



An integrated framework for the development of the music industry in the Northern Cape Province

Stephanus Francois Malan

DTech: Business Administration

Thesis submitted in fulfilment of the requirements for
the degree DTech in Business Administration at the
Central University of Technology, Free State.

Promotor: Prof PG le Roux

Co-promotor: Prof AJ Strydom

March 2016



Financial Assistance

Financial assistance from the Central University of Technology (CUT), Free State, is gratefully acknowledged. Statements and suggestions made in this study are those of the author and should not be regarded as those of CUT.

Declaration of originality

I, Stephanus Francois Malan, identity number [REDACTED] and student number [REDACTED], do hereby declare that this research project submitted to the Central University of Technology, Free State, for the degree DOCTOR TECHNOLOGIAE BUSINESS ADMINISTRATION, is my own independent work; and complies with the regulations of the Central University of Technology, Free State, and has not been submitted before to any institution by myself or any other person in fulfilment (or partial fulfilment) of the requirements for the attainment of any qualification.



1 March 2016

SIGNATURE OF STUDENT

DATE

ACKNOWLEDGEMENTS

To complete this study was no easy task. Many people were involved to various degrees, and I would like to take this opportunity to thank each and every one of them for their continued support and motivation.

Thank you to my main promotor, Prof Piet le Roux, for his expert guidance and leadership. Prof le Roux always maintained a positive attitude, and his continuous encouragement was a source of motivation. His professionalism was impeccable and he was always several steps ahead of me during the study.

To my co-promotor, Prof Albert Strydom, thank you for your specialist assistance, especially in the field of economics.

My sincere thanks to all the people of the Northern Cape who assisted me in the research process. Due to the limited information on the Northern Cape music industry, I had to rely on the knowledge and experience of various musicians, music teachers and music business owners for my research. They selflessly gave up many hours of their free time.

Thank you to all my friends and family who supported me in so many ways. In particular, I would like to thank Prof Charl de Witt for prompting me to embark on this venture and always enquiring about my progress, and my friend Johan Jankowitz and his wife Marelise for the many stay-overs in Bloemfontein.

Finally, thank you to my wife Kim for her love and support and the many lonely hours she had to endure. Her input on both a personal and professional level was invaluable, particularly in the preliminary language editing process.

ABSTRACT

An integrated framework for the development of the music industry in the Northern Cape Province

In a bygone era, the music industry in Kimberley, the capital city of the Northern Cape Province of South Africa, was vibrant. Local musicians and those visiting the country were sure to make an appearance in one of the many theatres of the Diamond City. The music industry was directly linked to the untold wealth of the diamond industry of the past. As the diamonds diminished after more than a century of extensive mining, so did the music industry. It is truly ironic that music, which was entirely dependent upon the then strong economy, is proposed in this study as a tool to contribute to the stimulation of economic growth in a province where economic growth and development has been lethargic since the demise of the diamond industry.

Musical talent in the province is currently not utilised to its full potential, and therefore, the music industry is not perceived as a tool for economic development. This study proves that music can generate income, provide employment and increase wealth. It explores the philosophy of musiconomy, which is based on the premise that if all the required elements are implemented, music can contribute directly and indirectly to economic growth and development. In addition, it will attract skills to and contribute to developing creativity in an area. These are just some of the aspects that cause a ripple effect in the process of development. The proposed integrated framework includes various layers of integration, both on a macro (with other industries) and a micro level (within the various sectors of the music industry itself). A value circle is proposed which includes the three pillars (or sectors) of the music industry, namely music performance, education and business. It demonstrates how all the spheres of music can have an impact on and indeed act as an economic stimulant for a myriad of other industries.

The main outcome of this research is that in order for a music industry to be successful and contributory to economic development, the following eight components are required:

Education and skills development: Apart from musical subjects, a holistic music education includes a multitude of aspects, such as skills development in business management, technology, professional services and many other ad hoc industry-related subjects.

Community development: The proposed NCMIDF can contribute to the formation of a development ready community and the resulting social capital, which is the underlying characteristic of the concept of musiconomy.

Infrastructure and locations for growth: The music industry requires specific and specialised infrastructure in order to function optimally.

Business development and support: The degree of economic liberalisation and the availability of seed capital and supporting bodies for potential music entrepreneurs have a direct impact the access of music industry actors to the “tools of the trade”.

Innovation: The process of developing the industry through an integrated framework, the concept of musiconomy and the promotion of local talent as part of the world music genre is an innovative approach.

Partnerships: A symbiotic relationship between the government at all levels, the music industry as well as the community (the market) as reflected in the triple helix approach.

Marketing: Although the music industry has its own unique marketing requirements, it also requires the four Ps (product, price, promotion and place (distribution)) in the marketing mix.

Internationalisation: Internationalisation generates income from outside and area and in addition contributes to gaining prestige and credibility for the product with local markets.

CHAPTER 1

INTRODUCTION AND LITERATURE REVIEW 1-1

1.1 Introduction..... 1-1

1.2 Literature review 1-3

1.2.1 Previous research and parallel studies..... 1-3

1.3 Theoretical framework 1-6

1.3.1 Economic growth vs. economic development..... 1-6

1.3.2 Musiconomy..... 1-7

1.4 Conceptual framework 1-9

1.5 Best practice..... 1-11

1.6 The music industry value circle..... 1-12

1.6.1 Creators 1-14

1.6.2 Performers 1-14

1.6.3 Enablers 1-15

1.6.4 Revealers..... 1-15

1.6.5 The consumer 1-15

1.7 Integration 1-16

1.7.1 Micro and macro-integration..... 1-18

1.8 Problem statement..... 1-20

1.9 Research questions 1-20

1.9.1 Objectives..... 1-21

1.9.1.1 Main objective 1-21

1.9.1.2 Secondary objectives 1-21

1.10 Research methodology 1-21

1.10.1 Research paradigm and philosophy..... 1-21

1.10.2 Approach..... 1-22

1.10.3 Target population 1-22

1.10.4 Sampling..... 1-23

1.10.5 Data collection methods..... 1-25

1.10.6 Data analysis..... 1-27

1.10.7 Chapter outline..... 1-27

CHAPTER 2

HISTORICAL BACKGROUND AND CURRENT STATE OF THE MUSIC INDUSTRY IN THE NORTHERN CAPE PROVINCE 2-29

2.1 Introduction..... 2-29

2.2 Historical developments that shaped music education and the music industry in the Northern Cape Province from 1900 2-29

2.2.1 Music performances and infrastructure on the Diamond Fields 2-33

2.2.1.1	Theatre Royal	2-34
2.2.1.2	City Hall	2-35
2.2.1.3	The Northern Cape Theatre	2-35
2.2.1.4	Other venues and events of note	2-36
2.2.1.5	Musical societies, associations and clubs.....	2-38
2.2.1.6	Performing groups and artists	2-39
2.2.2	Music business in the early years	2-40
2.3	The current status of the music industry in the Northern Cape	2-41
2.3.1	Music education sector	2-41
2.3.1.1	Department of Basic Education	2-41
2.3.1.2	Music tuition in schools.....	2-45
2.3.1.3	Music academies	2-46
2.3.1.4	The Field Band Foundation.....	2-48
2.3.1.5	Music in Higher Education	2-49
2.3.1.6	Summary of the music education sector	2-49
2.3.2	Music performance sector	2-50
2.3.2.1	Current community festivals in the Northern Cape Province.....	2-51
2.3.2.2	Northern Cape Department of Sport, Arts and Culture.....	2-53
2.3.2.3	Choral activities:	2-55
2.3.2.4	Church music.....	2-56
2.3.2.5	Professional performing musicians.....	2-56
2.3.2.6	Summary of music performance sector	2-56
2.3.3	Music business sector	2-57
2.3.3.1	Music shops.....	2-57
2.3.3.2	Recording studios	2-58
2.3.3.3	Broadcasting in the Northern Cape Province:.....	2-59
2.3.3.4	Repairs and maintenance	2-61
2.3.3.5	Summary of the music business sector in the Northern Cape	2-62
2.3.4	Overview of the Northern Cape music industry.....	2-62
2.3.4.1	Strengths and weaknesses in the Northern Cape music industry	2-64
2.3.5	Closing remarks	2-67

CHAPTER 3

BENCHMARKS: INTERNATIONAL AND LOCAL MUSIC INDUSTRIES AND SYSTEMS 3-70

3.1 Introduction..... 3-70

3.2 Bolivarian Republic of Venezuela 3-72

3.2.1	Background.....	3-72
3.2.2	The national music education system of Venezuela	3-73
3.2.2.1	Background	3-73
3.2.2.2	Principles of El Sistema	3-74
3.2.2.3	Approach to music education.....	3-75
3.2.2.4	Contribution to economic growth and development	3-76
3.2.2.5	Lessons learnt	3-76

