishers receive on their books (McGlone & Fazir 2021). A related problem is plagiarism by self-publishers which is difficult to combat with existing legislative frameworks in most nation states. Also, authors who sell their work directly on platforms such as Amazon are also faced with the possibility that their stories will be plagiarized (Lazendorfe 2016).

Secondly, podcasts and audiobooks have seen significant growth in recent years, with more modest growth in regard to e-books (McGlone & Fazir 2021). This shows the opportunities for diversifying beyond the print media. However, the impact of such trends has had a more problematic effect on the other aspects of the publishing sector. In the third place, possibly the most disruptive change is the development of a self-publishing capacity especially through the medium of e-books. This has helped in avoiding some of laborious and time- consuming processes in traditional publishing. The vast majority of books published now on Amazon are from authors who chose to self-publish (Alli 2021). Pleasing in some respects that such developments are, there are downsides in regard to the nurturing of exceptional writing talent and the decline of supportive cultural infrastructure such as bookshops and bookshop chains.

Other points of concern are the massive decline in the sales of hard copy newspapers, periodicals, and newspapers, within an accompanying fall in print advertising revenues. Although a number of publications make some or all of their content available online, either for a fee or free. The hope is that this will increase page views and advertising revenue. However, their overall ad revenues are miniscule compared to the tech giants (Haines et al 2017). The average length of articles in online publications is generally shorter, with freelance writers in turn receiving less revenue per submission as in the past. The economic decline of many print media firms has also been traumatic for the writer, cultural professionals and technicians (Adgate 2021). For instance, in 2020, there were 30, 820 workers in the US newpaper industry, less than half the numbers than the 74, 410 in 2006 with the downwards trend continuing (ibid.). Apart from massive staff redundancies newspapers have closed across the globe. Between 2004 and 2020, over 1800 newspapers closed in the US, many of them serving small, scattered communities (Adgate 2021). These continuing closures have seen 'news deserts' emerging throughout the country -- communities the inhabitants of which have no newspaper or diminished access to news and information that is crucial in a democracy and as part of the critical cultural ecosystem (ibid..and….) Similar trends can be found in a range of developed and developing countries (references required).

Film

The film sector has experienced a complex and contradictory engagement with digital transformation. A clear trend has been the increasing consumption of online audio-visual content, through computers, tablets and smartphones. There has also been an almost exponential growth in the distribution of online services (Haines & Lotter 2022).

The growth of online digital film service platforms has opened up avenues for the partial rehabilitation of existing film sectors and the expansion of existing ones, as well as reinforcing international exchanges. However, in a number of developing economies, South Africa included, local actors and film professionals have found an asymmetrical relationship in regard to contractual matters and issues of copyright, as well as collective bargaining (interview, Johannesburg 30 November 2022).

Impact on Artists and Remedial Attempts

The injunction of the 1980 Recommendation that member states 'assist artists and organizations to remedy, when they exist the prejudicial effects of new technologies on their employment and work conditions' is worth revisiting here. While there is significant academic and technical debate on the nature and impact of digital transformation and the promethean forces facilitating the expansion and diversification of the creative economy and CCIs, there is justifiable disquiet across the globe about the status and security of artists in the processes in play.

Compared to the 2014 UNESCO survey on the status of the artist, with the 2018 one, it seems that the former was somewhat more sanguine about the impact of digital transformation on artists income with differing views on the matter (UNESCO 2015). By contrast the subsequent survey showed that the majority of respondents felt the digital restructuring of the cultural and creative sector had led to a reduced income for artists, most especially in the areas particularly suited to internet-based distribution and consumption (UNESCO 2019). The current 2022 UNESCO survey results are due to be released in 2023 and it will be interesting to see if this is a longer-run trend.

Mangset et al (2016) draw attention to the phenomenon of the structural reproduction of low salaries of artists in the early decades of the 21st century despite the increased investment in the creative economy. A Swedish art collective advocating formal artist salaries captured this contradiction well:

> The point of departure for the project 'Artist's Salary Now!' was the government report about Swedish artists work conditions… It describes how artists, while they typically spend a long time in education, as a professional group have some of the lowest incomes in Sweden. The most 'radical' solution to the problems identified in the report is the suggestion to take Swedish krona (SEK) 100 million of the SEK million 225 million in the arts budget that is earmarked for specific actions, and give the money to the Swedish Agency for Economic and Regional Growth to support digitalization. According to the proposal, artists would in this way learn to better at protecting their copyright and get paid for the use of their work online.

From our perspective, this strategy appears both strange and provocative. It implies that arts policy is about supporting the market's commodification of art as the primary way to get paid for working as an artist. It is unclear how the report concluded that this should be the purpose of the Culture Ministry's arts policy, rather than the goal of the Ministry of Enterprise and Innovation. We don't think that culture is something that should exist because of economic reasons, or, as the Swedish Agency for Growth formulates it on their web page (Hanson 2019).

The authoritative surveys of Australian artist's incomes carried out by researchers from Macquarie University for the Australian Council seem to have put on hold in recent years. The last report in the series (Throsby & Hardy 2017) showed that between 2007-08 and 2014-5 the median income received by all artists for their creative output decreased by around 30%. For artists whose work was more amenable to internet distribution the median income drop was around 39% (Throsby & Hardy 2017). The impact of C19 epidemic exacerbated the loss of income, so new survey material will be necessary to assess contemporary and post-C19 trends. In the run-up to the C19 pandemic, it seems that artists in the global South overall had seen a decline in their incomes (UNESCO 2019; Karmy & Urquesta 2020; Moore 2021).

Artists and the Question of Copyright and Royalty Collection

The 1980 Recommendation had as one of its central objectives the improvement for artists of their access to and benefit from the copyright process. This was reinforced by the 2005 Convention and other relevant international measures. This concern is particular important with the digital transformation of the fields of culture, most especially in regard to the music industries.

The main purpose of copyright provisions is to encourage the production and availability of intellectual property by offering protection and compensation to the creators thereof (….) Fair and relevant copyright provisions it is argued should ensure that artists are duly compensated for their work in the digital space and elsewhere.

As Buihyan (2014) reminds us, however the notion of intellectual property was bound up with the spread of industrial capitalism in the north, and thereafter to the global south. Intellectual property rights (IPR) are assigned to two categories – copyrights and industrial property rights. Copyright assigns and allocates property rights to the artistic works of the creator such as music, fine art, books, journals, essays, pictures, audio-visual products, computer software.

According to the 2021 annual Global Collections Report published by the International Confederation of Societies of Authors and Composers (CISAC), worldwide royalty collections for creators of music, audio-visual, art, drama and literary works fell by 9.9 percent in that year, with losses amounting to more than €1 billion as a result of the global C19 pandemic. Total revenue collections dropped to €9.32 billion as lockdown measures almost halved live and public performance revenue globally. The decline was mitigated in part by a rise in digital royalties, which showed a jump in audio and video streaming consumption worldwide, as well as robust licencing activity by a number of CISAC's affiliated member societies internationally.

Global royalty collections for creators increased by 5.8% to €9.6bn (about $9.61bn) in 2021 (CISAC 2022). However, collections around the world, including in Africa, lagged behind by 5.3% compared to 2019.

Africa recorded the largest growth in collections across all five repertoires – music, audiovisual, art, drama and literary – increasing by 17.1% to reach €75m, which was generated mostly from digital collections. Digital collections on the continent increased by an impressive 68.9% to reach a four-year high of €12.7m. Nevertheless, the continent underperformed by 6.4% compared to the overall figures for 2019. South Africa was the largest contributor of digital collections in Africa and nearly doubled its revenue. This was due in part to the two South African agencies; Composers, Authors and Publishers Association (CAPASSO) and Southern African Music Rights Organisation (SAMRO) entering into a joint licensing agreement with Netflix, Facebook and Deezer (CISAC 2022).

Digital, however, remains poorly represented for the whole of Africa at only 16.9% of total collections. In comparison, Europe saw a 55.2% increase in digital, which was instrumental in expanding its total contribution by 1%. Globally, digital collections saw a 27.9% increase and now account for almost one-third (32.6%) of total royalty collections (ibid.). Live and public performance income in Africa increased by 3.1% in 2021, although is its still one-quarter below pre-COVID-19 2019 levels. Private copying grew 6.6% to reach €10.6m. Collections in Kenya shrunk by 43.9%, while collections in Ivory Coast dramatically increased by 58.9% due to collaboration with a local and national institutions (CISAC 2022). Latin America, by contrast, was the only region that experienced a decline in 2021 with a 44% decrease in live and public performance collection (CISAC 2022).

The unequal distribution of revenues globally is an enduring problem, with the International Music Council in recent reports showing that a particularly small percentage of royalties being distributed to African countries and a modest percentage going to Latin American countries (UNESCO 2019; 2022).

In recent years there has been an expansion of advocacy and conscious-raising programmes for artists, policy makers, consumers, and civil society on the significance of copyright laws for the distribution and consumption of cultural content on the internet and linked digital platforms. These programmes have been provided by state, artist associations and in some instances artist collectives, and coalition groups This movement has overlapped with diverse activist groupings (including artists) who have questioned the seeming inequalities in the distribution, consumption, and revenue regimes on the internet. The Future of Music Coalition and Electronic Frontier Foundation in the US, and the Copyright Coalition in South Africa are among a variety of groupings worldwide (Makagamathe 2022).

Although there is an increased awareness of and more critical approach to matters of copyright matters in regard to the commodification and consumption of artistic and cultural content on the internet, there are associated problems that impact on artists. A major and festering problem is that of digital piracy and the related matter of mostly unpaid dissemination of copyrighted works especially on content-sharing platforms. Digital technologies enable the copying, modification and manipulation of creative content and works. And the piracy of creative works is on the rise in recent years (Spajic 2022; Makgamathe) with software, music, literature, and videos and films being among the most susceptible to piracy on the internet. And as Nelson Granados (2016) observes the impact on established artists, such as film or rap and rock stars, is often cited in the press 'because it's easier to put a number on it'. As Nelson Granados (2016) argues, the piracy on established artist is often popularized as 'it's easier to put a number on it'. However, online piracy hurts emerging, and more marginal artists particularly hard as established artists generally have the resources to discount such activities.

Among some recent illustrative stats are the following: (i) pirated video material generates around 230bn views per year; (ii) more than 80% of global online piracy has been attributed to illegal streaming services; (iii) Annual global revenue losses from digital piracy are between $40 and $97.1 billion in the movie industry; (iv) illegal downloading of copyrighted materials consumes up to 24% of global bandwidth (Spajic 2022).

Apart from the question of digital piracy the issue of the asymmetrical nature of the existing digital platforms and systems in regard to the allocation of copyright revenues, saw increasing pressure on certain political authorities to develop new and more sophisticated legislation to deal with the persistent issues. The complaints came from certain artist constituencies and supporters as well as media companies who business models had been disrupted by the major digital platforms.

The European Union Directive on Copyright in the Digital Single Market, was passed in April 2019, requiring corporations such as YouTube, Facebook, and Twitter to take more responsibility for copyright material being shared illegally on their platforms. There are some exceptions for smaller and non-profit platforms Six member states (Finland, Italy, Luxembourg, the Netherlands, Poland, and Sweden) voted against adopting the directive while three (Belgium, Estonia and Slovenia) abstained from voting, with the remaining 19 member states voting in favour.

The Directive also sought to strengthen the bargaining capacity of authors and performers, particular in areas where their revenues were particularly low. The 500 000 musicians, singers, actors, dancers, and other performing artists – the Fair Internet Coalition (FIC) – welcomed the adoption of the Directive 'as a first, important step in the right direction in improving performers' rights. Of more importance, the FIC stressed is that that Directive establishes that the remuneration of performers should be in proportion to the revenues generated by the exploitation of their work, and that lump sum payments are the more the exemption than the rule (FIC 2019). The FIC stressed that going forward EU member states should ensure 'that performers should receive appropriate and proportionate remuneration, including for online exploitation'. In achieving this, the Coalition noted that the Directive encouraged members states to rely on different existing or newly introduced mechanisms which could comprise collective bargaining and other mechanisms (FIC 2019).

There have been a number of other efforts to regulate the increased digital restructuring of art and culture. In recent a number of countries have passed or are in the process of passing legislation in regard to copyright protection with an emphasis on the new digital creative economy. These countries include the US, Japan, Morocco, the UK, and Singapore.

The Music Modernization Act (MMA) was passed into law by the US Congress in 2018, codifying a range of compromises and licensing arrangements worked out among music publishers, record labels, and digital music services. The passage of the MMA was accompanied by hopes by the country's song-writing community as the last best hope to restructure the new digital music economy in a way that would treat songwriters equitably.

Before this Bill owners of master recordings were able to collect up to five times per Spotify stream than the creators of the song (Beall 2020). The Act provides for the creation of a new organization called the Mechanical Licensing Collective (MLC) which is designed to change the way that mechanical licenses are granted, and royalties are collected from digital service providers. It will create a new and comprehensive database that will issue blanket licenses for the use of all music on the various streaming platforms (ibid). The Collective is being operationalized. Whether the Music Modernization Act can restore the balance between songwriters and publishers, record companies and artists, and digital service providers like Spotify, Apple, YouTube, and Amazon remains a moot point.

In April 2022 the Morocco House of Representatives approved the Draft Bill the draft law number 60.10 amending law 2.00 on copyright and related rights. This measure has been a number of years in the making. The government stated that a central aim of the bill is to protect authors' rights, in line with its engagement in social and cultural fields. The multifaceted draft law provides the Moroccan Copyright Office with more financial independence and renames it the 'Moroccan Office of Copyright and Related Rights' to reinforce its work in the growing copyright sector, domestically and internationally. The measure aims to digitize musical and visual works for easy access to people with disabilities.

Furthermore, it provides the authority for the establishment of a social fund for creatives to enable them to benefit from the social coverage system. The office would seek to play a 'dynamic role' in the field of literary and artistic property, invoking advanced technology to protect further the rights of authors' projects. The draft measure aims to strengthen the digital protection of copyright and related rights as well as the resale rights of artistic work, such as paintings and sculptures. The office is also explicitly involved in efforts to promote the social inclusion of artists as well as the preservation of the cultural identity of their work (Latrech 2022).

On 28 June 2021, the Brazilian Government through the Special Secretariat of Culture opened a new public consultation on the need to reform and update the 1998 Copyright Act . The main goal is stated to be to “deal with the new technologies and new business models that have emerged over this period”. Accordingly, streaming services, content upload and sharing platforms, artificial intelligence and so on are on the list. The call makes explicit reference to the EU Copyright Directive as well as initiatives on the USA and Canada (InfoJustice 2021).

During the last five years of so, there have been efforts to implement existing WIPO treaties as part of a global response to the continued expansion of digital distribution. However, such calls, as some scholars and analysts see it, underestimating the political economic aspects of copyright protection under globalization. The play of Northern capital and especially US interests in the establishment of the WIPO has been scrutinized in writings by the likes of Standing (2016); Wade (2018); Bhuiyan 2014 and Perlman (…). As Bhuiyan contends, the transformation of Western economies into service economies has seen the emergence of IPR as a particular strategic commodity. ‘Big corporations have been extra vigilant to acquire and protect their IPRs across the world with the help of their respective states’ (ibid: 1).

Peter de Cola’s early (2013) study of artists and the internet is not without relevance. He points out that most artists on average derive a relatively small percentage of their income directly from copyrights, with the other income streams emanating from activities such as session work, live performances, merchandising, or teaching. None of these categories are that closely tied to copyright protection and thus the benefit of tighter copyright regulation and control would not really impact these revenue streams. A hypothetical boost in revenue from more effective enforcement would only increase the average musician’s total revenue by a small amount today, in the short term:

> Stronger copyright enforcement might provide them incentives to move up the income ladder in a winner-take-all kind of market. It will not, however, put more money in their pocket today (de Cola 2021).

Artists in the Digital Environment

While improved copyright regulations are probably on the whole a progressive move by national governments in developed and developing economies, new thinking/initiatives by policy makers especially at national and trans-national regional levels is/are required to deal more holistically with issues related to artists fair remuneration, status of the artists, and improving the funding of the cultural and creative sectors. The digital transformation as Martel has underlined, is in fact changing the terrain of cultural policy requiring new approaches and models. Such issues have shorter- and longer-term implications. What is important for our purposes is to consider some emerging initiatives and reforms of the expanding digital dimension of culture and the arts and the dynamics thereof.

Mini-Case Study: The HOPE Poster

In 2008, Shepherd Fairley created a poster entitled ‘Hope’ using an image of Barack Obama which symbolised the optimism and hope in America. The poster had blue, white and red shading and the word ‘HOPE’, which was Barack Obama’s campaign slogan.

The picture in the poster was based on a photograph of President Obama taken by an Associated Press (AP) photographer, Mr Manny Garcia, who was contracted by AP for five weeks in 2006. The poster quickly went viral, and the graphic featured on t-shirts, bumper stickers, campaign buttons and more.

In February 2009, AP announced that Fairley had used its photo (to create the poster) without securing the necessary licences and permissions, and required compensation. Mr Garcia, the photographer, in turn argued that his copyright had also been infringed, as the creator of the image. Mr Fairley argued that he was entitled to fair use exception of the copyright law, which allowed limited use of copyrighted materials.

AP in turn argued that (a) Mr Garcia was not entitled to compensation, because he was an employee when he took the photo and that (b) the fair use exception did not apply to Mr Fairley's poster. At a pre-trial hearing, the judge agreed and urged a settlement. In January 2011 and AP and Fairley settled out of court, agreeing to work together with future commercial use of the 'HOPE' image.

Policy Implications

Artists need to attend/receive training to understand the copyright regulations in terms of their own rights, and the rights of other businesses and individuals/artists.

For artists and cultural professionals to receive further compensation for their work it is crucial it should be available and accessible on digital platforms. With the latter becoming increasingly the prime means for delivering creative content, matters such as copyright and fair remuneration would seem to require more targeted interventions. In most developed countries national audio-visual content, including film and television offerings and public broadcast service material is available online (UNESCO 2019; UNCTAD 2019). In many developing economies such trends are emerging, but the question of national content and accessibility are among the challenges (UNCTAD 2019).

The most advances in recent years have come from the EU and certain of its member states. At a national level one of the earliest forms of regulation of on-demand video and film platforms was an update to a German law that required Netflix, and all other online streaming companies to contribute a portion of the revenue earned by their German services to the country's national subsidy service system, the German Federal Film Board (FFA) which funds local film and television production. German cinema and television networks already contribute to the fund, but the update required the relevant the relevant law passed in 2014 and approved retrospectively by the EU in 2016, requires all German streaming services who exceed 500,000 Euros per annum, to do so as well. In 2018 the European Court of Justice rejected a Netflix lawsuit objecting to the payment of a fee to the FFA in Germany (Roxborough 2018). Due to the fact that the video-on-demand service transmits its content to Germany, Netflix was obliged to pay the German film levy. The levy comprises 1.8% of annual revenue up to 20 million euros and 2.5% over 20 million euros.

France followed the German example extending a 2% video tax to all digital platforms. A number of EU member states have subsequently implemented such requirements under the EU agreement. For instance, in 2020 Portugal passed a law requiring streaming service providers to pay an annual fee equal to 1% of their Portuguese revenues or I million euros, whichever is more. The funds will support the Instituto do Cinema e do Audiovisual, a government-funded private agency that promotes Portuguese film and television. In addition, streaming platforms are required to invest 4% of their in-country revenues (or at least 4 million euros) in producing Portuguese-language movies, television series, or documentaries.

The law, which took effect this year, also requires state-owned Portuguese broadcaster Rádio e Televisão de Portugal (RTP) to spend more on locally produced content. RTP — which runs four national TV channels and three national radio channels and provides satellite and cable service as well — must reinvest 10% of its revenues in local content production, up from 8%. Among related developments the Swiss voted for a law requiring digital content streaming services to invest 4% of their income from Swiss subscribers in the country's film and television projects (Corliss 2022).

The growth of e-commerce and expansion of transnational digital services, especially those dedicated to streaming, has seen developed and, though to a lesser extent, developing economies move to put tailored VAT and related tax mechanisms in place to look to stimulate value creation in the digital economy and as one of the key outcomes, to stimulate national creative economies.

In 2020 EU leaders agreed to introduce a wider digital levy with more details to be elaborated during 2021-22. This initiative reinforces the increased policy pressure to re-assess how and where the tech giants pay taxes and how countries can look to claim a more equitable share of the revenue they help to generate. The Organisation for Economic Co-operation and Development (OECD) have in recent years headed up efforts to look for a more integrated and international system to tax services in the digital economy (UNCTAD 2020). Up to 137 nations are involved according to some accounts (Christie 2021). This would see i.a. non-resident digital platforms and streaming services registering and pay a sales tax in the relevant jurisdiction (UNCTAD 2020; UNESCO 2020).

If successful new tax regimes would make it easier for developed and developing nations to collect revenues generated within their borders. It would also perhaps reduce public antipathy to the companies involved such as the FANG group. There are institutional and coordination challenges, and a proliferation of digital-specific taxes could lead to retaliatory measures by the likes of the USA. America has already initiated trade investigations against countries such as France, Germany, and Indonesia, arguing that such tax methodologies unfairly single out US firms (Christie 2021).

In parts of the developing world, we are seeing some nations modifying their tax systems to include transnational audio-visual content providers. This trend is quite distinct in Latin America. Brazil has been something of a leader for some decades in stressing the importance of local content. In 2018 the Brazilian government announced its plans to proceed with the taxation of international and local companies' operation on-demand video streaming services (Marques 2018). This taxation will be levied soon on companies such as Netflix, YouTube and cable providers that offer video on-demand (VOD) (Marques 2018).

The tax collected from VOD providers does not necessarily directly benefit those local artists and creative professionals responsible for the cultural content. In this regard, Paraguay would seem to present a good case scenario. In mid-2018 the Secretariate of Taxation of Paraquay announced the drafting of a regulation to commence charging tax on foreign digital programmes such as Netflix and Spotify. Fifty per cent of the collection would be channelled to the Paraguayan Audiovisual National Fund which would be created by the law in question (Horbuz 2018). [UNCTAD (2020)]

While the number of initiatives and measures to improve the involvement and exposure of local, national and regional artists and creatives on digital platforms there are technological and institutional challenges. One theme is that the relevant search engines do not appear to prioritize the question of the diversity of content (Svanberg 2018; UNESCO 2022; 2019). This in turn has a deleterious effect on non-established diverse artists, which further inhibits the spread of global diversity of expressions (ibid).

Socio-Economic Rights of Artists and Cultural Practitioners

Artists, as the 1980 Recommendation stipulates, should be viewed as a professional social class, and be accorded all the rights and privileges as other citizens and employees within the state in question. As such artists are eligible for the same public social programmes as other citizens, irrespective of their employment situation and structures. They should except to be covered for essential or basic health care, parental leave, and retirement pensions when these are dispensed as part of a universal public service. As the income of artists is often low and not always paid in a regular fashion, these aspects may unfairly affect their benefits, should these be based on defined contributions to a pension and/or social insurance scheme. (ILO 2019; UNESCO 2019; Johnson 2020 etc)

Some artists may be in permanent or stable employment, although this scenario is less common in the 21st century. Such artistic employment of this nature might include those working as performing artists in opera, orchestral or dance groups, or working for media and broadcasting companies. Others may have gained full-time status in working for a long-term television series or being employed in a state agency or department. By and large, these artists would enjoy comparable benefits in the areas of health and medical aid, income insurance, and retirement pensions.

The number of employed artists is modest compared to the overall number of artists. Artists tend to be independent, and work on short-term basis. They are mostly self-employed, independent contractors or freelancers. In the broader cultural sector, there is not much in the way of specialized legislation focussing on these freelancers (UNESCO 2019; ILO 2019).

Artistic and creative employment is more sizeable than often assumed. In some countries up to 1 in 20 jobs in certain countries. And in certain regions and cities the figure can be up to 1 in 10 jobs. Cultural and creative professionals can be found in most sectors of the economy, if one opts for a broader definition of the cultural and creative economy, and in this regard might account for around 40 % of cultural and creative employment (Culture Fix 2022).

