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The industrialisation of South Africa's creative economy: The role of creative intermediaries

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Abstract

There is an increasing emphasis on the creative economy's convergence of cultural, social, and economic development agendas on the African continent. Africa's creative economy is a potentially viable source for development on both country-specific and continental levels. Studying creative intermediaries as mid-level actors is a plausible way to gain insight into a specific creative ecosystem. This approach allows for the exploration of the activities of creative and cultural practitioners representing the micro-level of sectoral activity whilst also reflecting on the policy frameworks which creative intermediaries operate in.

South Africa's creative economy has been proven to support inclusive economic development, but the sector's impact is often undermined by outdated policy frameworks and failed public programmes. The sector is also further burdened by delayed policy reforms and an insufficient national creative infrastructure to adapt to rapid changes in technological advancements, which is intimately linked to the value chain of many creative goods and services in various ways.

This study pursued the research question of how creative intermediaries can facilitate the industrialisation of South Africa's creative economy. Industrialisation is a key mechanism for economic growth. It entails the integration of various factors in the production process to ultimately increase productivity and result in more complex activities. This study focussed on South Africa's creative economy and studied the creative ecosystem of independent and prominent creative organisations based in the Western Cape. This study built on the grand theory of developmentalism in the context of a developing country and provided a framework for the industrialisation of an unconventional product. The research relied on a mixed method research approach based on complementarity. The research design was cross-sectional, and the sampling strategy was that of convenience.

This research found an extreme disconnect between the public sector and the rest of the creative ecosystem within the Western Cape. This study also identified creative intermediaries as a viable way to increase citizen trust and social mobility. A credible growth trajectory can, therefore, be created through improved governance, addressing persistent inequality, creating employment opportunities and the expansion of public initiatives which can all be facilitated through creative intermediaries.

The industrialisation of South Africa's creative economy can be aided by an embedded private-public sector, to firstly, ensure a well-informed state, and secondly to design industrial policy to motivate structural change and capacity building to aid policy inventions. This study also redefined the term creative intermediary to consists of three dimensions which enables the entity to act as agents of change. This is specific to the context of a developing country in which industrial policy needs to be designed to ensure inclusive development.

Contents

CHAPTER 1: INTRODUCTION 8
1.1 Background and context of the problem 9
1.2 Statement of the research problem 10
1.3 Aim of the study 10
1.4 Research questions 11
1.5 The rationale of the study 11
1.6 Concept clarifications/ definition of terms 12
CHAPTER 2: LITERATURE REVIEW 15
2.1 Conceptual Framework 15
2.2 Industrialisation 16
2.3 The political settlement framework 18
2.4 Economic dynamism 21
2.5 South Africa's development trajectory 23
2.6 South Africa's creative sector 27
2.7 Africa's creative economy 31
2.8 Creative Intermediaries 32
CHAPTER 3: METHODOLOGY 36
3.1 Research design 36
3.2 Qualitative research 37
3.3 Quantitative research 38
3.4 Ethical considerations 41
CHAPTER 4: FINDINGS 43
4.1 Sub-question 1: To what extent do creative intermediaries hold influence within the creative economy of South Africa? 43
4.2 Sub-question 2: Which strategies can be identified to ensure creative intermediaries have an impact on industrialisation? 48
4.3 Sub-question 3: How do these identified sustainable development strategies align with national creative economy policies? 51
4.4 Main question: How can creative intermediaries facilitate the industrialisation of South Africa's creative economy? 53
CHAPTER 5:DISCUSSION 56
CONCLUSION 63
References 65

Appendix A: Interview Guide 71
Appendix B: Survey Overview 72
Appendix C: Interview Informed Consent Form 87
Appendix D: Organisation Permission Letter 88

List of acronyms

AACC	African Audio-visual and Cinema Commission
ASGISA	Accelerated and Shared Growth Initiative
CCIs	Creative and Cultural Industries
DAC	Department of Arts, Culture and Heritage
DSAC	Department of Sports, Arts and Culture
GDP	Gross Domestic Product
GVA	Gross Value Added
OECD	Organisation for Economic Co-operation and Development
RDP	Reconstruction and Development Programme
NAC	National Arts Council
NDP	National Development Plan
NFVF	National Film and Video Foundation
NGP	New Growth Path
NHC	National Heritage Council
PESP	Presidential Employment Stimulus Programme
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNECA	United Nations Economic Commission for Africa
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USITC	United States International Trade Commission
SACO	South African Cultural Observatory
SDGs	Sustainable Development Goals
WTO TPR	World Trade Organisation Trade Policy Reviews

List of Figures

Figure 1: Development trajectories with country-specific institutional realities 19
Figure 2: Inclusive Growth Chains 22
Figure 3: Creative sector disciplines 41
Figure 4: Characteristics of creative intermediaries in the Western Cape 43
Figure 5: Respondents' suggestions for an improved sector 50
Figure 6: Respondents reported ease in working the National and Western Cape Government (scale of 1 to 10) 53
Figure 7: South Africa's political settlement in the creative sector 54
Figure 8: Dynamic servification by creative intermediaries 61
Figure 9: Creative intermediaries as agents of change 62

List of Tables

Table 1: South Africa's developmental phases 24
Table 2: Demographics of the survey respondents 40

Plagiarism Declaration

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2. I certify that I have received Ethics approval (if applicable) from the Commerce Ethics Committee.
3. This work has not been previously submitted in whole, or in part, for the award of any degree in this or any other university. It is my own work. Each significant contribution to, and quotation in, this dissertation from the work, or works of other people has been attributed, and has been cited and referenced.

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CHAPTER 1
INTRODUCTION

This chapter consists of six sections. Firstly, the chapter begins by providing an overview of South Africa's creative economy and supplies evidence of its potential as a viable source for economic growth. Secondly, the problem statement is provided which is then followed by stipulating the aim of the study. Fourth, the main research question is stated which is expanded by stating three sub-question this research pursued. Fifth, the rationale of the study is provided. The chapter concludes by providing the definition of key terms used in this study.

1.1 Background and context of the problem

There is a clear argument to be made that South Africa's creative economy should be part of any high-value growth strategy. There is evidence of potential expansion in the industry and globally robust growth in demand. The creative economy has the potential to assist in realising the United Nations' (UN) sustainable development goals (SDGs).

The creative economy, as defined in a joint report by the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Development Programme (UNDP), is an all-encompassing term that encapsulates "an evolving concept based on creative assets potentially generating economic growth and development" (UNCTAD-UNDP, 2010: 10). The creative economy includes the creative and cultural industries (CCIs), as well as the multilevel connection and creative contribution thereof, to the broader economic ecosystem (Hartley et al., 2015; Levickaitė, 2011; Chapain & Comunian, 2010).

It is estimated that in early 2010 globally, the creative and cultural industries (CCIs) generated roughly US$2.25 trillion– accounting for 3% of the global gross domestic product (GDP) (United Nations Educational, Scientific and Cultural Organisation [UNESCO, 2018). The creative economy's contribution to global GDP is forecasted to grow to 10% by 2030 (Buchoud et al., 2021). Currently, CCIs employ around 30 million people worldwide (UNESCO, 2018)

Although Africa and the Middle East only represent about 3% (US$58 billion) of the global trade in cultural goods (UNESCO, 2018), there is a new global awareness of the potential of creative industries to foster economic growth (UNESCO, 2021). The African Union, for example, established the African Audio-visual and Cinema Commission (AACC) in 2017 to focus on promoting Africa's film and audio-visual industry, while the African Export-Import Bank, Afreximbank, launched a US$500 million creative industry support fund in 2020.

This global collective interest in the role of CCIs was further evident when 2021 was declared the International Year of Creative Economy for Sustainable Development by the United Nations General Assembly and the Year of Arts, Culture and Heritage by the African Union (UNESCO, 2021).

The focus on the creative economy as a viable source of economic growth is also justified in South Africa. In 2020, South Africa's creative economy contributed approximately 3% of the country's overall GDP with an estimated gross value added (GVA) of R121 billion; evidently making the CCIs approximately the same size as agriculture (South African Cultural Observatory [SACO], 2022). Before the COVID-19 pandemic, it is estimated that the creative industry employed more people in South Africa than in the country's mining industry (Snowball & Hadisi, 2017). South Africa has also made strides in the international trade of cultural goods, with steady export growth from US$250 million to US$448 million between 2009 and 2018. There was, however, a sharp contraction in total exports during the worst of the Covid-19 pandemic (Hadisi & Snowball, 2022).

South Africa's creative sector has a high potential to support economic growth and address unemployment. However, the industry must adapt to changes in technology and policy environments to underpin sustainable creative sector advances in what could be termed 'the industrialisation of the creative economy'.

1.2 Statement of the research problem

South Africa's creative economy offers several opportunities to support the country's realisation of the UN SDGs. Due to the newness of the creative economy as a concept, the *language* of industrial policy often lacks the nuance to facilitate the creative economy. In addition, African countries often lack formal cultural policy frameworks and institutions, and where policies are in place, limited funding and capacity hinder development in the sector (Steedman, 2022). This, in turn, worsens the prospects of ensuring the creative economy is recognised as a valid growth mechanism for the country's overall development.

1.3 Aim of the study

This study aims to gain an in-depth understanding of South Africa's creative economy by studying the creative intermediaries in the Western Cape.

The specific research objectives are:

- To examine the current sustainable development strategies that can facilitate sectoral development and ways in which the creative economy can be utilised within the country's overall economic development;
- To develop a plausible definition of creative intermediaries and to determine the significance thereof in South Africa's cultural policy framework; and
- To elaborate on the understanding of the industrialisation of an unconventional product.

1.4 Research questions

The research question pursued in this study is: How can creative intermediaries facilitate the industrialisation of South Africa's creative economy?

The sub-questions studied were:

1. To what extent do creative intermediaries hold influence within the creative economy of South Africa?
2. Which strategies will ensure that creative intermediaries have an impact on industrialisation?
3. How do these identified sustainable development strategies align with national creative economic policies?

1.5 The rationale of the study

Creative intermediaries are defined as either individuals or organisations that help to facilitate the growth and development of the creative economy; this can pertain to the assistance of creative individuals, CCIs and/ or stand-alone projects (Comunian et al., 2021; UNCTAD-UNDP, 2010). The assistance provided by creative intermediaries is variable and includes providing access to information, skills, resources, and networks for either small- or large-scale, single standing- or continual projects (Comunian et al., 2021)

Studying creative intermediaries is a plausible way to gain insight into the overall creative ecology. This approach offers an understanding of the bottom-up (creative and cultural practitioners) and top-down (macro policy frameworks) networks of the creative economy (Comunian et al., 2021).

Njuguna et al. (2022) suggest that intermediaries are vital to creating new ways to encourage development. By exploring the role of these mid-level actors in the creative

institution, an in-depth study will show how these intermediaries facilitate pathways to creative, social, and economic development by encouraging dynamism. This study investigates the role of creative intermediaries in the broader South African creative ecosystem and how these mid-level players could assist with the industrialisation of the creative economy.

Comunian et al. (2021) suggest that Africa's creative economy should be considered in a country-specific context. This integral change in the perspective of viewing the continent's creative institution through the lens of the applicable political settlement echoes Levy's (2014) approach to sustainable development – a "with the grain" approach, or in other words, moving away from a "best practices" to a "best fit" approach. Although this remains a partial investigation of the creative ecosystem, studying the creative economy by focusing on the mid-level actors (creative intermediaries) will provide an opportunity to gain a relatively balanced perspective of the political settlement of the creative economy.

This approach allows the players to work with context-specific actors instead of juxtaposing alien policies that might have been successful in the place of origin. By honouring this argument, within the limits of this MPhil thesis, the research will provide an understanding of policy and sustainable development strategies in South Africa's creative economy that will contribute to continental knowledge.

1.6 Concept clarifications/ definition of terms

Creative economy

The creative economy is an all-encompassing term, focussing on all the activities and services needed to produce a creative product therefore interacting with technology, intellectual property and tourism objectives. The value chain of a creative product/ service pertains to creative individuals, creative and cultural industries (CCIs) and project-based activities, as well as other elements of production, for instance, production materials, marketing activities and logistics. CCIs include, for example, arts and crafts, design, entertainment, architecture, books, media, software, and advertising. The creative economy has a capacity for job creation, income generation and export earnings whilst also supporting cultural diversity, human development and social inclusion (Escaith, 2022).

Creative intermediaries

Creative intermediaries are characterised as entities that educate and preserve, processing a high level of cultural capital. They are immerged, understand, and can navigate the local setting to validate their legitimacy and authority. Creative intermediaries may include organisations, individuals, events, spaces, and socio-technical actors like machine-learning tools that recommend creative products (Comunian et al., 2021; Jansson & Hracs, 2018).

Sustainable development

Industrialisation integrates individual productive factors to enable increased productivity and more complex activities. Sustainable development facilitates the process of industrialisation whilst respecting dimensions of inclusive growth that consider societal and cultural norms and standards, the environment, and the economy (OECD, 2021; Rodrik, 2008).

Servicification

Servicification is the increase in services used to manufacture goods and/or services. The value of manufactured goods also includes, for example, logistics, embedded software, branding and design (Cramer & Sender, 2019).

Intricate nexus

The various inputs and steps a good undergoes before it is at the final stage, or the level of manufacturing of a good intended for consumption. An example of this can be where a certain fresh produce gets transported to a different country of origin to be cleaned, chopped and packaged to then be exported to another country where it appears in supermarkets ready for final consumption (Cramer & Sender, 2019).

Industrialisation

The term industrialisation captures the process and interconnected steps materials undergo before a final product reaches the end consumer. There is an increase in emphasis on industrial steps rather than on whether a product is or isn't produced in a factory. In recognising the various production processes, the capabilities associated with problem-solving knowledge, such as marketing, labour relations, and production technologies, for example, are integral to industrialisation (Cramer & Sender, 2019).

Political settlement

Political settlement refers to the arrangement in which political stability is ensured, and the threat of violence is kept at bay through two mechanisms, namely the specific relationships between the rulers and the ruled and, secondly, how these relationships are enforced through rents (Khan, 2000).

Rents

Rents are the political currency that ensures more power in the political settlement. “Rents” is an all-encompassing term and includes market privileges, patronage, public employment, single-sourced procurement contracts and preferential access to natural resources (Khan, 2000).

Art

Art refers to all forms of creativity and the varying degrees of individual and collective expression through public and private exhibitions. Art includes solo presentations or combinations of various traditions of dance, drama, music, music theatre, visual arts, crafts, design, and written and oral literature (Department of Sport, Arts and Culture [DSAC], 2017).

Culture

Culture refers to all distinctive life features, namely an individual’s characterisation within a society, which includes but is not limited to their various spiritual, material, intellectual and emotional practices and habits (DSAC, 2017)

Heritage

Heritage is the acknowledgement of all physical items and non-physical customs surrounding methods and practices of cultural expression. It includes, for example, palaeontological formations, sacred sites, architecture, literature and music and documentation of cultural significance (DSAC, 2017).

Elites and non-elites

Elites are either organisations or individuals that hold power, either due to financial position or general capacity to influence the state of other powerful elites within the political settlement. Non-elites are generally considered to be the general citizens (Khan, 2010).

Chapter 2
Literature Review

This chapter consists of seven sections. The first section will introduce developmentalism as the conceptual framework of this study. The second section provides an overview of theories covering the industrialisation of an unconventional product. It is suggested that development cannot be discussed without considering the institutional realities of a country. The third section, therefore, introduces the political settlement framework according to the theory developed by North (1995), and the fourth section elaborates on economic dynamism and how to stimulate growth. The fifth section provides a brief overview of South Africa's development trajectory, which is followed by a section discussing South Africa's creative sector. This chapter concludes with an elaboration of the term "creative intermediaries" and the possible capacity of these mid-level agents to stimulate inclusive development in the sector.