3.3 The music industry in Senegal..... 3-78

3.3.1	Content origination (creators)	3-78
3.3.2	Production (enablers)	3-79
3.3.3	Distribution (revealers).....	3-79

3.3.4 Consumption (consumer).....	3-80
3.4 The music industry of selected SADC countries.....	3-80
3.4.1 Background.....	3-80
3.4.2 Zimbabwe.....	3-81
3.4.2.1 Background	3-81
3.4.2.2 Performance sector.....	3-82
3.4.2.3 Music education sector	3-83
3.4.2.4 Music business sector.....	3-84
3.4.2.5 Closing remarks.....	3-85
3.4.3 Namibia	3-85
3.4.3.1 Background	3-85
3.4.3.2 Performance sector.....	3-86
3.4.3.3 Music education sector	3-86
3.4.3.4 Music business sector.....	3-88
3.4.3.5 Closing remarks.....	3-89
3.4.4 Botswana	3-90
3.4.4.1 Background	3-90
3.4.4.2 Music performance sector.....	3-90
3.4.4.3 Music education sector	3-91
3.4.4.4 Music business sector.....	3-91
3.4.4.5 Closing remarks.....	3-92
3.4.5 Mozambique	3-92
3.4.5.1 Background	3-92
3.4.5.2 Performance sector.....	3-93
3.4.5.3 Education sector.....	3-94
3.4.5.4 Business sector.....	3-95
3.4.5.5 Closing remarks.....	3-95
3.4.6 Lessons learnt from the music industries of the SADC countries.....	3-96
3.4.6.1 The industry and the market.....	3-96
3.4.6.2 Conditions of employment.....	3-97
3.4.6.3 Protection of intellectual property and piracy prevention	3-98
3.4.6.4 Opportunity in the SADC music industry	3-98
3.4.6.5 Summary	3-99
3.4.7 The trilateral music system of the Free State Province of South Africa: 1965-2013.....	3-101
3.4.7.1 Introduction	3-101
3.4.7.2 Historical background.....	3-102
3.4.7.3 The rise and fall of the three-tiered music system.....	3-102
3.4.7.4 Lessons learnt	3-106
3.4.7.5 Closing remarks.....	3-108

CHAPTER 4

REGIONAL ECONOMIC DEVELOPMENT IN THEORY AND PRACTICE 4-111

4.1 Introduction..... 4-111

4.2 Regional economic development..... 4-111

4.2.1 Characteristics.....	4-112
4.2.2 Historical background of RED	4-113
4.2.3 RED Theories.....	4-114

4.2.3.1	Classical theories on RED	4-114
4.2.3.2	Endogenous and exogenous factors in regional development	4-116
4.2.3.3	Economic clusters	4-116
4.2.3.4	Requirements for cluster development	4-118
4.2.3.5	Strategic planning for RED	4-119
4.2.4	Funding an RED strategy	4-121
4.3	Theory vs practice	4-121
4.3.1	Examples of RED strategies	4-122
4.3.1.1	The Metro Atlanta Regional Economic Competitiveness Strategy	4-122
4.3.1.2	The City of Portland, Tennessee	4-123
4.3.1.3	An economic growth strategy for the Essex County Council	4-124
4.3.1.4	A framework for community and economic development: Phillips and Pittman	4-125
4.4	RED in a South African context	4-127
4.4.1	National government	4-127
4.4.2	Provincial governments	4-128
4.4.3	Local governments	4-130
4.4.3.1	Kopanong Local Municipality	4-130
4.4.3.2	The Mpumalanga Economic Growth and Development Path (MEGDP)	4-131
4.4.3.3	West Coast District Municipality	4-134
4.4.4	Summary	4-137
4.5	Closing remarks	4-137

CHAPTER 5

COMPONENTS OF A HYBRID ECONOMIC DEVELOPMENT FRAMEWORK FOR THE NORTHERN CAPE PROVINCE 5-140

5.1	Introduction	5-140
5.1.1	Education and skills development	5-142
5.1.1.1	Rationale	5-142
5.1.1.2	Curriculum content	5-144
5.1.1.3	Objectives of the music education sector in the framework	5-145
5.1.2	Community development and social capital	5-146
5.1.2.1	The knowledge economy	5-146
5.1.2.2	Audience development	5-147
5.1.2.3	Development of local talent	5-147
5.1.3	Infrastructure and locations for growth	5-147
5.1.4	Business development and support	5-148
5.1.4.1	Co-ordinating bodies (facilitators)	5-149
5.1.4.2	Fiscal policy measures to facilitate growth	5-150
5.1.4.3	Effective intellectual property protection and piracy prevention	5-151
5.1.4.4	Accurate industry statistics and indicators	5-151
5.1.5	Innovation	5-152
5.1.6	Partnerships	5-152
5.1.7	Marketing	5-156
5.1.8	Marketing to grow the music industry	5-157
5.1.8.1	Marketing mix for the music industry	5-159
5.1.8.2	Industry profile	5-160
5.1.8.3	Competitor profile	5-161

5.1.8.4	Customer profile.....	5-161
5.1.8.5	Market penetration.....	5-162
5.1.8.6	Internationalisation.....	5-163
5.2	Closing remarks	5-164

CHAPTER 6

CONTEXTUAL FRAMEWORK FOR THE MUSIC INDUSTRY IN THE NORTHERN CAPE 6-165

6.1	Introduction.....	6-165
------------	--------------------------	--------------

6.2	Framework overview.....	6-165
------------	--------------------------------	--------------

6.3	The framework part 1: Music education	6-169
------------	--	--------------

6.3.1	Music in the current national basic education curriculum.....	6-169
6.3.1.1	Critical analysis of the current curriculum for music.....	6-169
6.3.1.2	Proposed curriculum for music in basic education.....	6-170
6.3.2	Music in tertiary institutions in the Northern Cape	6-172
6.3.2.1	Proposed curriculum for tertiary music education in the Northern Cape	6-172
6.3.2.2	Staff requirements	6-176

6.4	The framework part 2: Music performance.....	6-176
------------	---	--------------

6.4.1	Northern Cape Department of Sport, Arts and Culture.....	6-177
6.4.2	Northern Cape Arts and Culture Council	6-179
6.4.3	Central Services Unit	6-179
6.4.4	Community Art Centres	6-186
6.4.4.1	A historical perspective of CACs.....	6-186
6.4.4.2	CACs in the Northern Cape Province.....	6-188
6.4.5	Music academies.....	6-190
6.4.5.1	The Frances Baard CAC (Kimberley).....	6-193
6.4.5.2	Framework for the three music academies of the Frances Baard CAC	6-195
6.4.5.3	CACs in the other districts of the province	6-200
6.4.5.4	Framework for the music academies of the other CACs.....	6-200
6.4.6	Northern Cape Symphony Orchestra.....	6-201
6.4.6.1	Introduction	6-201
6.4.6.2	Framework for the Northern Cape Symphony Orchestra	6-202
6.4.6.3	Establishment plan.....	6-202
6.4.7	Arms of service bands	6-203
6.4.7.1	South African Police Services Band (Kimberley)	6-204
6.4.7.2	Military bands.....	6-204
6.4.7.3	Freelance performing musicians	6-204
6.4.8	Festivals, competitions and events	6-205
6.4.9	Church musicians	6-205

6.5	The framework part 3: Music business	6-207
------------	---	--------------

6.5.1	Conditions for growth	6-207
6.5.2	Types of music businesses.....	6-207
6.5.2.1	Administrators.....	6-208
6.5.2.2	Technical services.....	6-210
6.5.2.3	Distributors.....	6-211
6.5.3	A balanced bouquet of businesses.....	6-214

6.6 Summary	6-215
6.6.1 Statistics	6-217
6.6.2 The music entrepreneur.....	6-218
6.6.3 Key initiatives for a music industry framework in the Northern Cape Province.....	6-220
6.6.4 Timeline for implementation	6-222
6.6.4.1 Part 1: Music education framework.....	6-223
6.6.4.2 Part 2: Performance sector (including music academies).....	6-223
6.6.4.3 Part 3: Music business sector.....	6-224
6.7 Closing remarks	6-224
 CHAPTER 7	
 CONCLUSIONS AND RECOMMENDATIONS	7-226
7.1 Introduction.....	7-226
7.1.1 Objectives of the study	7-226
7.1.2 Retrospection	7-227
7.2 Conclusions	7-228
7.2.1 Conclusions with regard to the literature review	7-228
7.2.2 Conclusions with reference to the survey results	7-231
7.3 Recommendations	7-233
7.3.1 Recommendations based on the literature review	7-233
7.3.1.1 Theoretical preconditions for growing the music industry	7-234
7.3.1.2 Contextual preconditions for growth	7-239
7.4 Contribution of this research	7-246
7.4.1 Direct contribution	7-246
7.4.2 New knowledge	7-247
7.4.3 Further research possibilities.....	7-249
7.5 Summary	7-249
 REFERENCES	8-250