While cultural and creative work is of importance in underpinning the current growth/expansion of the CCIs and creative economy, there are distinct structural vulnerabilities at play. On the whole, cultural, and creative jobs are overall more precarious than other forms of jobs in regard to fluctuations in income; contractual stability; and access to social and health security. In the OECD economies, an estimated 29% of cultural and creative employees are self-employed. This is a little more than twice the average rate for all workers in these countries. Figures differ in various developing and economies (Cultural Fix 2022). Skills shortages. (UNESCO 2022a)

Artists across the ages have experienced precarious labour directly, well before the current term came into usage. This precarity as is noted above also impacts the broader culture sector. Frequently, when universal public social security programmes require regular and substantial contributions (taxes or premiums) from participating members, many professional artists who have an inconsistent income flow, face the reality of exclusion from such schemes.

The ways in which benefits are extended to contractual, independent, and freelance artists vary considerably. In some instances, as we have discussed earlier, existing public social benefits are shaped to accommodate artists' circumstance. States can create or sponsor and subsidize a thoroughgoing parallel programme or institute a specialized set of provisions for artists. Alternatively, a non-state system that complements public systems can be set up by differing agencies. These are often artists' associations and at times, by copyright collecting societies (ILO 2019; UNESCO 2019). A number of examples have been discussed earlier in this chapter. A few examples must thus suffice.

Johnson (2020) and the 2015 Full Analytic Report on the Implementation of the 1980 Recommendation (UNESCO 2015) identify four broad types of approach to social insurance of artists:

- No coverage: individuals must obtain private insurance.
- Integration into employment status; the artist is provided access to existing social security systems for workers; they are not differentiated as artists.
- State-sponsored targeted schemes: artists are covered by a specific scheme sponsored by the state. These schemes operate in parallel with (and are often modelled on) schemes for other employed or self-employed persons but makes special provisions for artists.
- Non-state schemes; artists are targeted through complementary or parallel schemes administered by collecting societies, artists' unions or other non-state organizations.

This typology has been largely retained with modification in the subsequent 2019 Report on the Implementation of the 1980 Recommendation (UNESCO 2019).

Artists Covered under Existing Schemes

In certain countries artists are incorporated in the public system by taking cognizance of their particular circumstances. For example, artistic creators in Lithuania are provided with the option of acquiring a voluntary social pensions' insurance by paying specified contributions to the budget of the state social insurance fund. This insurance in practice does not differ from the compulsory pension social insurance and ensures the right to the same national social insurance premiums (Tartilus 2009: 189).

State-Sponsored Parallel Systems

Several EU member states have formed or sponsored comprehensive programmes for artists that run parallel to the system covering employed worker, or has special bespoke provisions for artists. For example, in Belgium, from 2003 artists were able to benefit from a new social security system 'designed with their specific needs in mind'. The relevant social security statute applied to:

> "…all persons who provide or produce, without being bound by an employment contract, artistic performances and/or artistic works by order of a natural or legal person in exchange for a fee."

The provision of artistic performances and/or the production of artistic works is defined as:

> "…the creation and/or execution or interpretation of artistic works in the field of audiovisual and plastic arts, music, literature, theatre and choreography."

The new social security system thus applies to creative artists and performing artists, unlike the former system, which applied only to performing artists (Croux, H & Marx 2003). The system offers a wide range of benefits, with a 13% deduction drawn from artists fees, and a 35% contribution paid by the producer/employer. The state provides the remaining subsidies (UNESCO 2019).

Non-State Schemes

In some countries such as the US and Argentine, artists have arranged social protection schemes through their associations, unions or other non-profit societies. This allows artists to construct alternatives to deal with the lack or ineffective public social protection and/or discrimination between employers and freelancers and self-employed artists. In the UK, the Musicians Union runs a pension scheme of over 600 members which has been running for many years and providing tailored ways for members to make and receive pension contributions (MU 2022).

Whatever approach policy makers opt for in regard to the expansion and reinforcement of social security reform for artists and creative professionals, the particularities and dynamics of cultural and creative work and workers should be accorded due appreciation and respect. The CC sector is complex, and the individual experiences of substitute work, the trade-off between making a living and honing one's talent and craft, and even the kinds of personalities who are drawn to the arts, are part of the social equations that need to be solved. The market might be used imaginatively to mutual benefit, if possible, but it should never be an end goal.

Challenges Faced by Women, Young People and Disabled People in CC Sectors.

Women, young people and disable persons are more prone to structural challenges in the cultural and creative sectors. There are some signs of progress internationally within the CC Sectors,but such shifts are uneven; it is important to consolidate these modest gains, and for policy makers to continue to move on various fronts.

Women artists and cultural and creative professionals are still faced with a number of challenges. There are some gains. For instance, women having the majority of cultural employment in nine of the EU states. In the EU the share of women in cultural employment is slightly higher than in total employment but remains less than half (EU Parliament 2019). A 2022 Eurostat finding showed that in 2021, employment in the EU cultural sector recorded the smallest ever gender gap, with 3.76 million men and 3.60 million women employed (Eurostat 2022).

In 2020 the proportion of in full-time cultural and creative employment across OECD countries was around 50% -- slightly higher than the average share of women in employment in the collective economies. (Cited in Culture Fix 2022). Despite such levels of representation in the OECD countries women still have to deal with structural barriers in regard to seniority, pay and market access (ibid.). A 2017 Report by UNESCO's Institute of Statistic shows that in 58% of the countries in which there is available data more women were employed in cultural occupation than men (UNESCO 2017). However, the gender gap among artists is not about the respective numbers of professional artists but rather those employed as freelance, independent, or contractual workers.

The factors at play include income inequality, inequality in decision-making, gender depiction, as well as sexual harassment and personal safety (UNESCO 2019: UNESCO 2022a (book)) In social terms gender imbalances in creative positions remain relatively wide (UNESCO 2022a).

Likewise, more can be done in the OECD countries and internationally to deal with the question of diversity and the play of class and privilege (cultural capital) in access to such positions (Culture Fix 2022; EENCA 2020; Haines et al 2017).

A number of trends in regard to gender stereotyping are still prevalent in both developed and developing economies. A particularly prominent social expectation is centred on motherhood and the social fact that it is still assumed that women will take on the major share of home care responsibilities (EENCA 2020). These discourses entwine with the working practices in the CC sectors, and the particular social expectations and cultural norms in the differing countries globally. Inter alia, women are thought to be more suited to certain professions and occupations in the broader creative economy and tend to confront ‘glass ceilings’ and ‘glass walls’ (EENCA 2020) Gender pay gaps still existing in creative and cultural occupations.

The informal and short contractual work patterns in the sectors in question make it difficult to more collectively challenge such prevailing practices, expectations and ideologies. There are other factors. With the increase in age less women are active in employment in the relevant sectors. Also, motherhood can have an inhibiting effect on career progression and in instances women may leave their jobs or work part-time. Furthermore, creative outputs by women can be under-valued and under-appreciated compared to men, resulting in women receiving less payment and acclaim for the creative productions (EENCA 2020; UNESCO 2019; Culture Fix 2022).

Globally, income protection and career transition schemes are still rare. And with the rise of attacks on the freedom of artistic expression, and the increasing incidence of digital censorship, promoting gender equality within the CC space globally, will require committed resources and attention raising (UNESCO 2022a).

National and national cultural policies and interventions aimed a promoting women’s empowerment and improved gender equality, vary considerably across states. While specific policies and measures exist in a number of member states (of UNESCO) there is significant room for progress. In addition, the disjunction between policy and societal practice has to be addressed systematically and with more seriousness of intent (UNESCO; EENCA 2020).

Young people and graduates are also vulnerable in regard to entering and working in the CC sectors. Many have to struggle to find an opening or position within their selected sector, and are obliged to resort to unpaid work or restrictive work experience or internship schemes, which might not in the end result in paid or contractual employment (EENCA 2020; Haines et al 2017). Exploitative and unsound contracts and unpaid work are manipulative but still tolerated on the whole in a particularly competitive environment (EENCA 2020; UNESCO 2019). In addition, with entrance to the CC sectors quite often conditioned by the presence or lack of high cultural capital those with less economic resources at the outset are already in a discrimination trap (Haines et. al 2017).

Disabled artists and creative professionals find themselves in particularly challenging environment. Cultural policy often does not give due consideration to disabilities. There are also practical challenges. For instance, accessing funds with the CC sector, often a complicated process, can be more problematic for some disabled persons with some practical aspects in the process not being sufficiently anticipated by the funding agencies (EENCA 2020). Mobility is often a challenge and/or an additional expense for artists and creative professionals given the variety of contractual work often requiring independent travel (EENCA 2020). Such experiences and challenges show both the breadth and depth of the question of precarity in the CC sectors.

Freedom of Association, Collective Bargaining and Trade Unions in the CC Sector

Freedom of association in trade unions and the right to collective bargaining are guaranteed in numerous international treaties and instruments. In view of the particular links between these rights and the ability of workers to secure fair economic return from their work and access to social protection, there is a sound argument for artists and cultural professionals to consider a recourse to trade unions and other associational structures in advancing their cause.

As we have discussed, the CC sector in developed and developing economies has gone through significant growth and transformation over the last two decades or so. The sector has a wide range of employment and working relationship which fall outside traditional employment models of open-ended contracts. These atypical or precarious work and contractual relationships as highlighted inter alia in ILO studies tend to represent an increased incidence of 'decent work' deficits (ILO 2019; Euro Fim et. al. 2016).

Social dialogue and collective bargaining can play an important role in addressing the situation of artists and self-employed workers in the cultural and creative sectors. However, in in many EU states and the OECD countries social dialogue and collective bargaining covering the CC sector tends to be fragmented (Euro Fim et al 2016: Culture Fix 2022).

However, given the unique circumstances of the precarity of creative and cultural workers, the question of the kinds of institutions that should be utilized in articulating grievances and demands, is not necessarily orthodox trade unions.

Over a decade ago, Rebecca Gumbrell-McCormick (2011) argued that the significant increase in precarious or 'atypical' forms of work, including part-time, temporary or agency, contract-out, dependent self-employed and even undocumented work, constituted a major challenge for trade unions in the EU. This scenario, as other scholars have pointed out has in fact global application. With 'atypical' becoming in effect 'typical' in a number of EU members states, especially among women and younger workers, called for changes in the way trade unions developed strategies, policies, and structures. It also presented a challenge to their traditional way of thinking. Although unions had made some shifts, they would have to make paradigmatic changes to adapt to these developments. Subsequent events have reinforced her findings. Perhaps the biggest challenge lies in the shifting terrain/sands of the cultural and creative sector. In both developed and developing economies the fragmentation and particularism within the CC sector makes unionization difficult despite the seeming benefit.

The work of work in the first quarter of the 21st century is changing rapidly. In many developed and developing economies jobs in manufacturing are declining coupled with differing paths to deindustrialization (Siyawela 2021). The loss of formal industrial jobs, coupled with transitions to non-standard and flexible work and the growth of informal economies has gone hand-in-hand with changes in employment relations and behaviour and the spread of market-focussed practices. Such processes have eroded and even violated trade union rights and seen the fall in unionization rates in the majority of countries (Lafferty 2017; Visser 2019).

Against this background, trade unions face two major challenges: the digital economy and the way it transforms jobs and employment relationships as well as the social divide between workers with stable, paying jobs and workers with unstable, poorly paid, or precarious jobs, or no job at all. There are a range of particular conditions that influence trade union dynamics within countries, ranging from external conditions to other of a union's own making. In developing economies the size of the informal economy, ethnic diversity and conflict, the state of the institutions of collective bargaining; labour-management relationship, and union fragmentation are among the key factors (Visser 2019; Lafferty 2017) issues.

For Visser (2019) there are four possible future scenarios for unions:

- marginalization through the continuation of current trends of decreasing rates of unionization and aging unions;
- dualization of unions defending their positions and, under conditions of increased instability of work and decreased institutional protection, focusing their decreasing resources on defending the members closest to them at the expense of outsiders and precarious workers when necessary;
- replacement, or a process in which trade unions are increasingly replaced by other forms of social action and protection provided by employers, states, intermediary agencies, NGOs or emerging social movements; and
- lastly, revitalization based on policies and coalitions which strengthen trade unions as a relevant actor in shaping the 'new unstable workforce' in the digital economy.

Given the complex and diverse nature of the CC sector, to secure the substantive involvement of trade unions in helping organize precarious creative workers would require a propitious confluence of factors. Nevertheless, there are signs that precarious cultural workers and professionals are looking to unionization as one of the strategies to cope with their current work conditions and status (Cohen & De Peuter 2022).

There are also developments such as partial return in some Latin American countries such as Chile to revive old forms of associations such as mutual aid societies. For example, with the heightening of precarity among musicians and cultural workers in mutual aid groupings meshed with musician activist groups to promote a series of mutual aid initiatives in which musicians played central roles, using airtime and other means to access a wider audience (Karmy & Urqueta 2020). Tanghetti et al (2022) show how creative and cultural workers in Milan during the Covid-19 pandemic and its aftermath, leveraged the promissory discourse of a creative city, as well as certain of its physical resources, in social activism to draw attention to and help remedy their precarity.

The Canadian-based research collective seeks to link with local and international groupings of cultural and creative workers to help shape and raise consciousness around the articulation of various kinds of atypical workers in the various CC sectors.

Conclusion

This chapter provides an overview of the international and policy context and developments, including certain best practices cases. It deals extensively with the UNESCO 1980 Status of the Artist Recommendations which calls on member states to improve the professional, social and economic status of the artists, through the implementation of interventions in regard to training, social security, employment, income and tax matters, mobility and freedom of expression.

The chapter analyses the findings of the 2018 UNESCO survey of the progress of member states in aligning to these recommendations, in conjunction with the 2005 UNESCO Convention. Surveys are conducted at four-year intervals.

The chapter provides a number of examples measures enacted to respond to social security, employment and income and tax matters. The emerging efforts of certain developed and developing countries to tax such platforms is considered. The options to governments in using such revenues to fund programmes an structures to address precarity and social security concerns is also discussed. Such examples provide a useful policy option for the South African government, most especially given the current pressures on the national fiscus.

Attention is given to IPR and the growing impact of the transnational digital and streaming platforms on CC in developing and developed economies. The advantage and disadvantages of these digital resources and the inequalities and asymmetries thereof are considered.

Initial findings suggest that usually that the well-known artists (e.g. musicians, visual artists, and writers) have benefit primarily from the hegemony of the digital platforms, while the majority of users, especially those with local as opposed to international reputations, benefit modestly at best. Establishing a closer working relationship with UNESCO and its current work on these matters is a course of action the DSAC and the South African government might consider.

Chapter 4: South African Context and Policy

Introduction

This chapter opens with a compact overview of the questions of social security and atypical labour in the country. Thereafter a compact background brief of South African in regard to the promotion of its creative economy and the CCIs is provided.

The significance of industrial policy and the premature deindustrialization in the country in regard to interventions in the CC sector and the creative economy is discussed. Thereafter the alignment of two strategic documents, namely the 2022 Masterplan for the CCIs and the recently approved Revised Paper for Arts, Culture and Heritage, in regard to the entwined processes of precarity within the CC sector and the question of the state's response to the social security of artists is examined. The related question of the reinforcement of artists' status in the post-Covid 19 environment is also assessed.

Socio-Economic Rights Entrenched in South Africa

South Africa constitutionally entrenched socio-economic rights, including access to social security, through Section 27(1) (c) of the Constitution (1996) which states that "everyone has the right to social security." The policy framework for the provision of social security is set out in the White Paper on Welfare, 1997, which is based on four pillars - private savings, social insurance, social assistance, and social relief. These pillars are intended to work together to provide universal access to social security. However, as this section will show, there remain significant gaps in legal and effective access to social protection for precarious workers in South Africa.

Approximately 4 percent of GDP is spent on social protection, with the largest portion of this directed towards the provision of social assistance, administered under the Department of Social Development. Over 17 million people in the country benefit from 8 non-contributory means-tested cash grants covering child support (under 18 years of age), older persons (above 60 years of age), disability, foster care, care dependency, grant-in-aid, social relief of distress and war veterans. These grants are extended to South African nationals, and because they are not dependent on the existence of a formal employment relationship, may cover precarious workers who fall below the relatively generous means test threshold. Missing from the social grants is any form of unemployment grant to provide for those between the ages of 18 and 59 without access to employment (UN SDG Joint Fund, 2022). During the Covid-19 pandemic this was temporarily remedied through the implementation of the Special Covid-19 Social Relief of Distress Grant (SRD), which aimed to cover those with no access to other forms of protection. This grant has now been extended into 2023 albeit with stricter eligibility criteria, covering only those with zero income (Mthembu et al., 2022).

Publicly provided insurance for those of working age makes up the second main pillar of social security (Woolard & Leibbrandt, 2010). Publicly managed schemes include the Unemployment Insurance Fund (UIF), the Workers Compensation Fund (for work-related illness and injury) and the Road Accident Fund. However, there is also a large private insurance market in South Africa, where the state is engaged in its role as an employer - contributing to the Government Employees Pension Fund (GEPF) and the Government Employees Medical Scheme (GEMS).

Workers outside of formal employment, the self-employed, those working less than 24 hours a month for an employer, and migrant workers on fixed term contracts do not have access to the UIF or the Compensation Fund which are administered by the Department of Labour and Employment (Olivier, 2011). UIF contributions are made by employers and employees who each contribute 1% of the worker's salary to the fund, which allows workers to claim benefits for unemployment (up to 238 days), illness, and maternity leave. A death benefit is paid to the family if a worker dies whilst still in employment. In terms of the benefits, the maximum income replacement rate is fixed at 60% of the of the remuneration rate for lower-income contributors, and at 38% for higher income contributors. These replacement rates fall below the norm in other developed and developing countries which range from 50 - 90% of earnings (Olivier, 2011).

In 2003 the Unemployment Insurance Act was amended to enable access to the scheme for domestic workers with multiple employers, with benefits including unemployment, illness, maternity, adoption and dependence. In 2021, after several years of legal challenges, the Compensation Fund was also extended to cover domestic workers (LabourNet, 2021). However, as the Covid-19 crisis revealed, registration rates of such vulnerable workers with the UIF remains low (Alfers, 2021), and are likely to remain low with respect to the Compensation Fund. The reasons for this are multiple, but include employer-led registration paired with a lack of incentive to register as well as a lack of monitoring and enforcement, and complex and sometimes dysfunctional registration and benefit application systems (Plagerson et al., 2019; NALSU/UN Women/WIEGO, 2022).

Ongoing Developments

Efforts to remedy gaps in the social security system have accelerated since the Covid-19 pandemic, with several policy options being discussed in the public sphere. These include the following:

Basic Income Support:

The idea of a Basic Income Grant to ameliorate poverty levels in the 18-59 age group has a long history in South Africa, spanning back to the 2002 recommendations of the Committee of Inquiry into a Comprehensive System of Social Security (the Taylor Committee) (Seekings & Matisonn, 2010). The implementation of the Special Covid-19 SRD Grant, alongside increases in unemployment as a result of the attendant economic crisis, has reinvigorated calls for the implementation of basic income support, with a recent joint UN report supporting this call (UN Sustainable Development Goals (SDGs) Joint Fund, 2021). The Government has extended the temporary grant into 2023 while determining a pathway towards institutionalization.

Documents leaked to the press by the Institute of Economic Justice (IEJ) suggest that instead of a basic income, what is under consideration by the Presidency and the Treasury is a targeted grant for jobseekers, and for unemployed caregivers (Stent, 2022).

National Social Security Fund

During 2021, the long-awaited outline for an integrated National Social Security Fund (NSSF) was released by the Department of Social Development in the form of a Green Paper. This was met with a public outcry (see van den Heever, 2021), and the Green Paper was retracted for further deliberation. Nevertheless it provides a useful indication of thinking within the Government.

The NSSF would establish a 3-tier social security system - a floor made up of the social assistance schemes described earlier, a mandatory second-tier social insurance scheme providing contributory protections for low-income formal workers (up to an earnings ceiling of R276 000/year), informal workers and the self-employed which would integrate UIF, the Compensation Fund and the Road Accident Fund, and would also extend to providing retirement, survivor and disability benefits. A final third tier would be made up of voluntary private insurance arrangements (Green Paper, 2021).

In terms of the second-tier scheme to cover retirement, survivor and disability benefits, the Department of Social Development has outlined a scheme which would be based on relatively low contributions from workers (starting at R50/month). The fund would be split between a members account and government subsidy account. Contributors would be able to access a portion of the benefits out of their member accounts prior to retirement, but the government subsidy and the frozen portion would only be paid out afterwards. In terms of the disability benefits, the scheme would aim to pay out a monthly benefit of R1326/month until the age of 60, rising with inflation (Department of Social Development, 2022).

Maternity Benefit Reform

During mid-2022, the South African Law Reform Commission Project 143 on the extension of maternity benefits to self-employed workers submitted their report to the Minister of Justice for further action. Two major recommendations include the reform of the UIF to allow access for the self-employed to the maternity and parental benefits available under the fund - this would be financed by a 1% contribution based on a reference wage from the worker, to be matched with a 1% contribution from the government. A second recommendation includes the extension of the Child Support Grant (CSG) to the moment when conception is confirmed, as opposed to the current situation where the CSG comes into effect at birth.

Premature Deindustrialization in South Africa

There is growing consensus that South African is one of a range of developing economies to experienced 'premature deindustrialization' in recent years (Rodrick 2015; Siyawela 2021; Adreoni, Tregenana et al. 2021; Schussler 2021). The reasons are varied but interlocked.

There was a certain sanguinity in post-1994 policy circles that South Africa industry and other key sectors would profit from the 'peace dividend' and new global opportunities. Planners and newly minted consultants failed to take sufficient note of South Africa's recent development history. As we have seen, the structural trends in the 1980s which saw the partial dissolution of the production assets of the racially structured development state, and an over-enthusiastic adoption of new market-oriented development approaches, impacted both directly and indirectly on the future prospects of the manufacturing sector and on other key economic sectors such as mining. A systemic failure to beneficiate raw materials and primary industrial activity would also prove costly. The need for a more flexible labour regime coupled with smarter strategies in coping with cheap imports is a seemingly obvious criticism.

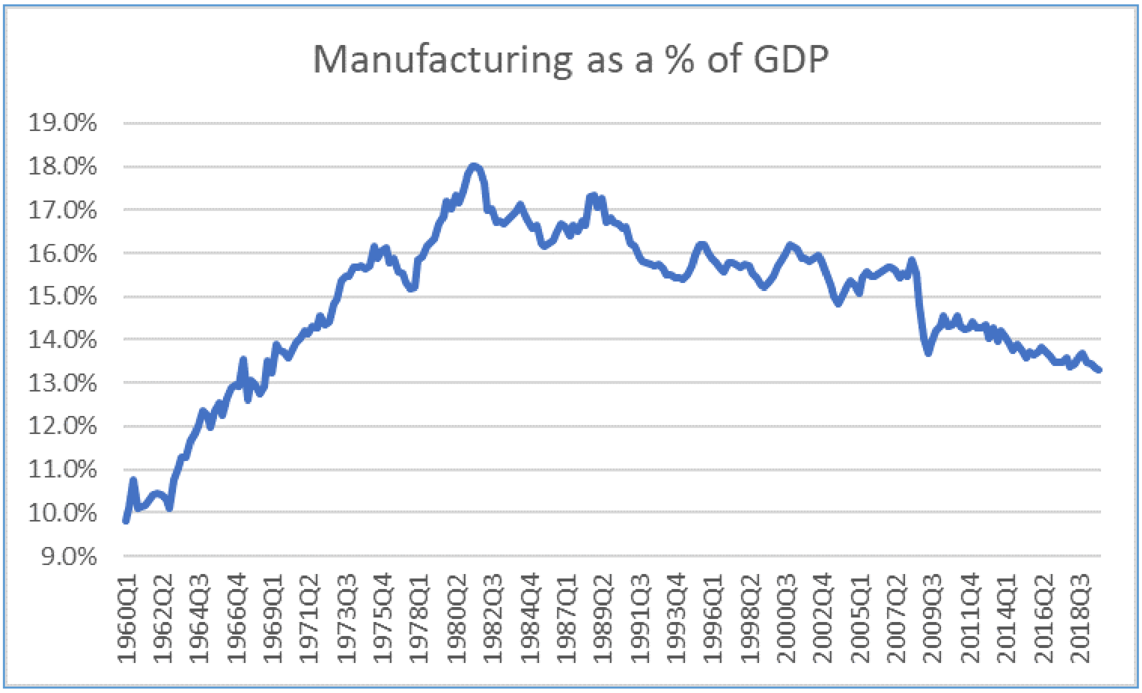
Also important has been the tendency in strategic national planning circles to underplay the importance of industrial policy and expanded industrial development. A raft of new research and writings (e.g. Vivares 2020; Adriano, Tregenna et al 2021; Siyawela 2021) has shown that the manufacturing and the industrial economy more generally should be central to development policy, but has in fact been marginalized in recent decades by more 'human-centred' and 'softer' technical development discourses (Thurbon & Weiss 2020). The imperatives of large corporate and multi-national capital and big power calculations have seen the downplaying of industrial policy and building national industrial bases, with significant exceptions in East Asian high performing economies (Siyawela 2021). South Africa's experience of, and capacity in import-substitution has since the early 1990s been extensively decried, and yet as recent research has shown many comparative Latin American economies were similarly persuaded both by new national elites and international agencies to 'throw the baby out with the bathwater' to the detriment of their overall economic growth (e.g. Siyawela 2021).