2.1 Conceptual Framework

Developmentalism as a grand theory, has a lineage of critique due to its core assumption that economic, social, and political development should follow a specific order of phases or steps as predicted in Western legacy (Wiarda, 2010). In recent years, developmentalism's failure, not taking the political dynamics of developing countries into account, has experienced a surge in rethinking (see, for example, Roy & Khan, 2021; Khan, 2019, 2018; Rodrik, 2016, 2008; Levy, 2014).

Developmentalism is rooted in the essence of being context-specific, considering the institution and the rules of the game to ensure growth (Johnsson, 1999). An argument exists for CCIs - within the Fourth Industrial Revolution - as a viable route for overall growth and sustainable development (Tralac, 2021; Bhorat; Buckholtz & Oloo, 2020; Lopes and Kararach, 2019; Steenkamp, Rooney, et al., 2016). It is on this revision of the industrial policy, in a period of radical technological development, and, the opportunities that holds, for a developing country, that Cramer and Sender (2019) positioned their study.

Titled "Oranges Are Not Only Fruit: The Industrialization of Freshness and the Quality of Growth", the study focused on the industrialised agriculture industry in Ethiopia. It highlights the importance of structure and patterns of production for poverty reduction – and the link neglected by developmental economists (Ocampo, Rada & Taylor, 2009). Wuyts

(2011) emphasises that pro-poor growth depends on three aspects, namely the degree to which it is driven by productivity gains, how productivity increases real wages, and how the two aspects of productivity and employment are linked. Cramer and Sender (2019) also introduce important aspects for consideration in industrial policy in the context of industrialized agriculture termed “servicification” and the “intricate nexus”. Servicification is used to argue that the categorical distinctions between manufacturing, agriculture and services have started to overlap and cannot be subjected to the traditional classification boundaries previously used in economics (Cramer & Sender, 2019).

This is of special importance to developing countries because of the inherent possibilities for productivity growth, export revenue, and the employment it can generate (Cramer & Sender, 2019). An intricate nexus points to inputs and steps that a product – a crop in the case of their study - undertakes before it reaches the final stage of consumption (Cramer & Sender, 2019). The challenge now lies in the reassessment of industrial policy to facilitate quality growth that is also reflected in an increase in employment opportunities – an issue of general concern on the African continent (see for example Stiglitz, Lin & Monga, 2013; Oqubay, 2015; United Nations Economic Commission for Africa [UNECA], 2016).

Africa’s diverse cultures can, if supported and efficiently facilitated through policy and stakeholder engagement, serve as a viable catalyst for Africa on the international stage whilst generating diverse opportunities for many people (Comunian et al., 2021). This unique asset, together with the continent’s young population, places Africa in a position to utilize its creative economy as a driver for economic and social development. Actively participating in the creative economy is a viable route for sustainable development in Africa due to its low barriers to entry and its emphasis on cultural diversity (Buchoud et al., 2021; UNCTAD-UNDP, 2010.

2.2 Industrialisation

Historically, economists have associated industrial processes with manufacturing (Cramer et al., 2018). This oversimplifies economic development to the shifting of resources out of low-productivity sectors into higher-productivity manufacturing activities (Cramer & Chisoro-Dube, 2021). Young’s (1928) early revision of the term “industrial” marks the beginning of a more nuanced understanding of the interconnectivity of specialised activities between the raw material, or the producer of the product, and that of the final consumer – essentially

moving away from linking industrialisation with products produced in a factory (Cramer et al., 2018). In other words, Young (1928) acknowledges the importance of recognising the various forms of industrial organisation, or what he terms the "roundabout" nature of production, which forms part of a product (Cramer et al., 2018). These various steps are also synthesised in Cramer and Sender's (2019) term "intricate nexus".

Bell et al. (2018) note the importance of industrialisation as a mechanism for economic growth in South Africa. Industrialisation is the integration of individual factors in production to enable increased productivity and more complex activities (McMillan et al., 2017). Johnson (1999) argues that industrial policy is a mechanism to increase economic dynamism through state intervention that deliberately alters incentives in the market to influence the behaviour of the public and private sectors, also referred to as the institution. Johnson (1999), therefore, accepts the role the various players in a specific political settlement play and how the institution can shape their motivation to stimulate development.

Munger (2022) also acknowledges the extent to which a political settlement can affect development. Munger (2022) argues that industrial policy in a democratic state can only lead to cronyism due to the various forms of rent distribution which entices rent-seeking. Rodrik (2008) notes two elements when considering "good" industrial policy. Firstly, Rodrik (2008) argues that industrial policy should acknowledge that the government does not always have the information to make the right decisions. Secondly, Rodrik (2008: 472) argues that "once government is in the business of supporting this or that industry, they invite rent-seeking and political manipulation by well-connected firms and lobbyists". Economic development should, therefore, motivate industrial policy and avoid enabling political ambitions.

Wuyts (2011) argues that for industrial policy to minimise poverty, it should include three aspects. Firstly, the policy should consider the degree to which it is driven by productivity gains. Secondly, it should consider how a boost in productivity can lead to an increase in real wages. Thirdly, industrial policy should recognise the relationship between productivity and employment. Cramer & Sender (2015) acknowledge Wuyts's (2011) contribution and elaborate on the need to recognise the structure and patterns of production to ensure development.

The political settlement framework is a tool to analyse whether policies will be sustainable given whether and how they are implemented in a specific institution (Khan, 2018). Policies may not be blocked outright or overturned, but the effectiveness of policies

may be influenced by the activities of powerful organisations in an institution (Khan, 2018). Khan (2018) adds that with power imbalances in the political settlement, especially in a developing country, implementation is often hindered by bias and corruption as these policies are modified to favour the various players' own interests or political motivations.

Given the varying degrees of distortion, especially in developing countries, Khan (2018) notes that the most important challenge for policymakers and analysts is to assess how specific institutions and policies can be designed to achieve outlined objectives given the specific political settlement.

2.3 The political settlement framework

The political settlement framework for institutional analysis shows the importance of this design challenge. Khan (2018) urges that the significance of this framework lies in its ability to explain the differences between institutional realities that often lead to institutional distortion and corruption. Similarly, Rodrik (2006) critiques the Washington Consensus as it enforces best practices, which fail to take account of the country or sector-specific political settlement.

Levy (2014) suggests that a careful analysis of how the institution shapes the incentives and constraints of decision-makers is needed to ultimately prioritise policy reforms that are both worthwhile and feasible given the institutional realities. Levy (2014) suggests a roadmap, depicted in Figure 1, for the development trajectories of various institutional realities.

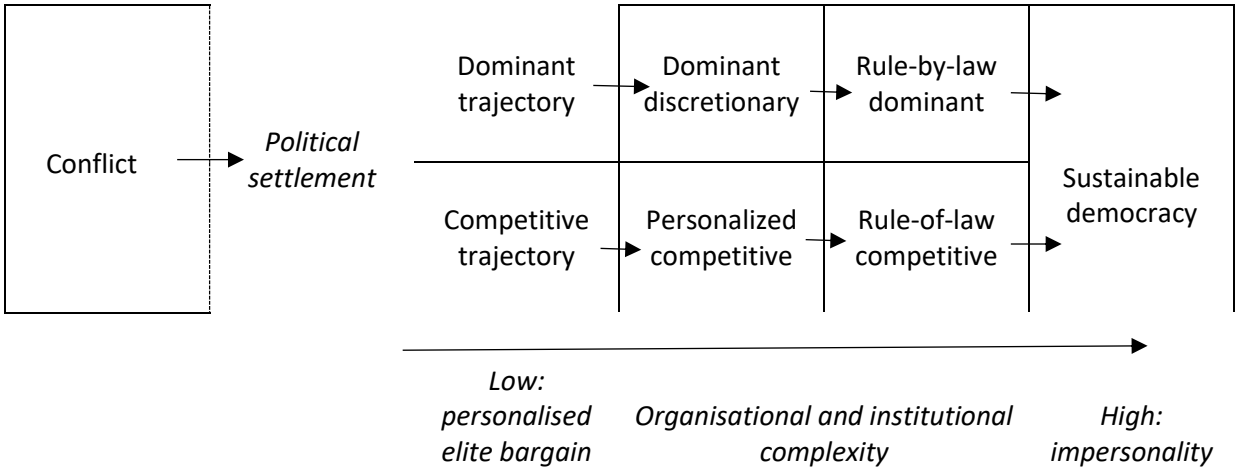

Figure 1: Development trajectories with country-specific institutional realities

Source: Adapted from Levy (2014: 31).

Figure 1 demonstrates two aspects of institutional realities. The first is the individual institution characterisation. Levy (2014: 31) describes this "as a world unto itself, with distinctive incentives, constraints, and frontier challenges - each a distinctive platform for development, with distinctive policy options". The second aspect represented in the diagram is the two trajectories of change an institution can undergo to ultimately progress from a settlement where elite bargains are rife, and the threat of violence is high, to that of a sustainable democracy with a low or distributed threat of violence and a high level of impersonality, meaning that the power does not lie in the hands a select few. Depending on the specific institutional realities, Levy (2014) suggests that the two development trajectories are characterised as either dominant or competitive.

The dominant development trajectory is characterised by the ultimate power maintained by the leadership. The leadership goes unchallenged throughout policy reforms, so the institution becomes more rule-bound, in other words, a "rule-by-law" institution, until the institutional arrangements cross over to that of a democracy (Levy, 2014). The competitive development trajectory happens when the basis for political stability shifts from a combination of elite bargaining and patron-client relationships to rule-constrained political competition (Levy, 2014). This is also known as the "rule-of-law" political settlement where, for example, politicians run the risk of not being elected in the next cycle due to civilian disappointment in their performance (Levy, 2014). The development trajectory does not

always follow the suggested path, and institutions can either reverse or change trajectories according to the change in institutional realities (Levy, 2014).

Khan (2018) reflects that the institutional characteristics of advanced countries are considerably more "rule-following" than those of developing countries. The enforcement of "good governance" has, therefore, proved a challenge in developing countries as legitimate state agencies like parliaments, the police, courts, and anti-corruption agencies generally enforce good governance by "rule-by-law". This is in contrast to more advanced countries where good governance is generally enforced by the "rule of law", where the enforcers are also subject to the rules (Khan, 2018).

Development on the competitive trajectory is characterised by a political settlement with agreements for political competition among elites. In the case of strong institutions, this is generally via elections motivated by specific public action programming (Levy, 2014). However, in the case of weak public institutions, the inherent motivation for political competition and the mechanism of political stability differs.

Levy (2014) identifies two challenges elites must navigate in weak public institutions. The first challenge is how the elites balance bargains that sufficiently capture enough rents to satisfy the critical mass, thereby keeping the threat of violence at bay whilst ensuring inclusive economic growth (Levy, 2014). Levy (2014:35) elaborates that to ensure political stability, "such bargains often involve personalised deals that use state authority to capture rents and allocate the rents among elite groups in rough proportion to their potential to be disruptive". The second challenge is that elites must ensure compliance among nonelites. Compliance can be achieved through networks that also favour nonelites and may be sustained through a promise "to direct public resources to favoured clients rather than commit to governing for the public good" (Levy, 2014:35).

Weak public institutions can, therefore, be summarised as a political settlement that consists of personalised competition, which struggles to move away from the initial power balances between the initial "founding" elites without creating political and economic instability (Levy, 2014). It is, however, possible to navigate this instability by ensuring economic dynamism (Levy, 2014; Norman et al., 2012; Rodrik, 2006).

2.4 Economic dynamism

Rodrik (2008:5) suggests that structural change is at the core of development as it "involves producing new goods with new technologies and transferring resources from traditional activities to these new ones". Rodrik (2008) notes three design principles that industrial policy must consider after the institutional realities have been studied. As with the previous discussion on the redistribution of rents and making more nonelite bargains, Rodrik (2008) echoes the importance of creating and redistributing rents for entrepreneurs to pursue, which ultimately promotes capacity building and other activities, leading to structural change. Rodrik (2008), however, warns against open-ended rents and encourages state intervention to steer rent-seeking away from unproductive sectors.

The second policy design principle argued by Rodrik (2008) is the realisation of the government's lack of omniscience. In contrast with the formally popular top-down approach to policy design, this principle encourages close collaboration between the government and the private sector – a concept also originally termed "embeddedness" (Evans, 1995). This concept describes an autonomous relationship between government and its agencies. This is in contrast with state capture and certain elite groups forming areas of unproductive rent creation. This concept is similar to an "open access order" discussed in Section 2.5.

Rodrik (2008:20) further argues for a "model of strategic collaboration and coordination between the private sector and the government with the aim of uncovering where the most significant bottlenecks are, designing the most effective interventions, periodically evaluating the outcomes, and learning from the mistakes being made in the process". This embedded approach to industrial policy is also central to the problem-driven approach to reform (Andrews et al., 2017; Fritz et al., 2009).

The third industrial policy design principle is accountability. Formal accountability has been closely linked to the building of state capacity. It consists of four principal-agent links (World Bank, 2004). These four links include the resources the agent works with; how the principal gathers information about the efforts of the principal; the delivery mechanisms of the agent, or in other words who the agent interacts with; and lastly, the incentives used to motivate the agent's performance. Accountability for state capacity building is, however, viewed as a more nuanced mechanism than the traditional "principal-agent" models and it has been suggested that it includes both "principal-agent" and "agent-principal" relationships, meaning that both the agent and the principal have a responsibility to one

another and should be held accountable when considering the delivery of the four links (Levy, 2014). These embedded "principal-agent" (for example, authority bodies exercising audits) and "agent-principal" (a politician leading ethically due to the threat of falling out of favour with their supporters) accountability links are essential to any successful development trajectory (Andrews et al., 2017; Rodrik, 2008).

These three design principles are merged into Levy's (2014) model, which depicts the links that can lead to inclusive growth and illustrates how a dynamic relationship between accountability, embeddedness and redistribution of rents can affect state capacity building, which, in turn, leads to institutional development. Figure 2 illustrates a scenario where gains are intentionally distributed across society, which, in effect, activates a chain reaction of economic, social, institutional and political changes and suggests economic dynamism through inclusive growth.

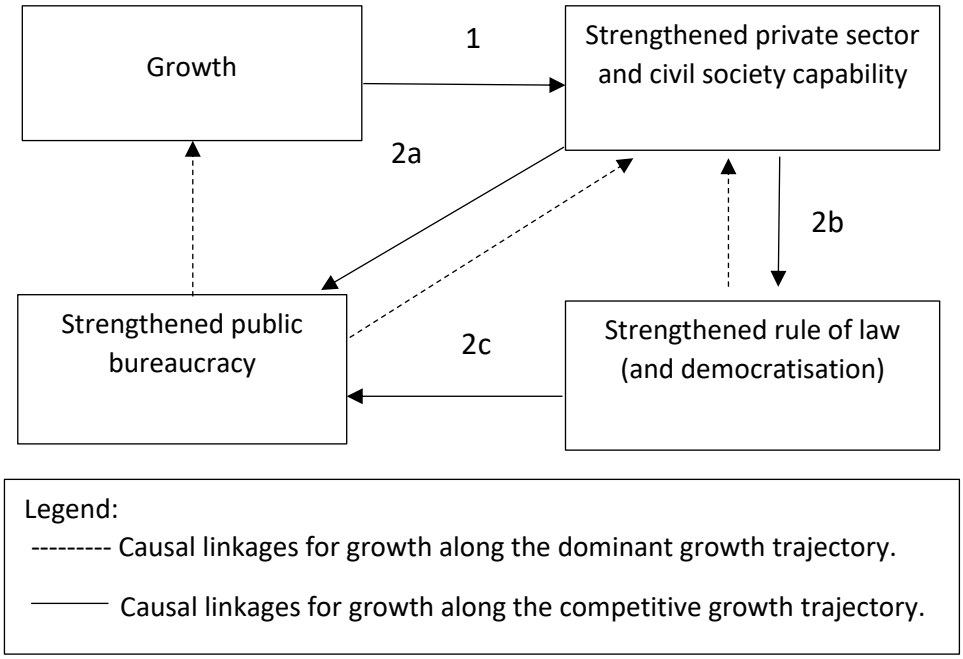

Figure 2: Inclusive Growth Chains

Source: Adapted from Levy (2014:36).