List of Figures

Figure 1: The Shaw value chain (Shaw, 2010:34).....	1-11
Figure 2: The proposed music industry value circle (own creation)	1-18
Figure 3: Micro integration (own creation)	1-19
Figure 4: Macro integration (own creation).....	1-19
Figure 5: The district municipalities of the Northern Cape Province.....	1-23
Figure 6: Music employment figures of the schools in the Northern Cape (own research).....	2-46
Figure 7: Total number of teachers in the Northern Cape (own research).....	2-46
Figure 8: Music employment figures at music academies (own research).....	2-47
Figure 9: Employment figures of the Field Band Foundation in the Northern Cape (own research)	2-48
Figure 10: Summary of employment figures in the music education sector (own research).....	2-49
Figure 11: Instrumental music students in the Northern Cape (own research).....	2-50
Figure 12: Employment figures of the music performance sector in the Northern Cape Province (own research)	2-57
Figure 13: Radio Teemaneng airtime distribution (Kau, 2013)	2-59
Figure 14: Employment figures of the music business sector in the Northern Cape (own research)	2-62
Figure 15: Employment figures per sector (own research).....	2-64
Figure 16: Current Northern Cape music industry (own research)	2-69
Figure 17: Map of the Republic of Venezuela (CIA, 2013)	3-72
Figure 18: Senegal (World Atlas, 2015).....	3-78
Figure 19: Member states of the SADC (SADC, 2012)	3-81
Figure 20: The three-tiered music education system of the Free State Province (own creation)	3-107
Figure 21: Kopanong Municipality (Kopanong Local Municipality, 2015).....	4-130
Figure 22: Mpumalanga Province (Rainbow Nation, 2015)	4-132
Figure 23: West Coast District Municipality (Western Cape Province, 2013)	4-135
Figure 24: Main entities forming part of the NCMIDF (own creation)	6-168
Figure 25: NCDSAC map (own creation).....	6-178
Figure 26: Components of the NCPACC (own creation)	6-180
Figure 27: Organogram of the CSU (own creation).....	6-181
Figure 28: CACs in the Northern Cape (own creation)	6-188
Figure 29: Components of a CAC (own creation)	6-189
Figure 30: Population density per district (Frith, 2012).....	6-189
Figure 31: Components of the Frances Baard CAC (own creation)	6-194
Figure 32: Key role players in the proposed music industry for the Northern Cape (own creation)	6-216
Figure 33: Student numbers per music academy (own research)	6-218
Figure 34: The Triple Helix model (own creation)	7-238
Figure 35: Micro-integration overview (own creation).....	7-248

List of Tables

Table 1: The South African schooling system	2-41
Table 2: Subject summary of the GET phase (Department of Basic Education, 2014)	2-42
Table 3: Minimum standard for music in the Department of Basic Education	2-44
Table 4: Current employment figures of the Northern Cape Province	2-63
Table 5: Northern Cape music industry workshop delegates	2-64
Table 6: A SWOT analysis of the music industry in the Northern Cape Province	2-66
Table 7: Summary of lessons learnt from the music industries of the SADC region	3-99
Table 8: Co-ordinating bodies for the NCMIDF	5-149
Table 9: Industry partnerships and stakeholders	155
Table 10: Government departments that have an impact on the music industry	6-166
Table 11: The different aspects of the subject of music	6-171
Table 12: Proposed additions to the current music curriculum	6-171
Table 13: Proposed curriculum for tertiary music education at the Sol Plaatje University	175
Table 14: Lecturing staff requirements for a tertiary music faculty	6-176
Table 15: Proposed staff of the CSU	6-182
Table 16: CAC staff	6-190
Table 17: Staff and activities for the three music academies of the Frances Baard CAC	6-196
Table 18: CACs and music academies in the other districts	6-200
Table 19: Staff and activities of the music academies in other districts	6-201
Table 20: Music business types	6-208
Table 21: The differences between the old and the new music industry	6-211
Table 22: Current music businesses in the Northern Cape	6-215
Table 23: Proposed music businesses for the Northern Cape	6-215
Table 24: Potential employment figures of the proposed framework	6-217
Table 25: Job opportunities for the entrepreneur	6-218
Table 26: Timeline for implementation of the music education sector framework	6-222
Table 27: Timeline for implementation of the performance sector framework	6-223
Table 28: Timeline for implementation of the business sector framework	6-224
Table 29: Innovative ideas for the music industry	7-236

List of frequently used abbreviations

CAC	Community art centres
CSU	Central Services Unit
FET	Further Education and Training
GET	General Education and Training
KAM	Kimberley Academy of Music
MAM	Mayibuye Academy of Music
NCDSAC	Northern Cape Department of Sport, Arts and Culture
NCMIDF	Northern Cape Music Industry Development Framework
NCSO	Northern Cape Symphony Orchestra
NGO	Non-governmental organisations
PACOFs	Performing Arts Council of the Orange Free State (later: Performing Arts Centre of the Free State)
RED	Regional economic development
SADC	Southern African Development Community
SMME	Small, medium and micro enterprises



Chapter 1

Introduction and literature review

1.1 Introduction

In 1994, nine provinces were established as part of the new South African provincial dispensation. Since then all provinces are eagerly looking for economic growth and development opportunities. The Northern Cape Provincial Spatial Development Framework focuses on the building of a prosperous, sustainable and growing provincial economy to eradicate poverty and improve social development for a caring society (Northern Cape Province, 2012:1). The Northern Cape Provincial Spatial Development Framework claims that the only effective means by which poverty can be reduced is through long-term sustainable economic growth and development in the agriculture, fishing, hunting, mining, manufacturing, tourism, knowledge economy (including creative industries) and energy sectors. Despite this claim, it is still only agriculture, hunting and mining that form the backbone of the rather small provincial economy (Northern Cape Department of Economic Development and Tourism, 2012:5).

It is apparent that the economic potential of local musical talents has been largely untapped and that the development of the culture sector is not treated as a serious economic venture. In most developing countries, this sector plays a much more limited economic role than in industrialised countries where it contributes to a significant proportion of the gross domestic product. In 1998, the value of the global music market was estimated to stand at US\$36.9 billion, of which Africa was worth only US\$207 million, a mere 0.6% of total global sales. In the same year the South African music industry was worth approximately R974.7 million (Ambert, 2003:ix). By 2011, the total revenue of the music industry amounted to US\$16.5 billion, indicating a steep decline, although between 2013 and 2018, digital music streaming is expected to grow by 13.4% annually, and digital music downloading is expected to grow by 3.3% in the same period (Statistics Portal, 2015).

1.2 Music in the Northern Cape Province

Since the discovery of diamonds in 1860, and until the early 1900s, the Northern Cape music industry was centred in and around Kimberley. Although it was reasonably vigorous, very little development has taken place since then. A proposed framework for a music industry in the Northern Cape could therefore act as a stimulus for the revival of the small but once rather spirited industry across the entire province.

There are currently more than 700 educational institutions in the Northern Cape Province, and it is estimated that only 5% of these offer musical training. Most of these institutions are in Kimberley (this information is contained in the Northern Cape Schools List 2013, which was provided by officials at the Northern Cape Department of Education). However, some development in the field of music education has taken place in the past two decades. In 1994, the Kimberley Academy of Music (KAM) was established, and in 2000, the first field band was established in Kimberley. Soon after this, a second field band was started in Kimberley and a third in Danielskuil. In 2004, the then national Minister of Education, Professor Kader Asmal, established the National Institute for Higher Education in the Northern Cape (Northern Cape Province, 2002). This institution entered into a partnership with KAM to bring tertiary music programmes to the province by offering music courses of the University of the Free State and the University of South Africa in Kimberley.

In 2008, the Northern Cape Department of Sports, Arts and Culture (NCDSAC) conducted a feasibility study for the establishment of a music academy which was to be based at the Mayibuye centre in Galeshewe (Kierman, 2008:1). The Mayibuye Academy of Music (MAM) began music tuition in September 2009 (Malan, 2009:2). The social investment responsibility of the corporate world has played an important role in the development of music education in the Northern Cape. Examples are evident at institutions such as KAM and the Field Band Foundation, where institutions such as De Beers, the Making An Immediate Difference Foundation and the National Arts Council of South Africa have collectively invested in excess of R10 million in the past decade. Music retail businesses are limited to a few music shops that can be found in the bigger

urban areas such as Kimberley and Upington. Other services related to the music industry, such as professional performers, recording studios and publishing houses, are virtually non-existent barring a few insignificant private attempts.

Given the above-mentioned background, the purpose of the present study is to create an integrated framework which will stimulate and develop the existing music industry in the Northern Cape Province in order to make a significant contribution towards economic growth and development in the province.