In South Africa the problem is compounded by an under-appreciation of the history of industrialization especially in regard to the close and complex relationship between mining and the rise of the manufacturing sector in South Africa. The progress of the development state in the segregationist and apartheid eras, was made possible by mining surpluses (Yudelman 1982). However, the failure to secure and ensure a productive and sustainable mining framework with undergirding legislation is a direct and indirect factor for premature deindustrialization in contemporary South Africa. The industry is in a state of structural decline. The contribution of mining to GDP fell from 19.4% in 1980 to 6.6 % in 2017 and the number of employees on South African mines has nearly halved from a peak of 829 235 in 1986 to 455 109 in 2017 (Robinson and Croll 2017). In an international conference in 2017, the CEO of the Minerals Council (formerly the Chamber of Mines) observed that mining companies in South Africa had essentially frozen all investments in the country because of policy and regulatory uncertainty. This decline has continued in recent years, with mining production falling 29.8% year-on-year in May 2020 (MiningMix, 14 July 2020).

The continuous emphasis on the manufacturing sector is premised on the view that the manufacturing sector is critical in the process of industrialisation. Growth in the manufacturing sector, with its strong backward and forward linkages to other sectors, contributes to growth across the economy, higher employment, and exports (Kaldor 1965).

Manufacturing has received targeted support from the DTI (now DTIC) most especially in the automotive sector. However, there has in fact been a distinct decline in manufacturing's share of GDP and over time decreased employment in the sector. This trend commencing in the 1980s is illustrated in Figure 1 below.

Table 5: Manufacturing contribution to GDP from the first quarter of 1960 to Q3, 2018



Source: Siyawela 2021

The lowering of tariffs and opening of borders, combined with increasing competition from countries such as China and India, led to a decline in South Africa's manufacturing sector. The number of jobs in manufacturing increased from 1,5 million in 1994 to peak at just over two million by 2008 before declining to 1,7 million in 2016. At the end of 2019 manufacturing supported around the same number of jobs – 1.77 million, according to the Quarterly Labour Force Survey. The contribution of manufacturing to Gross Domestic Product (GDP) has equally been in decline. Those industries that could restructure, modernise and/or benefit from significant state support have been able to benefit. They have not, however, been able to create the much-needed jobs required by the country to reverse the massive unemployment emanating from significant job losses starting in the mid-1980s in mining and agriculture, and later from employment-intensive industries such as clothing and textiles and steel fabrication, among others (Haines 2022 forthcoming).

Dani Rodrick (2015) has noted process of premature deindustrialization in developing economies including African economies in which countries lose their manufacturing jobs without first getting rich. As he argues: 'Developing countries have experienced falling manufacturing shares in both employment and real value add especially since 1890s.' The effects are already evident in large parts of the developing world. In Latin America, with the shrinkage in manufacturing informality has grown and national economic productivity has declined. In Africa, there is a crowding into petty services in the main urban centres, with no meaningful signs of a revival of industrial fortunes. This in turn contributes to the prevalence of precarity in the various economic sectors, the creative economy included.

In September 2021, at a book launch, Minister Enoch Godongwana noted the potential impact of such thinking on government policy:

> "Manufacturing has strong backward and forward linkages to the rest of the economy which make it a significant driver of demand across the economy. Equally, the sector's ability to interface between

> agrarian and resource extracting economies and introduce new products and technologies allows it to move the economy forward – from low to high productivity activities."

He added further that re-enhanced manufacturing and more generally industrial development would aid job creation where the official unemployment rate is at least 34%:

> "Further, in an environment, such as ours, where structural unemployment remains stubbornly high, manufacturing has a critical role to play in expanding our skills base and helping us deal with unemployment. Ultimately…industrial development is critical for our aspirations, as a nation, for higher levels of economic growth, job creation, transformation, and development" (cited in Haines 2021).

The Creative Economy, Creative and Cultural Industries (CCIs) and the Question of the Artist

A recent UN estimate sees the creative economy generating annual revenues of over $2 trillion and accounting for over $2 trillion annual revenues and providing almost 50 million jobs worldwide. Women make up about half of the global workforce, and that these industries employ more people in the 15-29 age bracket than any other sector. Television and the visual arts are the largest sector in terms of revenue, with visual arts and music the largest industries in terms employment (UNESCO 2022). These figures would have been higher had not the 2019-20 Covid19 pandemic devasted the sector. However, there are signs of a turnaround. Also, new technological and associated social trends are seen as playing a key role in expanding and transforming further the sector.

International trade in creative goods and services generates increasing revenues for countries, but creative services exports vastly exceed those of creative goods. The global exports of creative goods represented US$524 million in 2020, while world exports of creative services reached US$1.1 trillion. In addition, UNCTAD estimates that, in 2020, creative goods and services represented 3 and 21 per cent of total merchandise and services exports, respectively. The report also shows that creative services were more resilient during the Covid-19 pandemic than other services sectors.

South-South trade in creative goods has almost doubled in the past two decades. In 2020, South-South trade in creative goods represented 40.5 per cent of creative exports by developing economies. On the other hand, developed economies mainly tend to exchange cultural goods among themselves. South-South trade can be important for developing economies to create new trading opportunities and diversify exports.

What is clear is that trade in cultural and creative goods and services, is growing on a South-South basis. However, these trade flows also indicate continuing inequalities. While African economies are demonstrating sustainable growth rates in these are usually off a modest base and surpluses are difficult to generate **(EY 2015**). And although there is expansion in terms of export sales there is often a trade deficit when one factors trade imports into the equation.

It should also be borne in mind that with lower annual growth rates in past decades than high performing developing Asian economies, their outputs in terms of GDP contributions over time significantly less in real terms than their effective competitors. And there has been scholarly criticism in the past of the use of a developed/developing country classification. De Beukelaer ((2014: 2-3) argued for instance, that this approach, 'increases the absolute and relative shares of developing countries in the global creative economy' thus obfuscating reality and inhibiting the use of evidence-policies for the creative industries. Re-interpreting the relevant United Nations Development Programme (UNDP) and UNCTAD data he noted that in 2010 a group of 49 LDCs only accounted for 0.11% of creative goods exports but which showed an upward trend from 0.04% in 2002.

Notwithstanding these complexities, the promotion of creative economy in developing countries is more frequently advocated as a distinct and substantive development option (UNCTAD 2022). Such interventions would require more extensive and particular data most especially in many of the developing economies, and the related design and implementation of 'innovative and multidisciplinary policy responses' (ibid.).

Part of the policy challenge though is to balance the growth of the new creative economy and CCIs while maintaining and even extending established levels of public investment in the infrastructure and ecosystems for the traditional ACH (Arts, Culture and Heritage) sectors. For a range of developing economies, this includes dealing with long-standing commitments in terms of the 1980 UNESCO Resolution Concerning the Status of the Artist to provide more directly for the training and career development as well as the social security of artists and creative practitioners and secure their cultural rights as signatories of this measure.

Mini-Case Study: Artists in Schools Programme

The origins of the South African Artists in Schools (AIS) programme lie in the 2010 UNESCO, Goals for the Development of Arts Education and the 1996 DAC White Paper on Arts, Culture, and Heritage.

Conceptualised as a partnership between DSAC and DBE, the AIS structure was formalised in an MOU between the two national departments signed in 2017.

DSAC states that the purpose of AIS programme "is to develop and improve the art's practitioners' pedagogical capabilities and skills needed to collaborate with arts and culture learning area educators in schools and other learning centres, and more directly communicate and interact effectively with the learners. Very importantly, this project further seeks to improve the quality of the delivery of arts, culture and heritage education and training in the public schools. The programme also seeks to create sustainable job opportunities for the arts practitioners in the formal educational sector."

Artists working in schools shared their thoughts on the AIS programme:
"This program isn't just for today or tomorrow but it's a long journey where you can live your dreams in music." – Nathan Marang, Music Artist-facilitator (Phakama Arts Foundation, West Coast)

"I am looking forward to help, inspire and educate young people in music and to go as far as I can to inspire others to do their best." – Nathan Marang, Music Artist-Facilitator (Phakama Arts Foundation, West Coast)

Policy Implications

Programmes such as AIS have the potential to help learners develop creativity and critical thinking skills as well as promote cultural awareness. Such programmes can improve academic performance and contribute to the overall well-being of learners, their teachers and artists in the schools.

The 2013 Human Rights Council report by UN's Special Rapporteur, Farida Shaheed (UN 2013), points out that artistic expression and creativity are central pillars of democratic societies. She stressed artists and creative professionals required legal frameworks and protections that promote artistic freedom and underpin soco-economic rights. It was crucial too that public sector financing be available to ensure the space and scope for a diversity of cultural expressions. She noted her concern at the advent of 'market censorship' as constructed by corporate consolidation and the concomitant reduction of the diversity of funding sources that strengthen artistic autonomy and open up spaces for cultural and creation expressions and productions. She invoked the UNESCO 1980 Recommendation:

> States have a duty to protect, defend and assist artists and their freedom of creation (article III-3). They should ensure that artists have the freedom to establish and be a member of trade unions and professional organizations, and should enable organizations representing artists to participate in the formulation of cultural policies and employment policies (article III-4). Artists should be able to participate fully, either individually or through their associations or trade unions, in the life of the communities in which they practise their art, and be associated in the formulation of local and national cultural policies (article III- 7) (Cited in UN 2013)

In a not dissimilar vein, the 2019 UNESCO report on survey responses by member states on the advancement of the 1980 Recommendation and 2005 Convention initiatives, observes the marginalization of artists and creative practitioners from a number of policy constructions:

> One notes with great surprise, for example, the extent to which "artists" are actually often absent from the various cultural policies or programmes that are referred to, covering cultural expressions, arts institutions, cultural entrepreneurship or cultural and creative industries (UNESCO 2019: 9).

Cultural and Creative Industries Master Plan

The main aim of the DTIC's reimagined industrial strategy, is to grow and develop an innovative and sustainable Creative Industry via its Master Plan report and to outline key interventions in an inclusive fashion so that the Plan contributes in an effective and focussed way to the creation of 'decent work' in the South African economy. Utilizing the ILO's approach to work, the DTIC's Master Plan sees opportunities for work:

> "that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organise and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men" (cited in DTIC 2022: 5).

The creation of decent work should thus provide the means of reducing inequality and poverty in the country.

However, the creation of decent work, the Plan report concedes 'is a challenge' as employment in the CCI Sector exhibits high levels of precarity, with jobs often short-term, contractual, and intermittent in nature. Precarious work in the South African CC sector includes

> "…. work organised on a project-by-project basis, flexibility and intensification of work and widespread informality in hiring practices which could lead to substantial amounts of unpaid time. The degree of precarity of work differs across the sub-sectors of the Creative Sector, with those domains that are labour intensive exhibiting higher degrees of precarity and relative decline in their contribution to the economic value produced by the Creative Sector" (DTIC 2022: 5-6).

Moreover, it is noted, the CC sector 'is often characterised by inequality along race, gender and class lines' (2022: 6).

The Master Plan for the CCIs does not provide much detail on the structural implications of the precarity in the South African CC sector with reference to UNESCO discourses and interventions in regard to the

1980 Recommendation and the 2005 Convention and related measures. Thus, a number of areas of concern for artists and cultural workers in South Africa discussed particularly in chapter five, are not, and possibly understandingly, dealt with in much depth, given the focus and nature of the Masterplan.

These areas of concern include social security schemes:

- barriers to financial institutions for the CC sector for items such as mortgages and formal loans;
- providing structured interventions for the substantive training and upskilling of CC sector artists and artists;
- legally reinforcing the professional status of artists and creative practitioners;
- ensuing that rights to free association, collective bargaining and unionization are provided and indeed incentivized; and overall,
- ensuring that CC workers and practitioners are a stable and flourishing component of the ecosystem which needs to be consolidated and sustainably developed to nurture the CCIs as a whole.

Close attention to the needs, fears and aspirations of the artists and creative practitioners is essential in the construction of social and even cultural capital to allow the development of a more stable CC sector overall. The Plan cites as one of the touchstones the notion of the 'creative class' of Richard Florida (DTIC 2022: 34). For such a class to be more broadly nurtured, the increased professionalization and social stabilization of the CC sector would seem to be imperative.

The Masterplan does look to the question of education, and the articulation of relevant tertiary and university level education in more structured ways to look for the development skill levels more appropriate for the CCI sector. There is a particular emphasis on inserting the creative sector into an overall framework of innovation, with increased incorporation of art-related curricula and programmes to shift a STEM bias (science, technology, engineering, and maths) to a STEAM (science, technology, engineering and maths). There is reference, however, to humanities programmes being conjoined or supplemented with some form of STEM and also more bespoke training in the relevant digital technologies.

How such re-orientation impacts on existing programmes and arts courses at school and post-school level requires more clarification, otherwise the discourse of the artist might be conflated with or replaced by the teaching of the notion or even subject of innovation. In addition, as discussed earlier in this section, the issue of declining public funding for art education in schools, public libraries and citizen-oriented arts and culture will have to be borne in mind by the policy makers.

The report outlines several key threats to major threats to the promotion of CCIs, including the following:

> Lack of social security framework for artists, making their security highly precarious wherein on one hand their share of revenue is limited and on the other they are considered as independent contractors thus excluding them from accessing the rights and benefits afforded by the South African Labour Relations Act (DTIC 2022: 40).

Other threats that if resolved could be helpful to artists and creative workers are:

- A high percentage of creative industries products released and distributed in South Africa consists of imported material with shelf space in wholesale and retail platforms geared towards this imported content thus extending and entrenching the market domination of imported content. Piracy, both in physical and digital formats, as well as elementary copyright infringement and protection, remain a key concern of all in the industry

- Royalty collection, not only through organisations, is challenging and not as effective as it could be. The lack of income through copyright collection for artistic creation and the production of creative industries services and goods is a disincentive to creators, producers and investors to increase trade and investment in this sector (DTIC 2022: 40)

The identified policy intervention areas, if followed up, provide some measure of optimism for artists and creative workers. The Masterplan acknowledges the emphasis on the generation and consumption of local products and content by UNCTAD and UNESCO as an important touchstone in deriving these options. It is acknowledged that the South African Creative economy has been dominated by foreign content. In turn the over-supply of creative content from foreign providers impacts directly on the capabilities of the local creative industry to create, support and sustain local jobs (DTIC 2022: 40-41).

The critical policy-relevant interventions would be predicated on these listed issues listed in the DTIC Mater Plan (2022: 41).

- a robust and reflexive enforcement of IPR;
- local content and domestic demand and consumption stimulation;
- instalment of viable and vigilant fiscal regimes which will ensure fiscal benefits for the creative industries and possibilities for tax exemptions;
- support policies for financial institutions established to give targeted support for creative industry businesses and provide grants to creative arts;
- enact and administer policies for fair competition;
- strengthen the creation of cultural enterprises;
- develop quality exports of creative goods and services;
- design and implement a national and regional creative cluster strategy to network independently functioning units and create synergies between CCIs;
- develop entrepreneurial skills in the creative industries and provided related education and training; and
- institute effective data-collecting measures.

In addition, labour and social legal frameworks would be put in place to enable creative industry occupations to be recognized as full careers; and to support non-formal businesses and artists organisations.

Among a list of key action programmes to be initiated the ninth one would seem to be among the most promising as well as constituting something of a litmus test for the viability of the Masterplan exercise as a whole. This particular action programme would aim to realise the ‘aspirational vision and associated objectives’ of the Masterplan and Reimagined Industrial Strategy (RIS) more generally, though the articulation of infrastructural and institutional coordination of selected Ministries and State Owned Enterprises (SOEs) (DTIC 2022: 74). This process would be accompanied by a range of policy, regulatory and programmatic interventions.

Revised White Paper on Arts Culture and Heritage

Status and Rights of Arts, Cultural and Heritage Practitioners

After a number of iterations, the fourth draft to the 2017 Revision of the Department of Arts and Culture 1996 White Paper (DSAC 2017 [2022]: 55), was passed in Parliament in 2022. To date the Revised White Paper (RWP) is the most comprehensive statement by DSAC on the question of the Status and Rights of Artists in South Africa. In the White Paper the category of artist is expanded technically to embrace the terrain of arts, culture and heritage – in effect the ACH sectors.

The relevant section in the RWP would appear to take its reference point primarily from the original 1980 Recommendation, but the 2005 Convention… Cultural Diversity seems to have been also referenced in the draft of the section in question. And the international standard bearing of UNESCO on such matters is acknowledged (DSAC 2017 [2022]: 55).

The section in question opens with the following phrase: 'Artists create and heritage practitioners preserve artist and cultural diversity (ibid.).

Mini-Case Study: Rooibos and Traditional Knowledge Protection

Rooibos is a traditional herbal tea that which has been consumed in South Africa for centuries. It is an important part of our cultural heritage. In addition, it is an important agricultural product and an important source of income for many farmers in the region.

Protecting rooibos has resulted a various long, and expense, IPR battles. WIPO states that "the registration of rooibos as a trademark in the United States of America (USA) brought international attention not only to the unique properties of the plant, but also its link to the culture of the people in the Cederberg region and South Africa. This motivated the industry to unite around a common cause for the protection of rooibos, and finally, in 2014, rooibos received status as the first geographical indication (GI) for a South African product other than wine and spirits."

Protecting Rooibos as a traditional product of South Africa has helped to prevent the misappropriation of our heritage and intellectual property by other countries or companies. It has also helped to ensure that the farmers who produce Rooibos are fairly compensated for their work and that the product is sustainably produced.

Policy Implications

Attention needs to be given to safeguard products such as rooibos to preserve our cultural heritage, to support our local economy, to promote tourism and encourage sustainable economic development.

Social Status and Rights

A range of social status and roles are recognized and noted. All individuals without exception in regard to race, colour, gender and creed are to have the same opportunities to acquire and develop the skills necessary for the maximum de… exercise of their artistic talents, to obtain employment, and to exercise their profession without discrimination and abusive practices of any kind' (DSAC 2022: 55). Appropriate measures are encouraged to facilitate the teaching of certain artistic disciplines and related skills and facilities provided for this purpose. Particular attention should be accorded the participation and development of women, youth and the differently abled in various sector programmes. Work environments should be safe and secure from the practices of exploitation, sexual and other kinds of harassment. In addition, free international movement of practitioners and the freedom to exercise and practice their art and/or cultural expression of their choice should be protected (DSAC 2022: 55).

Economic Status and Rights

This section focuses on the improvement and reform of employment and working condition for art, cultural and heritage practitioners. The dual status of artists, as self-employed and as employees is underlined is problematic as self-employed artists cannot access UIF provisions. They are also faced with complex taxation processes and the lack of social security (DSAC 2022: 55).

DSAC is committed to engage in a 'series of discussions' with the Department of Labour (DOL) to enable artists to keep their self-employed status for taxation purposes while access benefits such as unemployment insurance; occupational health and safety compensation; and other social benefit offerings (DTIC 2022:55).

The policy outlined in this section, is aligned with UNESCO recommendations, among other relevant international institutions and guidelines. This policy endorses the drafting and passing of legislation aimed at the following outcomes:

- Recognize the unique status of artists in law. Such a categorization could allow an exemption from paying income tax and paying tax on materials and equipment
- Agree to a formal definition to be applied by all entities supporting the artists. This will ensure bona fide artists are duly recognized by any future tax and benefit scheme.
- To provide a registry of artists. This will allow for the administration of any proposed social security scheme for artists.
- Provide a formal framework for the regulation and facilitation of relationship between artists and producers;
- Structure bankruptcy protection schedules, such as classifying artists as preferred or secured creditors in the case of a bankruptcy situation;
- Allow tax deductions for expenses incurred through artistic work;
- Facilitate investment in the arts via charitable donations;
- Establish a specialize benefit regime for artists in the country; and
- Protect the creative and intellectual property and copyrights of artists, authors and creative innovators in the ACH sectors (DSAC 2022: 55-56).

These actions were the building blocks for a substantive Benevolent Fund. This structure was outlined in research commissioned by the then DSAC in the early 2010s (DSAC 2022: 56). The Benevolent Fund will be established in a two-phase process. The first phase will provide emergency support and certain technical and practical support, contingent on the partnerships established during this phase. The second phase would finalize the development of the Fund (DSAC 2022: 55).

The anticipated Fund will offer emergency financial aid to artists across the spectrum of the arts. Services will include:

- Death and funeral benefits within a proscribed range in instances where an artist dies and needs a burial (for the artist not family members);
- Crisis funding, when contingent and 'acts of God' preventing the artist from generating an income;
- Supply selected specialist medical costs, which will cover the provision of equipment damaged during disasters.
- Source or provide low-interests, short-term loans up to a scheduled amount that will also reconstruction of workspaces or damaged equipment.

- Provide non-repayable single grants via direct payment into accounts. This would include water dues; electricity and water dues; rental agreements, doctors or hospital bills, funeral parlours, or channelled directly to the grieving family.

The Fund will also be able to offer technical assistance to artists for a limited set of functions, contingent on the establishment of partnerships with service providers and specialists in the field (DSAC 2017: 57). The economic rights of ACH workers is preferred access to public publication, television, radio and other media, predicated on policies which look to enhance local content for broadcasted programmes, and other performances and events. Local content between 60-90% guidelines is recommended for adoption (DTIC 2022: 57).

Right to Form an Association

The RWP supports the rights of artists and cultural practitioners to establish discipline-based associations at local, provincial and national levels. The creation of a National Federation of Associations is also recommended., which would be representative of the various sectors and sub-sectors of the ACH fields. Criteria for the formation and public funding of representative professional associations should be developed in consultation with relevant practitioners (DTIC 2017: 57).

Human Resource Development

Human Resource Development (HRD) is discussed in Chapter Seven of the RWP. This policy field is directly informed by the relevant aspects of UNESCO's 1980 Recommendation and related policy pronouncements.

The policy in regard to HRD provides for a thoroughgoing educational intervention from early school through to tertiary and university education and training 'in which culture and creativity are adequately addressed in the form, content and practical resourcing of curricula, delivery methods, learning methods and the human resources that bring these together'. The policy implementation exercise entails a close intergovernmental relationship between DSAC and the Department of Basic Education (DBE) in the formative and basic education stages of arts, culture and heritage curricula and teaching in the schools. Such curricula must be driven by a heightened awareness of how fundamental this intervention is 'for the development of critically engaged and culturally aware citizens' (DSAC 2017: 58).

The RWP reflects on the lack of systemic and intensive implementation of relevant arts and humanities curricula and programmes as envisaged in the 1996 White Paper on Arts and Culture. The implementation of the curricula and programmes was hampered, particularly in previously disadvantaged schools by 'a lack of trained educators, while inadequate facilities, material and equipment hampered the implementation of the policy'. Matters were exacerbated by the allocation of 'a mere two periods of 35 minutes' allocated to the relevant learning area per week (ibid.).

The failure to implement has created a problematic situation which needs to be addressed with due urgency:

> These factors resulted in a situation in which the policy recognition of the arts was contradicted in practice to such an extent that the policy advances of the past two decades are at risk. New commitments, agreements and partnerships are thus needed to guard against this implementation failure (DSAC 2017: 59).