Levy's (2014) model shows that economic dynamism will lead to inclusive growth, ultimately strengthening the capabilities of nonelites through an energised private sector. This is depicted in link 1. Sustained growth strengthens the private sector, the middle class, and civil society, which, in turn, brings economic complexity. This leads to power challenges between the existing elites and the rise in new social classes and strengthened civil societies,

trade unions and business associations. Link 2a suggests this interactive relationship where indirect accountability puts pressure on bureaucracy to ensure better service delivery and where the government is responsible for creating the correct incentives to lead to structural transformation and development.

A strengthened private and civil society applies pressure on organisations and institutions for improvements, leading to development in institutional realities, ultimately strengthening the quality of bureaucracy and the rule of law. Link 2b reflects Levy's (2014) fundamental argument that inclusive growth will follow the strengthening of the rule of law , and when inclusive growth is achieved the nonelites are empowered to demand development in return. An enhanced rule of law decreases personalised deals, stimulating strengthened bureaucratic capabilities as depicted in link 2c.

2.5 South Africa's development trajectory

During the first decade of democracy, South Africa's annual GDP growth rate increased from -0.56% in the period 1990 – 1993 to 4.86% in the period 2005 – 2008, with public sector fixed investment increasing by 3.19 percentage points over the same time (Levy et al. 2021). This period can be categorised as, what Hirschman (1979) refers to as, a "growth phase" that developed between 1994 to 2007/10 through reform as a reaction to the country's past colonial and apartheid rule (Levy et al. 2021). With a strong institution and partial mutuality, South Africa sustained its seemingly "miraculous democracy" (Hirsch & Levy, 2018:3). The national government adopted the Accelerated and Shared Growth Initiative (ASGISA) in 2005, the New Growth Plan (NGP) in 2010 and the National Development Plan (NDP) in 2013. Changing national policies, together with South Africa's undeniable growth in the creative economy, validated the White Paper revision.

Hirschman (1979) identified three phases in his "tunnel model". This model captures the complexities of relative deprivation and unmet expectations to analyse underdevelopment or cases where a country has made some development, which is followed by a reversal in progress, where civil unrest is present (threat of violence). Levy et al. (2021) use this model to dissect South Africa's political settlement changes since becoming a democratic sector noting that the period 1994-2007/10 can be classified as the country's "growth phase"; the period 2008 -2017 can be said to resemble that of the "anger phase";

with 2018 onwards presenting the possibility of initiating the “reform phase”. Characteristics of each of these three phases are summarised in the table below.

Table 1: South Africa's developmental phases

	Growth phase	Angry phase	Reform phase
Ideas	Hopeful; a central role for cooperation	Conflictual; the rise of identity politics	Transformational
Institutions	Contradictory influences	Pressured	Contested, with some possible reform and repurposing
Inequality	Uncertain trend	Challenged/contested	Promise of more inclusive trajectory
Growth orientation of economic policies	Growth-oriented and poverty-reducing	Short-term orientation, with a potential rise in discretionary, punitive, and clientelistic policies	Period of experimentation
South Africa's pattern	1994-2007/10	2010-2017	1989-1994, 2018?-

Source: Adapted from Levy et al. (2022: 10).

As South Africa moved into the second decade of democracy, the unifying power of hope started to diminish. Levy et al. (2021) elaborate on general improvements in overall public service provisions between 1993 and 2011, including increased social grants, reaching 12.6 million more people in the outlined period. It is important to state that this “growth phase” in South Africa’s development was solely due to good governance, but that the country’s mining sector saw a sustained commodity boom between 2001 and 2008 (Levy et al.: 2021). Hirsch & Levy (2018: 31) refer to the stark rise in individual income above the eightieth percentile as a “distribution cliff” and suggest that even where income increases came via grants, a “ladder” for families to improve their social circumstances was missing in implemented reforms. Education and skills upgrading is a particular “ladder” suffering from weak accountability largely due to patronage politics and the public sector workforce (Hirsch & Levy: 2018).

The above notion of a “ladder” should be seen as a possible area within which growth can be made; an accumulation of these unorganised growth areas can then lead to an increase

in overall causal linkages as explained in Figure 2. The accumulation of development in certain areas with a causal link to other aspects along the overall growth trajectory can lead to a concept known as “doorstep conditions”. Doorstep conditions refer to interactions between institutions and organisations where both are held accountable for continuous improvements in the rules of the game to ultimately advance conditions within a political settlement that underpins impersonality (Levy: 2014). As this process of cumulative improvements develop, a political settlement characterized as a “limited access order” – meaning only limited elites have access to the limited rents within the political settlement – moves toward an “open access order”. An open access order describes a political settlement with checks and balances between various parties, and not just limited to a certain number of elites who are unwilling to surrender their discretionary authority (Levy: 2014).

The country initially had a strong institution enshrined in the ANC’s pledge to inclusive, complex policies to ensure equal growth opportunities, but the settlement’s doorstep conditions started to diminish (Hirsch & Levy, 2018). After a decade of prevailing inequalities brought about by President Mandela’s focus on consolidation and President Mbeki’s reign that was hindered by a global financial and economic crisis, a new challenging “rules-deals” dimension began to evolve (Levy et al. 2021; Hirsch, 2020; Hirsch & Levy, 2018; Levy et al. 2014).

South Africa’s bidimensional political settlement became increasingly visible during the initial democratic years (Levy et al., 2021). The initial political settlement was based on the equilibrium between the economically powerful white elites and the politically strong liberalists acting on behalf of the oppressed majority. A robust constitution codifying checks and balances where the primary aim to sustain economic growth served as a credible commitment, enhancing the economic position of the majority.

The other dimension in South Africa’s contemporary political settlement is the extent of interests grouped under the dominant liberation party, the ANC. To ensure maximum political power, the mostly blue-collar interest party now making up the lower middle class of the country, the Congress of South African Trade Unions (COSATU), and the South African Communist Party formed a coalition with wide-ranging economic and political interests (Levy, 2014).

South Africa’s initial struggles to contend with the previously mentioned “distribution cliff” persists (Levy et al., 2021: 39). Levy et al. (2021) and Hirsch (2020) suggest that a credible

growth trajectory can be achieved by increasing citizen's trust through better governance, addressing multifaceted historical inequality, job creation and expanded complex public initiatives. South Africa's political settlement could address inequality and activate a growth trajectory to an open access order with a sustainable democratic state by complying with the aforementioned-policy directives.

South Africa currently faces three possible development trajectories. The first scenario entails a continuation of recent ethnic-populist tendencies where political entrepreneurship enforces the elite/ nonelite settlement deal. Levy et al. (2021) suggest that this scenario results in an overall fiscal decline and a 20% drop in aggregate income over five to ten years. The second scenario proposes the settlement continues the current path, which will yield an estimated growth of 20% in aggregate income over a five-to-ten-year timeframe (Levy et al., 2021). Although this second scenario evokes validation of the trajectory seen in the first decade of South Africa as a democratic republic and creates the least resistance from established elites, it is unlikely to gain enough broad-based political support for robust deal-sustaining credible commitment to progress to a true democratic institution (Levy et al., 2021). Dually problematic in this second approach is that the country's current sustaining elite bargain shows signs of decay owing to its failure to provide credible gains for nonelites (Levy et al., 2021).

Levy et al. (2021), therefore, propose a third scenario which will also yield the most growth by ensuring a general acceptance and buy-in (credible commitment) to inclusive development (Levy et al., 2021). It is estimated that this trajectory will deliver an increase of 40% in aggregate income over a five-to-ten-year timeframe by reducing absolute poverty, the facilitation of modest gains for the white minority and the creation of major gains for the lower-middle class (Levy et al., 2021). This discussion will focus on the third possible scenario.

Hirschman's (1979) model helps to clarify how South Africa's perpetual inequality was the main determining factor in the country's failure to develop beyond a certain point. The Organisation for Economic Co-operation and Development (OECD) (2021) also recognises the impact persistent inequality can have on development trajectories and proposes the counter-effect that social mobility can have. Inequality will be tolerated to an extent if there are reasonable prospects for advancements. Rodrik (2017) adds that as soon as the prospects of a "better life for all" disappear, people perceive the system as unfair (Becker, 2021; Rodrik, 2017).

The question is now how to improve the situation through "good" industrial policy, especially in the context of limited funding to disperse among the country's various sectors. Research shows that a country's social mobility, or lack thereof, is a more reliable indicator than inequality in determining the threat of violence in the institution (Houle, 2019). OECD (2021) elaborates that social mobility does not just extend economic opportunities. It also includes dimensions of social, political and environmental factors. We can, therefore, conclude that continuously unmet expectations lead to failed policy implementation, a deterioration in the relationship between government and donors, and civic discontent. To quote OECD (2021):

> *If structural limitations to social mobility are not acknowledged and addressed, a situation might arise whereby inequality is justified in terms of an illusory meritocracy in which elites see their status as due reward of their hard work and talent, while the precariat have only themselves to blame for their vulnerability and diminished prospects. This state of affairs is likely to further polarise society, generate resentment across a population and weaken democracy.*

Building state capacity to allow for social mobility to ultimately build economic dynamism is the result of formal accountability (Andrews et al., 2017; Levy, 2014; World Bank, 2004). Levy et al. (2021) and Hirsch (2020) suggest that a credible growth trajectory may be engaged by increasing citizens' trust through better governance, addressing multifaceted historical inequality, job creation and expanded complex public initiatives. As previously mentioned, accountability extends beyond the traditional one-directional "principal-agent" models and is, instead, an embedded relationship between two entities, whether that is person to person, organisation to organisation, collective to specific leadership bodies, or organisation to person (Andrews et al., 2010, 2017).

2.6 South Africa's creative sector

The functioning of creative economies is dependent on national specificities (Neelands & Choe, 2010; Power, 2009; Oakley, 2004). An argument also stands for the further refinement of institutional analysis of the creative sector to city and regional levels (see, for example, Dzudzek & Lindner, 2013; Bontje & Musterd, 2009; Waitt & Gibson, 2009).

South Africa's transition to a democratic republic has resulted in a change in institutional realities. The 1996 White Paper on Arts, Culture and Heritage (hereafter referred

to as the 1996 White Paper) was an extension of the macroeconomic policies of the newly founded democratic South Africa. To ensure this sector's democratic dispensation, cultural institutions were formed in the framework of the Reconstruction and Development Programme (RDP) (Oliphant, 2020). The formulation of the 1996 White Paper was the product of two years of extensive consultation and research, and after its adoption in August 1996, the National Arts Council (NAC), together with several national and provincial arts and culture agencies, were established to support policy implementation (Maralack, 2021). The country's diverse cultures were seen as a tool to promote "creativity, renewal, and inclusivity", and the NAC together with the National Film and Video Foundation (NFVF) and the National Heritage Council (NHC), were incorporated on national, provincial, and local government levels to ensure a multifaceted African national identity under the Department of Arts, Culture and Heritage (DAC), now known as the Department of Sport, Arts and Culture (DSAC) (Oliphant, 2020).

The 1996 White Paper was an expansion of the Education and Culture clause in the Freedom Charter which aims at making learning and cultural celebration available to all South African (DSAC, 1996). The country's political settlement of the mid-1990s was designed to ensure stability through deals between economic and political elites and was committed to distributing the gains throughout the settlement (Levy et al., 2021; DSAC, 1996). The 1996 White Paper focused on institutional redress, nation-building and social cohesion by upholding the Freedom Charter (van Graan, 2019).

The 1994 democratic state inherited four performing arts councils (PACs) accorded to the four provinces under the National Party. These four public arts councils were: the Cape Performing Arts Board, which was located in Cape Town and later renamed Artscape in 2001; the Natal Performing Arts Council in Durban, later renamed the Playhouse Company in 1995; the Performing Arts Council of the Orange Free State situated in Bloemfontein, which was renamed in 1996 to the Performing Arts Council of the Free State; and the Performing Arts Council of the Transvaal previously known as the Pretoria State Theatre until 1999 and then renamed the South African State Theatre in the early 2000s (Maralack, 2021).

Two additional public arts councils have since been added, namely the Market Theatre and the Windybrow Theatre, both situated in Johannesburg (DSAC, 2020a; DSAC, 2020b). The six public art councils are governed by the Arts Institutions Act No.119 of 1998, outlining them

as receiver houses, meaning that they only receive funding for infrastructure (Mhlongo, 2022).

With six arts councils having to provide the majority of publicly funded creative infrastructure over the country's nine provinces, many creatives are left without the needed support to deliver and practice their craft. The Mzanzi Golden Economy (MGE) strategy aims to address the geographical disparity in cultural activity partially supported by the unbalanced distribution of these arts councils (van der Linde et al., 2020). The conceptualisation of the MGE strategy was developed with the National Growth Path (NGP) and the Industrial Policy Action Plan 2 as references (DSAC, 2017). The objectives of the MGE programme were to stimulate demand in arts and culture through audience development and consumption, as well as the building of heritage resources, human capital, and cultural entrepreneurship-development, and focus on research in the sector (van der Linde et al., 2020). The MGE strategy also shifts the focus from traditional performing arts to that of the entire CCI portfolio, namely: cultural and natural heritage; performance and celebration; visual arts and crafts; press, books and information; audio-visual and interactive media; design and creative services; and events, technical skills and production (DSAC, 2017). The objectives of the MGE strategy are to stimulate demand for arts and culture, build heritage resources, increase human capital and cultural entrepreneurship development and support research on the sector (van der Linde et al., 2020). Although the programme was launched in 2013, MGE funding only started to properly reflect the funding the National Treasury provided to the public art councils in the 2020/21 financial year (DSAC, 2021c).

An emphasis on sectoral research has been evident since the 2010s and also supported the general advocacy of the country's creative economy. SACO was established in 2014 to deliver concrete research contributions. SACO's objective is to provide policy and sector-specific information about the CCIs in South Africa through developing, collecting and analysing governmental resource allocations and its outcomes (Comunian et al., 2021b).

The Revised White Paper on Arts, Culture and Heritage was adopted in 2020, emphasizing the potential of the creative economy. The South African Government (2022), however, notes that this new emphasis on the creative economy as a tool for inclusive growth further excludes the poor, as CCIs must be appreciated by a market that has disposable income to sustain this newly celebrated growth potential. The South African Government (2022) argues that the 1996 White Paper centres around a human rights approach which

sought to give all individuals access to arts, culture and heritage by looking to the state to provide the needed leadership and infrastructure (South African Government, 2022).

This over-emphasis on the government as the main provider of leadership and infrastructure in the sector is widely acknowledged by the artists and the government alike. Historically, a select elite group of artists enjoyed strong government support as it was seen as a tool to advance state ideology, but with the change in institutional realities, creatives were mainly left to fend for themselves and operate in a competitive entertainment market. This state dependency was also perpetuated by the state elites as promises of a "better life for all" motivated stronger support from non-elites, opening the door to various rent-seeking behaviours detrimental to economic development.