1.3 Literature review

1.3.1 Previous research and parallel studies

For the purpose of this study, the term “music” refers to all music. There are, and have always been, many different types and styles of music: classical, ethnic, pop, rock and jazz, to name but a few. Modern communications and sound reproduction technology have made musical pluralism part of everyday life (Cook, 2000:i). No single type or style of music can establish and sustain a viable music industry by itself. For this reason, the present study focuses on music as a product or commodity in its broadest form.

“You cannot have high-tech innovation without art and music” (Florida, 2002). This statement suggests that music can contribute to development. Countless studies have proven scientifically that in subjects such as mathematics and languages, students who participate in musical training outperform those who do not. Such students are more likely to become productive contributors to society (Wilder, 2014:1).

The development of knowledge and of society in general requires two synergistic elements: education and imagination – in other words, learning and creativity. Music education provides the ideal opportunity to develop both the left and the right brain hemisphere simultaneously, and musical training thus develops intelligent and adaptive minds that imagine, create and produce. Without creation and production, an economy will stagnate and collapse (Margiotta, 2012). Developing music can also contribute significantly to fighting some of the

social ills of South African society. It has been proven that young people participating in musical activities are less likely to be involved in crime, and that simply playing classical music in crime hotspots, such as shopping malls, repels troublemaking youths (Chilvers, 2011). According to Shaw (2010:207), music contributed 0.18% to the GDP of South Africa in 2007. It is envisaged that if the findings of this study are implemented, this percentage may increase. Music can also contribute to the creation of jobs in the Northern Cape. At full implementation, more than 400 sustainable posts in the music industry may be created with many freelance job opportunities. These estimates are only applicable to the Northern Cape Province, but it is clear that the music industry countrywide would benefit from such a stimulus.

In a Small Enterprise Development Working Paper, Ambert (2003:1) explores the possibility that the promotion of cultural entrepreneurship within the Southern African Development Community (SADC countries) may provide innovative possibilities for boosting incomes and generating quality employment in a sector that is normally overlooked by policymakers (Ambert, 2003:iii).

Globally, the creative industries, which include music, film and television, publishing, craft and visual arts, are recognised as a significant component of trade and are at the heart of the knowledge economy. The success of the Venezuelan programme, El Sistema, is a good example. El Sistema is a publicly financed voluntary sector music education programme, officially called the National System of Youth and Children's Orchestras of Venezuela. It is a state foundation comprising 125 youth orchestras and involving more than 370 000 children who attend its music schools around the country. Ninety per cent of these children come from poor socio-economic backgrounds (Bolivar, 2012:1). Many international organisations recognise it as being unique and worthy of being implemented all over the world, particularly in countries that are seeking to reduce levels of poverty. Many music education projects have been modelled after the Venezuelan programme in more than 25 countries. In 2007, the Bolivarian Republic of Venezuela made a loan application for the amount of US\$150 million to the Inter-American Development Bank for further funding of El Sistema. The application was made by the Venezuelan State Foundation for the National System of Youth and Children's Orchestra, known as FESNOJIV (Cuesta,

Antola, Castillo, Frigerio, Lamas, Soto & Ortega, 2007:i). On 6 June 2007, the Inter-American Development Bank announced the granting of a US\$150 million loan for the construction of seven regional centres of El Sistema throughout Venezuela. This decision was made and implemented despite the objections of many bankers within the Inter-American Development Bank on the grounds that classical music is for the elite. The bank has conducted studies on more than two million young people who have been educated in El Sistema. These studies link participation in the programme to improvements in school attendance and a decline in juvenile delinquency. Measuring benefits such as a decrease in school dropout rates and a decline in crime, the bank calculated that every dollar invested in El Sistema was reaping about \$1.68 in social dividends (Lubow, 2007:i).

Reiss (2000:10-26) suggests numerous creative ways in which larger concert audiences can be attracted, a process which, in turn, brings much needed capital back into the industry. He further highlights the various methods of generating funds for the arts in general (Reiss, 2000:15). According to Frey (2003:16), most musicians are either not equipped with the knowledge of or not interested in the economics of their trade, and are therefore not able to make a financial success of their careers. He further states, "[T]he true artist will let his wife starve, his children go barefoot, sooner than work at anything but his art" (Frey, 2003:143). The creation of a sustainable industry, which includes opportunities for musical entrepreneurship and the development of industry-related (non-musical) skills, is therefore a way in which the industry can contribute to economic growth and development in a region. Chong (2005:30) argues that entrepreneurship is the process of identifying economic opportunities and acting upon them by developing, producing and selling goods and services. Byrnes (2003:113-115) addresses in detail some fundamentals of several interesting organisational designs within the music industry.

1.4 Theoretical framework

1.4.1 Economic growth vs. economic development

According to the Centre for the Advancement of the State Economy (CASSE, 2014), economic growth is the increase in the GDP over a period of time as a result of an increased productive capacity of an economy. Furthermore, it does not prioritise environmental issues such as the depletion of natural resources and pollution. It is a quantitative process in terms of investment, output, consumption and income (Barefield, 2003:5).

Economic development, in contrast, is a qualitative process and a normative concept. It refers to the development of economic and social issues which result in an improved sense of morality, dignity, choice and freedom (Todaro, 2014). These are some of the aspects that lead to improved living standards and the creation of more opportunities in the sectors of education, healthcare, employment and the conservation of the environment. In economic development, sustainability is a priority which involves a fine balance between providing for the needs of the present without compromising future needs. According to Rücker and Trah (2007:13), economic development does not consist only of individual business entities, but is shaped by a composition of networks and dynamic systems of interactions which should assist in raising income levels of individuals and in alleviating poverty through education, creativity and entrepreneurship (Thompson, 2010). It involves changes in the structure of the economy, including innovations in institutions, behaviour and technology (Barefield, 2003:5). The term economic development implies generating income from outside the community and not just re-circulating the same income. Therefore, economic development involves the development of areas that aim at increasing the general welfare of the citizens. A balance between the two concepts is required to ensure a steady and sustainable economy (CASSE, 2014). For the purpose of inclusiveness, both growth and development will be implied from here onwards.

Governments and economic policymakers must create conditions that foster sustained economic growth and development. Current economic theories imply

that growth can occur with an increase in input factors. This can be achieved by the acquisition of more equipment and an increase in the number of workers that enter the labour force. This option, which is also called “capital accumulation”, can be expensive and can cause smaller profit margins. Growth can also occur with an increase in the personal output of individuals. This is also referred to as “productivity”, which is the key to improved living standards and increased sustained growth (Kozma, 2008:5).

The music industry can follow a similar development pattern by providing quality training, thus producing skilled musicians with an improved output and productivity. To reach this goal, infrastructure such as teaching institutions, performance venues and studios as well as all the necessary equipment are required. Furthermore, stimulating the private sector would result in the employment of more freelance musicians and the creation of new permanent posts in the various sectors of the industry.

1.4.2 Musiconomy

Musiconomy is an amalgam of two words and is used to describe the direct and indirect process and outcome of a music industry. A definition of Musiconomy is the optimum functionality and integration of all the various aspects of the music industry, contributing to economic growth and development, thus creating wealth (own creation). The three sectors of the music industry, namely music education, performance and business, must be integrated and equally active within the value circle of the industry. A home-grown (localised) musiconomy has a skilled musical workforce, state-of-the-art facilities and top-tier educational programmes that not only attract the market from outside the provincial borders, but, more importantly, that grow its native talent into entrepreneurs and professionals of the music industry. Musiconomy requires a holistic and integrated approach to music education that stimulates both left and right brain activity and consequently produces creative citizens who can contribute to economic growth and development in areas other than music. At school level, learning music contributes to achieving better results in other subjects, such as mathematics and science. Acclaimed guitarist and composer Kevin Eubanks, quoted in Long (2013), aptly puts it as follows:

"There's science in sound, math in compositions, poetry in lyrics, and a long, rich history to music. What's more, students of music learn how to take direction, to come together as a group to collaborate, and to follow a leader. Everything core education subjects are supposed to prepare you for is inherent in the arts from day one. The arts bring all of the core disciplines to together in one song, or one dance, or one painting. What could be a more perfect curriculum to have in a school?" (Long, 2013).

A child who learns music needs an instrument, which requires a manufacturer, a supplier and instrument maintenance technicians. These individuals or business entities in turn need buildings and equipment in order to supply their services. Performers need a market that can afford to pay for their product, and sheet music from which to present their product. Once all these aspects are in place, the concept of musiconomy develops as a powerful tool to assist in the development of individuals, societies and economies.

The present study is based on the theory of musiconomy, which implies that music can contribute directly and/or indirectly to economic growth and development. Various theories of economic development emphasise the importance of human capital, and music is a perfect tool for the development thereof. One of the secondary objectives of the study (see section 1.10.1.2 below) is to formulate an integrated framework to enhance and maximise the contribution that the music industry can make to the economy of the Northern Cape Province. According to the Oxford Advanced Learner's Dictionary, the word "integrated" means "something in which many different parts are closely connected and work successfully together" (Hornby, 2005:775). A framework is "a set of beliefs, ideas or rules that is used as the basis for making judgements and decisions" (Hornby, 2005:591).