The provision of arts, culture and heritage education for learners at basic education level is reaffirmed as the responsibility of the Ministry of Basic Education in partnership with the Ministry of Arts, with the Ministry of Arts, Culture and Heritage. The implementation exercise requires appropriately trained teachers as well as suitably equipped and 'fully resourced' facilities duly staffed with qualified educators 'in all forms of the creative and performing arts and heritage'. The roll out would be extended progressively to all basic educational institutions, agencies and programmes throughout the country (DSAC 2017: 59-60).

Supplementing this would be the establishment of a 'dedicated satellite system' of national Art, Culture and Heritage Schools in each of the nine provinces, designed to reinforce provincial development and for 'the specific needs of the provincial population, while also including national and international exchange and cooperation' (DSAC 2017: 60).

The question of arts education at more advanced levels and its articulation with basic education is thereafter discussed. Three key policy objectives are put forward:

- Growing new audiences and consumers of the arts
- Growing future creative talent
- Addressing areas of scarce and critical skills lacking in industry such as the areas of arts administration; management and entrepreneurship, relating particularly to tertiary education and the provision of work-based training.

Although the core mandate for arts education lies with the National Departments of Basic and Higher Education, there is a key role for DSAC to play in ensuring that the disciplines of the arts and the cross-cutting fields that support the broader sector are accommodated in the education system.

Shortcomings in the nature and articulation of the training and education programmes at Further Education and Training (FET) and Higher Education Institutions (HEIs) are raised and new and more integrated approaches are mooted, as is the question of decolonizing thoughtfully the curricula and teaching practices at the institutions in question (DSAC 2017: 61).

The RWP moves on to consider the question of addressing the ad hoc approaches to management and administrative training and certification for cultural practitioners and artists. These interventions should involve existing disciplines, as well as the 'cross-cutting fields of arts management, cultural policy; cultural leadership and cultural entrepreneurship as a critical set of strategies and tactics to 'professionalize the sector and to ensure scholarship on the sector' (DSAC 2017: 61).

The development of the Sector Education and Training Authorities (SETAs) in the period after the publication of the 1996 White Paper, and the significance thereof, is considered. The creation of a new SETA Landscape including the specific orientation of the Culture, Art, Tourism, Hospitality, and Sport Sector Education and Training Authority (CATHSSETA) is assessed. The related development of the National Skills Fund (NSF) in the field is contextualized, and the partnership of DSAC and NSF in ensuring that the NSF benefits from the focus areas of the fund in regard to the arts, culture and heritage sectors.

The RWP anticipates that the National Economic Development and Labour Council (NEDLAC) consultative process will consider the new SETA Landscape and the National Skills Development Plan.

DSAC is entrusted to ensure that the ACH sectors are duly represented in these consultations with the sector participating fully in the process.

The Copyright Amendment Bill

In South Africa the National Assembly passed in September 2022, the Copyright Amendment Bill. The Bill will now go to the National Council of Provinces. Originally published in 2015, the Bill has undergone several rounds of discussion and redrafting. The Copyright Review Commission Report informed the reform of existing copyright legislation in the country. The Commission considered i.a. the workings of the societies collecting royalties for authors, performers, musicians, and other artists, and took note of the concerns of the creative industry regarding the collection and distribution of royalties to artists. A long-term grievance by local artists and creatives that around 70% of royalties are allocated outside South Africa, was factored into the findings. The Bill incorporated a range of recommendations from the Commission regarding ways and means to address lack of regulation and transparency, sub-standard governance, and maladministration relating to distribution of royalties and unallocated revenues (RSA Government 2022x; Mail & Guardian, 1 September 2022). A good number of clauses in the Bill were adopted from other relatively progressive copyright regimes, such as the US, UK, Israel, the EU and Singapore (Mail & Guardian, 1 September 2022).

The Bill is not without its structural problems included the use of 'fair use' methodology borrowed from the US copyright legislative practice (Mail & Guardian, 1 September 2022) It is also a complicated piece of legislation. Furthermore, it seems that the efficacy of the scope and implementation of this measure has been questioned by certain of the artists' associations (strategic interview, Johannesburg. The Copyright Coalition of South Africa (CCSA) said the passing of the Bill was 'extremely disappointing and a sad day for the South African creative industry' (Githahu 2022).

There are also some small creative companies, especially in the book sector, who are concerned that the Bill is 'a win for big tech companies'. One small local publisher questioned the Bill's sections providing users a right to copy a work without payment if this for educational purposes. Challenging big tech in court on such issues might be costly and a difficult process for small businesses it is argued (Billa 2022).

Association and Unionism in the CC Sector in South Africa

The CC sector is a somewhat fragmented terrain in South Africa and institutional efforts in regard to associationism, collective bargaining and unionization have been modest even with the shift to a democratic order in the mid-1990s. In recent years, however, there are some encouraging signs. There is an accompanying paucity of scholarly research in this area, and it is hoped that new scholarship will provide a deeper understanding of the agencies and organizations at play and the impediments to institutional development in the arena.

The Performing Arts Workers' Equity was established in the late 1990s and affiliated to the Congress of South African Trade Unions (COSATU) It was a small union with only 365 members at its peak with its locus of activities centred in Gauteng. (ESAT 2022). The Musicians Union appears to have been formed in the 1994 (ESAT 2022b). Also centred in Gauteng, it had a membership of around 700 and was affiliated to COSATU (ibid.). Mobilization of members was not easy and helps explain the merger of these two organizations in 2007 – a process that was initiated in 2005.

The resultant new organization, named the Creative Workers Union of South Africa (CWUSA) was affiliated to COSATU. CWUSA was registered with the Department of Labour in 2010 (RSA, Government Gazette, Notice B17 of 2010). The union sought to represent the broad spectrum of artists 'including musicians, actors, poets, technicians, composers, performers, independent producers, radio disc jockeys, general disc jockeys, arts administrators, artist directors (sic), arts educators, choreographers, dancers, designers and other sector practitioners'. (ESAT 2015). Among its aims were to improve its members conditions of employment, lobby the state and employers on behalf of the membership, and to promote the rights of creative workers'. In addition, the Union sought to foster cohesion in the creative industries; and to 'capacitate the SADC region in order to be able to share in the collective intellectual property' (ibid). Given the breadth of its component membership there is reference to trade union action such as collective bargaining and industrial action (ibid.). CWUSA came in for criticism that it was not particularly representative of musicians (Birkholtz 2009). In April 2014 the registration of the CWUSA was cancelled by the Department of Labour. CWUSA appears to have retained the name and functioned as an informal association and pressure group thereafter on select artistic issues.

The difficulties of sustaining formal trade unions in the CC sector may be ascribed in part to the problems of drawing sufficient paid union members, but other factors are at play. Some associational structures such as the SA Actors Guild (founded in 2012) are keen to undertake certain core union activities such as collective bargaining but have been inhibited in expanding their field of activities by government regulations most especially under the industrial relations system.

For instance, Jack Devnarian, Chair of the Guild, has complained for some years that because actors do not sign an employment contract with an employer, they are not protected under labour laws. They thus do not receive protection under the Labour Relations Act. Freelancers are currently not (King 2022). This contributes in turn to the prevailing exploitative nature of the industry which means that actors are often given little or no room to negotiate a contract, effectively being told to 'take it or leave it' (Cited by King 2022).

With the seeming difficulties in utilizing more traditional forms of unions in the CC sector/s in South Africa, there has been in recent years an increased recourse to and consolidation of certain networks to provide some degree of coordinated action and articulation of grievances and rights. The South African branch of the international organization ASSITEJ, though focussing primarily on providing cultural and creative education to young South Africans, have grown in recent years and established meaningful partnerships with certain state institutions such as the IDC (Industrial Development Corporation). These networks have allowed the numbers of small and emerging firms and some modestly sized and under-resourced creative associations to find some measure of mutual benefit in such arrangements (telephonic interview, name withheld, 10 February 2023).

The debilitating impact of Covid19 on the CC sector (SACO 2021) and the dissatisfaction among many creative workers at the handling of the state's response, has seen the emergence of new initiatives at strengthening institutional cooperation and collective action within the sector. One such initiative is the establishment of the Sustaining Theatre and Dance (STAND) Foundation in 2022. This organization is an independent, non-profit and public benefit structure created primarily by individuals within the sector to nurture and promote South African dance and theatre. Funds have been raised by individual patrons, as well as from the Netherlands Embassy and Business and Arts South Africa (BASA).

A variety of projects are planned to provide income for practitioners (Van Graan 2022). In addition, the STAND Foundation has also drafted a strategic discussion document for dance and theatre in the country. As cultural activist Mike van Graan argues, the measure 'if implemented, could radically shift the practice and sustainability of contemporary theatre and dance'. While centred on individual patronage and the securing of external funding, the STAND initiative has seen a range of dance and theatre groupings look to coalesce under the STAND banner (telephonic interview, name withheld, 10 February 2023).

In 2014 the Cultural and Creative Industries Federation (CCIFSA) was established as non-profit company with funding from government via the then Department of Arts and Culture. It central aims and objectives were to promote and develop the social and economic interests of the CCIs and to act as a controlling body for these sectors. The idea for CCIFSA originated following a 2009 meeting between Pres Zuma and some members of the cultural and creative industries. DAC thereafter formed two task teams which developed a framework for a federation identified 12 sectors and 45-sub sectors in the industry (Tham 2015).

An interim committee was set up and given funds to launch an elective conference. The conference was held in Bloemfontein in March 2015 but was characterized according to press reports by walkouts, conflict among the delegates and accompanying death threats, complaints/allegations about the lack of consultation and financial accountability (e.g. Tham 2015; Kuper 2015). Among the concerns raised subsequently was that the 'arm's length' concept of government in relation to arts and culture organizations had been replaced by direct government involvement in the sector and its industries. For instance, theatre director Gita Pather, one of the leading members at a post-conference meeting on concerns with the new organization, noted problems such as the lack of representation of different groups and the opacity of the mandate, as well as the fact that a memorandum of incorporation was not discussed or endorsed by the arts fraternity (cited in Kuper 2015).

Such concerns seem to have inhibited the subsequent workings of CCIFSA and it has struggled somewhat to gain legitimacy and traction with the CC sectors. The labelling by certain cultural activists of the Federation being a DSAC 'sweetheart' structure used by certain cultural activists (e.g Sigwen 2021) may also be an impediment in this regard. Concerns have also been raised by the Select Parliament Committee on Arts and Culture and the Select Committee of the NCOP on Education, Technology, Sports and Culture (e.g PMG 2017; PMG 2018; PMG 2021). These include the question of financial expenditure and transparency, provincial representativity; organizational efficiency; the problems with connectivity and use of social media (ibid.). The possibility of CCIFSA being non-inclusive and monopolistic was raised at 2017 meeting (PMG 2017).

Conclusion

In this chapter a brief overview is provided of the South African CCI policy context and strategic developments. Consideration is given to major economic trends, the impact of deindustrialization on the development of the creative economy. Attention is given to recent DSAC policy productions, including the Revised White Paper on Arts, Culture and Heritage, and the CCI Masterplan (a collaboration with the

Department of Trade, Industry and Competition). Both documents contain provisions to improve working conditions for artists and cultural practitioners and proposals for social security measures in the CC sector.

This chapter is relatively compact, but its material is policy rich. It emphasises the need for more effective relationships between government officials and CC workers and practitioners. It is argued that the current structures for engagement have been compromised in recent years by developments such as handling of relief funds for creatives during the COVID-19 pandemic.

Attention is given to efforts at unionization and collective bargaining in the fragmented terrain of the CC sector. But there has been little success. Instead it seems that there seems to have been a further attenuation of what little exists in the way of formal union structures in the CC sectors. Progress is required to create better legal provisions for, and coverage of, short-term contracts and gig work by creatives and cultural workers. A research audit on the nature and scope of the associations, and other institutional structures and initiatives for artists and cultural workers is advisable. There are other further policy implications and associated research, and these are teased out in chapter 8 of this report.

Chapter 5: Strategic Interviews and Focus Group Findings

Introduction

This chapter reviews 17 in-depth interviews with 18 selected stakeholders and one focus interview held with three representatives of DSAC. Interviews and the focus group discussions were shaped by a semi-structured schedule of questions, which started with respondents describing their roles in the cultural and creative sector. The interviews then focused on five themes:

- Context of precarious and atypical labour in the cultural and creative sector
- Artists' rights, business, associations and unionisation
- Social security for artists and creative practitioners
- Government's role in provision of social security in CCI
- General observations and suggestions

The purpose of conducting interviews in this study, is to gather information about the experiences, perspectives, and opinions of participants.

Most of the interviews were conducted in person while three done via Zoom. Each respondent signed a consent form before participating in the interview to indicate that they understood the nature of the study and that they agreed to participate voluntarily in the interview. The consent form provided information about the study, including its purpose and the procedures involved, as well as the respondent's rights, including the right to terminate the interview at any stage. The anonymity of the respondent was discussed and assured.

The interviews were generally between 60 and 120 minutes, and were recorded. Transcripts were produced and archived. Summaries of all interviews have also been produced and archived. The schedule for the interviews can be found in of this report.

The interviewees constituted a diverse, informed group with a rich set of relevant experience and provided the interviewers with a wealth of information, insight, and enhanced understanding of the complexities of work in the cultural and creative sector, the need for social security and protection of the rights of creative practitioners.

Respondents' Roles and Experience in the Cultural and Creative Industry

Interviewees represented various domains in the cultural and creative sector, as defined by UNESCO. These included: audio-visual and interactive media, performance and celebration, visual arts and crafts, cultural heritage, and design and creative services.

Of the 18 interviewees, five were representatives from the audio-visual and interactive media domain, nine were people from the performance and celebration domain, and one each from the visual arts and crafts, cultural heritage, design and creative services domains. One other interview was conducted with a representative from an organisation that provides research, policy and training services.

Most of the interviewees were from Gauteng, five were from the Western Cape and the remainder were from the Eastern Cape and Kwa-Zulu Natal.

In their discussion, most respondents indicated that they were either managers or owners of organisations or businesses in the CCI. However, respondents stressed that they fill many different roles in their place of work. For example:

> "So I'm a software developer, content creator, animator, XR, VR developer. Those are my personal skills. But the work that I do [within the industry] is listing storytellers, using audio using video using augmented and virtual reality, to tell compelling stories and create content." (Respondent 2)

> "I'm actually the… project manager, the office manager, you know, the marketing person at times." (Respondent 6)

Respondent 13 explains: "The truth is that our industry is such that the artist has to prepare themselves to be everything. You're the marketer, you're the makeup artist, you're the tea maker, you're the scriptwriter, but you also have to be the legal person."

Other roles that respondents fill include:

- Consultant to creative associations
- Digital and software developers
- Trainer of students – teaching technology, lighting design, technical production
- Youth and Community Development Coordinator

When talking about their experiences, respondents articulated interesting views about the nature of CCI in South Africa. Respondent 16 described her love of the sector because "it was completely interdisciplinary. It was also one of the most integrated network organizations I've seen, you know, in terms of really engaging with everybody from everywhere."

Other respondents discussed the unconventional nature of the CCI, as summarised by Respondent 2:

> "it's sometimes hard to regulate or to create policies, because again, creatives don't want limitations and boundaries. So there's definitely a lot of unconventional things happening within the industry in the space. But you know, I guess the work in progress, creatives are now starting to speak out, they're starting to formalize their businesses, they're starting to change their approach to certain things. So maybe with time where they will start to get better."

Respondent 4 queried whether the CC sector can actually be called an "industry" because what "defines an industry, we don't find in the creative economy. So we've got to be very careful how we define ourselves." He asks how CC practitioners can be described as "workers":

> "Do they have the rights to organize? Do they have the right to collective bargaining? Do they have a right to have a representative structure working off the same kind of rulebook? … [Are there] legal remedies to protect the vulnerable?

Using this criteria, Respondent 4 concludes: "we cannot meet the standard of being an industry, which makes us very concerned."

Respondent 13 highlighted the fact that creative practitioners often struggle to work practically in a business environment, saying, “I think that sometimes it's challenged by this overlapping of business and individual creative expression with cultural necessities, so it exists within a cultural space, which doesn't necessarily have to conform to business principles.” The respondent then questioned whether the CCI should be considered an industry, “or is it sometimes something bigger and more important than that, that gets lost when reduced to business?”

This respondent went on to say that this is “a really complex and interesting space,” because it is the bread and butter of creative practitioners, and so they cannot be “airy fairy” about their work. “I've seen this with lots of artists, they work for love, for joy, for passion, but how do you go about paying your rent? …It needs to feed development and pay raise families, or whatever the case may be.”

Respondent 10 sums up the point about inadequate income for artists and creative practitioners. “It's kind of, you know, crazy kind of volunteerism. And they are earning the equivalent of a stipend.”

Respondent 13 reminds us that the CCI comprises more than just artists and creative practitioners.

> “But the whole industry is this body of auxiliary services that inform the arts, right? So it's catering. It's transportation, it's event hire equipment, needs coordinators, is press writers, that the creative industries, if one were to reduce them to the staged work, one may miss the point of just how deep and how entwined with so many other industries that arts. And I think often when we under-evaluate the importance of the artist... It's kind of ironic that everybody else who supports the industry seems to think they're more important than industry.”

Theme 1: Context of Precarious and Atypical Labour in the Cultural and Creative Sector

The questions in this theme were informed by the key purpose of this research, i.e. precarious work in the creative and cultural sector, and encouraged respondents to think analytically about the atypical nature of labour in this sector.

Respondent 14 got to the heart of the matter with the statement that “if you want to be in this industry, you've got to bust your gut to get there. And it's hard because the opportunities are fewer and further between.”

Respondents also pointed out that “the arts are the lifeblood of a nation.” The argument was made that the creative arts are a reflection of our country’s overall health and wellbeing. A vibrant cultural and creative arts sector in indicative of a dynamic and thriving society.

Challenges of Precarious Labour in the CCI

Respondents generally agreed that precarious and atypical work in the cultural and creative Sector is a major concern in South Africa.

Respondent 18 gets to the heart of the matter:

> “Because the industry, industries and performing arts industries are unregulated, a lot of people are facing situations where they exploited effectively, they don't have contracts even for the work that they are doing. Next the contracts are not very secure. The contracts don't really give them full value

> for their work in terms of the relationship they have with the production companies and all of those kinds of things."

Respondent 18 further explains that this does not only apply to the "artist on the front end. We are also talking about people who work at the back end of the arts, people who work as producers, people who the script writers, people work as lights. And it gets even worse for them because their plight is even less seen than the people who are the artists that are front facing."

Building on this, Respondent 4 describes the state of the CC sector as fractured:

> "We are fractured, we are disorganized, we are not held together by any kind of legislator legislative policy framework that directs all our efforts towards a cohesive industry goal. And we feel this as a as a living working reality."

Respondent 15 stated that work in this sector is not stable; jobs are not permanent, because "you get a job today, and then next week, there's no job, you get a job this month, next month, there's no job. So I think for the economy, that it creates an unstable environment."

When asked whether precarity in the sector had increased or not, Respondent 8 indicated that it was difficult to give a 'yes' or 'no' answer, because it seems that artists are learning to adapt and that "the ecosystem is supporting artists to adapt."

Respondent 13 indicated that precarity is a clear and present danger for everyone working in CCI. "If somebody said to you, can you pay rent for three months straight, without worry? A lot of them can't answer that. There are some I know who live at the drill hall, there are others who are living at the bus factory. None of these are spaces for accommodation. There are two spaces for rehearsals, but a lot of them end up having to live there."

Even respondents in more 'stable' employment worry, as sometimes they do not get paid on time (Respondent 6). So the problem in the industry, as explained by Respondent 14, is "the fact that people just really can't plan their lives to any great extent." A respondent expanded on this by describing how artists who work in the performance domain know that their roles could disappear at the whim of the director or producer. There is always a fear that their work could end at any time; "you can be out like that – they can write you out in a moment." And thus, the precariousness nature of the work in CCI is not only due to outside factors.

Respondent 8 elaborated on the nature of seasonal work. She explained that this sector is dominated by only a few funders and grantees, and that projects are time-bound. "So once the project is over, then the cycle is over." Respondent 15 shared this sentiment, saying, "My issue is the continuity. This place is vulnerable, if you go there, and you today, and tomorrow, what happens tomorrow?" He argues that a more permanent intervention is needed so that we can develop artists for a long-term career in this sector.

Respondent 10 highlights CCI job precarity as follows. "The problem is that we are raising up, or training people to work in this industry, when actually working in this industry is not viable. Very few people are actually able to earn a viable wage in the space. And we have to ask some serious questions of ourselves around what we're doing to perpetuate those issues?"

An illustration of how people experience precarity in this sector is shared by Respondent 11 through the example of an internship programme offered by his organisation. "And we can see it, we can see the anxiety building in this group of actors who are coming to the end of the program, and now have to venture into the field of employment." He concludes by stating that "the sector remains precarious and scary". Moreover, "diminishing South African platforms are significant.".

However, Respondent 18, has a delightfully positive view of the how the CC sector in South Africa can flourish.

> "Because for me, an artist is like a plumber. Number one, a plumber, everybody needs a plumber. There's nobody who doesn't need a plumber. All of us need to be engaged and stimulated and want access to cultural products. There's nobody in South Africa who doesn't want to hear music. Nobody in South Africa who doesn't want to be entertained, who doesn't want to laugh, who doesn't, you know, enjoy that kind of thing. It's like a plumber. Everybody wants one, everybody needs one. But also like a plumber, that person can become their own boss, they don't need to set up a large corporation, they don't need to stand in long queues for somebody to go and to employ them in a large corporation. They literally can show up in a place, do what they need to do and go. And we just haven't created that economy. We haven't created policies that allow for that."

In line with this thinking, Respondent 7 believes that there are low-tech opportunities to create jobs in the CC sector. Arguing that there is a difference between employability and job creation, the respondent contends that the creative space in South Africa constitutes a largely untapped possibilities for local communities to engage in the creative economy:

> "We need to get more low-tech solutions, so that we create more opportunity for creatives locally, because then it would mean that they can interact and create opportunities for themselves and compete better. Because it's very hard for a kid in the township or mechanic in the township to be able to compete with a gentleman in vehicle.

Covid-19 – Impact of Lockdown

"Precarity and fear of survival. What does that drive in terms of, of people's sense of survival and protecting their turf or trying to get work. That definitely doesn't bring out the best in everybody." (Respondent 9)

There was a fair degree of consensus among respondents regarding the impact of Covid-19 and its aftermath, on the nature of work, and challenges faced by professional artists and practitioners in this sector. Respondents provided interesting insights into this issue and describe the many ways the pandemic affected creative professionals. These included:

- loss of income [some creatives work in another precarious field to supplement their income & the supplement income was also taken away by lockdown]
- difficulty accessing the internet to do remote work
- loss of access to physical workspaces
- loss of contact with audiences and supporters

- loss of opportunities to work and collaborate with colleagues
- mental (and physical) health challenges

Respondents shared their views about how stress and uncertainly in their sector was exacerbated by the pandemic and the lockdowns. “We couldn't travel, we couldn't go and perform. And creatives could not come and access the space because of things like social distancing, where most creators work is around group-oriented activities. So those are nearly the challenges.” (Respondent 2)

A number discussed the toll that the forced isolation had on the mental and physical wellbeing of artists. Creatives are often gregarious people and the limited communication necessitated during the long months of 2020 left many anxious and depressed.

> “And then another phenomenon, which I think was mentioned by someone recently, just this idea of isolation. And I suppose that also speaks to the COVID-19 phenomenon of that we became quite insular contained, we discovered new forms of entertainment, which were less public.” (Respondent 11)

“So much came to a standstill that we are basically having to start again.” This quote from Respondent 10 encapsulates the situation in which so many of our CCI workers find themselves. This respondent went on to describe a key challenge that the sector faced (and is still facing) as a result of the Covid-19 lockdown measures.

> “And the reality is, people don't have the same level of disposable income. So actually, if you're looking at R500 or R1000 for a seat, and times a family or four, then you still, you know, must get drinks or supper and transport and, and I mean, people just don't have that kind of money anymore. And those that do will be spending less frequently or more carefully.”

Reiterating the above point, Respondent 11 stated that “post COVID, post two years of economic decline, people have less money to, to spend, and especially on the arts”. Respondent 7, agreed, giving the following examples:

> That's because COVID was went on for quite a couple of months, and all and there is no relief for creative designers in the sense of, okay, because this has hit let's reduce the rent, you know, they still have to pay the same amount of rent.”

Respondent 10 explained that the challenges have continued, and will probably continue, years after the lifting of the Covid-19 lockdowns.