Some of the current institutional realities exposed in the recent COVID-19 pandemic were mismanagement and deep-rooted corruption in the sector (Forbes, 2021; Thurman, 2021; Thebus, 2021). A recent example of rent-seeking behaviour was seen in the implementation of the Presidential Employment Stimulus Programme (PESP), established to help creatives navigate the constraints of COVID-19. The programme has made funding available to the creative sector from 2020 to 2022 (National Arts Council [NAC], 2022, 2021, 2020). However, inefficient initial implementation was evident, with money "over-allocated" and unaccounted for. Furthermore, various board members and their organisations received PESP funding (Thurman, 2021; Forbes, 2021). This misallocation of funds led to protests and highlighted the sector's lack of industry bodies and unions (Mhlongo, 2022; Thurman, 2021; Forbes, 2021; Mahomed, 2020; Van Graan, 2021).

The second example of rent-seeking behaviour is the political interference seen in the recent Market Theatre whistleblowing-case (Mahomed, 2020). This case saw the deliberate orchestration of fake and misleading evidence against the theatre's CEO and CFO after they spoke out on misconduct by board members who had been placed there by Minister Mthethwa himself (Bambalele, 2020; Mahomed, 2020; Van Graan, 2020; Bambalele, 2018; Blignaut, 2018)

The third example is the 7-year revision process of the Revised White Paper. This example does not aim to discuss whether the Revised White Paper should have been drafted but rather to highlight the suspicious circumstances under which the process started under the former leadership of Minister Mashatile. Suspicions include the timeframe it took to

develop, the secrecy of the people involved, and the general sectoral dissatisfaction with the process and content of the document (Maralack, 2021; Blackman, 2013).

The Revised White Paper suggests a heterogeneous policy approach to the mobilisation of CCIs, making specific reference to African Knowledge Systems, which "signifies a shift from the top-down (central planning) approach employed in most development projects in the past to one that ensures that local economic priorities are defined by the involvement of the communities and that actions are taken with local agents and focused on investing in innovations that unlock the potential of local value chains and local economic sectors" (DSAC, 2017: 49).

This policy approach has five dimensions, namely: a transformation agenda to create links between cultural knowledge and enterprise development; sub-sectoral strategies to detail the specificity of each domain; digital technologies and how to respond to their impact on the sector; the importance of culture and creative industries in urban development; and new, innovative funding and financing arrangements (DSAC, 2017). Alongside elaborating on the department's mandate, the strategic focus, and some suggestions on how to measure the sector's impact, the DSAC Strategic Plan 2020 – 2025 outlines an external and internal environmental analysis which hinders policy implementation, which they intend to navigate (DSAC, 2020). This document identifies overall funding constraints and lack of resources, infrastructure shortages, general undervaluing of the sector among national authorities, policy designs not conducive to sectoral growth, lack of own departmental capacity, the notable strain the sector takes with political changes on provincial, national and international level, and the general disdain towards DSAC (DSAC, 2020).

2.7 Africa's creative economy

While the spread of COVID-19 has disrupted many domains in the creative economy, the demand for media streaming services, and the sheer quest for survival by other domains in the sector during the pandemic, contributes to the ongoing digital revolution (UNESCO, 2021; SACO, 2021). The Fourth Industrial Revolution and the 'Africa Rising' narrative is evident in the demand for African creative products. The challenge often is in satisfying the market's desires but in the lack of needed structures and policy frameworks to reap the benefits of this sector's renaissance (UNESCO, 2021).

An example is the Nigerian film sector, known as Nollywood, which has grown significantly over the past 40 years but still faces multiple challenges. Nollywood ranks as the third largest film industry in the world after Hollywood (the film industry in the United States) and Bollywood (the film industry in India) (World Trade Organisation Trade Policy Reviews [WTO TPR], 2017). Nollywood generates approximately US$600 million for the Nigerian economy annually and primarily satisfies the African diaspora (United States International Trade Commission [USITC], 2014). It is estimated that Nigeria's film industry employs over 1 million people – evidently making it the country's largest employer after agriculture (USITC, 2014).

Although digitalisation has various positive influences on Nollywood, for example, through the improvement in quality and an increase in exposure to foreign markets, demanding licensed streaming content, it also leads to industry challenges that must be leveraged through government policy. Blockages include a lack of enforcement of intellectual property rights, piracy, low DVD production, distribution bottlenecks, a lack of digital platforms, poor publicity, inadequate packaging and marketing, too few cinema houses, informal operations, insufficient copyright products and insufficient Nigerian film-making schools (USITC, 2014). There have been many governmental actions to overcome these challenges, including prioritising funds for the sector, funding selected movies, hosting award ceremonies, and supporting production villages (WTO TPR, 2017).

Similar action can be seen in South Africa's audio-visual and interactive media subsectors (under which the film industry is categorised) to overcome these challenges. In 2020, this subsector accounted for an estimated 30% of the overall creative economy contribution to that year's GDP (2.97%) (SACO, 2022). This subsector also enjoys various governmental boards and private bodies, ensuring that government hears and meets their needs. An example is the Office of Film and Events in the City of Cape Town, which deals solely with the film industry. Not all subsectors are as formalised, leaving them vulnerable to the challenges that the Fourth Industrial Revolution brings (UNESCO, 2021).

2.8 Creative Intermediaries

The term "creative intermediary" is a development of the term "intermediary" used by Gibson (2014) in the context of the creative economy. The application of this term enables the translation of the creative economy to a cultural economic field where mid-level actors can

be seen as players in their institutions. In response to Gibson (2014), Jakob and van Heur (2015) expand on this term by making further research suggestions, which capture the dynamic role of these intermediaries in a well-functioning and growing creative sector.

The term “creative intermediaries” was used in the work of Comunian et al. (2021b), who studied intermediaries on the African continent using case studies from South Africa, Nigeria, and Kenya. The term, creative intermediary, was first coined by Macquire and Matthews (2014) to describe an entity that educates, preserves, and processes a high level of cultural capital, that is immerged, understands, and can navigate the local setting to validate its legitimacy and authority. This description was further expanded by Jansson and Hracs (2018), to include creative intermediaries as organisations, individuals, events, spaces, and even socio-technical tools such as machine-learning software, recommending creative products.

There is an increasing emphasis on the creative economy’s convergence of cultural, social, and economic development agendas on the African continent (see, for example, Comunian, Hracs & England, 2021; Ismail, 2021; Schultz & Van Gelder, 2008). Africa’s creative economy is a potentially viable developmental source on both country-specific and continental levels (United Nations [UN], 2019; UNCTAD-UNDP, 2010). Participating in the creative economy is a viable route for sustainable development in Africa because of low barriers to entry and the emphasis on cultural diversity (Buchoud et al., 2021; UNCTAD-UNDP, 2010).

Comunian et al. (2021a) and Hracs et al. (2022) recently launched pioneering research with two edited books on Africa’s creative economies as a contribution to the overall debate on the UN’s 2030 Agenda for Sustainable Development (Comunian et al., 2021). The research, conducted in South Africa, Nigeria and Kenya, concluded that the continent should be wary of implementing policies and strategies that are not context specificIt is argued that the effectiveness and ethics of the creative economy are largely influenced by the creative intermediaries as they are integral to shaping and regulating the sector (Jakob & van Heur, 2015).

Creativity is often understood as a synonym for ‘‘dynamism, growth, talent formation and national renewal” (Schlesinger, 2013:29). The fast-paced digitalisation, globalisation, access to trade in creative goods, and the creative economy’s overall upward growth trajectory in recent years position the sector as a viable route for economic (and social)

development (Munro, 2016). The resilience of creatives is often compared to that of entrepreneurs, emphasising the creative economy's link to various other fields and, therefore, other sectors (Jucevicius & Grumadaite, 2015; Porfírio et al., 2016; Jonker et al., 2009; Scott, 2006).

Hracs et al. (2022: 32) notes five policies for a thriving creative economy in an African context, namely: to recognise the value that creative economies bring to communities, society and the economy; realise the role creative intermediaries play in bringing together policymakers, communities and entrepreneurs; invest in higher education collaborations and partnerships; strengthen continental and international collaborations through research and network building; and create accessible and inclusive infrastructure to support creative economies.

Both the working definition and the five recommendations fail to consider the sector's political settlement. The second policy suggestion of the aforementioned five does, however, allude to creative intermediaries' capacity in "bringing together policymakers, communities and entrepreneurs" but fails to acknowledge the complexities of this relationship (Hracs et al., 2022:32).

Jakob and van Heur (2015) highlight four areas of research to expand the definition of intermediaries in the creative sector. The first and second identified areas for further research are termed "appropriation" and "interests". Jakob and van Heur (2015) argue that the creative economy is significantly sensitive to its context of country and region, noting that the existing players in the sector already have their own dynamics and interests. Both concepts are addressed by the political settlement framework used in this study. The third and fourth areas of suggested further research are titled "norms" and "effectiveness". They are generally referred to as "the rules of the game" in this study.

Cramer and Chisoro-Dube (2021: 123) note that industrial capabilities entail the "accumulation of knowledge and skills, both at an individual and organizational level" and that those industrial capabilities have been important in facilitating the growth of the creative sector (Munro, 2016). Cramer and Chisoro-Dube (2021: 123) further elaborate that "while developing such capabilities requires education and formally acquired skills, of equal importance are capabilities associated with the problem-solving knowledge embodied within organizations". Cramer and Sender (2014) also introduce an important aspect termed "servicification" for consideration in industrial policy. Servicification is used to argue that the

categorical distinctions between manufacturing, agriculture and services have started to overlap and cannot be subjected to the traditional classification boundaries previously used in economics (Cramer & Sender, 2019).

Boschma and Frenken (2009) note that intermediaries play a cardinal role in effectively implementing and shaping the dynamics of policymaking and implementation in a specific location. To industrialise the sector, the market and to an extent, its experts (or what can also be referred to as non-elites in the sector's current political arena) is still too fragile in the classification of the political settlement framework. There is, therefore, space for creative intermediaries to act as agents of change to strengthen the market, increase social mobility and hold the public sector accountable for incremental development – a process summarized as industrialisation.

CHAPTER 3

METHODOLOGY

This chapter begins by describing the overall research design employed in this study. Next, the research methods, sampling strategy, data collection processes and data analysis methods are discussed. Finally, the chapter concludes with the ethical considerations followed in this study.

3.1 Research design

This study adhered to a mixed-method research approach using both qualitative and quantitative data. This approach is justified through its social-theory-driven approach that both qualitative and quantitative inquiries convey different levels of understanding and meaning inherent in the respective approaches (Weber, 1962; Caroll & Rothe, 2010).

This study employed a cross-sectional research design. A cross-sectional design is motivated when studying the variation between different groups and people and consists of data collected from more than one case to establish variation (Bell, Bryman & Harley, 2019). A cross-sectional study is performed at a single point in time and allows for the collection of quantitative and qualitative data for one or more variables (Bell, Bryman & Harley, 2019). This is, therefore, a legitimate research design for both in-depth unstructured interviews with selected experts and an online survey distributed to individuals working in South Africa's Western Cape Province to determine the current policy design and its effect on the broader creative ecology.

The research plan was designed from a Weberian perspective that argues that qualitative and quantitative paradigms form "a continuum of reconstructed meaning" through complementarity (Caroll & Rothe, 2010: 3479). Complementarity is an epistemological design that uses different yet dialectically similar approaches to research to assist in capturing a wide range of factors in a specific area of interest (Caroll & Rothe, 2010). Because this research is focused on creative intermediaries, complementarity enabled an in-depth understanding of provincial and national policy structures, affecting the creative economy (qualitative inquiry through in-depth expert interviews), as well as the lived realities of artists (quantitative inquiry through online survey). In other words, by putting creative intermediaries at the centre of this study's enquiry, insight was gained into the lower-level

(artists) and higher-level (policy structures) of the creative ecology – like the approach known as “Bergson’s Box” (Bergson, 1949). Bergson’s Box argues that to get to know an object, for example, a box, must look from both the inside and outside perspectives of the object (Bergson, 1949). Rothe (2000) later expanded this inquiry model to social and individual phenomena (Caroll & Rothe, 2010).

3.2 Qualitative research

Research method

This study was aided by secondary qualitative data in preparation for the primary qualitative data collection. Primary qualitative research was conducted through ten in-depth expert interviews. All interviews were open-ended, with the interviewer encouraging the interviewees to elaborate on or add any dimension they felt was important for a thriving creative economy. Please refer to Appendix A for the interview schedule. The interviews lasted between 45 and 60 minutes each.

Sampling

Theoretical sampling enables the researcher to discover categories and define the characteristics whilst mapping certain connections into a theory (Glaser and Strauss, 2017; Bell, Bryman & Harley, 2019). The qualitative approach in this research took the form of purposive and convenience sampling.

Nine interviews focussed on leaders in the Western Cape creative ecology whilst the tenth interview was with an expert on the creative economy who has helped to develop the definition of creative intermediaries. The experts selected for interviews were chosen on the grounds of their stature and influence in the Western Cape creative economy.

Data collection

Interviews were conducted between June and August 2022. The in-person interviews were recorded in full using a voice recorder. Zoom interviews were recorded through the Zoom recording application. These files were securely stored on a personal cloud file and numbered in the interview sequence to remove any identification of the respondents for their anonymity. All audio files were transcribed to assist with data analysis.

Data analysis

The in-depth interviews with identified key individuals were analysed in an interpretivist paradigm using thematic analysis. Thematic analysis is a form of narrative analysis which provides insight into people's perception of an experience (Bryman & Bell, 2019). Thematic analysis focusses specifically on the content conveyed through these inquiries rather than on how it is conveyed (Bryman & Bell, 2019).

The first round of thematic analysis was conducted using broad themes. These were: the goal of the organisation; what contributes to a thriving creative economy; which activities of the organisation contribute to community, social and economic development; whether funding constraints are the biggest obstacle to a growing sector; which aspects need development; positive and negative experiences with policy frameworks; and other general remarks.

These thematic groupings allowed for further analysis and were used as a sorting mechanism for the quantitative online survey, which tested the notions made in the expert interviews. The term "respondents" is used to refer to both qualitative and quantitative data.

3.3 Quantitative research

Research method

The primary qualitative research inquiry was followed by an electronic survey circulated to creatives who live and work in the Western Cape's creative economy. The survey was designed according to the themes highlighted in the ten expert interviews conducted with leading Western Cape-based creative organisations.

This survey was primarily close-ended and comprised 54 questions (see Appendix B). The last survey question provided a space for respondents to elaborate on an aspect they felt would contribute to the growth of the creative industry. The survey format was a Google Form, with an estimated completion time of 10 minutes.

The survey underwent a pre-test phase, during which it was completed by eight individuals working in the creative economy to check for question clarity, usability, and response time. Six of these eight individuals gave in-depth feedback and the time taken to complete the survey. The survey was refined to get to its final format, which was then circulated.

Sampling

The survey was electronically sent to identified individuals and organisations which had given permission to receive the survey for internal circulation. A total of five organisations officially agreed to circulate the survey. Non-probability convenience sampling was the sampling technique used. Thus, the survey was not random and is not representative of arts and creative professionals in the Western Cape.

It is estimated that the surveys reached approximately 2000 potential respondents. A final survey sample of 62 respondents was achieved.

Selection bias is a particular concern. The electronic nature of the survey excludes professionals without access to the internet. The survey completion time could also have excluded professionals too busy with other work to complete them. The sample may also be skewed towards individuals with a connection to the researcher. Table 2 contains the demographic characteristics of the study respondents. The survey was completed by more females (58%) than males, respondents were well-educated (75% reporting that they had a tertiary degree), and approximately a third reported belonging to a professional body or union. Most respondents (85%) had worked in the creative sector for more than five years. Regarding monthly income levels, around 80% of respondents earned R20 000 (before tax) or higher, whilst 27% reported earning more than R40 000.