In an attempt to start the process of constructing the framework, a combination of the above-mentioned theories can be applied to the three main sectors of the music industry (music education, performance and business). Increased capital accumulation and productivity is required within all three sectors in order to contribute directly to the economic growth and development of the province. Indirect contribution to economic growth and development, in contrast, requires

knowledge workers. Basic literacy and numeracy skills are no longer sufficient for the 21st century knowledge economy and information society. Technological and media literacy, effective communication, critical thinking, problem-solving and collaboration skills are required. If all students have access to music instruction it will stimulate and develop the four overlapping Cs: critical thinking and problem solving, communication, collaboration, and creativity and innovation (Judson, 2013).

1.5 Conceptual framework

As with any commodity, music moves through a value chain from its creation to its consumption. The Charles Landry example of a traditional value chain provides valuable insight into the requirements of a value chain for the music industry as it includes concepts directly relevant to the cultural industries (Department of Arts, Culture, Science and Technology, 1998:12). His model is based on the following five pillars:

1) Beginnings:

This includes the design and creation of the raw product against the background of all the social, political and economic processes and structures that provide the context conducive to the emergence of a creative milieu necessary for sustaining the industry. Such a milieu is particularly essential for a music industry.

2) Production:

This refers to the production of the master (original) and the mass (copies). In the music industry, production occurs at a number of sites and in a number of forms. Sites include concert halls, studios and factories, while forms refer to CDs, MP3s, sheet music and merchandise.

3) Circulation:

Circulation is defined as the various steps that influence the process of distribution from the point of production via the delivery mechanism to the retail outlets. The music industry requires highly developed and integrated circulation methods.

4) Delivery:

Delivery mechanisms are the structures that make the product available to the market. In the music industry, these mechanisms include retail, broadcast and transmitting.

5) Reception and feedback:

The type of reception and feedback, be it positive or negative, will enable various elements in the chain to reformulate strategies. In the music industry, an example would be the audience reaction, which can be used as a guide.

According to the Cultural Industries Growth Strategy, the Landry model emphasises the possibility for each part of the process to have an impact on the rest of the value chain and in so doing avoids creating a static, linear representation of the sector (Department of Arts, Culture, Science and Technology, 1998:12-18). The Cultural Industries Growth Strategy suggests that a music industry should consist of the following elements:

- originators (musicians and composers)
- publishers (producers of sheet music and promoters of musicians)
- record companies (sound recordings)
- manufacture (mass production of product e.g. CDs)
- broadcast, retail and entertainment sectors (the market).

Shaw (2010:35) promotes a similar value chain for the South African music industry (see figure 1). This value chain provides a logical foundation for further elaboration and upon which to create a suitable industry framework for the Northern Cape Province:

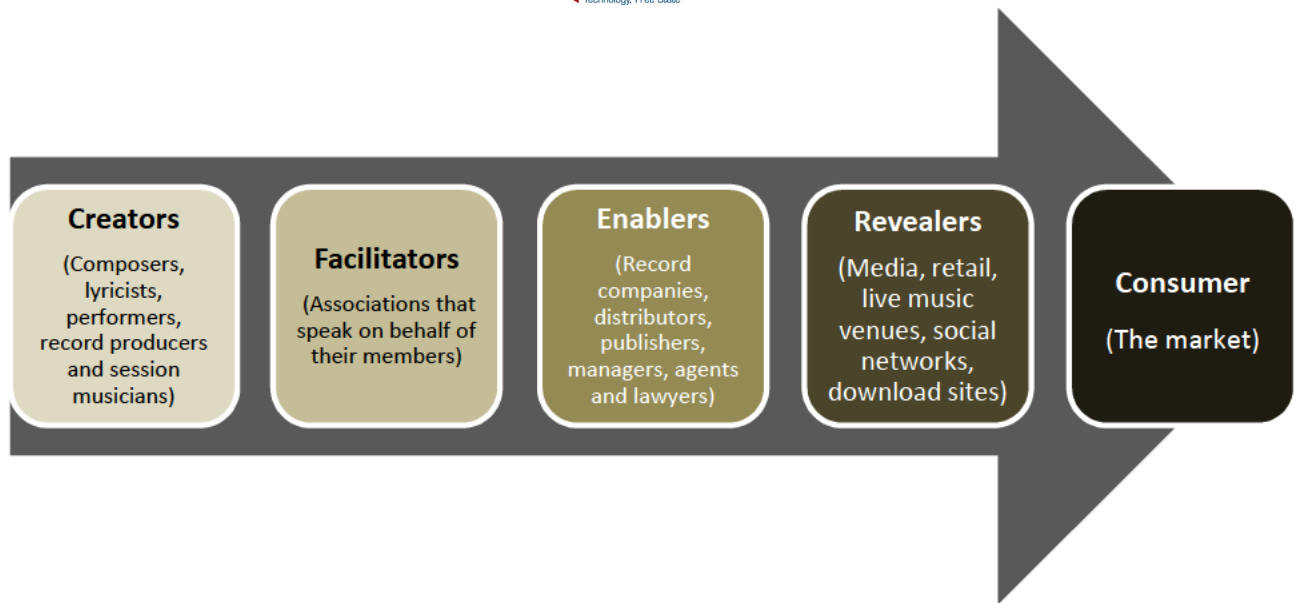


Figure 1: The Shaw value chain (Shaw, 2010:34)

1.6 Best practice

Before applying the principle of best practice to the pursuit of a framework for a feasible music industry for the Northern Cape, it is necessary to briefly define the concept of best practice. Best practice can be defined as a practice which is based on previous experience and which is feasible to implement because it improves outcomes (Duignan, 2009). Best practice may take on any form: it could be a method, a programme, or (as is the case in the present study) a framework. Best practice must be measurable, notably successful and replicable to some extent. Best practices earn this status if they have been found to be 1) successful in accomplishing their goals and 2) adaptable for use in other circumstances. Before applying best practice, the practitioner must determine whether this best practice suits the purpose, structure and philosophy of the initiative that will use it. The availability of the resources required by a particular best practice and its cost-effectiveness must also be evaluated. Employing best practice increases the chances of accomplishing specific goals and boosts the credibility of the particular outcome or result (Rabinowitz, 2013). In creating a scientifically sound theoretical framework, the following three aspects will be examined:

- the music industry value circle as opposed to a value chain
- the importance of integration and partnerships in the music industry

- pursuing best practice principles by looking at the development strategies of specific case studies.

Conclusions will be drawn to formulate a hybrid framework for the Northern Cape music industry, based on other examples and lessons learnt in previous research. The conceptual framework for the Northern Cape Music Industry Development Framework (NCMIDF) will take this information into account.

The three sectors of the music industry (music education, performance and business) will be used in tandem with the value chain to create an integrated framework for the development of a music industry in the Northern Cape that will contribute to economic growth and development. It is important to note that effective music education programmes should be central at every level of the value chain. It is therefore proposed that a more intricate value circle, rather than a chain, be assembled, within which every part is affected by music education and each other, directly or indirectly. The fundamental argument is that all these elements are integrated and that it is only by strengthening the entire value circle that a music industry can be viable.

1.7 The music industry value circle

In the music industry, creators (e.g. songwriters) need enablers (e.g. record companies) and revealers (e.g. media) to reach their market. The dealings among these groups are negotiated by facilitators (e.g. associations). Shaw (2010:34) stresses that the internet has disrupted this value chain and has broken down the traditional idea that the music industry revolves around the recording industry. Technology has paved the way for many new role players and has provided shortcuts in the industry. The Charles Landry model of a standard value chain, as cited by the Department of Arts, Culture, Science and Technology (1998:12), has five pillars, namely:

- beginnings (soft infrastructure and conditions conducive to a creative milieu)
- production (the creation of master and mass)
- circulation (legislative framework and corporeal aspects)
- delivery mechanisms (availability to the market, e.g. retail and broadcast)

- audience reception and feedback (mechanisms for measuring popularity).

The researcher is of the opinion that the music industry is, however, far more flexible and intricate than these models propose. Nothing prohibits jazz improvisers, for example, to approach consumers directly, either through live performance or by using technology. Consumers can now purchase the product of their choice directly from creators. Facilitators do not form a link in the value chain, as they do not add value but rather provide a platform for the other links in the chain to develop and reach the market. Consumers find themselves at the end of the traditional value chain. This position is of extreme importance because it is the stage at which the listener becomes motivated and inspired to enter the music industry at any one of the different stages. For this reason, a new analysis of the industry is required. The researcher therefore proposes a value circle (as opposed to a value chain) because such a variation can contribute more comprehensively to our understanding of the integration of the different stages of the industry. Music education becomes more important than merely a facilitator and takes up a pivotal role in the centre of the circle. The following role players (or stages) are included in the proposed value circle:

- creators (composers, songwriters, arrangers, improvisers)
- performers (performing musicians, instrumentalists, disk jockeys (DJs), vocalists)
- enablers (managers, recording studios, record labels, distributors, technicians)
- revealers (internet, concert venues, mobile devices, media, retail)
- consumers (the market).