> “And so the long-term effects are actually far more significant than what happened as a result of that immediate shutdown, because people can make plans for the short term; it's the medium and long term that are more complicated. I think there just aren’t the resources, whether that's financial or otherwise, to sustain or continue in the way we work. There's a lot more required to start something than to sustain something.”

Respondent 8 agreed, saying; “It definitely threw a lot of artists into a more of a precarious situation than they otherwise would have been… But it also showed up the weaknesses of our institutions, in terms of supporting artists… On the other side, I also noticed with my own work, a move towards digital.”

The majority of interviewees felt that there would be a continued shift to new ways of working in this sector. These new ways could include transitioning to remote work, making increased use of online platforms for collaboration and communication services. It was also noted that during and after the pandemic, a number of artists and organisations embraced the opportunity to come up with creative ways to market and sell their products and services.

One respondent observed how rapidly the creative sector is changing, due to the digital platforms and technologies – and the youth need to be trained, not only to understand the nature and workings of these key technologies, but also to see themselves as content creators.

Another impact of Covid-19 was described by Respondent 8. “I have a sense more and more creatives are looking toward the entrepreneurial route. But what does that really mean? It might mean that there's more people wanting to become more professional, so that they can provide goods and services as opposed to applying for grants.”

In terms of government support to creatives, Respondent 16 described how lack of information stymied some attempts:

> “And the city wanted to give out food parcels to artists, but they have no idea how to get hold of those artists. So they came to us. And, you know, we then put together a database of over 100 artists around the city who we knew were artists, because they couldn't verify whether or not they were artists. And we were able to put the city in contact with them and get the food parcels and up to them.”

Theme 2: Artists’ Rights, Business, Associations and Unionisation

Respondent 8 described the difficulties of protecting artists’ intellectual property rights. The issues include, not only those in power taking advantage of artists desperate for work and to build on their curriculum vitaes, but also artists who are naïve and have not been trained on how to negotiate a fair wage and contract.

This concern is shared by Respondent 13 who argues that currently there is not sufficient protection of the work of artists and their intellectual property. She refers specially to actors and “people getting paid for when their work goes into syndication or when you repeat it again. So that an artist who was in generations in 1990, when, when the thing is played, again, they don't make any money from that.”.

Respondent 13 goes on to make the important point that “artists themselves have to [find] value in protecting each other.”

> “So the artists themselves don't have a value of protecting artists. Because it's me and mine. So the value system within the arts community is, is perfect for creating exploitation, we exploit each other happily. When we say government master, government can only do so far. If you yourself don't carry the values of fairness, there is no point in government in instituting anything because you don't believe in it.”

Respondent 2 elaborates on this, arguing that creatives have to take responsibility to protect their IPR:

> “It works in two ways. You can't really protect someone who's like literally exposing their

vulnerabilities. So a creative has a responsibility to ensure that they've registered their work formally so that it's known that this belongs to them. And should anything happen, the law can take its cause to say, well, we err on the side of this creative because they registered their work. They notified us that it's belonging to them, and they did it first. So whoever is then copying or recreating is now infringing on this person's copyright. So it starts with the creative making sure that they've covered their tracks and secured their work.

However, Respondent 18 points out that inadequate legal protections offer opportunities for exploitation which international companies profit from:

> "International productions will choose South Africa, and will choose to come and do their work here, because they know they can get cheap labour, they know that they can get exploited of labour. They know that they can get actors to act here and perform here. And they won't have to give them their due use in perpetuity, like they have to do in other countries, because other countries will say, for every time you get money from this production, the artists must get the money because we don't have regulations like that."

There was also discussion about the role of SAMRO, the body that takes care of royalties to musicians, as well as the Indigenous Knowledge Systems Bill, which deals with protecting the intellectual property of our cultural knowledge and heritage.

In the interviews, respondents listed a number of associations which have been established to provide different forms of support to people in this sector. These associations include:

- South African Guild of Actors (SAGA)
- Sustaining Theatre and Dance Foundation (STAND)
- Theatre and Dance Alliance (TADA)
- The Theatre Benevolent Fund
- UASA (a general union which is affiliated with SAGA))

Discussing the challenges and successes of associations established in the CCI, Respondent 16 emphasised that "these organizations are absolutely vital. They are the voice of the industry, basically. And they're the spaces in which things are being discussed and debated. And it frustrates me no end that government doesn't seem to take them very seriously."

Respondent 10 also spoke about the Woolworths *My School* model in which people who shop at Woolworths would be able to support selected beneficiary organisations. One of these organisations is the Theatre Benevolent Fund.

Respondent 14 indicates that "the common factor amongst beneficiaries [of the Theatre Benevolent Fund] is that most - some of whom have been very famous in their various fields, some of whom have been completely unknown because they've been stagehands or whatever - live a subsistence existence."

The other issue which respondents expressed their ideas and concerns about, was the issue of unionisation (or lack thereof). Respondent 8 said, "The lack of unionisation really opens up the door for abuse of artists – the lack of standardisation in terms of rates, etc. and employment contracts and sort of standard procedures. Maybe it's industry specific, where a union would make sense. Maybe being a freelancer, or being independent, is a different type of treatment for certain sub sectors within our sector."

Expanding on the issue of unionisation, Respondent 17 indicates that while actors in films and television have representation, those in the live performing arts do: "we've got many little bodies that have sprung up over the years. But most of them work on the lobby and advocacy front to try and engage in government to try and engage with corporates to try and but we not unions, that's the difference we not unions."

Respondent 17 goes on to discuss unionisation has helped artists in the UK:

> "They have a very strong union for artists, where they stipulate what contracts you should sign, what contracts you shouldn't sign, what your remuneration is. We've got no idea in this country, you've got a young artist coming out and saying, well, I signed that contract – to do a gig at Sun City, you know, like a weekend gig. They're getting paid peanuts, because they don't know what it is they supposed to be earning,"

Respondents indicated that artists do not only need union protection from in private business, they also need protection from some government departments who take advantage of them:

> "Government wants to use artists, at a concert for a new president, or a carnival in the Johannesburg street. And they don't want to pay the artists. And it's actually just wrong. They call on the artist to be around for these big things, but then they pay six months later. But people can't live like that." (Respondent 17).

Theme 3: Social Security for Artists and Creative Practitioners

"So, the industry doesn't work with protections." (Respondent 13 speaking of businesses and practitioners within the CCI)

"There just there isn't any support. And also, there is no way of anything being policed. Any oversight. There's no remedy. There's no way of somebody being brought into line because of doing a, b and c. Yeah, there is nothing." (Respondent describing the rights of CC practitioners)

Nevertheless, respondents argued that people working in CCI are worth protecting. This is articulated by Respondent 8:

> "Artists are a vulnerable group. I would say that this is a particular breed of person that has the tenacity to be able to follow their calling. It's different from other jobs – there's no safety net for them. **I would say it's worth investigating**. So, what would South Africa look like if we didn't have any artists? If you didn't put interventions in place?"

For this theme, our respondents provided us with a substantive set of perspectives, insights and recommendations regarding social security for artists and creative practitioners.

Ideas on what can be included in CCI Social Security

The need for some form of security to support artists in a future catastrophic event was mentioned by a number of respondents. After the Covid-19 lockdowns, respondents agreed that "the idea of having some form of let me call it creative social net would really help. The question that comes to how do you manage that so that it is not abused? So that It doesn't create further dependency." (Respondent 7).

Respondent 11 argues that the social security net should allow opportunity for artists to be trained, and to experiment in their field:

> "I believe artists should receive some kind of support, some kind of cushioning, to enable them to be in a field that is exploratory, that is experimental. That is not always guaranteed a market and sometimes that's a long journey. to both to develop a skill, but to also deepen one's research one's investigation into a field or into a specific focus. And I think, on some level that does need support. But it's again, you know, what is the value that we give to it? And then, you know, I suppose there's always the tension around outcomes. And again, sort of what are the timelines that are given to those outcomes. And that the notion of the fixed outcome versus an outcome that may be surprising or and I suppose these are pedagogical issues as well."

The idea of collaborative spaces for creative practitioners and artists was also put forward a way to support people in CCI

> "I think the notion of the Creative Hub community or to say incubation spaces, I think are vital. And that they should be in every small town and city in South Africa. I think that sense of connection, sociability is so important, creates a support structure. But it also enhances the idea of collaboration. Which I think, yeah, I know specific art forms sometimes engage collaboration in different ways, or there's always the joke around composers struggling to collaborate and prefer the isolated space."

A clear need in this sector is a legal framework to protect creative practitioners under our South African Labour Act. This, however, will not be easy. In his interview, Respondent 4 commented that he finds it "very disconcerting that even DSAC doesn't seem to be a firm grasp of what it means to work as a freelancer". The Respondent goes on to discuss the difficulties experienced by officials of the Department of Employment and Labour when attempting to gazette regulations to protect freelancers in the CCI.

> "And what resulted from this is the Department of Employment and Labour, realizing that there is no direct translation of labour laws into our sector, simply because of the nature of the work itself." (Respondent 4)

Any social security mechanisms developed to allow "artists to flourish" needs to take into consideration public benefit. "And the big question, I guess, is, is this a public benefit? And what role does government play in supporting artists to be able to focus on their craft, which often turns into national treasures?" (Respondent 8).

Another key issue which was noted that the social security mechanisms need to specify in what way artists and creative practitioners are registered for benefits:

> "And who accesses our spaces, you know, who accesses the skills development? Because we're not structured, anyone just comes in?" (Respondent 15)

A fundamental point was made by Respondent 19 about funding of the CCI. The point was that careful consideration should be given to how funding is allocated by government and which domains are funded by government. Because such funding can have a significant impact on the productivity of this sector. Respondent 19 indicated that traditionally much of the government investment has gone to visual and fine arts "and I feel with the fact that visual art fine art is among the biggest contributors as a domain to the cultural sector in South Africa has to do with the success of that funding."

Thoughts on how to design a Social Security System in CCI

"How do we make peace with all the different kinds of cultural economies or sectors of the economy? How do we how do we build bridges and not destroy one another by everyone fighting for their a piece of the pie?" (Respondent 9)

A caution about the move to create social security platforms is provided by Respondent 8:

> "If we are going to be doing a Social Security programme, we really have to learn from the best, think of who does it very well. Artists are jaded, they don't trust the government, they don't trust these systems. So this is what government needs to do a lot of work to gain the trust of their citizens, that they do really care about their well-being"

Respondent 21 agrees:

> "Because for me, the whole question of Social Security is a question of collective rights and collective bargaining, and not the individual as the individual, you know."

More details about the need to engage with practitioners is provided by Respondent 8:

> So, look, when it comes to creating better policies to support artists, one would have to ask the artists, but not only the artists, one would have to do a real mapping of the ecosystem. What are the academic institutions that are supporting research in the area of cultural expression like SACO? What are the private sector players, you know, like Standard Bank, who are supporting artists with their CSI funding? What about incubators and innovation hubs, for example, or artistic precincts on a city level?

However, other respondents indicated that they have been consulted enough. Respondent 15 summarises the feelings of some in his statement: "I've sat in so many forums, and we speak about that. And people say a lot of things and all that. …I don't know how many times I've read reports and sat in meetings where I promise you, I've said so much", and seemingly nothing has changed. As a result: "I'm not going to sit in any forums anymore, because it seems like there's a block somewhere. And the gap between the government and the practitioners is so huge."

In this regard, note should also be taken of Respondent 13's comment that artists need to accept responsibility for their social security. Speaking to artists, she states bluntly that:

> "You know how to find what you want on the internet? Why do you never find what you want in terms of your work and what you do? So is it [only] government's responsibility? …Should the government be responsible for me? No."

Linked to this is the question raised by Respondent 5. She speaks about artists who don't want to be registered on various bodies and government agencies (presumably including SARS). "That's the other thing that has to be discussed. Why don't artists want to be registered?"

Theme 4: Government's Role in Provision of Social Security in CCI

"Are you registered? No, I'm just a guy who walks around with my guitar. What do you mean register for what?" (Respondent 13).

So in a simple terms, we don't have rules and regulations, we are just doing this as we please, anyone can just do as they please. (Respondent 15).

The context described by Respondents 15 and 13 above is allowed because there's currently there is limited mechanisms regulating and supporting the CCI sector, Respondent 5 expands "there is not the infrastructure, there is not the maintenance budget, there's not the budget, there's not the finance institutions, there's not the social protection laws".

While acknowledging the many problems facing practitioners in the CCI, Respondent 19 was able to highlight the proverbial silver lining, "Africa has had its own history of labour struggles… And those struggles are rich enough to produce solutions."

Establishing social security provision for those in the creative industries would be a challenge, but it is increasingly necessary. Thus far, government has not been able to deliver sustained forms of security for people working in the creative industry and this has had a devastating effect on artists during and after the lockdown. An example was given, in one of the interviews, of a performer who had to cancel his medical aid during Covid (for financial reasons) and shortly thereafter was diagnosed with cancer. He died a few months later.

Respondent 21 acknowledges that the government has a role to play in providing a measure of security for those working in this sector. Reference was made to the conditional grant for libraries, which was started by the national government in the early 2000s and which still exists. It, inter alia, provided for the building of new infrastructure and for jobs for community librarians, which later became permanent jobs. Linking this to setting up of community art centres, the respondent argued that once you get such a centre off the ground and have buy-in, you will probably create permanent jobs at a later stage. "And once you have one permanent job, it's easier than to bring others on board, so that you create that stability."

Respondent 2 discussed how government policies can help those in the CCI:

> "So government has created these policies that forced everyone to go out and look for a young creative to work with, so that they either get incentives from government, or they get more leverage support from the government. So government can create policies where it incentivizes people who support and work with creatives, so that they also boost that industry and give creatives adequate work opportunities."

Respondent 10, however, is more subdued about the possibilities for government support for social security measures in this sector. "We keep trying to reinvent the wheel. And each time, there is a bunch of people who can get excited and say, well, maybe this one will make the difference. But you know, for every one person who has that energy and excitement and sees possibility, there are nine saying 'Not this again, it's a complete waste of time, energy and money.'"

Hampering the attempts by government officials to begin to devise and implement support measures for people in the CCI is that many of these officials have different background and priorities:

> "And then also you find that institutions, especially government institutions are not trained to be able to understand and accept the work of artists, and things like the supply chain." (Respondent 13)

The complexity that government officials need to understand and grapple with is described by Respondent 13:

> "Informality is kind of built into how the industry works. Because if I'm a producer, and I am a director, and I hire you, as a performer, you cannot impose upon me strict working laws with leave payment and blah, blah, blah, for me to meet, because I don't have those resources, right. So sometimes what government will do is impose laws and say, this is the rate card and this and that, and you go, in what context, this context only works if I'm a big company, but the majority of producers don't fit that particular thing. So who are you talking to? And who are these regulations for?"

Respondents refer to diametrically opposite views on their experiences with government departments and their expectations of officials' ability to support those working in the CCI.

On the one hand, there are respondents sharing disappointments, felt by many other respondents:

> "You've got to scrape and scratch and scramble for every bit of funding you can find. And places like sorry, I'm sorry about this, ladies and gentlemen, but places like the DSAC are so unreliable. And there seems to be so much corruption and inefficiency, that that, [people] have been completely let down." (Respondent 14).

> "Most people in industry, if you mentioned national government, it's kind of an immediate eye roll, because they, it feels like they're out of touch, they're spending money on the wrong things. You know, it's heavily bureaucratic in a way that doesn't make sense, trying to fit a whole bunch of square pegs into, into kind of, you know, 40, square pegs into three round holes. You know, and they say they want consultation, but plan it badly. (Respondent 10)

On the other hand, other respondents describe positive interventions by government:

> "The Department of Education have just managed to get an MOU in terms of their Artists in Schools program. So yeah, the Department of Education [is] acknowledging that arts programs and schools are important. There are not enough teachers and the teachers that are there are not qualified or experienced. And so a supporting structure, bringing artists into schools. And then that training that [is] provided, which kind of almost becomes a bridging between teacher and artist. I think is a is a good example of how a department can support us." (Respondent 11)

Respondent 19 is optimistic of what government can achieve indicating that if government invested in CCI job creation initiatives, and are successful in their initial outreach, funding for the programme can double because other government departments could become involved in the project.

There is acknowledgement by many respondents that government support is essential to enable the CCI to recover fully and thrive in the coming years because government can, for example, create conditions for "community art centres to be supported need to be managed in a way that enables creative creativity and access." If good administrators and servant leaders are appointed – not politicians. (Respondent 11)

Theme 5: General Observations and Suggestions

“It's the politics of business.” (Respondent 19)

Respondent 9 explained why it is important for government and the private sector to work together to support the CC sector. She noted that “the creative sector has an absolutely pivotal role to play not only in producing creative professionals … but also because when we incorporate the creative disciplines in education, we are training people to be creative thinkers and to be adaptive. Not necessarily vocational skills, but adaptable skill sets, which then equip them for an adaptable 21st century needs in any employment sphere.”

In the interviews it was emphasised that recommendations and documents do not constitute regulations and laws. Respondent spoke about the need for action to be taken to ensure immediate, even if small, gains for this sector, because these “quick wins” will enable government departments and organisations to move onto other issues, making it “easier to organize, easier to win rights for. And once you win those rights, … we can now move on to something else.” (Respondent 19).

A suggestion made was that possibly organisations along the lines of the performing arts councils need to be reconstituted because these provided work and security to many people.

Respondent 2 outlined how government can enact changes in the CC sector:

> “The reason why people choose to remain informal, is because it does make sense to them to become formal. Because then you have to be held accountable to this and that obligation. So I'd rather remain informal because I don't make that much money.
> Now what could be done is literally to support that or reverse that. Lower the barriers of entry so that informal people can now see the value to change the way they approach things.”

At the same time, Respondent 2 warns that: “the barriers to entry to the formal space should not make informal people feel like it's a headache... A lot of people will remain informal because they're trying to avoid all of that.”

Respondent 1 agrees with this position stating: “I think let me start with the fact that the exploitation, and lack of rights for artists and businesses of art and culture is one. There's too much red tape that disallows artists to really start up their businesses. And that red tape is often the government red tape in what is required.”

Agreeing with the sentiments shared above, Respondent 17 outlines the challenges of applying for National Lottery Commission grants. While acknowledging that agencies such as the Commission were set up to assist practitioners in the CCI, their “bureaucratic requirements, don't take into account that many of these artists are working on shoestring budgets. You've got to have three years’ audited accounts. And then they just send a letter saying you weren’t approved for funding, and they don’t tell you why.”

In their interviews respondents acknowledged that there are no easy answers to the provision of social security measures. They warn against over-regulation of the CCI, while at the same time offering sufficient support which “gives people dignity and value for their work. I don't think we're at the point where people feel like they get dignity or value for their work” (Respondent 18).

Respondents acknowledged that those in the CCI cannot “rely on the private sector. Because the private sector won't automatically, immediately, come to the party.” Positive change requires government intervention. (Respondent 19)

Conclusion

All respondents agreed that there is an urgent need for a series of social security mechanisms to be devised and implemented in the CCI because of the precarious nature of work in the sector. However, most found it difficult to articulate how these mechanism would operate. For example, while it was argued that there is a need to stop reliance on government funded jobs, there was also hope expressed for government funded support structures.

While professionals look forward to greater support from government, there was also acknowledgement by all that there needs to be self-regulations to improve conditions for those working this sector.

> But before we can go anywhere, we need to formalize ourselves and we can be able to regulate, then we start finding problems. Why are freelancers paid less? Why are there jobs, you know, who's benefiting? (Respondent 15)

What is apparent from the interviews is that some professionals in this sphere believe that there has been sufficient discussion series and reports generated, and that the focus should now move away from the theoretical to the practical. And that some measures need to be in place, even if they are not perfect so that artists can see that government is providing mechanism to support those in the CCI.

> “And I think we want to see, firstly, what a quick wins, what can we do and achieve quickly to get this off the road? What are the more medium term gains, and then long term way to go, but we would like to come out with at least one or two tangible things that we can do to take better of social safety nets or whatever, for artists?” (Respondent 19)

As Respondent 2 states:

> “It's basically creating policies, policies that ensure that creatives are afforded opportunities, not to say give them everything on a platter, but at least create an opportunity for them to work and earn it. And then of course, support them further so that from the first project, they are able to continue growing into their next project. And of course, the support that organizations to ensure continuity and allow creators to also go and build their empires independently.”

Chapter 6: Analysis of Survey Results

Introduction

To get as much information from creatives themselves, a survey was sent to the SACO database of creatives consisting of 900 individuals or creative enterprises. Later, the survey was also sent to officials in DSAC to ensure an even wider coverage.

Potential respondents were told that the research and subsequent survey arose because during the Covid-19 lockdowns it become apparent that artists and other creatives were disproportionally affected. The purpose of the survey was to better understand the nature of work within the cultural and creative industries (CCIs) and what measures can be put in place to minimise the negative effect of such catastrophes. Further, its purpose was to get a deeper understanding of the vulnerability and volatility of income, including the earnings or profit of South African CCIs.

In this section the profile of the CCIs is analysed and compared these to the actual data from the latest SACO Mapping Study. This ensures the responses are representative of the CCI population.

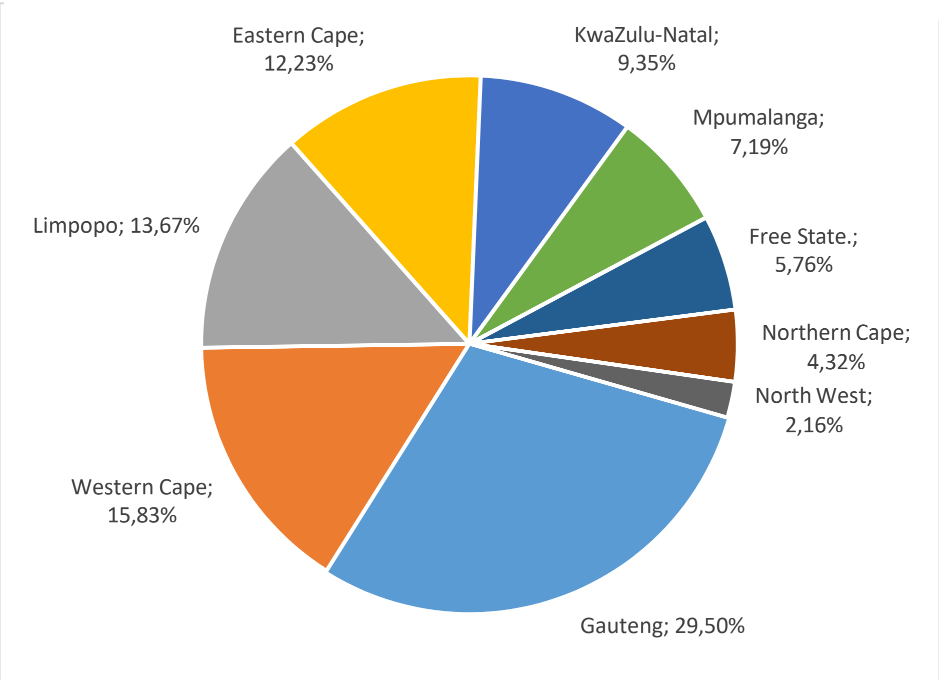
Respondents by Province

A total of 144 creatives respondent to the survey.

Almost a third of the respondents were from Gauteng. This was followed by the:

- Western Cape (16%),
- Limpopo (13.6%),
- Eastern Cape (12,2%),
- KwaZulu-Natal (9.35%),
- Mpumalanga (7.19%),
- Free State (5.76%),
- Northern Cape (4.32%), and the
- North West (2.16%).

Figure 1: Percentage of Respondents by Province



It must be noted that from the SACO Mapping Study (SACO, 2020[4]), 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%).