Table 2: Demographics of the survey respondents

		Count	%
Gender			
	Female	34	58
	Male	25	42
	Total	59	100
Obtained a tertiary degree			
	Yes	45	75
	No	15	25
	Total	60	100
Belong to a professional body/union			
	No	42	68
	Yes	20	32
	Total	62	100
Years working in creative sector			
	Less than 5 years	9	15
	More than 5 years	53	85
	Total	62	100
Personal monthly income before tax			
	less than R5 000	2	3
	R5 001 - R10 000	3	5
	R10 001 - R15 000	7	12
	R20 001 - R30 000	19	32
	R30 001 - R40 000	13	22
	Greater than R40 000	16	27
	Total	60	100

In terms of disciplines in the creative economy that respondents work in, the top three categories were: design and creative services (34%), visual arts and crafts (31%), and performance and celebration (26%) – see Figure 3. Note that respondents could report working in more than one discipline, and thus the categories are not mutually exclusive.

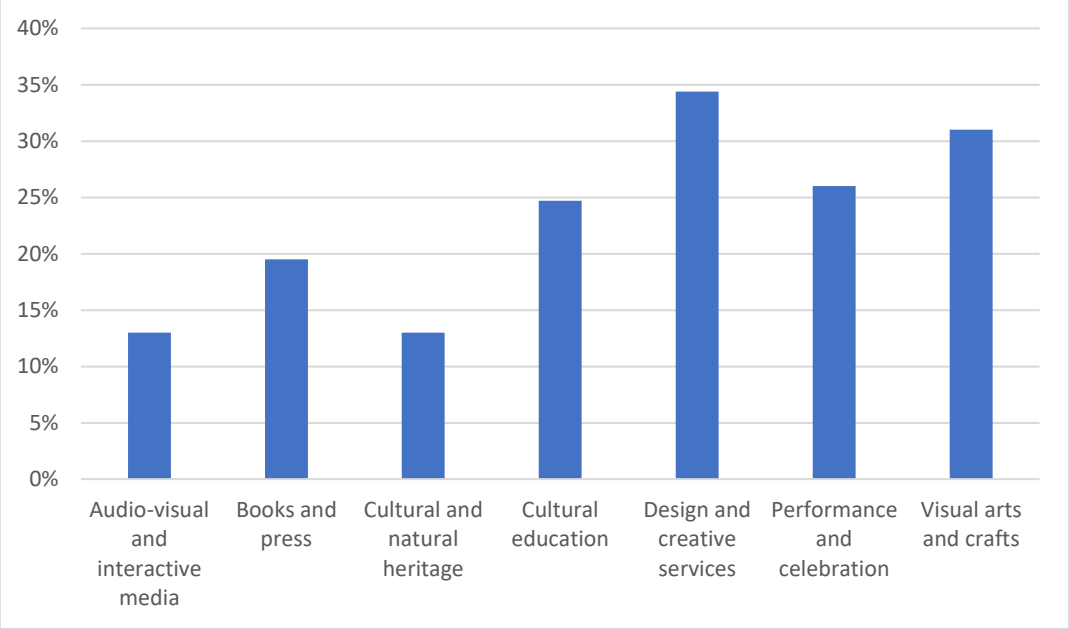

Figure 3: Creative sector disciplines

Data collection

All data obtained from the online survey was anonymous and stored on the cloud, using a Google Form. All questions were optional. The data was downloadable via an excel sheet to store after the form response time ended and to conduct further analysis, which the Google Form analytics did not address.

Data analysis

Primary quantitative data was interpreted in an objectivist paradigm. Quantitative data was analysed using descriptive statistics. The sample size and response rates per question did not allow for basic bivariate analyses. The approach to the analyses was informed by exploratory qualitative research before quantitative sampling.

3.4 Ethical considerations

This study's proposal was submitted to the University of Cape Town's Ethics in Research Committee for formal ethical clearance before any primary research was pursued. The application was successful, so the primary research enquiry started in April 2022.

The researcher also acknowledged the possibility of bias in the research as an active practitioner. The researcher navigated this using a two-fold approach. Firstly, in upholding virtues characterised by an unbiased and objective nature. Secondly, the cross-sectional research design allowed for the justification and testing of thematic analysis.

Informed consent and voluntary participation

The study adhered to the ethical guidelines stipulated by the University of Cape Town's Office of Research Integrity. Every effort was made to ensure that all interviewees fully understood the informed consent form they signed before the interview. This in-depth understanding was ensured by sending the form before the interview. This form covered various dimensions of the consent form and welcomed any questions or concerns from the interviewees. The interviewees were also reminded throughout the interview that if they were at all uncomfortable with a question, they had the right to decline to answer – see Appendix C for the interview informed consent form.

Informed consent was also obtained from the survey respondents. The same dimensions of informed consent captured in the interview informed consent form were communicated in the survey introduction and can be viewed in Appendix B. It is, therefore, assumed that all individuals who completed the survey did so with full consent.

An organisational permission letter was sent to organisations that were approached to circulate the online survey within their internal structures. Only the organisations that gave permission received the survey with a textual paragraph introducing the study to be circulated. This organisations' permission letter can be viewed in Appendix D.

Privacy, anonymity and confidentiality

The researcher adhered strictly to the Ethics in Research Committee's outlined consent and privacy policies, including the protection of personally identifiable information. All respondents in this study have remained anonymous.

Minimising harm

All respondents were treated with respect and dignity. No harm was intended to the individual respondents or the collective community and institution. The researcher also noted the responsibility involved in pursuing the proposed research and did not ask any personal or sensitive questions during the two-phase study.

A possible harmful dimension of this study could be that of a power imbalance between the researcher and the creative practitioner. This was navigated by including the definitions of the creative economy and creative intermediary in both the interview guidelines and the online survey. All interviewees were also asked whether they were comfortable with the definition of both these aspects before continuing the interviews.

CHAPTER 4

FINDINGS

This chapter presents the findings that emerged from the primary data. The research findings will be discussed according to the three sub-questions this study pursued. The main research question will be addressed in the discussion chapter because it compares the findings with the study's theoretical framework.

4.1 Sub-question 1: To what extent do creative intermediaries hold influence within the creative economy of South Africa?

The nine creative intermediaries interviewed presented an array of factors describing their influence and outlining their personal and organisations' objectives. Although the direct output of creative intermediaries seems to differ, this is linked directly to the operation specificities of the creative intermediaries interviewed. Four common characteristics did arise when the influence of these mid-level actors was analysed – see Figure 4 for an overview of the four identified characteristic and the number of interviewees who highlighted each characteristic in their interviews.

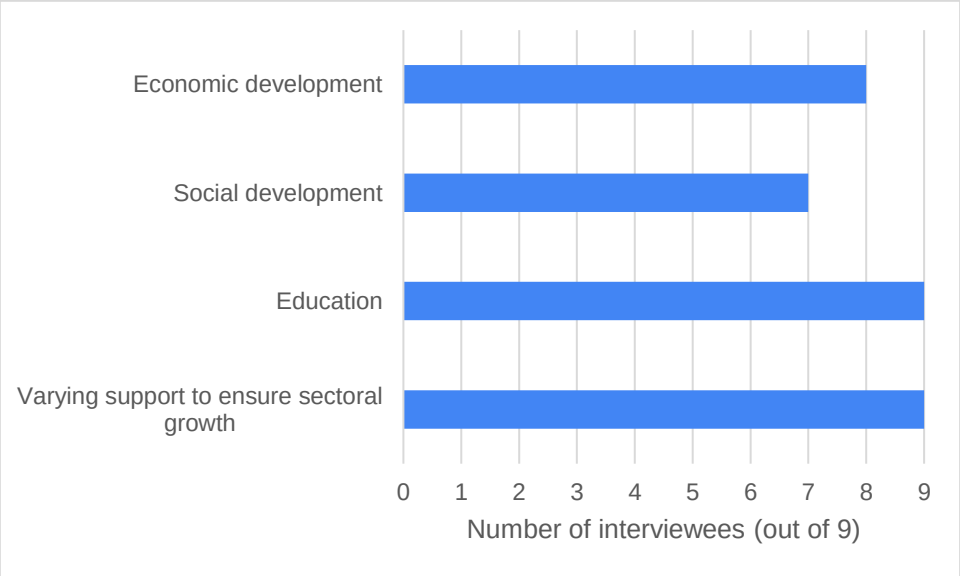

Figure 4: Characteristics of creative intermediaries in the Western Cape

Supporting the creative economy

The first characteristic of creative intermediaries this study identified is a passion shared by respondents to help support the creative economy in whatever capacity fits with their respective portfolios. The support offered varied in nature and reach. A respondent shared their passion for providing dynamic support to the development of what they felt is one of South Africa's biggest exports, namely singing, especially as they felt that it currently lacked investment.

> *Respondent: I'm also a believer that great cities are great because of their culture. Actually, if you think of like, you know, Rome or London or New York, what is it that you actually think about? We know London as a financial center, but its West End. It's all the things that make it a great cultural capital, Right? Museums. Restaurants. Well, you know, you know what I'm saying? I believe this is a huge part of that. And I think even if you don't love opera, like you don't have to love it. But the fact that you live in a city that has opera means that you probably live in a city that has better restaurants, that has more of other things that you might like, you know what I'm saying? So you don't have to love, you need, you need to come, but it will support the orchestra, it will support a whole bunch of other things that you might actually like and people just forget that the first thing they get when they do, when they get home is watch Netflix or put on the radio in the car and does all artists, You know, you think it's like not a job, but it actually is a job. You know, people can go from here into film or, you know, I want to remind people of that and say that you know what, this is, is not just a nice to have, it's actually fundamental to us as human beings. Like all these arts and you know, you might not even realize what a big part it is of your life. Even if it's not opera necessarily, but it's the offshoots and the tentacles that it has. Like if you were to remove this company, like Cape Town would be immeasurably poorer as a cultural.*

Another respondent shared that they have had a unique event for which creatives in the publishing sector could volunteer, after which the creatives who volunteered would feature in various catalogues. Due to the offering and reputation of the creative intermediary, their collection of works also serves the informal role of a recruitment platform. The creative

intermediary uses this volunteer structure to eliminate major costs in the publishing value chain, allowing these creatives to spend part of their limited budget on translating children's books into all eleven official languages and offer books for children to use at home and not just at school.

The difficulties independent creatives experience in securing project funding was also noted by a respondent. They reported that they could often assist in this process as they leveraged their reputable position in the sector to make easier links to funders. In their experience, many independent artists need collective representation, whether due to the lack of network reach experienced by the independent creative or funders who view this as a way of ranking the standard of the creative before engaging in further conversations.

Financial support of creatives has always been a controversial topic in the creative sector. This discussion usually ranges from various degrees about the relevance of the six national art councils to whether there is too much focus on community arts projects. A respondent voiced the need for artists to access a well-resourced space where they can just experiment and hone their craft. They think of themselves as a not-for-profit arts laboratory, providing partnering individuals and organisations access to their resources.

Education

The second characteristic of creative intermediaries that emerged is that they offer an educational component. Although the age target, skill-level focus and the design and size of the offered educational programmes differ, it is integral to all nine interviewed creative intermediaries' influence. The standardisation of this educational component also varied among creative intermediaries, with some having multi-level programmes, starting from toddler groups to developing professional artists. A respondent summarised their year-round 'informal' training, yet immersive, approach to upskilling less-experienced artists.

> *Respondent: There's funded training that I do not believe in, because that's not stable. Um, but I guess there's on-the-job training by pairing artists, um, with one another, more experience with the less experienced so that they can learn from one another by pairing local and international artists so that the international and the experience of the local and the local of the experience of what's going on around you want. So, it's participative training, learning on the job, because usually most of those artists need to bring bread to the table. They*

cannot attend the six months class and just wait and see. They need to actually work and learn at the same time.

Another respondent mentioned the potential of arts education to support dynamic individual development, in other words, they focus on the transferable skills in arts-based knowledge.

Social development

A third characteristic of creative intermediaries was their inherent capacity to stimulate social development. A respondent elaborated on how one of their projects unexpectedly influenced the community. They remarked that after a show presented in a rural area, a group of young girls came to them and, of all the production elements, remarked on how they had noticed that all the people running the production were women.

A respondent explained the lasting impact many of their projects have had on the various communities they have worked with. Sometimes the single act of implementing the project involves the public input of that community on the project implemented in their area. A respondent reported that this makes communities feel seen and heard whilst also serving as a space for community members to socialise and meet people outside their normal circles.

Other examples include community workshops involving groups varying in age and profile, often facilitated alongside projects. The respondent recalled how one of their projects reclaimed an alleyway known for gangster activity. The project left a safer public space for community members while giving them access to a faster route to public transport and schools in the area. The alleyway has also become a space for various after-school classes. A few local organisations took joint ownership after the project was initiated.

Respondent: Public art is social by nature, by the nature of public art. Um, it has to be social. Uh, it has to be empowering. It has to engage. It has to be positive. Uh, and it has to have an impact. If you want to put a public artwork that doesn't have an impact rather don't put it. So that's when we speak about what is being created or the artwork. Yes, the artwork has a social dimension. Um, because of the dialogue and then interaction it generates. Um and as I mentioned earlier, it is the different participants of the artwork, from those involved in the artmaking across to the spectators, that have a huge social impact…If the artwork has been documented, uh, all those are the workshop

has been organised around the artwork…All those participants actually bring a strong social dimension and make the artwork even stronger and make people in their circle of influence stronger. So we can use a project we did in Gugelethu as an example where the goal was just to clean a highly dilapidated alleyway and painted it. Fast-forward a few months and the alleyway is evolving into an artwork. People are having workshops now, 5 to 6 different organisations out there. And actually it's from, uh, it went from an alleyway for drug dealers and gangs into an alleyway where kids are enjoying after class workshops. Um, so the social dimension is definitely very strong.

Another respondent explained that their organisation's main objective was social cohesion. This is achieved by working towards a production that showcases South Africa's arts and culture, including a diversity of people to allow people to get to know each other. Performance, creativity, and celebration, therefore, become tools to bridge gaps across communities.

Economic development

The fourth characteristic of creative intermediaries is their inherent capacity to implement certain programmes that has been shown to likely stimulate economic development in the long run. The respondents offered various examples of how they actively help economic development. A respondent expressed how they are likely to boost economic development in the future by focussing on increasing children's literacy skills, and, ultimately, enhancing their employment opportunities beyond the low-earning, manual job market.

Respondents have noted various examples of how marketing their projects ensures portfolio growth and thus leads to a rise in the earning potential of their featured artists. A respondent also highlighted their annual flagship event as an opportunity for the city it takes place in, Cape Town, to get associated with creativity on an international level.

Respondent: The goal behind the [event] is to have international and local artists but also to showcase that South Africa can be an international platform that can be a recognised entity globally. It's not just an event for a local neighbourhood, it's actually placing the city on the map and ensures that it is being recognised for its talent...So, it's art that has some participative elements, some social impact, generating some conversations and

engagement and resonating with the public should that be a local or wider public…Um, now the impact it has had when we look at the figures and we see that more than 100 million people around the world have seen the [event], uh, online through media, we can definitely say that it's an international platform. 100 million people is quite large and very vast…Um, and by participating to the festival, it also creates for them economic opportunities for future job, because suddenly an artist that is exposed to 100 million views will get another job.