All of the above-mentioned role players in the music industry can be found within two of the three pillars of the music industry, namely the performance and business sectors. The proposed value circle is based on the Shaw (2010:34) model with an additional stage, namely the performer. All the role players, including the newly added performer, become part of the value circle or process as they mutually feed off one another. The product (audible music or related merchandise) can move backwards and forwards in almost any direction within the value circle. The proposed framework integrates all the role players in the

music industry's value circle with one another in a myriad of ways and links them with indirect industry contributors outside of the circle, such as government departments.

1.7.1 Creators

The researcher defines a musical creation as a musical composition that is written down on paper, an improvised performance on a musical instrument (including the human voice) or an arrangement of an existing composition, either in improvised or tangible (hard copy) form. Creators therefore comprise composers and songwriters, improvisers, arrangers and DJs. Although arrangers do not create original versions of music, they change it in such a way that it takes on a new form. This particular skill is on a par with the skill of composing.

Due to technological developments, creators now have the freedom to choose at which stage of the value circle they would like to present their creations. They could even participate in a different stage in the circle, provided they possess the necessary skills to carry out the required tasks. For example, songwriters can sing and record their own song and then sell it directly through the internet. By using technology, it is therefore possible to bypass any or all of the stages in the value circle and reach consumers directly. Creators can therefore also be performers, enablers and/or revealers.

1.7.2 Performers

Performers are musicians who perform musical works by improvisation or by reproducing a musical creation generated from another source, adding value to it by making it audible and by adding his own unique interpretation (McDonagh, 2012:1-2).

Performers can use a musical instrument (instrumentalists), their voice (singers) or sound equipment such as a sound desk, as in the case of a DJ. In the case of an orchestral conductor, the orchestral musicians become the instrument in the process of reproducing composed music. As is the case with creators, performers can choose at which stage of the value circle they would like to present their performance. Concert pianists may wish to perform a solo recital in a community

hall while simultaneously making a live recording. They can further duplicate the master recording and distribute the copies themselves, or use the services of a manager or a retailer.

1.7.3 Enablers

Enablers are those entities that provide administrative or physical support to enable creators or performers to produce a product. Enablers include record companies, distributors, publishers, managers, lawyers and agents. Artisans and technicians skilled in manufacturing, maintenance, repairs and sound engineering also form part of the community of enablers, although their skills are often too specialised to be replaced by technology. As a result of the technological options available to composers and performers, they are no longer entirely dependent upon enablers for their success. Enablers, on the other hand, sometimes find themselves in the ironic situation where they have to approach the creators and performers for business. In the past, it was the other way round.

1.7.4 Revealers

Revealers are those institutions or individuals who provide platforms for musicians to present their products to the market. They are not reliant on the music industry for survival but are tools used by the industry for promotion, development and distribution. Revealers include the media, retail outlets, live concert venues and the internet.

1.7.5 The consumer

Music industry consumers are the listeners and buyers of music products. Although music forms an integral part of human existence, consumers do not rely on the music industry for physical survival. It therefore requires a concerted and continuous marketing effort to ensure that consumers spend money on musical products. In the final analysis, consumers determine if the music industry prospers or not, and they form the basis of the feeding system for new entrants into any one of the stages of the music industry. True economic growth and real prosperity can be said to have been achieved if consumers from outside an area (in this case, the Northern Cape Province) purchase a product.

1.8 Integration

The significance of integration cannot be overemphasised because a multitude of aspects must collaborate to create a viable music industry. According to Ambert (2003:3), the true economic value of music is hidden behind a host of related industries involved in the process of creating and consuming music. Music adds value to several other industries such as tourism, hospitality, advertising and retail. The success or failure of these mostly non-cultural industries affects local economies and the creation of employment. Their success rates are inextricably linked to general local development levels and services. It is this integration (or linking) that provides the guidelines on how to maximise the development potentials of the music industry (Ambert, 2003:ix). The ripple effect of the music industry on the rest of the economy is much wider and more powerful than its direct, industry-specific impact. Throughout the value circle, examples can be found of how the music industry affects and even stimulates other industries. Creators require education, technology, sound equipment and infrastructure, all of which make up the tools of their trade. Performers need major infrastructure and equipment such as performance venues, recording studios and musical instruments. These items, to name but a few, involve many other industries, such as building and manufacturing. Enablers, for their part, are involved sectors such as law, labour and transport, while revealers use the printing, advertising and e-industries. Musiconomy reaches across most categories of economic activity, including construction, manufacturing, wholesale, retailing, consumer services and the public sector (Beyers, Fowler & Andreoli, 2008:i). An integrated approach requires all the contributing aspects, stages and role players to function optimally and that they all work together efficiently.

Music industry role players are derived from two distinct groups. The first group is found in the industry's value circle and are mostly part of the private sector (e.g. composers and performers). They are mostly concerned with producing and distributing the product. The second group is found mostly in government (e.g. the Departments of Art and Culture, Finance, Tourism, Trade and Industry). They are mainly concerned with the provision of an environment with suitable conditions for sustainable growth of the music industry. The non-profit organisations in the music industry can be found in both these groups. Co-

operation between these two groups highlights yet another level of integration which occurs when seemingly unrelated industries contribute directly or indirectly to the development of the music industry. This level of integration can manifest in many ways, such as providing physical infrastructure, or in the training of entrepreneurial musicians.

Creators of the music product appear at the top of the value circle. This is where music is produced for the first time, and all other aspects of the industry await this event. In the case of creators being composers or arrangers, they need performers to bring the creation to fruition. Enablers are those individuals and institutions who provide the tools and make it possible for the raw product to be packaged and promoted for further use. Revealers launch the product into the public domain for consumption. The ultimate goal is that the consumers are not just local buyers but from a much larger base, including the international market.

Music education is at the centre of this because different types of skill are required for each segment of the industry. These skills can only be acquired through effective music education.

Figure 2 can be used to visualise this idea:

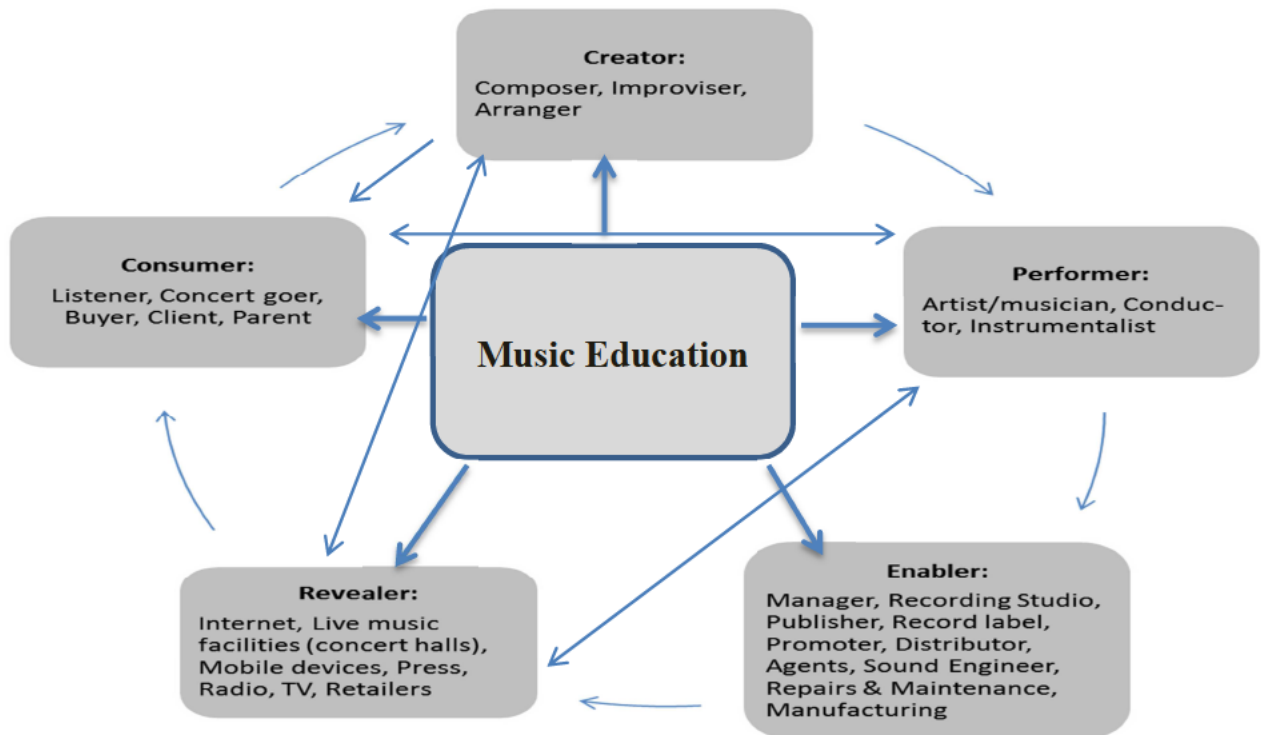


Figure 2: The proposed music industry value circle (own creation)