[4] Provincial Profiles: Cultural and Creative Industries in South Africa - 2022

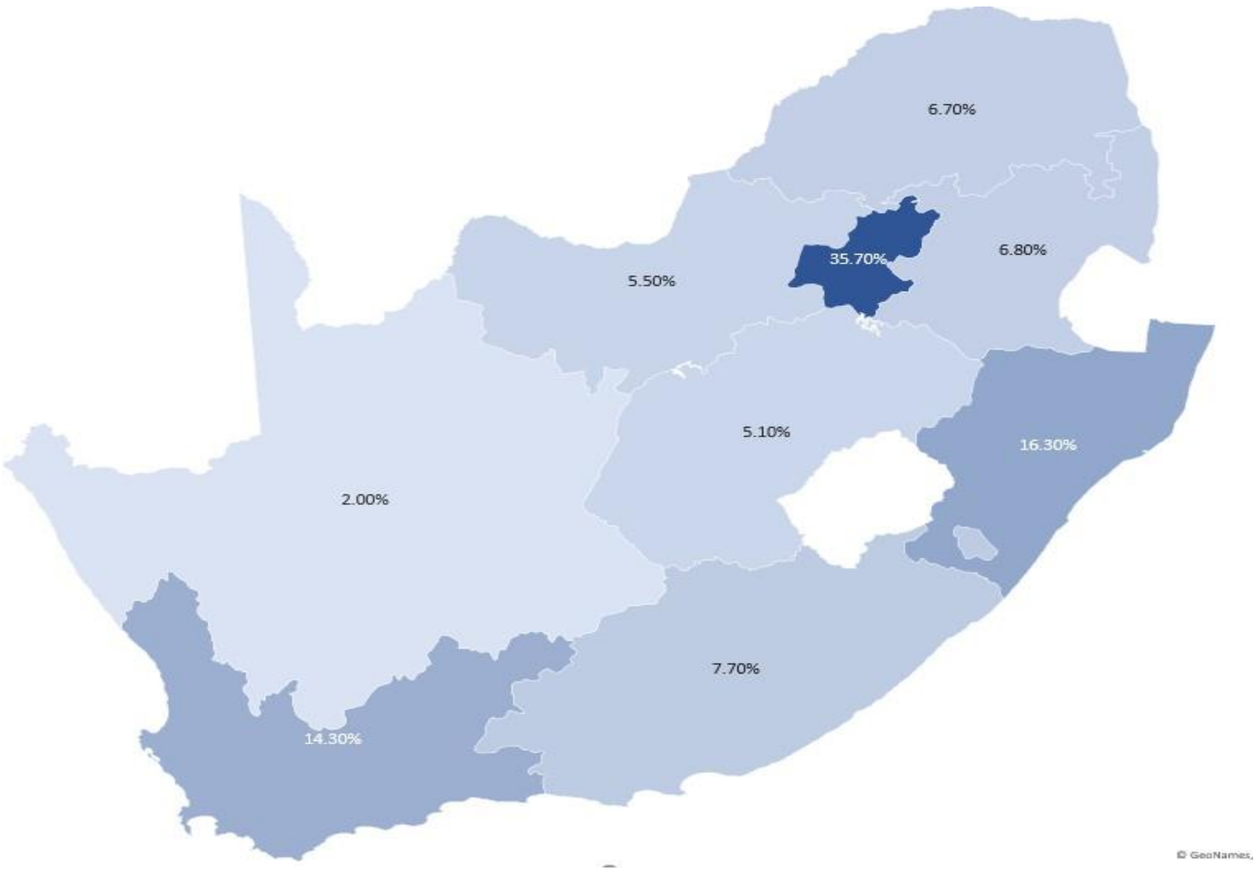
The number of respondents for each province is more or less in line with the size of each province's GVA and cultural occupations.

Table 6. Comparison of provincial contributions to South Africa's creative economy

Province	GVA (Total)	GVA (Cultural)[5]	Cultural Occupations	Exports
Gauteng	34.8%	46.5%	32.0%	32.4%
Western Cape	14.4%	12.4%	14.4%	53.1%
KwaZulu-Natal	17.1%	14.2%	18.2%	10.9%
Eastern Cape	7.7%	7.5%	8.7%	1.2%
Limpopo	6.4%	5.2%	10.0%	0.6%
Mpumalanga	7.3%	4.6%	6.7%	0.7%
North West	5.4%	4.0%	4.2%	0.6%
Free State	5.0%	4.2%	4.3%	0.4%
Northern Cape	2.1%	1.5%	1.6%	0.0%

Table 6 shows the relative contribution to South Africa's GVA of the CCIs per province. Generally, the response received for the survey are aligned to this, although Limpopo appears to be an outlier.

Figure 2: Percentage Contribution to GVA per Province, 2020

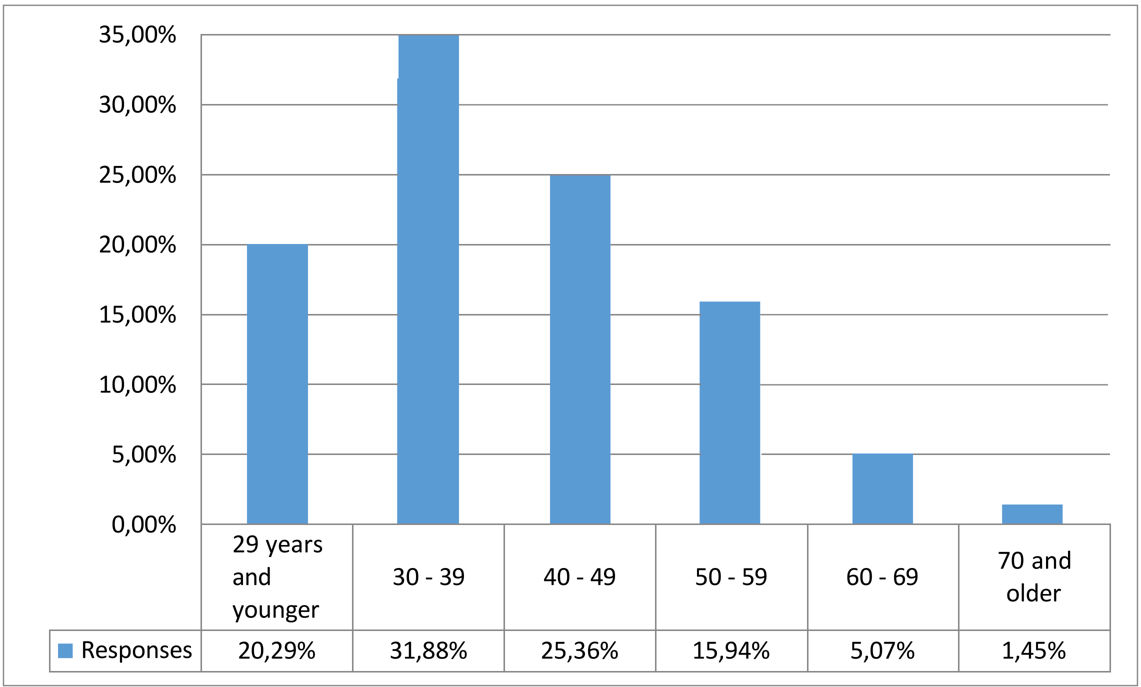


[5] Numbers do not add up to 100% because of rounding.

Respondents by Age

The was a good spread of respondents across the age range. However, it is important to note that the majority of respondents were younger than 40 years, indicating that interventions implemented now will be of benefit to our younger generation.

Table 7: Respondents by Age Group



Respondents by Domain

Since creative domains often overlap and creatives themselves express their art creative activities across many creative fields, respondents were allowed to include more than one domain.
Since precarity would tend to have a greater impact on those creatives in the gig economy, it is not surprising to see that the Performance and Celebration domain had the highest number of respondents.

SACO (2020) found that the largest domain, in terms of cultural occupations in 2019, was 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%). It is therefore disappointing to see the Visual Arts and Crafts domain with so few responses.

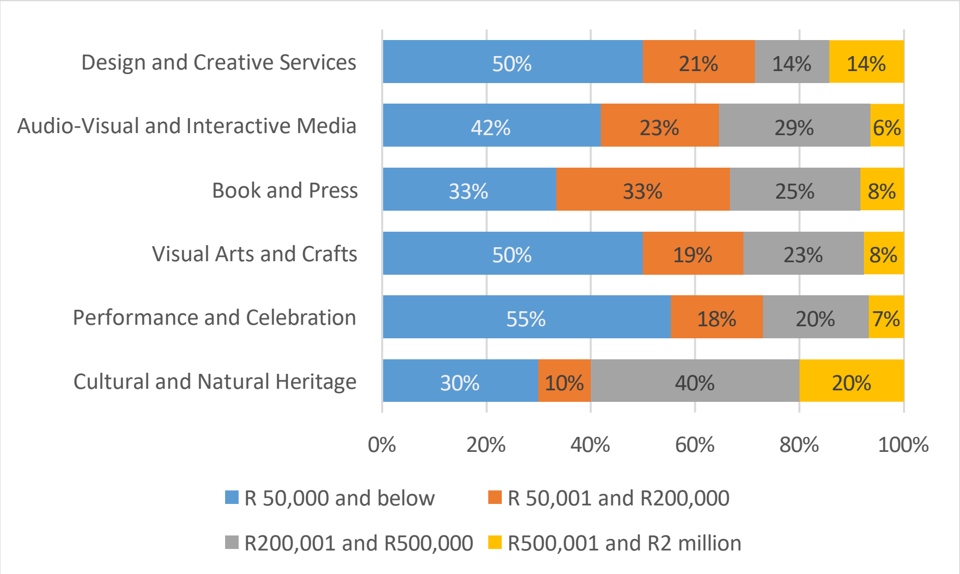
Table 8. Number of Respondents by Domain

Domain	Number of Respondents
Cultural and Natural Heritage	10
Performance and Celebration	75
Visual Arts and Crafts	28
Book and Press	12
Audio-Visual and Interactive Media	32
Design and Creative Services	14

Income earned by Domain

To understand in which domains creatives are the most precarious, a question was asked to regarding the income group. Many respondents did not answer this and many respondent also indicated that they are earning from more than one domain. The results of are shown graphically below.

Figure 3: Earnings per Domain



SACO (2020 b) found that CCI domains can be categorised into three groups of CCI domains. Cultural and Natural Heritage and Performance and Celebration, form the first Category. It is the most "cultural intensive" domain. Although they are relatively small in terms of their contribution to GDP, they do have strong roots and assets (both physical and intangible). These have been built up over the years. The Visual Arts and Crafts as well as the Books and Press domains, are in the middle - both in the size of their contribution to GDP and their growth potential. These domains, are a mixed category, relying both on cultural content as well as creativity and technology form the second category. Even before the Covid-19 pandemic of 2020, the GDP contributions of both these domains have fallen. The Audio-visual and Interactive Media as well as the Design and Creative Services domains form the third Category. The cultural content is relatively less than their creativity (and technology) content. The domains from this Category are growing faster and the two largest domains.

The Performance and Celebration domain has proportionately the most precarious creatives who earn R50 000 or less per annum. This is followed by the Visual Arts and Crafts domain and the Design and Creative Services domain. It is not surprising to see how precarious the creatives in the Visual Arts and Crafts domain are. Crafters especially are often found in informal sectors. However, it surprising to see the earnings of the Design and Creative Services domain. This is a more formal domain, growing and also tends to be more creative-intensive. It must be noted however, that there are potential areas of informality such as dress designers, landscapers etc. that could influence the precarity of this domain.

Even though the Cultural and Natural Heritage domain is in the cultural-intensive category, many museums are owned by government or large corporations and the same is true for natural heritage sites. This domain also includes categories such as 'Traditional chiefs and heads of villages', and 'Religious and associated professionals. Workers in this domain tend to be full-time employees and are therefore in a less precarious position.

Qualifications

Better qualified people tend to be employed in more stable jobs and therefore have more security and are less precarious. Table 9 below shows the percentage of respondents per domain and educational category.

Table 9. Qualifications of the respondents

	Performance and Celebration	Cultural and Natural Heritage	Visual Arts and Crafts	Book and Press	Audio-Visual and Interactive Media	Design and Creative Services
Grade 10 or lower	4.1%	0.6%	0.6%	0.6%	1.2%	0.6%
Matric certificate	14.2%	0.6%	3.6%	1.2%	4.1%	2.4%
Apprentice training / certificate	4.1%	0.0%	0.6%	0.0%	0.6%	0.6%
Diploma	5.9%	0.6%	3.0%	0.0%	4.1%	1.2%
Degree	3.6%	0.0%	0.6%	1.2%	3.0%	0.0%
Post-graduate	13.6%	3.6%	7.7%	4.1%	5.3%	3.0%

The respondents are well educated. The highest percent of respondents have a post graduate degree (37%) and a further 8.4% have a degree. Fifteen percent have a diploma. A quarter have a completed school. Six percent have apprentice training with a certificate. Only 7.7% had Grade 10 or lower. The domains with the highest percentage of postgraduate are the Cultural and Natural Heritage domain (66.7%) followed by the creatives in the Book and Press domain (57.7%). The respondents from the Visual Arts and Crafts domain also have a high proportion of postgraduate at 48%. The qualification in the Cultural and Natural Heritage as well as the Book and Press domains are to be expected as these two domains lend themselves to post-graduate research. It is how surprising to see the qualification profile for the Visual Arts and Crafts domain, especially since this the creatives working in this domain are more vulnerable.

The most precarious domain are the Performance and Celebration as well as the Design and Creative Services domains where the creative have a high school qualification or lower at 40% and 38.5% respectively. It is surprising to see the number of Design and Creative Services creatives with lower qualifications.

Nature of Respondents Work in CCI

A total of 121 respondents answered this question. 21% of these indicated that they are owners of a firm within the CCI. And 13% of respondents indicated that they are employed full-time in a CC firm. The majority (39%) noted that they are freelancers. 13% of respondents selected the “other” option – most of these indicated that they are currently unemployed and looking for work, or working in another sector until they can be employed in the CCI. One respondent noted that they were a volunteer in a community development project.

Table 10: Nature of Respondents Work

	...employed full time in a cultural or creative firm	... employed part time in a cultural or creative firm	...an owner of cultural or creative firm with employees	...a freelancer with no permanent employee	...an employee in the public sector	...an employee in a non-profit/NGO etc	...an employee for an international firm or organisation	Other (please specify)
% Responses	13%	7%	21%	39%	2%	17%	1%	13%
# Responses	16	9	27	50	2	22	1	16

People working in CCI have to be willing to fulfil an array of roles. Below are a few example of the answers received to the question: Describe your work:

- Composition, Performance, Promotional Concepts, Administration, Artists Management and Event Organizing
- Choreographer and Theatre Maker. Workshops and information sessions
- Composition, Performance, Promotional Concepts, Administration, Artists Management and Event Organizing
- Editing and research; dance writer and critic; part-time teacher/lecturer
- Festival curator, movement practitioner, drama tutor
- Photographer, layout design, workshop facilitation, arts administration
- Writer editor performer creative writing teacher educator researcher

Income earned from creative activities

Earnings allow workers to contribute to pension funds, savings and also to the Unemployment Insurance Fund. If earnings are too low or very sporadic, creative workers cannot contribute to pension funds and have save whatever they have for the proverbial rainy day.

Many creatives do not pursue creative occupations because they have other full-time work. To understand the extent of this phenomena, the question was asked: “Roughly what percent of your income is earned from cultural or creative activities?”

It appears as though whites are earning the most on average from creative work. Africans on the other hand are not pursuing creative occupations.

Table 11. Earning from Creative Occupations by Race

	Earning from Creative
African	44%
Coloured	77%
Indian / Asian	66%
Nama[6]	100%
White	79%

To determine the extent of precarity between the creative is the provinces, the same question (Roughly what percent of your income is earned from cultural or creative activities?) was analysed in a provincial context. The finding are set out in Table 12 below.

Table 12. Earning from Creative Occupations by Province

	Average of Percent Income	Standard Deviation of Percent Income
Eastern Cape	70%	38.73
Free State	37%	33.93
Gauteng	76%	30.22
KwaZulu-Natal	59%	34.81
Limpopo	44%	34.29
Mpumalanga	11%	17.58
North West	27%	4.62
Northern Cape	43%	37.35
Western Cape	68%	39.54

Creatives in the larger provinces in terms CCI GVA (Gauteng, Western Cape and KwaZulu-Natal) as well as the Eastern Cape, tend to rely on the creative occupation for their income. Creatives in Mpumalanga tend to have other sources of income and therefore cannot dedicate their efforts full time to their creative endeavours.

Unemployment Insurance Fund

The Unemployment Insurance Fund (UIF) is a government-run fund that provides benefits to workers when their employer terminates their employment. The unemployment insurance system in South Africa is governed by the following legislation:

- Unemployment Insurance Act, 2001
- Unemployment Insurance Contributions Act, 2002

The amount of the contribution due by an employee, must be 1% of the remuneration paid by the employer to the employee. The employer must pay a total contribution of 2% (1% contributed by the employee and 1% contributed by the employer) within the prescribed period.

[6] One of the Khoi groups

UIF gives short-term relief to workers when they become unemployed or are unable to work because of maternity, adoption and parental leave, or illness. It also provides relief to the dependants of a deceased contributor. The benefits are only available to workers who have been contributing to the UIF while they worked. Workers cannot claim if you have resigned, been suspended or absconded from work.

Since many creatives work in the gig-economy and do not have fulltime work, a question was asked to determine what percentage are eligible for UIF should they lose their employment. The survey showed that only 34% of creative workers were registered for UIF. Only 45% of enterprises registered for VAT indicated that they were also paying UIF.

What can Government do to assist those in the CCI?

In the final open-ended question of the survey. respondents shared their ideas about what can be done to assist them in answer to question 25. It is worth highlighting that the typical time spent completing the survey was 16 minutes, showing that respondents were not only keen to shares their thoughts, but also hopeful that note will be taken of these for future policy developments.

The suggestions of respondents have been grouped (very loosely) into 7 categories.

Agencies

- Establish and enforce agencies that deal with CCI
- Have enough youth centres situated in our communities.
- Have more people who are aware, passionate and have experience in the arts to be in the government run institutions that work for the industry
- Have a relevant database of artists. Deploy young artists to work in schools for limited periods for a stipend. Provide support for arts venues. Support children's art initiatives including traditional dance and poetry. Recognise organised arts organisations and collaborate with them to schedule a sustainable set of activities that benefit society at large

Legislation

- Through legislative interventions support, protect and promote the local industry.
- Approve the actor’s bill of rights
- Help create a regulatory structure that permits collective bargaining rights. This should include structures for standard work contracts, dispute resolution and UIF contributions.
- Change labour law definition of worker
- Most they should provide platforms and to partner with non-profit organizations within the creatives
- Recognise the arts and artists formalise the industry and stop letting politicians and politics interfere in the creative industry
- Allow for an organised industry with labour protection for artists and producers.
- Regulation and enforcement of regulated working hours
- See the value that the CCI have in the economic and social development of this country and for tourism. Minimum wage conversation needs to happen, more government subsidies and finding for projects, royalties, and fees
- Create more coherent and responsive enabling frameworks and more nuanced financing instruments
- Be consistent with procurement practices

Funding and grants

- Fund programmes to install skills which will be used to market art in general and ideas to achieve self-sustaining
- Distribute funds to those in need and not use it for their own pockets
- Recognise freelancers/contract workers as essential to the creative industries and small business and independent contractors by cutting all the red tape out.
- Provide financial support
- Fairness based on application adjudication. They need to improve their communication. Have budget for each province to create equality in distribution of funds. Scrap unnecessary compliance documents during the application process and be clear on what they need from applicant rather than introducing new things when suit them.
- Fund projects and companies for minimum of three years so that they have a chance to become sustainable and self-sufficient in other ways. Not steal money. Not give less that requested project budgets or if they do, to not expect the project to be executed in the same way to the same standard and outcomes.
- Artists should be able to apply for and receive a universal basic income grant to survive and pay their monthly expenses.
- Actually care. Distribute funds to not only the famous and more evenly
- Establish more funds to fund commercial ventures to ensure financial sustainability of organisations
- Public funding support for film
- Create a funding stream specifically for Khoi artists. - access to more resources and funding for CCI Industry, without ridiculous compliance needs.
- We need to look at the CCI industry spectrum of how many groups are there working hard with no funding and make sure that they are the ones who will get funding. Government should have a list of these organizations.
- Granting of funding for programmes that actually create jobs.
- Support the orchestras so musicians have job security
- Be timeous and thorough in the way that they support artists. They need to be quick off the mark, have vision and the ability to make well thought through and advised decisions. In Ireland by the second week the arts council was already asking Arts organizations to fill in forms that measured their predicted losses so that the Arts council knew how to respond.
- Not be so corrupt so that the money set aside for the arts actually gets to those who need the support
- Better support for artists- continue initiatives such as the PESP and the Social Employment Fund (SEF)
- Truly help by spreading funding, good projects fail without the government ever recognizing them because of unnecessary red tapes.
- More employment opportunities such as internships across industry. More funds for training providers in customized short courses. More grants for all businesses.

Education and training

- Empower the creative sector through workshops and training.
- Partner up with private companies to support creative artists who are trained and training in the sector with benefits such as medical aid, loans, grants, insurance and then furthermore have one structure where all cci agencies report their financial terms.

- Student Incubation Programme which facilitates the development of youth CCI practitioners into the global market and industry sector
- Prioritise creative & artistic education in the entire education system. Subsidise the consumption of creative products for youth /schools etc (e.g. theatre tickets).
- Proper funding courses. Supporting existing theatres and youth programmes. Better arts management.

Government officials

- Appoint a minister with some background in the Arts for starters and understand that Arts and Culture are totally different things.
- They need to be proactive instead of reactive. I do not think they have a cultural plan
- Understand it better so the interventions are fit for purpose
- Build innovative ways to help artists mentally, emotional and sell together to care for our economic needs
- Government should start instilling the culture of entrepreneurship in the creative industry and not just disburse funds without monitoring them
- Have a strategy! Be more forward thinking and daring! Stop lagging behind the western world and take ownership! See the value of the creative economy for entrepreneurship and job creation with youth. Hire a minister who actually understands the sector.

Platforms to showcase talent

- Assist with overseas trade shows again.
- Create marketing platforms for creatives to showcase their work and to network with other stakeholders.
- Partner with them in any event they host
- Provide access points to Broad-Based Black Economic Empowerment (B-BBEE) at art shows
- The youth and art offices in our local municipalities are practically useless as they are run by people who are not artists and who have no interest in solving our problems so I think your department should have an office in every municipality that will have someone who is helpful. More funds could be allocated to skills development, training and implementation of projects.

General

- Transparency is important
- Easy access to interns for SMEs without all the blocks from SETA.
- Make the drive rebate work for animation industry, mandate SABC to broadcast local animation, make the copyright amendment bill work for animation and all related, fund industry organisation's intermediaries. Create a cluster policy and fund. Fund incubators. Reintroduce arts in schools. Mandate Dept of Communications to create a fund for animated TV series. Make sets separate animation. Form live action know how much we pay and ensure all left over money goes to intermediaries/industry organizations, create an animation development fund for business model and script creation
- Encourage people to attend cultural activities such as concerts. Perhaps provide funds or ‘vouchers’ for youth to attend cultural events.
- Creating more opportunities for small business
- The pandemic taught me to be self-reliant and as a result I wouldn't want to rely too much

on an impersonal institution.

Conclusion

In this chapter an analysis was provided of the 141 responses to our online survey. The analysis included consideration of where the respondents live (provinces). This showed that the number of respondents for each province and domains is more or less in line with the size of each province's GVA and cultural occupations. Limpopo was the only outlier. Although the sample is relatively small compared to the CCI population, the findings can therefore consider to be a true reflection of CCIs.

Analysis was then provided of the ages of respondents; the domains in which respondents indicated that work in; the income earned by domain; the qualifications of respondents; the nature of the roles work done by the respondents and the income earned from their creative activities. There was also an analysis of the extent to which whether respondents contributed to unemployment and / or pension funds (the results were destressing low).

The UNESCO Framework For Cultural Statistics (UNESCO, 2009) definition for the categorisation that includes six CCI domains, was used to analysis the precarity of the CCIs. Following the SACO Mapping study, these were again grouped into three broad categories where appropriate:

1. Culturally intensive (the Cultural and Natural Heritage as well as Performance and Celebration domains);
2. Cultural and Creative (the Visual Arts and Crafts as well as Book and Press domains); and
3. Creative and technology intensive (the Audio-Visual and Interactive Media as well as the Design and Creative Services domains).

Finally, answers to the open-ended question of what government can do Government to assist those in the CCI, were shared.