The creatives that participated in the study survey affirmed the benefits of marketing that could possibly lead to the creatives having a bigger online presence and therefore receiving more work. Eighty percent of respondents indicated that they felt that they would benefit from having more written in the public domain about them or their work; whilst 65% of survey respondents said they felt they would benefit if there were high-resolution photos in the public domain of them and their work.

4.2 Sub-question 2: Which strategies can be identified to ensure creative intermediaries have an impact on industrialisation?

The primary enquiries delivered a few strategies for creative sector optimisation.

From the in-depth interview respondents, suggestions were made that there should be more opportunities for professional creative development. A respondent voiced the need for artists to receive constructive feedback throughout their careers, thereby differentiating their organisations from more commercially driven creative outlets. This strategy was echoed in the quantitative enquiry where 75.4% of the survey respondents indicated that they did not currently have a mentor. However, 51.9% of these respondents indicated that they did see a need for a mentor and 27.8% said that a mentor did not apply to their position.

This theme of professional development is also identified for organisations and not just individual creatives. Survey respondents also suggested a need for both professional development and business training as a possible strategy for optimising the creative sector. A respondent elaborated that their organisation assists other organisations by sharing their expertise to ensure that organisations around the world can duplicate their cost-effective model of creating children's books.

Respondent: What we've done when people ask us to run a [book event] for them is we refer them to an incredibly detailed manual on how to run your own book creation event. It's called the [book event] manual. You can click through to it from our website, it's open, anyone can do it. And many organizations across the world have. So, organizations in France and in Laos and in Nigeria and in Angola and most recently in Lebanon, um, run their own. So, we tell them, look at work through that manual, everything is in there literally from what kind of snacks to serve in the afternoon to all the design templates to everything, work through the manual and then contact us with questions and then we have a video call also to support them to run the event.

A respondent remarked that the creative sector is a delicate ecosystem where the level of creativity in, for example, Cape Town, is influenced by and influences the creatives in the surrounding area and, therefore, the creative products produced and available in the immediate future. They elaborated that one should support a creative product even if you are not a fan because that support stimulates the entire ecosystem in the city and results in better overall delivery, ultimately affecting the creative product in which you are most interested.

In two expert interviews, respondents said that they viewed funding constraints as the biggest challenge in the sector. Fifty-four-point-eight percent of survey respondents shared the same view. A possible strategy suggested in an expert interview is that government funding should be allocated according to categories that correspond with the function they wish the creative product to serve, for example, arts for social development, arts for education, and arts for artistic development. This strategy was supported by 95.2% of survey respondents.

This study's quantitative enquiry also allowed for one open-ended question prompting the survey respondents to suggest an aspect of improvement that they felt was most needed for a thriving creative economy. From the 62 total responses, 50 completed the open-ended question, with three respondents making two suggestions and one respondent indicating three areas of possible optimisation. The answers were analysed, and nine themes were identified from the responses. The summary of open-ended responses is displayed in Figure 5.

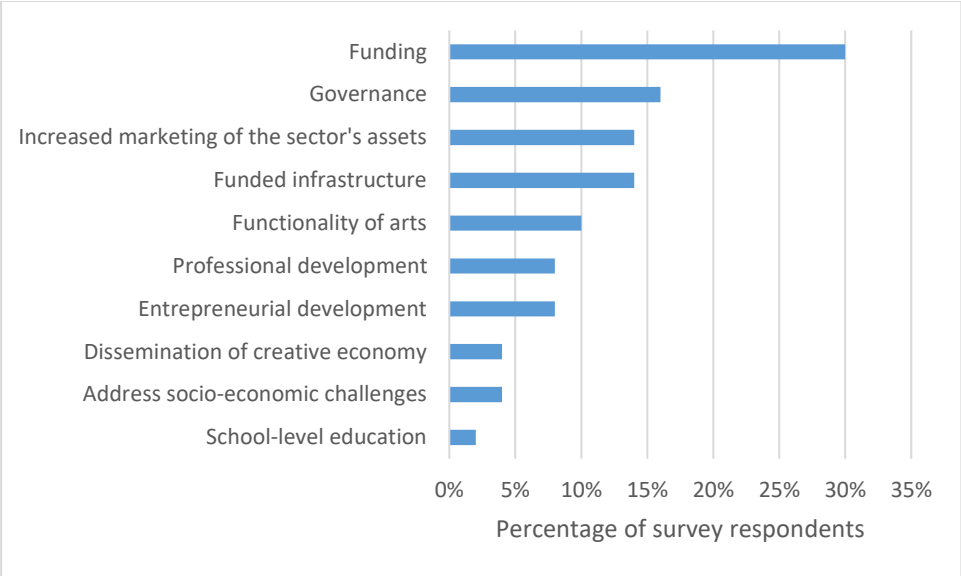

Figure 5: Respondents' suggestions for an improved sector

Thirty percent of survey respondents said that more funding would lead to a thriving creative sector. This referred mainly to project funding that should be made available for independent creatives to realise their project ambitions, and reference was made to state support in countries such as Sweden and Germany. Sixteen percent of survey respondents argued that the sector is struggling due to various corrupt officials, and that there should be more accountability and officials that understand the sector. It was also said that creatives long for more general support from the government and it was suggested that there must be more communication between creatives and the government. It was also mentioned that creatives must advocate for their needs and need better access to government bodies. Concern was also voiced about DAC merging with sport to form DSAC in recent years.

Fourteen percent of survey respondents said that the sector should be more vocal about its capabilities for social and economic development and 10% of respondents argued that people are unaware of the inherent value of the creative sector. Some of the suggestions made included that there should be an arts education reality tv, and all creative disciplines should receive the same level of exposure. A comparison was made to the sports sector in South Africa stating, “Everyone knows the name of the Springbok Rugby Captain, but does anyone know the name of the Children’s Book Laureate or this year’s Standard Bank Arts Winner? We cannot be what we cannot see!”.

Another 14% of survey respondents suggested that lack of access to infrastructure, such as rehearsal spaces and studios, created a major barrier to growth. Sixteen percent of respondents suggested that upskilling could lead to a thriving sector, with 8% specifying that the sector would benefit from exposure to training in business acumen from law and financial management for creatives, to how to market a niche product in a resource-constrained environment. The other 8% suggested that upskilling within their discipline would be advantageous and recommended professional hubs to brainstorm creative endeavours, receive critical feedback and allowing for a space to network with fellow creatives. More discipline-specific festivals and competitions to aid in professional development were also suggested.

Four percent of respondents said that the creative economy should become more interlinked with the life of the man on the street and suggested that there could be more creative hubs for creatives to perform and sell their products and for the public to engage with art in various socio-economic locations. Four percent of respondents voiced their concerns that the creative sector would not thrive until the government ensured that peoples' basic needs, were met with statements like, "More support from government institutions, job creation and the general growth of the economy. Unless their basic needs are met, people don't care about music. They want warm food and a place to sleep." Two percent of respondents argued for better school-level training in the various forms of arts and culture.

Other suggestions gained through the expert interviews for a better functioning sector were for clear and transparent communication of policy framework and various sector-specific implications thereof; to allow for the organisational core costs when allocating project funding; to find ways to communicate the sector impact; and the development of sectoral management and policymaking resources.

4.3 Sub-question 3: How do these identified sustainable development strategies align with national creative economy policies?

When speaking about creative sector development, respondents shared a sinister opinion that one cannot rely on the government to support artists when the government cannot support itself. They suggested that you learn how to "package" your creative product or service better, ideally to address a specific need, which will either lead to more interest from funders or entice more purchases.

This focus on the necessity for business acumen and the need to translate a creative product into a consumer item or service that serves a bigger ideal than one-on-one product or ticket sales was echoed by another respondent. The respondent argued that the government and the citizens of Cape Town are their direct stakeholders. They provide a cultural asset, already recognised on an international level, that enhances cultural pride and attracts skilled workers, companies, and tourists to Cape Town whilst spending a considerable amount of money on accommodation, transport and other consumables sourced from local suppliers like catering and set-building materials.

Although there is a need to recognise the dynamic impact inherent in the creative economy, 83.9% of survey respondents indicated that they did not feel that government officials recognised the social value of the sector. When asked what the perception was of whether government officials acknowledge the economic value of the creative economy, 88.7% of the survey respondents indicated that they felt it was not recognised.

This general lack of trust in the government is also prevalent among survey respondents; 94.9% of respondents said that they did not feel that DSAC represents their voice and 54.2% of respondents indicated that they found it difficult to get assistance from publicly funded institutions like museums, archives, and libraries, whilst 25.4% of respondents indicated that institutions of this nature did not affect their productivity.

Ninety-eight-point-four percent of respondents said that they felt the creative sector itself should have more agency to help the sector grow; a sentiment that was echoed by the same percentage of respondents who want an increase in active creative sector civil society representation. Sixty-seven-point-seven percent 67.7% of survey respondents indicated that they did not belong to any professional membership-based organisations or unions.

Another aspect that was suggested by a respondent is that spatial planning in the Western Cape, especially in Cape Town, should be addressed as this actively limits equal participation in the creative economy. This notion of physical barriers to the creative economy, such as spatial distribution of activities and venues, was also supported by 93.2% of survey respondents. Regarding non-physical barriers, survey respondents indicated that they have found it challenging to connect with both the Western Cape and National sectoral governing bodies - illustrated in Figure 6.

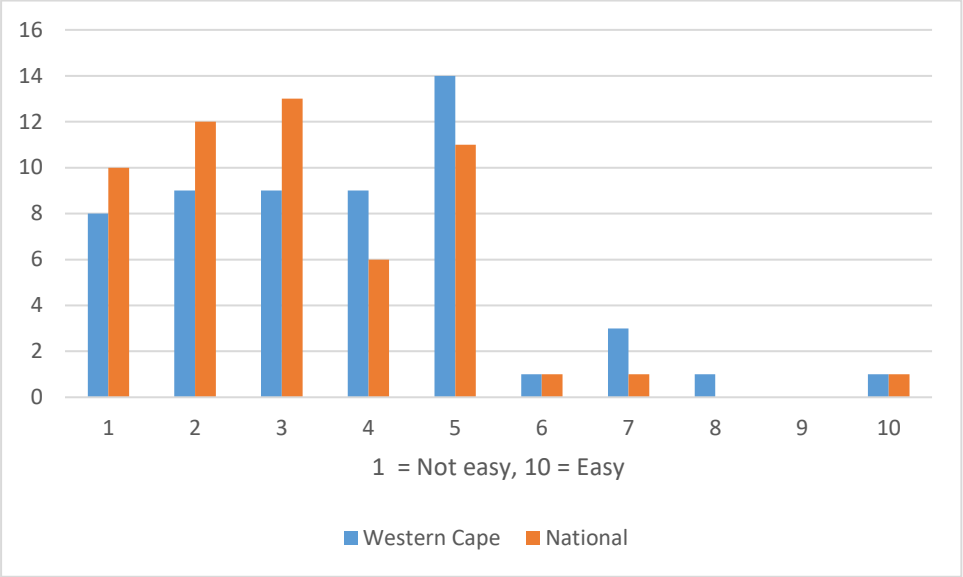

Figure 6: Respondents reported ease in working the National and Western Cape Government (scale of 1 to 10)

Respondents also pointed to a need for support with administrative and other non-creative duties. Sixty-two-point-nine percent of independent creatives and 79.7% of creatives, working for an organisation, indicated that they were responsible for numerous roles within the creative value chain, from creating the product to fundraising, budgeting, and reporting. A respondent said that they were thinking of helping independent creatives with this by setting up an organisation to help individual creatives with fundraising, report writing, financials and application forms, so the artists could focus on their creative delivery.

4.4 Main question: How can creative intermediaries facilitate the industrialisation of South Africa's creative economy?

The findings of this study show an overwhelmingly negative attitude toward DSAC and local government and its resources. There seems to be an overreliance on the government for change within the sector fuelled by current policies. Creatives feel unsupported and cited various requests for more funding to realise individual projects as well as publicly funded infrastructure.

Drawing from the political settlement framework, the current institutional realities are depicted in Figure 7.

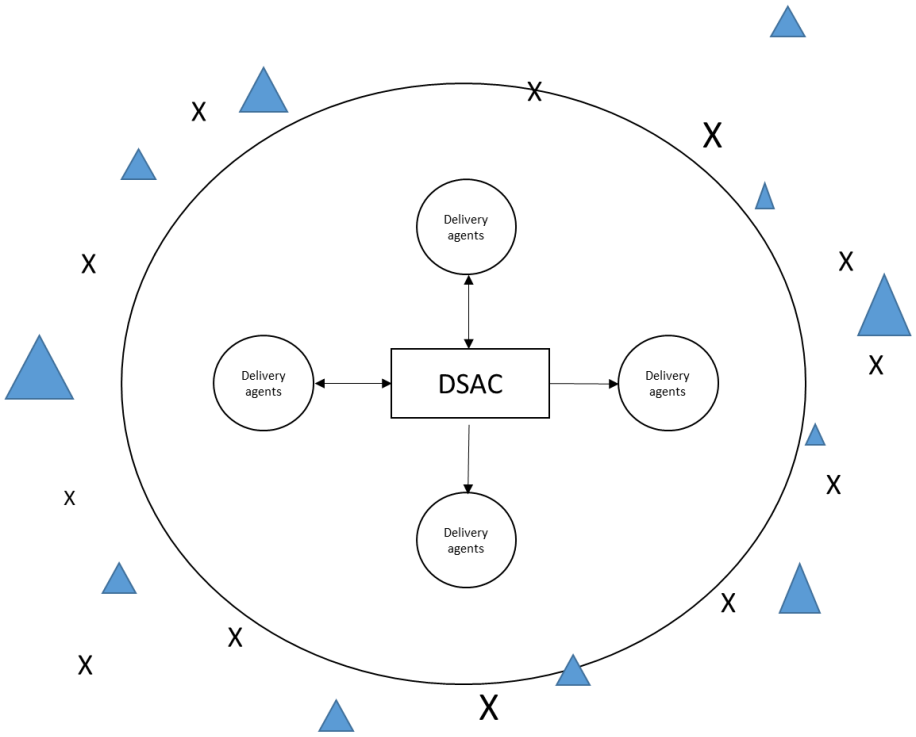

Figure 7: South Africa's political settlement in the creative sector

Figure 7 is a visual representation of the South African creative sector's political settlement. It depicts a concentrated power configuration around DSAC at the centre with its delivery agents holding most of the power. Some delivery agents hold more power than others and a dispersed power configuration between them and DSAC makes the implementation of the institution more tedious (DSAC, 2020). The big circle represents the creative institution with the main players inside the circle. DSAC holds the main power in the settlement and operates in a "top-down" manner with its delivery agents, which include, for example, the NAC, provincial and city departments, and the national arts councils. Some arrows point one way towards the delivery agents depicting a "principal-agent" relationship. In the case where some delivery agents have a bit more power in the settlement, for example some provincial departments, their embedded relationship is marked with a two-way arrow.

The triangles represent creative collectives or organisations, and the crosses represent independent creatives. The creatives and private creative organisations mainly operate on their own. These vary in size, signifying the varying power they hold within the settlement. This study has found that independent organisations and creatives in the sector are alienated,

and only a select few can voice their concerns and needs to the institution. This is depicted by the position of the triangles and crosses in relation to the outer circle.

This bi-dimensional sector is, therefore, characterised as a weak institution due to its inability to move away from the "founding" elites and elite bargains since South Africa's democratisation. The institution has also not successfully distributed rents to stimulate non-elite buy-in to various policy designs and can, for example, be seen in the various criticisms of the lack of implementation of the 1996 White Paper.