1.8.1 Micro- and macro-integration

The researcher is of the view that internal integration within the music industry's value circle is required for effective co-operation of the various role players, and this may be referred to as micro-integration. At the same time, external integration with other industries and services is required, on both national and provincial levels in order to create a milieu conducive to industry growth. This may be referred to as macro-integration. The education sector, for example, must be effective and productive in order to produce quality participants such as composers, performers, recording artists and journalists, and to introduce them into the value circle. Similarly, the performance sector must be active and offer career opportunities in the formal sector (e.g. military bands and the Provincial Arts and Culture Council), the informal sector (e.g. the entertainment and hospitality industries) and the business sector. These sectors must be

empowered and supported to provide all types of service required for the other role players to perform optimally. They must also have the capacity to absorb new entrants (e.g. up-and-coming performing artists) into the industry. The internal well-being of all of the above-mentioned contributors will determine the level of success or failure of the industry. Integration and co-operation with multidisciplinary initiatives and services outside the value circle (such as finance, labour and legal services) are essential for the creation of a lucrative market for the music industry. The researcher compiled figures 3 and 4 to illustrate this interaction:

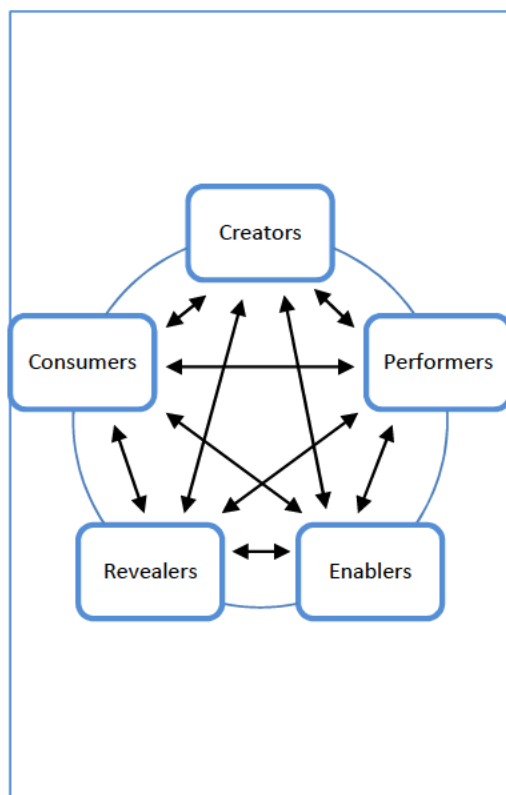


Figure 3: Micro integration (own creation)

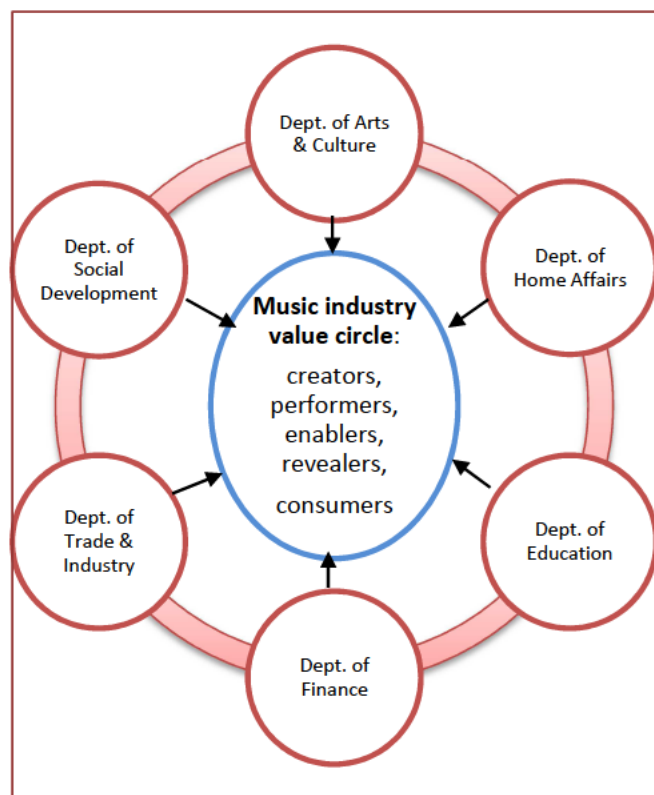


Figure 4: Macro integration (own creation)

1.9 Problem statement

The Northern Cape is the sixth poorest of the nine provinces in South Africa (HSRC, 2014:51). Despite several lucrative industries such as mining, agriculture and tourism, the growth rate for the period 2002–2009 was, according to the Northern Cape Province, a mere 2.6%. This was the lowest of all the provinces in the country and below the national average of 3.7% for the same period. The current unemployment rate is around 25% (2012/13). According to the Cultural Industries Growth Strategy (Department of Arts, Culture, Science and Technology, 1998:9), the music industry is the 23rd fastest growing market in the world. Until now, this industry was grossly underdeveloped in the Northern Cape, and its potential is still not being realised. There is currently no integrated framework to empower the music industry to contribute optimally to the economic growth and development of the Northern Cape Province. Music can, through the philosophy of musiconomy (see par. 1.4.2 above), contribute to economic growth, although this opportunity is not utilised to its full potential in the province.

1.10 Research questions

The main research question of the present thesis is: What are the components of an integrated framework for the development of the music industry in the Northern Cape Province?

From these research questions, the following sub-questions arise:

- What lessons can be learnt from music industries and music education systems in other countries and locally?
- What is the current status of the Northern Cape music industry?
- Which economic theories can be utilised to design a music industry for the Northern Cape Province?

1.10.1 Objectives

1.10.1.1 Main objective

The primary objective of this study is to develop an integrated framework to stimulate the development of the music industry of the Northern Cape Province. The proposed framework will include proposals to create integrated development opportunities within the three main sectors, namely music education, performance¹ and business.

1.10.1.2 Secondary objectives

The study also has the following secondary objectives:

- to conduct a literature review to determine the historical events that shaped the music industry in the Northern Cape Province
- to determine the current status of the music industry in the Northern Cape Province
- to document local and international examples of successful integration of the music industry, demonstrating regional economic growth and development
- to create a framework for a music industry that can contribute to the economic growth and development of the Northern Cape region.

1.11 Research methodology

1.11.1 Research paradigm and philosophy

The timeframe of this research falls within the period from the early years of the Diamond Fields (ca. 1860) up until its completion in 2015. Because music forms part of people's everyday life, this research falls within the realm of social sciences. It is applied research because it has a specific application in mind, namely the creation of a music industry framework with the aim to guide the development of this particular industry. The research philosophy is based on phenomenology in order to accommodate people's viewpoints and to understand

¹ For the purpose of this study, the term performance refers to all forms of live music-making which generate an income. Performing musicians include instrumentalists, singers, conductors and disk jockeys.

social perceptions.² According to Dash (2005), there are two main paradigms in which to substantiate theories, namely positivism and anti-positivism. The former is based on a scientific method and aims to accumulate knowledge, and the latter emphasises that social reality is viewed and interpreted by individuals according to their ideological positions. Anti-positivism, which is used in the present study, focuses on qualitative analysis, such as personal interviews, participant observations and the accounts of individuals.

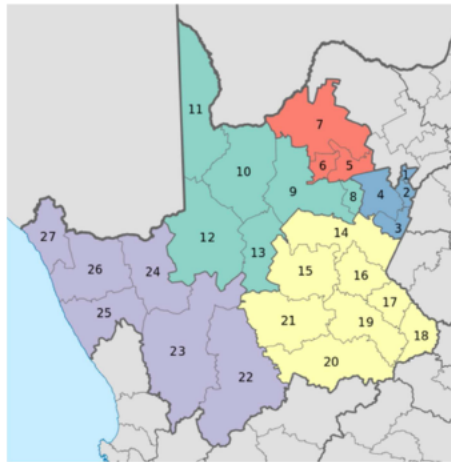
1.11.2 Approach

According to Anderson and Poole (2009:22), quantitative research is characterised by experimental studies in science-based disciplines where findings are usually expressed in numerical form. Qualitative research is characterised by ethnographic and historical studies where findings are more commonly expressed in words than in numbers. Although quantitative research techniques (such as questionnaires and interactive data collection methods) will be used in some areas of this study (e.g. in determining the current size of the music industry in the province), the research will be mostly qualitative. This approach was selected because the proposed topic requires a holistic investigation which must include the perspectives of the people who live it.