Chapter 7: Modelling Salaries for Social Purposes

Introduction

The modelling to estimate the salaries of the various skill levels (as well as the informal sector) follows the methodology employed to estimate the CCI Cultural Satellite Account that was used to estimate various economic dimensions that were included in the SACO Mapping Study. The UNESCO Framework for Cultural Statistics (UNESCO, 2009) that is an international guideline used for align national data for international comparison was used. Although the framework is based on six cultural and two related domains, only the six CCI domains are estimated in this report.

The CCI Cultural Satellite Account is based on the South African System of National Accounts (SNA) that is used for all official purposes. The SNA is compiled by Statistics South Africa and is also reported by the South African Reserve Bank. Further, the South African SNA is based on the United Nations' 2008 System of National Accounts (United Nations *et al.*, 2009).

Embedding the SNA into a CCI-Input-Output or Social Accounting Matrix Model

A Social Accounting Matrix or an Input-Output (IO) model is essentially a set of matrices representing the national (or regional) economic accounting. The complex economic structure of each sector of the economy has many dynamic variables, each of which is unique. The SAM shows backward and forward linkage within the economy (i.e. how industries trade with one another) and their production (and who uses them e.g. for intermediary inputs, final consumption, investment government consumption or trade with the rest of the world). The IO analysis is the standard method for measuring the effects of changes in the final demand for a product of an industry or sector (Surugiu, 2009).

South Africa SAM are based on the Standard Industrial Classification (SIC) system. The UN has developed the International Standard Industrial Classification (ISIC) that is used in the SNA. South Africa has adopted the SNA framework and is using an adapted version of the ISIC. This system does not make provision for CCIs. Estimates, therefore, must be made using available information. A South African CSA was estimated using a bottom-up approach that firstly involves deriving the CCI activities out of the various SIC sectors where they have previously been accounted for, using both direct and indirect extraction methods. This process involves:

- Establishing the Rand-value magnitudes of the CCIs in terms of variables such as production, capital and labour usage, etc.; and,
- Then deriving the structures of the CCIs in terms of how they link backward and forward to other SIC sectors.

The methodology is more fully explained in the first chapter of SACO's Mapping Study "The macroeconomic impact of the Cultural and Creative Industries in South Africa" and can be found at www.southafricanculturalobservatory.co.za.

For this study the number of workers and the total compensation for each sector was obtained from Quantec. Both the total compensation and number of workers could be identified according to their skill level or if they were informal (high-skilled labour; skilled labour; low-skilled labour; and informal labour). These were then used to calculate the average wage rate be sector per category. Unfortunately, it is not possible to calculate the standard deviation that would have given a better idea of the spread of the wages.

These average wage rates were then incorporated into the SAM.

Using the Macroeconomic Modelling System that was developed for the Mapping Study that included using MATLAB vR2021a (a programming and numeric computing platform used to analyse data, develop algorithms, and create models) as well as Stata v15 (a general-purpose statistical software package for data manipulation, visualisation, statistics, and automated reporting) and Microsoft Excel, a new SAM was estimated with CCIs and information on the wages. The new SAM made it possible to capture project specific programme, construction, and operational data. These programs generated various macroeconomic and socioeconomic information and the information needed for this report. The software used could also undertake sensitivity analysis to ensure that the assumptions used were as accurate as possible.

Results from the Model

The final output that provides the estimates for the average wages for each domain according to whether the workers are categorised as high-skilled labour; skilled labour; low-skilled labour; or informal labour is included in the table below.

Table 13. Wages according to Skill Levels

	Cultural and natural heritage	Performance and celebration	Visual art and crafts	Books and Press	Audio-visual and interactive media	Design and creative services
High-skilled labour	R 240 023	R 52 721	R 215 622	R 285 526	R 266 436	R 555 812
Skilled labour	R 134 239	R 32 470	R 110 849	R 141 750	R 173 435	R 334 581
Low-skilled labour	R 95 267	R 22 060	R 98 977	R 109 383	R 105 816	R 221 569
Informal labour	R 44 154	R 19 932	R 29 390	R 75 079	R 55 819	R 137 110

This table shows that workers in the Performance and Celebration domain clearly have the lowest wages and would therefore be expected to be the most vulnerable. On the other hand, those employed in the Design and Creative Services domain generally have the highest wages.

Conclusion

This compact, but significant, chapter has introduced a means of modelling the salaries of the various skills levels of cultural workers and practitioners including in the informal sector. It draws on the specific methodology invoked to estimate the CCI Cultural Satellite Account.

This approach has been used to estimate the various economic dimensions that comprise the current SACO Mapping exercise of the CCI Sector.

The UNESCO Framework for Cultural Statistics (UNESCO 2009) has been used as the touchstone to align the national data for international comparison. While the UNESCO Framework allows for six cultural and two related domains, only the six CCI domains are estimated for the purposes of this report.

The main tabular set of results for the six domains are broken down internally into four categories of earnings:

- high skilled labour;
- skilled labour;
- low skilled labour; and
- informal labour.

The results show that workers in the Performance and Celebration domain clearly have the lowest wages and would therefore be expected to be the most vulnerable. On the other hand, those employed in the Design and Creative Services domain generally have the highest wages. The findings with regard to the Performance and Celebration domain tallies with insights provided by our interview and survey material.

The overall findings reinforce the international and national analysis in regard to the diversity and dynamics of the CC sector and suggest the need for nuanced approaches in responding to precarity, conditions of work, and social security considerations for artists and cultural workers.

Chapter 8: Policy Recommendations

Introduction

This exploratory research report on Precarious Work and Social Security in South Africa, has ranged relatively widely given the set parameters. The various chapter incorporate a desktop analysis in terms of the literature review, the international and comparative policy context and review section, and the consideration of select issues in South African policy context discussion.

Empirical evidence generated from select strategic interviews and a focus group input added value. We also took the option of a modest online survey which returned solid findings and results. In addition a speculative conceptual modelling related to the feasibility and logistics of a possible social security intervention was undertaken. These individual and triangulated sources of information have informed the following policy recommendations.

Recommendation 1: UNESCO Survey

As a matter of urgency DSAC should look to engage directly with UNESCO and with the current UNESCO survey regarding the continued implementation of the 1980 Recommendation on the Status of the Artist. South Africa is one of the Member States of UNESCO and aligning itself with the activities of its counterparts in Africa and other continents regionally and globally will help in providing strategic policy touchstones and to draw on the network of international resources available in this regard. In addition, UNESCO has declared its willingness to collaborate with member states in accessing additional resources and expertise in developing bespoke Status of the Artist of an institutional and legislative nature.

Recommendation 2: BRICS Network

DSAC should consider an exploratory meeting or colloquium between its BRICS (Brazil, Russia, India, China, and South Africa) partners on the post-Covid19 interventions in regard to social security issues and schemes that are being considered, partly as a response to the depth of the socio-economic crisis in the creative and cultural sector in most countries. As primarily middle-income countries (including South Africa) and all having significant ethnic diversity this would be (i) a particularly useful exchange of ideas; (ii) a means of identifying shared resources; (iii) discovering and sharing best and good practices; (iv) a means of identifying international funding – at least on a nation-to-nation basis; and (v) should be fundable from beyond prescribed Departmental budgets, from an institution such as the New Development Bank (NDB) formally the BRICS Development Bank.

Recommendation 3: Inter-Government Strategic Reference Task Team

DSAC should proceed rapidly in establishing a compact/small inter-government strategic reference task team comprising the appropriate specialised persons from relevant departments and associated state agencies. This team should include representatives from the Departments of Labour; Social Welfare; Trade, Industry and Competition (DTIC); and possibly a nominated representative of NEDLAC. In addition, the key agencies of the Ministry of Finance, namely the national Treasury; the South African Revenue Service (SARS) and possibly Stats SA should be included.

The South African Cultural Observatory should also be considered to add research and policy research expertise to the team. The lead researchers on this report might be considered to represent SACO in this regard. The establishment and functioning of this team could initially be undertaken on a non-statutory and informal or exploratory basis as per the designated protocols relating to inter-governmental collaboration. It is also recommended that the Department of Sports, Arts and Culture coordinate and chair this team or committee. If necessary, the requisite authority could be found to establish the body on a more formal and/or statutory basis.

Recommendation 4: CCI Database

Establish a registry artists and cultural practitioners. This should help fast-track debates about defining artist and cultural practitioners. The establishment of a relevant data base for artists has also emerged as strategic consideration in the recommendations from our current interview and survey results.

The creation and effective use of a CCI database of creative industries (including micro firms) would seem to be a popular and acceptable action step.

Recommendation 5: Create a Platform that can be used to Build Positive Relationships in the CCI

As discussed in the strategic interviews and the first phase of the online survey, there is a perceived lack of faith and trust in government. See also Appendix 1. This was exacerbated in the controversy over the handling of relief funds for artists. There are a number of associations and stakeholders that need to be engaged. If necessary preliminary research on the nature, scope and methodology for such interactions should be implemented.

The creation of a large-scale digital platform by DSAC in collaboration with the private sector for use by CCI firms and creatives should be integral to this process. Internationally, there are some best practice digital platforms created by governments for CCI firms, and artists and cultural workers with a view to stimulate and sustain the creative economy. In South Africa such a venture would help build positive relationships and the articulation of social and cultural capital in the CC sector. DSAC should also consider involving certain other relevant state agencies in the project. The engagement with existing and established CCI bodies and cultural workers and practitioners would allow the develop of social and cultural capital in the sector. It would also allow certain of the related RWP and Masterplan objectives to pursued simultaneously.

Recommendation 6: Training and Education for CC Workers

The emphasis placed by UNESCO and the ILO on the importance of a country ensuring that the providing exemplary training, education and nurturing for its artists has been overlooked somewhat in a number of developing and even certain developed economies. In the South African context, the relative lack of design and articulation of a kind of training and ecosystem for artists and cultural workers is an area requiring policy research and related policy design. The approved Revised White Paper for Arts, Culture and Heritage, and the 2021 Masterplan for Cultural and Creative Industries also provide related policy suggestions on this matter.

The Masterplan for the Creative Industries (May 2022) – the outcome of a partnership between DTIC and DSAC (along with SACO) --refers to the need for social security measures as well as certain interventions in establishing career-related training and education for CC workers and professionals which links with certain international and comparative policy interventions. There should be dialogue between DSAC and DTIC and potentially other institutional partners such as the DBE and DHET on looking how the Masterplan, and the overarching RIS (Reimagined Industrial Strategy) mesh with these matters. The not dissimilar envisaged interventions and actions suggested in the RWP could also be considered in this process.

Recommendation 7: CCI Associations and Unions

There is a need to consider the various options to enhance the freedom of association in the CC sector in regard to (i) collective bargaining; (ii) the conceptualization of new forms of unions and unionization as per current international developments. In addition, a parallel informal discussion with interested parties and stakeholders would be useful. The researchers would help in establishing a list of potential invitees.

Recommendation 8: Legislation and Support

There are a number of potential shorter-term options for government in terms of legislation and associated support measures.

Firstly, the 2017 Revised White Paper (fourth edition) has been recently passed by government. It has a section which directly addresses the status of artists and cultural workers, and the question of social security. It also specifies existing understandings confirmed during the consultative and drafting processes, most particularly the cooperation with the Department of Labour (DOL). It is important that steps be taken to operationalise policy recommendations of the long awaited RWP.

Secondly, consideration should be given to development of a pro forma contract for gig and self-employed workers in the cultural and creative economy in South Africa.

In the third place a practical step would be to investigate the establishment of a dedicated unemployment insurance fund for creatives.

Recommendation 9: Role of Private Sector

As evidenced by international cases and developments, the private sector, and particularly the financial institutions, are crucial players in the design, delivery and participation in social security measures and certain efforts to ameliorate precarity in the CC sector.

Very likely levies or contributions for contractual CC workers should come off their contractual payments in the future for some form or forms of social security (including a modified UIF). In addition, as is already happened in the South Africa public universities, one or more of the large financial institutions could manage or help manage the particular pension funds in question.

DSAC should formalize a dialogue with key private sector representatives, most especially the major financial institutions to consider social security measures. There are opportunities for quick wins such as access to finance by contract CC workers and practitioners on matters such as mortgages and loans and HP arrangements on a motor vehicle. DSAC and government should be able to prevail on the finance houses to develop a new model for creative and cultural workers.

The structuring of a Public-Private Partnership arrangement on this particular matter with Treasury participation should be considered in this instance.

Suggestions for Future Research

Our exploratory research ranged quite/relatively widely. In so doing a number of areas suggested themselves for more detailed and follow-up research.

In the first place, there the expansion of aspects of the online survey, especially in regard to determining with more specificity the dynamics of contractual work in the broad CC sector. Further details need to be gathered on how artists and cultural workers the CC sector would consider the kinds of social security measures and related interventions to improve the working conditions and ameliorate (to an extent) the effects of increased precarity in the sector.

Secondly, there is a paucity of research on the institutional setting and the kinds of associations, and cooperative activity in the CC sector. An audit of existing organizations and initiatives and the inscribing of this into a dynamic data base would be a worthwhile exercise. There is also scope for a substantive history and contemporary study or set of studies of efforts at unionization past and present in regard to CC workers. The lessons learnt from such analyses would be of value for current and envisaged policy design regarding social security programmes, and a refitting of trade union activity and organizational forms within the sector.

In the third place, there is scope for a comprehensive study of the recent policy history of efforts by DSAC and government more generally, in regard to social security measures in the CC sector, and impediments to the implementation of these. In respect of closer collaboration with state agencies and private sector finance corporations in considered and future intervention, an institutional policy lineage and associated research audit for key documents will be necessary. This will entail tracking down relevant documents and policy pronouncements in key state institutions and at private and third sector agencies and establishing and refining the institutional narrative. This would be a useful resource for the international and national commitments such as the periodic UNESCO surveys on the international status and working conditions of artists, referred to above, and a base for sectoral consultations on likely social security measures.

Fourthly, more international, and comparative research is required in regard to current responses in developed and developing economies in regard to the intensification of precarious labour in CC sectors, and to revived and emerging targeted social security measures.

Fifthly, it is important not to overlook at the emphasis placed by UNESCO and the ILO on the importance of a country ensuring that the providing exemplary training, education and nurturing for its artists has been overlooked somewhat in a number of developing and even certain developed economies. In the

South African context, the relative lack of design and articulation of a kind of training and ecosystem for artists and cultural workers is an area requiring bespoke and policy-oriented research.

Conclusion

This chapter has put forward recommendations generated by the findings of this exploratory research report on Precarious Work and Social Security in South Africa.

The nine recommendations listed above, provide a starting point for the DSAC to address the related concerns of increased precarity and the need for speedy responses to the social security underpinnings of the CC sector. The recommendations takes due cognizance of the fiscal constraint that the contemporary South African state is facing and looks to options and solutions in terms of public-private partnerships, the creation of networks and social capital, and the deployment of volunteer capital.

In addition to the recommendations, this chapter discusses potential future research in the overlapping area of precarity and social security in the CC sector. These five areas are:

- the expansion of the online survey;
- a substantive study of the institutional landscape, including associations, collective action, and inhibited unionisation;
- a policy history of efforts by DSAC and government about social security measures in the CC sector, and impediments to the implementation of these;
- a large-scale comparative international research focussing on responses to the intensification of precarious labour in CC sectors; and
- the design and articulation of training and ecosystem for artists and cultural workers is an area requiring bespoke and policy-oriented research.

Conclusion

This exploratory research report on Precarious Work and Social Security in South Africa, deals with two inter-related sets of issues in regard to global and national efforts to promote the creative economy and CCIs, and to locate such initiatives within a drive to create employment and sustainable development. The report ranges relatively widely given the set parameters, reflecting the surge in interest worldwide in the working conditions of artists and cultural workers, and the ways and means of addressing them. The impact of COVID19 on the CC sector, artists and cultural works, and the CCIs, has been severe and much needs to be done in the post-COVID period.

Though modest in its original conception, the report is timeous and significant, and points the way to more substantive interventions by DSAC and government more generally.

The introductory chapter sets the scene, discusses the terms of references, and aims and objectives of the research. There is also a short summary of the constituent chapters.

Chapter one comprises the main international and comparative literature review. It provides a variety of insights into the dynamics of precarity in the cultural and creative sectors. It underlines the fact that precarity in the CC sectors differs from that experienced in other sectors of the economy. Artists and cultural workers are in general well educated and skills, and their precarity is often related to their predilection to a calling and preference for work and potentially a career in particularly challenging fields. This is why the UNESCO places such a deliberate emphasis on the question of the status of the artist and the need to nurture and provide for and sustain such features.

The review shows that class, ethnic factors and the mobilization of cultural capital can and does affect entry to and career progression in the sector, the particularities of which would appear to vary with regard to the country or region in question. There are also North-South dichotomies at play in areas such as international donor relationships with local cultural and creative economies which can on occasion straitjacket and/or marginalize promising local talent.

We see as well that precarity has deepened in creative economies worldwide. And as a range of scholars argue such developments can be tied with the increased deregulation of the world economy and the erosion of state and union protection of cultural workers. The development of transnational platforms and large corporate entities has eroded in a number of respects the options open to local firms in the creative and cultural economy. Nevertheless, as some scholars argue the occupational complexities and the heterogenous and shifting nature of the creative economy needs to be taken into account. Certain groups of cultural workers and practitioners see the precarity as a given and look to negotiate and even exploit the opportunities. And some such workers have the networks, cultural capital and an outlook that welcomes a variety of work and experience as opposed to more corporate and structured occupational satisfaction.

In general, there has been a discernible intensification of work and increased insecurity in swathes of the cultural and creative economy globally, and a seeming dilution of traditional public spending on arts and culture. More reflexive and innovative interventions are required globally to reinforce the status of the artist and cultural workers and to ameliorate working conditions through particular social security measures.

While there is a reasonably body of work on precarious labour in South Africa the scholarship on precarity in the cultural and creative sectors is modest. Several SACO publications have collectively extended our understanding of precarity in the CC sector in South Africa, most specifically in regard to the impact of the recent pandemic and its aftermath. Ongoing research is likely to add directly and directly to our overview of the trends. More case studies and ethnographic work is needed, however. In addition, there is some indication from that in certain CCI sectors, most particular gaming and content creation, that the relevant cultural workers and practitioners have learnt to live with the likelihood of precarious work and have adapted to this reality.

Chapter 2 provides a compact discussion of this report's methodology and research methods. A reflexive mixed method approach is utilized. The desktop component includes a literature and review discussed above, and an international policy and context review with best practice case studies. There is also a South African policy context. The quantitative economic aspects include the deployment of an Input-Output Table and a Social Accounting Matrix. The fieldwork and empirical component consisted of an online questionnaire with a balance of closed categorical questions and open-ended questions. In addition, strategic interviews with selected stakeholders, and a focus group session were carried out.
The various data sources were subsequent triangulated.

Chapter 3 covers the international and policy context and developments, including certain best practices cases. It includes a range of literature and documentary sources. An important touchstone is the 1980 UNESCO Recommendation concerning the Status of the Artist. This has been supplemented by the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions. The 1980 Recommendation calls on member states to strive to improve the professional, social and economic status of the artists, through the enactment and/or implementation of policies and measures in regard to training, social security, employment, income and tax matters, mobility and freedom of expression.
Surveys are now conducted at four-year intervals to gauge the extent to which the states concerned are managing to implement the spirit and content of the 1980 Recommendation.

The chapter provides a number of best-case examples especially in regard to social security, employment and income and tax matters. There is also a consideration of the question of intellectual property and the artist's rights in these regards especially with the growing impact of the transnational digital and streaming platforms. The advantage and disadvantages of these digital resources and the inequalities and asymmetries thereof are considered. The findings suggest that usually that the well-known artists (e.g musicians, visual artists, and writers) benefit primarily, and that the majority of users, especially those with local as opposed to international reputations, benefit modestly at best. Establishing a closer working relationship with UNESCO and its current work on these matters is a course of action the DSAC and the South African government might consider.

The emerging efforts of certain developed and developing countries to tax such platforms is considered. The options to governments in using such revenues to fund programmes and/or structures to address precarity and social security concerns is also discussed. Such examples provide a useful policy option for the South African government, most especially given the current pressures on the national fiscus.

Chapter 4 provides an overview of the policy context, and strategic developments and issues in South Africa. It considers the major economic trends, the impact of deindustrialization on the economy and society of the country including the constraints on the development of the creative economy. Recent DSAC policy and joint policy productions most particularly the Revised White Paper on Arts, Culture and Heritage, and the CCI Masterplan (a collaboration with the Department of Trade, Industry and Competition) are examined with particular emphasis in regard to their provisions to improve working conditions for artists and cultural practitioners and proposals for social security measures in the CC sector. The fragmented terrain in the CC sector for union and associational activities is also examined, and institutional initiatives noted.

This chapter is relatively compact, but its material is policy rich. The need for closer and more productive relationship between government and the cultural workers and practitioners is again emphasized. Current structures for engagement are not, it seems working particularly well, and have been compromised in recent years by developments such as handling of relief funds for creatives during the pandemic. Efforts at unionization and collective bargaining have not made much headway. Indeed, there seems to have been a further attenuation of what little exists in the way of formal union structures in the CC sectors. In addition, progress is required in regard to more binding legal provision for and coverage of short-term contract sand gig work by creatives and cultural workers. A research audit on the nature and scope of the associations, and other institutional structures and initiatives for artists and cultural workers is advisable. There are other further policy implications and associated research, and these are teased out in chapter 8 of this report.

Chapter five comprises the presentation and analysis of the qualitative empirical material. There are two components: (i) 17 strategic interviews were conducted with 18 stakeholders; and (ii) one focus group session was held with three DSAC officials. The interviews and the focus group session were shaped by a semi-structured questionnaire. The five organizing themes were: (i) the context of precarious and atypical labour in the cultural and creative sector; (ii) artists' rights, business, associations and unionisation; (ii) social security for artists and creative practitioners; (iv) government's role in provision of social security in CCI; and (v) general observations and suggestions.

The response to the theme 1 on the context of precarious and atypical labour in the cultural and creative sector is captured by a remark of Respondent 1 in regard to a 10-month internship programme coming to an end: "And we can see it, we can see the anxiety building in this group of actors who are coming to the end of the program, and now have to venture into the field of employment." He adds that "the sector remains precarious and scary" and notes that "diminishing South African platforms are significant.".

On the second theme of artists' rights, business associations and unionisation, respondent 8 outlined the difficulties of protecting artists' intellectual property rights. The issues include, not only those in power taking advantage of artists desperate for work and looking to build on their CVs, but also artists who are naïve and have not been trained on how to negotiate a fair wage and contract. Respondent 13 reinforced the view that there is not sufficient protection for artists' IP. S/he refers particular to actors and ''people getting paid for when their work gets into syndication or when you repeat it again. So that an artist who was in Generations 1990, when the thing is played, again, they don't make any money from that." Another key concern was the question of unionization (or lack thereof). As Respondent 8 noted: "The lack of unionisation really opens the door for abuse of artists – the lack of standardization in terms of rates etc, and employment contracts and sort of standard procedures. Maybe it's industry specific…, where a union would make sense. Maybe being a freelancer, or being independent, is a different type of treatment for certain sub sectors within our sector."

The third theme also elicited important insights. "So the industry doesn't work with protections", noted Respondent 13. That said the respondents argued strongly that people working in the CC sector are worth protecting. As Respondent 8 stressed:

> "Artists are a vulnerable group. I would say that this is a particular breed of person that has the tenacity to be able to follow their calling. It's different from other jobs – there's no safety net for them. I would say it's worth investigating. So, what would South Africa look like if we didn't have any artists? If you didn't put any interventions in place?"

For this theme our respondents provided us with a substantive set of perspectives, insights and recommendations for social security for artists and creative practitioners.

In respect of the fourth theme on government's role in the provision of social security in the CCI sector, select responses can be summed up as follows:

- Establishing social security for those in the CCI sector would be a challenge, but it is increasingly worth doing.
- Thus far, government has not been able to deliver sustained forms of security for people working in the CC sector, and this has had a devastinga effect on artists during and after the lockdown.
- An example was given, in one of the interviews, of a performer who had to cancel his medical aid during Covid (for financial reasons) and shortly thereafter was diagnosed with cancer. He died a few months later.
- There is an acknowledgement by many respondents that government support tis necessary to enable the CCIs to recover fully and thrive in the coming years because government can example, create conditions "community art centres to be supported and managed in a way that enables creativity and access".
- If good administrator and serving leaders are appointed – not politicians (Respondent 11).