CHAPTER 5

DISCUSSION

Khan (2018) notes the importance of designing policies according to the specificities of the political settlement. The general sentiment of alienation of the creatives involved in this study is worrisome as it clearly shows a disconnect between the development objectives set out by DSAC and overlapping departments. According to Rodrik's (2008) three industrial policy design principles, an aspect that must be addressed to ensure creative intermediaries play an active role in ensuring the sector growth is to identify ways in which these mid-level actors can gain more access to rents.

The first strategy is to make more funding available for organisations to increase their capacity. There has been a policy suggestion to allocate the available funding to the sector according to the "purpose" it serves. This strategy was supported by 95.2% of survey respondents. This aspect was also highlighted in varying ways during the expert interviews. Respondents voiced their frustration that current project-based funding (the vast majority of advertised funding calls from both public and private funds) is strictly for once-off projects, requiring strict best-practice (qualitative and quantitative) reporting directly after project implementation. This leaves many organisations unable to plan fiscally or strategically for more than a few months ahead.

This also harms the degree of sectoral formalisation as many organisations cannot employ full-time staff to develop their own offering as they are dependent on project funding. This also means many creatives must continue to freelance in a not-so-stable creative economy. This study, therefore, adds to the proposal made by the Draft Theatre and Dance Policy (South African Government, 2022) by highlighting the importance of growing organisations within the sector.

An identified non-fiscal strategy is for sectoral leadership to acknowledge the need for mid-level actors to perform as dynamic informants advocating for the sector's needs in a landscape constantly evolving (USITC, 2014). Neither DSAC, nor the provincial and city authorities, currently have the capacity to conduct in-depth studies to stay ahead of trends, nor do they have the budget to provide the infrastructure needed to seize the opportunities posed by said trends.

DSAC's focus on constantly reworking policies and strategies and reliance on government bodies to implement the White Paper provides insight into the top-down approach the sector is currently governed by. DSAC denouncing their omniscience and effectively increasing the concept of "embeddedness" will ultimately lead to creative intermediaries competing to become stronger. Incentivising creative intermediaries to become key in an open private-public information channel on grounds of merit will lead to organisation development. The stronger the organisation becomes, the more power the organisation will have in the institution – a process that provides entrepreneurial motivation to expand and indirectly keep up with trends, inevitably providing the sector with what is needed at that point in time to take advantage of the growth opportunities.

Creative intermediaries pursuing a stronger portfolio, invertedly promoting capacity building and productivity gains, to get power in the institution either through organisational grants distributed according to merit, or solely expanding their professional network by gaining direct contact with government officials will motivate these entities to take on certain activities to increase their productivity and expand their capacity to employ more people. The policy reforms should, therefore, consider ways in which the sector can increase rents in the institution. Inviting creative intermediaries to act as informants will lead to a slight improvement in productivity without increasing the overall budget available to the sector.

Effective industrial policy is motivated by economic development. According to Wuyts (2011), policy should be driven by productivity gains, consider how an increase in productivity can lead to an increase in wages and ultimately recognise the interconnectivity between productivity and employment. Currently, there is a national call for all sectors to place the NDP at the core of national departments around a vision to improve employment and reduce poverty and inequality. DSAC has, therefore, announced its priorities from 2020 to 2025 to align with the NDP to work towards a capable and ethical developmental state; prioritise job creation and economic transformation; focus on education, skills and health; consider spatial integration, human settlements and local government; and ultimately create safe communities and social cohesion (DSAC, 2020).

The discontent by both the private and public sectors at the level of the implementation of the 1996 White Paper may be due to the overemphasis on the inherent capability of arts and culture to ensure inclusivity and social development. This fact is

uncontested, quite the opposite, but the 1996 White Paper, and arguably, the Revised White Paper, does not outline how to activate a viable growth trajectory.

Productivity in the creative sector is questionable, and there is scepticism about the value of the Revised White Paper. DSAC (2020) repeatedly places an overemphasis on the role of the government in the development and implementation of said objectives. Often in the case of personalised competition, the political settlement is centred around the initial power balances as set out in the "founding election" (Levy, 2014). The power struggles that accompany these changing political platforms, and, therefore, distressed personalised deals, are evident in the external factors as indicated by the national department, stating that implementation success varies in the political landscape according to who the ruling political elites are in that area (DSAC, 2020).

The sector has recently shown significant promise, but is this partly because SACO's inception marks the first time it is possible to measure the economic impact of the country's creative economy? This masking effect of economic growth shares some similarities with what was previously referred to as South Africa's "growth phase" where economic growth in the early 2000s disguised the persistent inequalities in the country, which would ultimately lead to the "anger phase". With South Africa's creative economy recently gaining in significance, the unbalanced political settlement has been partially overlooked. A parallel can be drawn to the overall economy where the lack of a complex broad-based economic reform was concealed through GDP growth during the first decade of democracy. Thus, it stands to reason that avoiding barriers to the creative sector will keep the sector from experiencing inclusive growth.

It is important to ensure that the sector does not continue on the same path as it has since the mid-1990s. The overwhelmingly negative association the sector has with both national and provincial authorities is worrying when considering the effectiveness of the Revised White Paper. Hirsch (2020) notes the importance of increasing citizens trust when creating a credible growth trajectory. The suggestion is that this can be done through improved governance, tackling persistent inequality, facilitating employment opportunities and the expansion of public initiatives.

Recognising the potential of creative intermediaries and the capacity of these entities to effect change through incentivising growth or mid-level actors satisfies the requirements for achieving a credible growth strategy. Industrial policy can, therefore, be utilised to

increase economic dynamism. Introducing more rents aimed at creative intermediaries will serve as an energiser for these actors to industrialise the creative economy, increasing employment opportunities through entrepreneurial efforts. With intentional rent creation, inequalities within the sector can be addressed to a degree.

By embedding creative intermediaries into policy design, the entities will increase buy-in and ultimately facilitate and implement public initiatives. Not only will the government receive much deeper insight into the value chains of creative goods and services, but this invitation to act as informants on behalf of the sector will minimise the prevailing estrangement. This will effectively lead to more opportunities for communication between public and private entities, resulting in independent artists and smaller organisations experiencing the positive effect of well-designed policy implementation.

This also resembles an embedded "principal-agent" and "agent-principal", the building blocks of accountability links that ensure development. Increased accountability, the redistribution of rent and open private-public communication are keys to achieving inclusive institutional growth. It can, therefore, be said that the identified sustainable development strategy of boosting the mid-level actors in the sector through intentional incentives is a viable pathway to achieve the current national creative policies whilst navigating the internal and external challenges to outlined objectives.

Structural change is at the core of development. There is a clear need for professional development, in the sector, on an individual and organisational level. The creative economy's recent growth is intimately connected to the fast-evolving digital revolution. The Fourth Industrial Revolution is only starting, leaving many trends and technologies unexplored and the impact on the sector thereof still unknown.

To navigate an ever-changing playing field, organisations with varying in-house skills and the capacity to learn on the go will ultimately withstand the ever-changing challenges and even view them as an opportunity to expand. Capacity building is, therefore, key to ensuring the industrialisation of the creative economy. This is also reflected in the results of this study, with approximately two-thirds of respondents voicing the need for professional and organisational development to enhance their creative delivery.

The term "servicification" captures the flexibility in the creative sector. The sector consists of various disciplines; each varying in degrees of development, and the relational impact on one another and each is affected to various degrees by digitalisation and policy

frameworks. Many creatives specified that they worked in more than one creative field, and many respondents indicated that even when they worked in the same field, they performed several diverse duties along the value chain. Organisations can serve as an administrative body that can ease the workload of creatives as most respondents voiced that they fulfilled various roles in the creative value chain, from being the accountant to the soloist in the concert.

This study reworks the definition of creative intermediaries, especially in the context of a developing country, in two ways. The first aspect that this study wishes to alter regarding the current definition of creative intermediaries is to include three dimensions of servicification at the core of the entity. These three dimensions are depicted in Figure 8.

The first dimension is the servicification of the market. Creative intermediaries should have the capacity to satisfy a variety of for- and non-profit market needs. This will ensure an open market and the development and competitiveness of creative goods and services.

The second dimension of servicification creative intermediaries should possess is inward to the creative sector itself. This includes, but is not limited to the education, professional development, and commissioning of independent creatives and organisations. These two dimensions ensure multifaceted social mobility, rent creation, and rent distribution in the political settlement, which strengthens the entity's status in the institution. Lastly, the third dimension of servicification that should be present is the entity's ability to influence bureaucracy and advocate for the sector's complex and ever-changing needs.

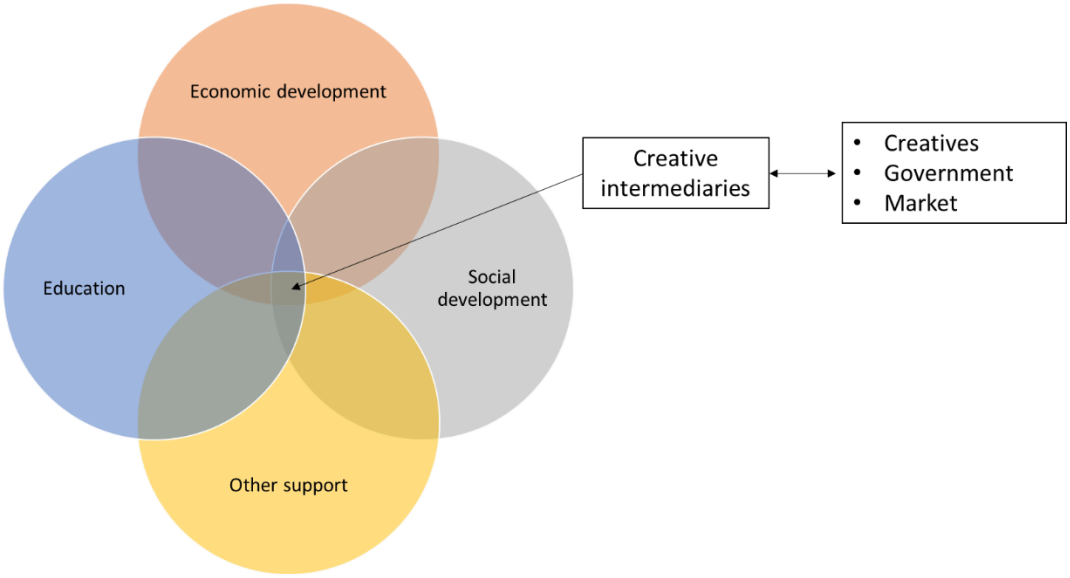

Figure 8: Dynamic servification by creative intermediaries

The second change to the definition is, therefore, to include an entity of some authority, likely meaning a registered business with multiple employees (part-time or full-time) and not just for any creative to help another to some undefined extent. Although this new definition does not exclude the variation of this entity added by Jansson and Hracs (2018), it is concerned with the extent of power that can be exercise by the creative intermediary.

This newly reworked definition is illustrated in Figure 9, using the Hirschman (1987) model of social mobility for stimulating growth, Levy's (2014) institutional development trajectory model, as well as Levy's (2014) adaptation of the World Development Report (2004) embedded principle-agent accountability model. In utilising all three of these models, the definition of creative intermediaries in a developing country like South Africa could be advanced to affect inclusive growth.

The industrialisation of the creative economy reinforces the social mobility of creatives and organisations, which ultimately strengthens the position of creative intermediaries in the institution. This increased power in the political settlement reinforces the accountability of the bureaucracy and politicians to ultimately effect change. This interconnected and reciprocal relationship is illustrated in Figure 9.

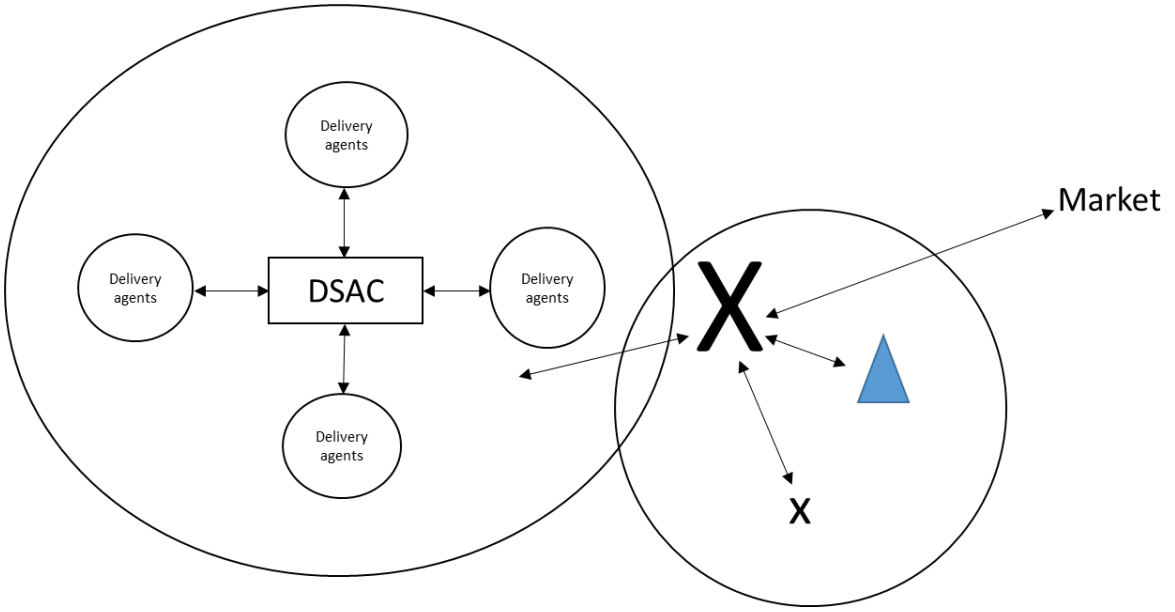

Figure 9: Creative intermediaries as agents of change

In Figure 9 a new circle is introduced into the projected institutional analysis, which serves to depict the ecosystem around a bigger organisation (pictured with a bold X), illustrating the dimensions of servicification the creative intermediary has with the market, smaller organisations and independent creatives. This newly introduced creative intermediary ecosystem also overlaps with the previously isolated public entities. All arrows are now two-directional, indicating an embedded public-private relationship with increased accountability.

CONCLUSION

The industrialisation of the creative economy challenges the classic notion that industrialisation should focus solely on goods that can be produced in factories. Taking from recent literature on industrialisation that considers the service dimension of products, this study argues that South Africa's creative economy can be industrialised with a certain agent of change. Simply stating and promoting the social and economic benefits of arts and culture without any action other than placing the onus on the state will not change the power imbalances in the political settlement.

South Africa's creative economy has recently received attention for its economic development potential. Though evidence of dynamism within the creative economy is present, effective industrial policy has been a challenge. The widespread acceptance of failed policy reform emphasises the importance of considering the political settlement framework to understand the institution as a whole and to effectively design an industrial policy to support the sector.

The findings from sector-wide interviews for this research suggest an underlying tension constraining structural transformation in South Africa's creative sector. The sector has been governed by characteristics of a top-down approach to development attempts which has failed to transform the initial elite bargains democratic South Africa inherited ultimately alienating private entities in the sector. This study motivates that creative intermediaries should be incentivized through carefully created rents to increase capacity building and economic dynamism. It is suggested that an increase in social mobility that will follow will stimulate the onset of inclusive growth and strengthen private-public accountability.

The paper concludes by drawing from Hirschman's (1987) model of social mobility for stimulating growth, Levy's (2014) institutional development trajectory model, Levy's (2014), and an adaptation of the World Development Report (2004) principle-agent accountability model to design a definition of creative intermediaries. This definition positions creative intermediaries, especially those within a developing country, as agents of change that can ensure inclusive development.

The development of South Africa's creative economy is directly linked to policy incentives created to enable growth. Growth should be understood to include both monetary

value and increased social mobility where the impact can be amplified by inviting creative intermediaries as key stakeholders in the institution.

The main policy recommendation this study offers is to consider the potential creative intermediaries have in the creative economy. This consideration has three dimensions. Firstly, public authorities governing the various departments effecting the creative economy must consider the creative sector as a valid industry for stimulating inclusive development and economic dynamism in the Fourth Industrial Revolution. This consideration is reflected in more digital-driven sectors like film and television, but not across the entire creative economy (UNESCO, 2021). Due to the variety of disciplines within the creative economy and the interconnectedness of these disciplines with one another and the overall creative ecosystem, mid-level actors should be positioned as the focus of industrial policy to avoid unbalanced development in the sector. A recommendation for possible research is to understand how to design industrial policy in support of the various art forms, according to the extent to which the current execution thereof is driven by technological advances (both in technology for creating the artform, but also for the dissemination thereof).

The second dimension of this study's call for policy reform is to consider the role of creative intermediaries as a mechanism to build state capacity and enhance accountability. A suggestion for further research is to explore optimum routes for public-private consultation and how a public programme could include such an element to increase social mobility.

The last dimension the policy recommendation proposes is consider the creative economy's potential for inclusive development. The four characteristics highlighted by this study is creative intermediaries' capacity for economic and social development; as well as education as elaborated on in the above narrowing of the definition of these mid-level actors. Further research is integral in understanding to what extent this impact can serve society, as well as to what level of influence the creative intermediary should have to be considered an active agent of change.

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Appendix A: Interview Guide

The following two definitions will be explained and informally discussed to frame the study and the outlined questions.

Creative Economy

The creative economy encapsulates the revenue produced by creative activities and goods. This pertains to creative individuals, various creative and cultural industries (CCIs) and project-based activities. CCIs include, for example, arts and crafts, design, entertainment, architecture, books, media and software, and advertising. The creative economy includes these and the broader value chain of production which will include, for example, production materials, marketing activities, and logistics to name a few.

Creative Intermediaries

Creative intermediaries are individuals or organisations that assist in the growth of other creative entities defined by either an artist, group of artists, and/ or smaller creative organisations. The development through information, skills, resources, and networks, supports the growth of the creative entity receiving help and ultimately increases the economic activity by that entity.

Outlined questions:

1. Describe the activities of your organization.
2. Describe your role within the organization.
3. Do you provide support to other artists/ organizations within your private/ organizational capacity?
4. If so, how often? Please describe?
5. Do you see yourself/ your organization actively participating towards the social and economic development of the province/ country? If so, please elaborate.
6. How do you view what you do within the broader policy framework of the province/ country?
7. How does this policy framework limit/ enable what you do and how you do it?
8. Are funding constraints the main challenge in the creative economy?
9. Can you suggest any policy reforms that will make your job easier?

Appendix B: Survey Overview

South Africa's Creative Economy

Hello,

Thank you for taking the time to complete this survey. Please note that this study's focus is on creatives mainly residing in the Western Cape. This micro-focus assists with delvingdeep into the local sector.

The **creative economy** encapsulates the revenue produced by creative activities andgoods. This pertains to creative individuals, various creative and cultural industries (CCIs) and project-based activities. CCIs include, for example, arts and crafts, design, entertainment, architecture, books, media and software, and advertising. The creative economy includes these and the broader value chain ofproduction which will include, for example, production materials, marketing activities, and logistics to name a few.

By submitting this survey, the researcher understands that you have read the below andthat you have given your consent to participate in the study.

Please take note of the following:

- Your participation in this research study is voluntary, and you may opt to withdrawfrom the research at any time.
- The questionnaire will take approximately 10 minutes to complete, and you are freeto omit to answer any questions you may not feel comfortable with.
- As part of the questionnaire, you will not be requested to provide any identifiableinformation. This is to ensure the anonymity of your responses.
- The questionnaire responses will be kept strictly confidential and will be availableonly to the researcher. Excerpts from the questionnaire may be made part of thefinal research report, but no specific details with respect to respondents' names, addresses, contact numbers or organisation will be disclose.

1. In what discipline within the creative economy do you work?

Check all that apply.

	Please select the applicable subsector/s
Cultural and Natural Heritage	☐
Performance and Celebration	☐
Visual Arts and Crafts	☐
Books and Press	☐
Audio-Visualand Interactive Media	☐
Design and Creative Services	☐
Cultural Education	☐

2. Do you work as an independent creative, within an organisation, or both?

Mark only one oval.

◯ Independent creative ◯ Within an organisation ◯ Both

◯ Other: _____

3. How many hours per week do you work within the creative economy?

Please respond with just a number, for example, 5.

_____

4. Including 2022, how many years have you worked in the creative economy?

Check all that apply.

- [ ] Less than 1
- [ ] year1 - 2
- [ ] years
- [ ] More than 2 years, but less than 5
- [ ] yearsMore than 5 years

5. Do you at times work outside of the Western Cape?

Mark only one oval.

- ( ) Yes
- ( ) No

6. If YES, how often a year do you work outside of the Western Cape?

The options below is a total average per year.

Mark only one oval.

- ( ) 1 week
- ( ) 2 weeks
- ( ) 1 month
- ( ) 3 - 5 months
- ( ) 6 and more months

7. Do you at times work internationally?

Mark only one oval.

- ( ) Yes
- ( ) No

8. If YES, how often a year do you work internationally?

The options below is a total on average per year.

Mark only one oval.

- 1 week
- 2 weeks
- 1 month
- 3 - 5 months
- 6 and more months

9. Do you belong to a professional union or membership-based organisation?

Mark only one oval.

- Yes
- No

10. On a scale of 1 to 10, how aware are you of the policies governing the creative sector?

Mark only one oval.

	1	2	3	4	5	6	7	8	9	10	
Not aware											Extremely knowledgable

11. Does the lack of knowledge sometimes keep you from creating your projects?

For example, are you sometimes scared to create something that will get youinto trouble with the law, or to invest in infrastructure with the possibility of it being taken down?

Mark only one oval.

- Yes
- No

12. Do you find it costly to navigate specialised fields within the creative sector?

For example, do you find it expensive to rent venues for rehearsals, or transport specialised equipment?

Mark only one oval.

	1	2	3	4	5	6	7	8	9	10	
Not costly at all											Extremely costly

13. Do you find connecting with the governing bodies in the Western Cape easy?

Mark only one oval.

	1	2	3	4	5	6	7	8	9	10	
Not at all. helpful.											Very easy! They are super

14. Do you find connecting with the governing bodies in the country easy?

Mark only one oval.

	1	2	3	4	5	6	7	8	9	10	
Not at all. helpful.											Very easy! They are super

15. Do you have an agent?

Mark only one oval.

Yes

No

Not applicable

16. If NO, do you think you would benefit from having an agent?

Mark only one oval.

Yes

No

Not applicable

17. Do you currently have a mentor?

Yes

No

18. If NO, would you want to have a mentor?

Yes

No

Not applicable

19. Do you feel that government officials recognise the **social value** of the creative economy?

Yes

No

20. Do you feel that government officials recognise the **economic value** of the creative economy?

Yes

No

21. Do you see funding as your main constraint as a creative?

Yes

No

Not applicable

22. Do you create your creative product, project plan, fund raise, budget, and report on your own?

Yes

No

Not applicable

23. If you work in an organisation, do you often wear many hats? For example, are you the editor, but also in charge of the marketing department? Or are you the CFO who also acts as the artistic director on projects?

Yes

No

Not applicable

24. What is your **main** source of work?

I connect with people within my network.

People reach out to me through my various marketing tools, for example mywebsite or Instagram acoount.

I have an agent.

Other: _____

25. Do you feel that by expanding your creative network/ circle, you will receive more work opportunities?

Yes

No

26. Do you find it difficult it to connect with other creatives and expand your network?

Yes

No

27. Do you have long-standing patron support?

In other words, have you received funding from the same donor/s over multiple years?

Yes

No

Not applicable

28. If YES, is this your main source of income towards your creative pursuits?

Yes

No

Not applicable

29. Do you feel you would benefit from having more written about you and your work (and available in the public domain)?

Yes

No

Not applicable

30. Do you feel you would benefit from having more high-resolution photos of you and your work?

Yes

No

Not Applicable

31. Do you feel that there should be more creative spaces/ hubs outside of the metropolitan areas?

Yes

No

32. When you are in a creative space, do you feel like you belong?

	1	2	3	4	5	6	7	8	9	10	
Not at all.											Yes, very much so.

33. What does your office environment generally look like?

Check all that apply.

- Computer
- screen
- Studio
- Rehearsals
- Other: _____

34. Do you feel that some fields within the creative economy get more attention that the others?

Yes

No

35. Do you feel that you have ownership over creative infrastructure that is publicly funded, for example galleries, libraries, studios?

Yes

No

36. Do you find it easy to get assistance from publicly funded creative institutions, for example archive collections, libraries, museums?

Yes

No

Not applicable

37. Do you feel like the Department of Sport, Arts and Culture (DSAC) represents your voice?

Yes

No

38. Do you feel the creative civil society can be bigger?

In other words, do you feel the sector can have more people working in it thatadvocates for the sector's rights and needs?

Yes

No

39. Do you feel the creative community can have more agency?

Yes

No

40. Would it make sense to you to differentiate between the different impacts the arts can have?

For example, art to achieve an educational outcome, art to achieve social cohesion, art for artistic development?

Yes

No

41. Should the government share overall annual funding allocations between the different impacts the arts can have?

For example, art to achieve an educational outcome, art to achieve social cohesion, art for artistic development?

Yes

No

42. What age were you on your last birthday?

Please simply fill in a number, for example 25.

_____

43. What is your gender?

Mark only one oval.

Female

Male

Other: _____

44. What is your home language?

Afrikaans

English

IsiNdebele

IsiXhosa

IsiZulu

Sepedi

Sesotho

Setswana

SiSwati

Tsivenda

Xitsonga

Other: _____

45. What is your highest educational qualification?

Matric

Diploma

Bachelor's degree

Postgraduate diploma

Master's degree

Doctorate

Other: _____

46. Do you have a tertiary degree in a **creative field**?

- ( ) No
- ( ) Diploma
- ( ) Bachelor's degree
- ( ) Postgraduate diploma
- ( ) Master's degree
- ( ) Doctorate
- ( ) Other: _____

47. Were you born in South Africa?

- ( )
- Yes
- ( )
- No

48. Where did you grow up?

- ( ) Eastern Cape
- ( ) Free State
- ( ) Gauteng
- ( ) KwaZulu-Natal
- ( ) Mpumalanga
- ( ) Limpopo
- ( ) Northern Cape
- ( ) North West
- ( ) Western Cape
- ( ) Other: _____

49. Where do you currently stay?

Mark only one oval.

- City of Cape Town Metropolitan
- Cape Winelands District
- Central Karoo
- District Garden
- Route District
- Overberg District
- West Coast District
- Other: _____

50. Do you live with your spouse/ partner?

Mark only one oval.

- Yes
- No

51. What is your individual or personal monthly income before tax?

Mark only one oval.

- less than R5 000
- R5 001 - R10 000
- R10 001 - R15 000
- R20 001 - R30 000
- R30 001 - R40 000
- greater than R40 000

52. What your household monthly income before tax?

- ◯ less than R5 000
- ◯ R5 001 - R10 000
- ◯ R10 001 - R15 000
- ◯ R20 001 - R30 000
- ◯ R30 001 - R40 000
- ◯ greater than R40 000

53. Do companies/ projects/ organisations you work for pay tax on your behalf?

- ◯ Yes
- ◯ No
- ◯ Not applicable

54. Please suggest one thing which you feel would help South Africa's creativeeconomy to thrive.

Appendix C: Interview Informed Consent Form

THE NELSON MANDELA SCHOOL of Public Governance
UNIVERSITY OF CAPE TOWN
IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD

Private Bag X3,
Rondebosch, 7701
Linkoping House
27 Burg Road
Rondebosch, 7700

T +27 (0) 21 650 1420
F +27 (0) 21 650 5709
E mandelaschool@uct.ac.za
www.mandelaschool@uct.ac.za

INTERVIEW INFORMED CONSENT FORM

(To be shared with selected experts prior to an in-depth interview requesting a signed copy to be returned via email. This will also be read out by the researcher before the beginning of the interview.)

Please acknowledge that you have understood the information shared and provide your informed consent to participate in the study by returning a signed copy of this letter.

My name is Carla Ferreira; I am a Masters' student at the University of Cape Town (UCT) currently studying towards an MPhil in Development Policy and Practice (student number FRRCAR018). As part of the requirements for my degree, I am conducting a research study on "The industrialisation of South Africa's creative economy: The role of creative intermediaries". The purpose of the study is to examine how creative intermediaries assist in the activities of the arts and culture sector. This study has been approved by the Departmental Research Ethics Task Team. Please take note of the following:

- Your participation in this research study is voluntary, and you may opt to withdraw from the research at any time.
- The interview will take approximately 60 minutes to complete, and you are free to decline to answer any questions you may not feel comfortable with
- As part of the interview proceedings, you will not be requested to provide any identifiable information. This is to ensure the anonymity of your responses.
- The interview responses will be kept strictly confidential and will be available only to members of the research team. Excerpts from the interview may be made part of the final research report, but no specific details with respect to respondents' names, addresses, contact numbers or organisation will be disclosed.
- Should you desire a copy of the final research report to be shared with you, this can be arranged. If you should require additional information or have any questions regarding the research, please feel free to contact the researcher, Carla Ferreira via e-mail frrcar018@myuct.ac.za.

I,_____ , hereby provide consent to be interviewed for the aforementioned study.

_____ _____

Signature Date

Appendix D: Organisation Permission Letter

THE NELSON MANDELA SCHOOL of Public Governance
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ORGANISATION PERMISSION LETTER FOR ONLINE QUESTIONNAIRE CIRCULATION

(To be shared with selected organizations prior to questionnaire circulation requesting a signed copy to be returned via email.)

Dear (*Name and Surname of organisation representative*),
My name is Carla Ferreira; I am a Masters' student at the University of Cape Town (UCT) currently studying towards an MPhil in Development Policy and Practice (student number FRRCAR018). As part of the requirements for my degree, I am conducting a research study on "The industrialisation of South Africa's creative economy: The role of creative intermediaries". The purpose of the study is to examine how creative intermediaries assist in the activities of the arts and culture sector. This study has been approved by the Departmental Research Ethics Task Team.

In realizing this research, I wish to circulate an online questionnaire through the network of your organisation. As part of this quick anonymous questionnaire, the following information will be displayed prior to the questionnaire being undertaken. The questionnaire will only continue if the respondent consents to the process.

As part of data collection for the study, a questionnaire is being administered to several stakeholders of which you have been identified as one. Please take note of the following:

- Your participation in this research study is voluntary, and you may opt to withdraw from the research at any time.
- The questionnaire will take approximately 15 minutes to complete, and you are free to omit to answer any questions you may not feel comfortable with
- As part of the questionnaire, you will not be requested to provide any identifiable information. This is to ensure the anonymity of your responses.
- The questionnaire responses will be kept strictly confidential and will be available only to the researcher. Excerpts from the questionnaire may be made part of the final research report, but no specific details with respect to respondents' names, addresses, contact numbers or organisation will be disclosed.

Please acknowledge that you have understood the information shared and provide your informed consent to allow the circulation of the questionnaire by returning a signed copy of this letter.

I,_____, from the organisation _____hereby provide consent that the aforementioned study be circulate via our organisation's network..

_____ _____

Signature Date