In terms of the fifth theme on general observations and suggestions there was significant emphasis on the point that recommendations and documents did not constitute regulations and laws. One respondent spoke about the need for action to be taken to ensure immediate, even if small, gains for the sector, because these "quick wins" will enable government departments to move onto other issues. This in turn will make it "easier to organize and win rights for [cultural workers]". Furthermore "once you win those rights …. we can now move on to something else". (Respondent 19).

Chapter 6 analyses the data generated from the online survey. To get as much information from creatives themselves, a survey was sent to the SACO database of creatives consisting of 900 individuals or creative enterprises. To ensure wider coverage certain DSAC officials were requested to respond. There were some additional information about the survey in the newsletter of STAND and Assitej offered its network for the survey. Given the time constraints, such networks will be used in a reworked follow-up survey.

147 respondents answered the question, with 141 being considered for the formal analysis as a few

responses were available only after the time parameters. The analysis of the survey results included a consideration of where the respondents resided. This showed that the number of respondents for each province and domains is more or less in line with the size of each province's GVA and cultural occupations. Limpopo was the only outlier. Although the sample is relatively small compared to the CCI population, the findings can therefore be considered a reasonably accurate reflection of CCIs. Thereafter, a profile was generated of the ages of respondents; the domains in which respondents indicated that work in; the income earned by domain; the qualifications of respondents; the nature of the roles [and] work done by the respondents and the income earned from their creative activities. There was also an analysis of the extent to which whether respondents contributed to unemployment and / or pension funds. The results in regard to the number of contributions are worryingly low.

The definition and categorization of CCIs is based on the UNESCO Framework For Cultural Statistics (UNESCO, 2009). While the Framework allows for six direct domains and two associated domains, the analysis concentrated solely on the six formal CCI domains. This mode of categorization was then used to analyse the precarity of the CCIs. Following the approach of the SACO Mapping study, these were again grouped into three broad categories where appropriate:

- Culturally intensive (the Cultural and Natural Heritage as well as Performance and Celebration domains);
- Cultural and Creative (the Visual Arts and Crafts as well as Book and Press domains); and
- Creative and technology intensive (the Audio-Visual and Interactive Media as well as the Design and Creative Services domains).

Finally, answers to the open-ended question of what government can do Government to assist those in the CCI, were shared. These open-ended questions raised important sets of issues for future policy design. The clustering of issues included the (i) creation and/or reform of current agencies involved in the CC sector; (ii) providing new and relevant legislation; (iii) improving the nature, extent and allocation of funding and grants; (iv) providing more focussed and articulated education and training; (v) improving the calibre of government officials dealing with cultural workers and practitioners; (vi) providing more in the way of platforms for showcasing talent; and (vii) a range of general observations.

Chapter 7 models the salaries of the various skills levels of cultural workers and practitioners including in the informal sector. It draws on the specific methodology invoked to estimate the CCI Cultural Satellite Account. The UNESCO Framework for Cultural Statistics (UNESCO 2009) has been used as the touchstone to align the national data for international comparison. While the UNESCO Framework allows for six cultural and two related domains, only the six CCI domains are estimated for the purposes of this report.

The table provided gives a snapshot of the diversity of the CC sector and shows how a nuanced approach is essential in regard to the constituent sectors and differing levels therein, in the overall process of policy design and intervention in the CC sectors and for artists and cultural workers more broadly.

Chapter eight utilizes the findings, insights and suggestions in the literature and policy chapters, the interviews and focus groups; the online survey and the quantitative modelling in the relevant chapters to determine key policy recommendations. These specific and triangulated sources of information have thus collectively informed the drafting policy recommendations. These are policy recommendations not exhaustive with the emphasis falling rather on practical and implementable suggested measures.

There are nine recommendations which provide a starting point for the Department of Sports, Arts and Culture in regard to addressing the related concerns of increased precarity and the need for a speedy response to the question of providing with due urgency social security underpinnings to the CC sector.

(i) As a matter of urgency DSAC should look to engage directly with UNESCO and with the current UNESCO survey regarding the continued implementation of the 1980 Recommendation on the Status of the Artist.

(ii) DSAC should consider an exploratory meeting between its BRICS partners either on a bilateral or collective basis regard to share information and resources on potential social security interventions in regard to the CCIs and the CC sector in these countries.

(iii) DSAC should proceed rapidly in establishing a compact/small inter-government strategic reference task team comprising the appropriate specialised persons from relevant departments and associated state agencies. This team should include representatives from the Departments of Labour; Social Welfare; Trade, Industry and Competition (DTIC); and possibly a nominated representative of NEDLAC. It would seem advisable to include the key agencies of the Ministry of Finance, namely the national Treasury; the South African Revenue Service (SARS).

(iv) Establish a registry artists and cultural practitioners and the accompanying methodology to identify who should qualify.

(v) Create a large-scale digital platform in collaboration with the private sector for use by CCI firms and creatives that can be used to build positive relationships and the articulation of social and cultural capital in the CC sector.

(vi) The emphasis placed by UNESCO and the ILO on the importance of a country ensuring that the providing exemplary training, education and nurturing for its artists needs to be pursued systematically in terms of research and related policy design in the South African context.

(vii) There is a need to consider the various options to enhance the freedom of association in the CC sector in regard to collective bargaining, and the conceptualization of new forms of unions and unionization as per current international developments. A discussion with interested parties and stakeholders would be useful. The researchers would help in establishing a list of potential invitees.

(viii) There are a number of potential shorter-term options for government in terms of legislation and associated support measures. Firstly, the 2017 Revised White Paper (fourth edition) has been recently passed by government. It has a section which directly addresses the status of artists and cultural workers, and the question of social security. It also specifies existing understandings confirmed during the consultative and drafting processes, most particularly the cooperation with the Department of Labour (DOL). It is important that steps be taken to operationalise policy recommendations of the long awaited RWP. Secondly, consideration should be given to development of a pro forma contract for gig and self-employed workers in the cultural and creative economy in South Africa. In the third place a practical step would be to investigate the establishment of a dedicated unemployment insurance fund for creatives.

(ix) As evidenced by international cases and developments, the private sector, and particularly the financial institutions, are crucial players in the design, delivery and participation in social security measures and certain efforts to ameliorate precarity in the CC sector. DSAC should formalize a dialogue with key private sector representatives, most especially the major financial institutions to consider social security measures and to seek quick wins such as access to finance by contract CC workers and practitioners on matters such as mortgages and loans. Select state agencies may be added to this institutionalized dialogue. The structuring of a PPP arrangement on this particular matter with Treasury participation should be considered.

Discussion and action steps in regard to these policy proposals, and accompanying research, may lead to the consideration of further related and viable policy options. In addition, this report has demonstrated that question of precarity and atypical labour in the CC sector in South Africa, is significantly under-researched. This is also the case in respect of the research on the efforts to ensure that the status and working conditions of artists and cultural and creative workers are in more in line with accepted international standards.

The chapter contains a short-sub section outlining distinct and desirable future research. The suggestions are not exhaustive but rather tie up with DSAC's increasing commitments to help ameliorate the worst aspects of precarious and atypical labour in the sector, and to look for more engaged and systematic work in the consideration of future social security measures for the sector and the national creative economy.

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APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY – Precarious Work and Social Security in South Africa's Creative Economy – March 2022/23				
	NAME	**TITLE**	**SIGNATURE**	**DATE**
Approved by:	*Ms. Unathi Lutshaba*	*SACO Executive Director*	Umlutshaba	March 2022/23
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Appendix 1: Towards sustainability in the South Africa Cultural and Creative Industries: moving from surviving to thriving

Introduction

The June 2021 report into the National Arts Council's mismanagement of the Presidential Economic Stimulus Programme (PESP) Funding - produced the Theatre and Dance Alliance (TADA) - is scathing. It paints a pattern of gross absence of care for and accountability to the government entities that should be serving the sector, and underlines the significant lack of trust in government structures and a top-down approach, and which seems to exist across CCI interactions and interventions.

Precarious Nature of Work in the CCI

No matter what level they are earning at, or how much success they (are perceived to) have; people working in the CCIs in South Africa are almost all living from hand-to-mouth, and are largely unable (either practically, or systemically) to make proper accommodations for their futures. Whether those periods of not being able to work or earn are in the immediate or distant future; and/or if those periods are short or longer term; and/or whether that 'incapacity' occurs due to something like the extensive Covid-imposed bans on working or gathering, or instead the somewhat more predictable scenarios like pregnancy/child-care issues, or injury, or ill-health, or old-age; the situation remains that precarity dominates - both in terms of the practical ability to work, and the ability to make adequate provisions for life from that work.

One of the most significant results of the Covid-19 pandemic has been to the expose cracks in our societal systems, and one of the areas in which this has been most evident has been in the effects on the CCIs. Three years on, and the few parts of this landscape that have been able to return to a semblance of their prior function remain a shadow of their former selves. They are few and far between; and they are the 'lucky' ones - many losses will never be able to be recovered, and we are all poorer for it.

As things stand, there are far too many stories of limited options, lost hope, and deaths by suicide. In their paper on "Creating a healthy arts sector ecosystem", experienced creative industries practitioners Bridget Rennie-Salonen and Yvette Hardie present a series of fictional vignettes, adapted from real stories. They provide a glimpse into various scenarios (many of them highlighting a lack of structural support for dealing with occupationally induced injuries) that could have been prevented if health and wellbeing - in the broadest sense - were considered in the arts sector. Rennie-Salonen and Hardie argue that "sustainability depends on healthy individuals, healthy organisations, and healthy societies. Without health and wellbeing, the system crumbles." and suggest that the notion of 'health promotion' (a term borrowed from the public health sphere, and meaning 'keeping people healthy') offers a lens through which to examine multiple facets of the arts sector.(Rennie-Salonen and Hardie 2022:5-6).

While some support and regulation is certainly necessary, it is suggested that the primary focus of formal initiatives is in creating enabling and supportive environments in which those trying to do work in the CCIs are able to direct their efforts towards the kinds of creation and innovation that are the lifeblood of this continent, rather than on survival first.

The Need for Collective Engagement within the CCI

The prevailing perspective of the CCIs seems to be one of disorganisation and disparity, but there are a number of examples showing that collective engagement driven by respected individuals or organisations *within* these industries can achieve remarkable success. Any kind of sustainability is based in creating stability, which comes from being able to plan ahead. Yet, the current ecosystem does not support that; instead, making it - quite literally - practically impossible. Time and again, there is evidence presented that the CCIs in South Africa survive/thrive in *spite* of, rather than *as a result* of, government-led interventions.

The information and perspectives that follow are drawn from information available in the public domain, and a series of loosely structured strategic discussions and interviews with broadly networked individuals of varying levels of all of whom are currently working in the sector, of a varied demographic spectrum, and all of whom have considerable experience across multiple roles and contexts (almost always concurrently).

Suggested Strategic Interventions in the CCI

Based on the above, the sectoral needs discussed can be organised according to the following broad areas of suggested strategic interventions:

1. URGENT REPUTATION MANAGEMENT
   Around lack of faith and trust in the government: This requires increased transparency across all aspects, which could be achieved by legitimate sectoral engagement with follow through. A start would acknowledge and respond to current attempts from the sector to engage with government structures (e.g., re CCIFSA, from TADA etc, re NAC)

ACCESS TO INFORMATION AND SUPPORT

   This could easily be achieved through the creation and effective use of a CCI Database

ENGAGE rather than ENFORCE:

   Recognise and offer ongoing support to existing/established representative bodies.
   Assist with the support and development of functional and effective training, accreditation and regulation structures and initiatives.
   Assist with facilitation/creation of private sector initiatives allowing for different modes of ongoing personal investment (e.g., allowing for lump sum investments rather than monthly contributions)

INFRASTRUCTURAL INTERVENTIONS:

   Pparticularly in terms of addressing first-level barriers such as expensive and unreliable access to 1. power supply, 2. bandwidth and 3. safe transport; as well as effective mechanisms for the protection of the rights of CCI workers (areas of particular concern include matters of finance, labour, health and safety, intellectual property)

FINANCIAL SUPPORT:

   This needs to be transparent, fair, and needs-appropriate mechanisms of funding and financial support are required. This should apply to current funding mechanisms, but also include the establishment of a (3 month minimum) Safety Net Fund accessible to those working in the CCIs, an 'Investment Injection/Initiative', and a financial services environment that encourages private sector donations an investment.

Appendix 2: Questions for Strategic Interviews

1. Overview of the Research Project

Current Details & Experience

Questions:

3.1 Precarious and Atypical Labour in the Cultural and Creative Sector

a) What is Your Assessment of the State of the Creative Economy in South Africa, and more specifically in your Region?
b) In your opinion is precarious and atypical labour an issue in the creative economy in South Africa and locally?
c) Is the incidence of this kind of labour on the increase or is it decreasing? Elaborate.
d) What in your opinion can be done to ameliorate the situation or should it be left to the market to decide?
e) If there are options for intervention, what form should they take? What role do you think should government and local business play in this regard?

3.2 Social Security for Artists and Creative Practitioners

a) Do you think there should be a formal social security programme for artists and creatives?
b) Do you know of any schemes that exist in this respect in the country at present?
c) Who should provide for such a programme?
d) Should the state and/or business be involved? If so how?
e) Given the current situation with state finances would such a programme be feasible?
f) What kind of aspects should such a programme (or associated programmes) cover?
g) Should such a programme cover professional artists and creative practitioners only? How should the selection be made?
h) What in your view are the other aspects in regard to vulnerable artists and creative practitioners that should be dealt with by such intervention/s?

3.3. Artists Rights, Business and Other Associations, and Unionization

a) Is there sufficient protection of the rights of artists and creatives in South Africa at present?
b) How in your view could the situation be improved?
c) What in your experience is the extent and effectiveness of business associations in regard to such the rights and interests of artists and creatives in South Africa at present?
d) Is there scope for the development of more specific and/or active associations? What in your view should be done further?
e) Is there sufficient protection of the intellectual property rights of artists in your sector, and generally?
f) What as you see it is the situation in regard to unionization of your sector and the CC sector more generally?
g) Should there be more formal unionization? If so, how?

3.4. Any Other Observations and Suggestions?

Appendix 3: Schedule of Interviews

Domain	Description of work	Province	Researcher	Key
Audio-Visual and Interactive Media	Art and Entertainment Film Incubation	Gauteng	YX	1
	Film	Eastern Cape	YX	2
	Film and TV	Gauteng	RH	3
	Film and TV	Gauteng	RH	4
	General	Western Cape	RH	5
Cultural Heritage	Cultural Heritage	KwaZulu Natal	FG	6
Design and Creative Services	Design and Creative Services to improve built environment in low-income communities	Eastern Cape / Western Cape	FG	7
Education	Research, training, consulting	Western Cape	RH	8
Performance and Celebration	Music	Western Cape	RH	9
	Performance/General	Western Cape	RH	10
	Theatre/General - Youth and Community Development	Gauteng	RH	11
	Performance (live and recorded)		FG	12
	Theatre/General - Youth and Community Development	Gauteng	YX	13
	Performance/General	Gauteng	FG	14
	Theatre/General - Youth and Community Development	Gauteng	YX	15
	Youth and Performance	Gauteng	FG	16
Performance and Celebration	Supports the creation, distribution and appreciation of contemporary South African theatre and dance.	Western Cape	RH	17
Visual Arts and Crafts	Various	Gauteng	YX	18
Focus Group	Administration	Gauteng	RH/YX	19
		Gauteng	RH/YX	20
		Gauteng	RH/YX	21

Appendix 4: South African CCI Representative Bodies / Associations / Organisations

This is a starting list of associations in the CCI, which can be expanded in the revised report.

- Association of Theatre for Children and Young People South Africa (ASSITEJ SA)

- Community Arts Centres Network (CACNET)
  Community arts centres are the lifeblood of a country's cultural well-being. CACNET was launched in April 2022, with the goal of organising and advocating for formalised community arts centres across the Western Cape and ultimately the country. CACNET Western Cape defines their purpose as a platform "to enable arts centres to share learnings, advocate for their interests, and build partnerships and tours throughout the province, nationally, and internally."

- Community Arts Practitioners Network

- Cultural & Creative Industries Federation of South Africa (CCIFSA)

- Dramatic, Artistic, and Literary Rights Organisation (DALRO)

- Festivals Network

- 'I'm 4 the Arts'
  Noteworthy accomplishment was arranging a sit-in at the NAC offices, after the NAC messed up distribution of the Presidential Employment Stimulus Programme funds allocated to help artists recover from the lockdown. https://www.facebook.com/groups/Im4theArts

- NATi

- NWASA

- Performing Arts Network of South Africa (PANSA)

- Personal Managers Association (PMA)
  www.thepma.co.za

- Roadies Association

- South African Dance Alliance (SADA)

- South African Guild of Actors (SAGA)
  https://www.saguildofactors.co.za/

- South African Performing Arts Health Association (SAPAHA)

- South African United Cultural and Creative Industries Federation (SAUCCIF)
- Southern African Music Rights Organisation (SAMRO).
- Sustaining Theatre and Dance Foundation (STAND)
  an independent, non-profit and public benefit entity created by individuals within the sector to nurture, promote and celebrate contemporary South African dance and theatre.
  https://www.standfoundation.org.za/
- SWIFT
- Theatre & Dance Employers Association (TDEASA)
- Theatre and Dance Alliance (TADA)
  a coalition of organisations, institutions, festivals and companies that operate, and individuals who make a significant part of their livelihoods within the South African theatre and dance sector.
  https://www.tada.org.za/
- Theatre Benevolent Fund (TBF)
  Founded in 1964, and helps those in the entertainment industry who have fallen on hard times and have no-one else to turn to.
  https://www.tbfza.co.za/
- Theatre Dance Association (TDA)
  https://www.thetda.co.za/
- UMINA
- Visual Arts Network of South Africa (VANSA)
- Western Province Dance Association
- WGSA

Appendix 5: Online Survey Questionnaire

south african
cultural observatory

Precarious (uncertain) labour needs survey

During the Covid-19 lockdowns it become apparent that artists and other creatives were disproportionally affected. We are trying to understand the nature of work within the cultural and creative industries (CCIs) and what measures can be put in place to minimise the negative effect of such catastrophes.

Therefore purpose of this survey is to get a deeper understanding of the vulnerability and volatility of income (e.g. earnings and profit) in the CCI of South Africa.

Your feedback will be used be in a policy relevant report which will include recommendations for public and private sector interventions.

This research has been commissioned by the South African Cultural Observatory (SACO) which is a project of the national Department of Sports, Arts and Culture.

You can provide as much or as little information as you wish - the more information, the deeper will be our understanding of your sector's needs and challenges.

It should take about 12-20 minutes to complete the survey.

All the information you provide will be treated confidentially.

Thank you for your time - your input is much appreciated.

Kind regards
The SACO Research Team

1. I agree to participate in this survey and acknowledge that the information will be treated confidentially.

   - ◯ Yes
   - ◯ No

2. My gender

   - ◯ Female
   - ◯ Male
   - ◯ Other (please specify) ____________

3. Race (for statistical purposes)

	African	Coloured	Indian / Asian	White
Race	○	○	○	○

Other (please specify)

4. My age group

- 29 years and younger
- 30 - 39
- 40 - 49
- 50 - 59
- 60 - 69
- 70 and older

5. I live in this province (primary residence)

- Eastern Cape
- Free State
- Gauteng
- KwaZulu-Natal
- North West
- Limpopo
- Northern Cape
- Mpumalanga
- Western Cape

Other (please specify)

6. My highest qualification level

- Grade 10 (Standard 8) or lower
- Matric certificate
- Apprentice training / certificate
- Diploma
- Degree
- Post-graduate

Other (please specify)

7. I am ...

- ...employed full time in a cultural or creative firm
- ... employed part time in a cultural or creative firm
- ...an owner of cultural or creative firm with employees
- ...a freelancer with no permanent employee
- ...an employee in the public sector
- ...an employee in a non-profit/NGO etc
- ...an employee for an international firm or organisation

Other (please specify)

8. What best describes your cultural and creative industry (CCI) domain?

- ☐ Cultural and Natural Heritage (e.g. museums)
- ☐ Performance and Celebration (e.g. acting and music)
- ☐ Visual Arts and Crafts (e.g. painting, photography, sculpture)
- ☐ Book and Press (e.g. authors, poets, journalists and editors)
- ☐ Audio-Visual and Interactive Media (e.g. film makers, radio and games designers)
- ☐ Design and Creative Services (e.g. architects, advertising, landscape, fashion designers)
- ☐ Tourism
- ☐ Education

Other (please specify)

9. Roughly what percent of your income is earned from cultural or creative activities?

0% 50% 100%

10. Describe your work

Cultural and creative work

Your work if your cultural and creative work is not your main source of income

11. How long have you been working in this domain?

- ○ Less than 1 year
- ○ 1 - 3 years
- ○ 3 - 6 years
- ○ 6 - 10 years
- ○ 10 - 20 years
- ○ More than 20 years

Other (please specify)

12. What percentage of your time do you spend working in your main job?

0% (Part-time) 50% 100% (Full-time)

13. What is your average annual income?

- ○ R50,000 and below
- ○ Between R50,001 and R200,000
- ○ Between R200,001 and R500,000
- ○ R500,001 and R2 million
- ○ More than R2 million

14. How regular do you receive your income?

- Daily
- Weekly
- Monthly
- Quarterly
- Annually
- Very irregularly

Other (please specify)

15. Do you have or contribute to a pension?

- No
- Yes, provided by employer
- Yes, I have made my own provisions

Other (please specify)

16. Are your registered for

Tick all that apply

- Individual income tax
- UIF
- Medical Aid
- Workman's Compensation

Other (please specify)

17. If you have a business or work in a business, is the business registered for:

Tick all that apply

- Income tax
- VAT
- Skills levy
- Workman's Compensation

Other (please specify)

18. How does Infrastructure impact on your work in the creative and cultural industry?

	I have access to this for my creative work	This is reliable	This is affordable for my work
Electricity	☐	☐	☐
Public transport	☐	☐	☐
Private transport	☐	☐	☐
Cell phone	☐	☐	☐
Broadband internet	☐	☐	☐

Any comments you would like to share with the researchers

19. How was your income impacted by Covid-19 during Phase 3, 4 and 5 lockdown levels)?

☐ No income

☐ Made no difference

Other (please specify)

20. During Covid-19 lockdowns what support did you receive?

	I used this, and it helped me	I used this, but the support was insufficient	I was not eligible to use this	Knew about, but did not use	Did not know this was available	Not applicable
TERFS	○	○	○	○	○	○
Solidarity Fund	○	○	○	○	○	○
Presidential Economic Stimulus Package	○	○	○	○	○	○
DSAC Covid-19 Relief Funding	○	○	○	○	○	○
Financial support from local organisations	○	○	○	○	○	○
Financial support from international organisations	○	○	○	○	○	○
Financial support from friends and family	○	○	○	○	○	○

What other ways did you obtain income during Covid-19?

21. Are you active on the following social media platforms (or similar)?

	Personal use / communication	I use this to market my services / products	I use this for distribution / sales	I use this to create content
Facebook	☐	☐	☐	☐
Instagram	☐	☐	☐	☐
LinkedIn	☐	☐	☐	☐
Pinterest	☐	☐	☐	☐
Reddit	☐	☐	☐	☐
Substack	☐	☐	☐	☐
TikTok	☐	☐	☐	☐
Tumblr	☐	☐	☐	☐
Twitter	☐	☐	☐	☐
WhatsApp	☐	☐	☐	☐
YouTube	☐	☐	☐	☐

Please share advantages these platforms and problems you are aware of.

22. Where do you see yourself in 3 years time? What job would you like to be doing then? What promotion would you like to have achieved?

23. To what extent are you ready should another catastrophe occur (such as Covid-19)?

Not at all prepared — Have made some basic provisions — Completely prepared

24. What are you doing (or should you do) to protect yourself should another catastrophic event occur (such as Covid-19)?

25. Please share any other information to help us understand your needs in the cultural and creative industry.

What can government do to assist those in the CCI industry?	
What can organised business do?	
What can organised labour do?	
What can the non-profit sector do?	

26. My contact details

If you are willing for us to contact you directly

Name and surname	
Email address	
Cell phone	

27. Do you wish to receive an electronic copy of the completed report?

- ○ Yes
- ○ No