1.11.3 Target population

The Northern Cape Province is divided into five district municipalities. These are divided into 27 local municipalities. Figure 5 illustrates the location of each district and local municipality within the province.

² In phenomenological research, the researcher's aim is to describe as accurately as possible the phenomenon in question, refraining from any pre-given framework, but remaining true to the facts. The phenomenologist is concerned with understanding social and psychological phenomena from the perspectives of the people involved (Groenewald, 2004:5).



Key	District	Seat
1 - 4	Frances Baard	Kimberley
5 - 7	John Taolo Gaetsewe	Kuruman
8 - 13	ZF McGawu (Siyanda)	Upington
14 - 21	Pixley ka Seme	De Aar
22 - 27	Namakwa	Springbok

Figure 5: The district municipalities of the Northern Cape Province

The Frances Baard District Municipality is the smallest in size (12 836 square kilometres) with the biggest proportion of the population (382 086). Community services, finance and trade are the main economic sectors in the area. The John Taolo Gaetsewe District Municipality covers an area of 27 283 square kilometres. This municipality is home to 224 799 people who live in 186 towns and settlements. Here the main economic sectors are agriculture and tourism. The ZF McGawu District Municipality covers an area of 102 524 square kilometres with the second biggest population of 236 783. Main economic sectors include agriculture, mining and tourism. Pixley ka Seme is the biggest of all the district municipalities. Although it has the lowest rainfall, the Orange River flows through its 103 410 square kilometres, feeding two major dams. Finance, manufacturing and trade are the main economic sectors. The Namakwa district is 126 836 square kilometres big and borders on the Atlantic Ocean in the west. It has the smallest population (115 842) in the province. Agriculture and tourism are important economic sectors in the region (Northern Cape Province, 2015).

All the major role players in the Northern Cape music industry (see page 24) make up the target population of this study, which consists of three population elements namely music education, performance and business, the three main sectors of the music industry.

1.11.4 Sampling

Sampling is a process used in statistical analysis in which a predetermined number of observations are taken from a larger population. A population is the

whole group under investigation (Central University of Technology, 2011:152). In this study, the entire music industry is the population. Non-probability (or subjective) sampling was required when compiling the statistics of these sectors. Specific institutions such as schools, musicians and businesses were selected on the basis of the researcher's personal judgment that they would be likely to provide the required information.

In the music education sector, the selection of schools and related music education institutions was assisted by consultation with the Northern Cape Department of Education and the South African Society of Music Teachers. The music business sector is currently limited to a small number of formal enterprises, making sampling unnecessary. The various outlets of the performance sector were identified by consulting the SAEXPO³ register, where existing arts festivals are advertised. Formal performance venues exist only in the Frances Baard District Municipality. The following specific samples (or institutions, in this instance) within each population element were selected for further investigation:

1) Music education:

- o Frances Baard District Municipality: eighteen schools, two music academies and three field bands
- o John Taolo Gaetsewe District Municipality: five schools
- o Namakwa District Municipality: five schools
- o Pixley ka Seme District Municipality: three schools
- o ZF Mcgawu (Siyanda) District Municipality: eight schools.

2) Performance:

- o Frances Baard District Municipality: two annual arts festivals, two annual choir festivals, South African Police Band, William Humphreys Art Gallery, Northern Cape Theatre.
- o Siyanda District Municipality: one annual arts festival, one annual choir festival.

³ SAEXPO is an interactive website that contains a register as well as other related information of South African events such as festivals and expos (Deyssel & Swart, 2013).

3) Music business:

- o Frances Baard District Municipality: five music shops, two recording studios, one repairs and services business, two radio stations
- o Siyanda District Municipality: two music shops, one radio station.

1.11.5 Data collection methods

Historical information about the Northern Cape music industry was gathered using mostly non-interactive data collection methods: analysing archived and documentary sources such as newspapers, magazines, theses and other historical documentation. This method was used because both primary and (to a larger degree) secondary information sources are readily available. Specific historical information on music education in the province was extracted from records of the following institutions: the Departments of Education of the former Cape Province (pre-1994) and current Northern Cape Province (post-1994), the NCDSAC, the Field Band Foundation and KAM. Both interactive and non-interactive methods were required as most of the above mentioned entities are still actively involved in music education in the province.

With regard to the music education sector, interactive data collection methods, such as interviews and questionnaires, were used. The music teachers of the twelve schools and two music academies in the province that currently offer music tuition were selected for this purpose. The Field Band Foundation is currently running three field bands in the province. These bands play an important role in the music education sector and information about them was captured by means of a structured interview with the regional director. Private and informal teaching is not included in the study.

In collecting data regarding the performance sector, recent information with regard to participation and employment statistics was collected from festivals, churches and professional performing musicians by means of interviews and questionnaires. Similarly, records of other institutions which are involved in presenting live musical entertainment, such as the William Humphreys Art Gallery, the Northern Cape Theatre and the McGregor Museum, were examined.

All formal business ventures trading in the supply and service of music merchandise in the province were interviewed. This includes services other than teaching and live performance. There are eight music shops in the province: five in Kimberley, two in Upington and one in Kathu. Other business ventures include three community radio stations, one recording studio and two music instrument technicians, all working in Kimberley. Information relating to aspects such as sales, royalties⁴ paid to musicians and employment figures was collected using collection methods such as interviews and analysis of primary information sources.

In preparation for the design of a framework for an integrated music industry, the following four examples were used:

- Venezuelan El Sistema:

Due to the fact that El Sistema has been recognised internationally as one of the most significant examples of how music can contribute to social and economic upliftment, an abundance of literature is available on the topic. This model is described by conducting a literature study of available material.

- The music industry value chain in Senegal:

Pratt (2004:35-43) makes a number of useful policy recommendations to assist the Senegalese government to utilise music as a tool for economic growth and development.

- The music industry within the SADC region:

Comprehensive research has been done and reported on in the document "Promoting the culture sector through job creation and small enterprise development in SADC countries: The music industry", (Ambert, 2003) which will form the basis of a brief literature review on the topic.

- The trilateral music scheme of the Free State Province of South Africa:

⁴ A royalty payment is an amount of money owed to someone who has created something and owns certain rights therein.

The three-tiered music education and performance structure of the Free State province included the Free State Musicon, the Music Department of the University of the Free State (now the Odeion School of Music) and the Performing Arts Council of the Orange Free State (now the Performing Arts Centre of the Free State). Since this scheme has not been sufficiently documented, interviews were conducted with some of the surviving founding members and selected staff members of the above institutions.

1.11.6 Data analysis

Data analysis refers to various methods used in all sciences to help describe facts, detect patterns, develop explanations and form hypotheses (Canadian Government, 2015).

In the present study, the analysis of data collected was qualitative in most instances, and collection and analysis took place simultaneously. This was necessary to accommodate the views and thoughts of participants when interviews were conducted.

Quantitative analysis was used to a lesser degree, but specifically when statistics such as employment figures and levels of participation with regard to the music industry were collected. In these cases, descriptive tables, figures and graphs were used to present the data and make summations. Due to the fact that the volume of the required data is relatively small and that the study is mainly qualitative in nature, high-level statistical analysis was not required. Data was captured and processed using spreadsheets provided in software such as Microsoft Excel and Word. If the data was in numerical form, descriptive statistics were used to summarise patterns and make deductions. These deductions assisted in determining the current status of the music industry, which, in turn, formed a basis upon which to build further arguments towards designing a framework for the development of the industry. If data was not in numerical form, qualitative analysis was carried out, based on the experiences of the individual participants.

1.11.7 Chapter outline

The study consists of seven chapters which are divided into three main sections:

The first section (Chapters 2 and 3) takes a look at historic events which shaped the music industry in the Northern Cape. Current music industry trends and statistics are analysed and other examples of music industries and systems, both internationally and locally, are discussed as benchmarks. Qualitative and quantitative research methods were used in this research. Questionnaires were issued to various schools in the province, and interviews were conducted with key persons within the local music industry. Data was collected and conclusions were reached to form an impression of the industry. This impression was presented to delegates from the performance, education and business sectors of the Northern Cape music industry, in the form of an interactive workshop during which a SWOT analysis was drafted of the Northern Cape music industry.

The second section of the thesis takes a look at global and local examples of regional economic development theories by means of a literature study in Chapter 4. This information is used to develop a blueprint for a music industry. Chapter 5 highlights pertinent aspects derived from the various economic theories and establishes a link between them and the framework for the development of the music industry in the Northern Cape, based on the principles of best practice.

The third section describes the framework in context (Chapter 6), draws conclusions about the current scenario and makes several recommendations which are prerequisites for a successful music industry (Chapter 7).

This was the first time that research was conducted to establish the size of the music industry in the Northern Cape. In addition, this was also the first time that other industries, systems and economic theories have been used as benchmarks to develop a framework for the local music industry. The results of this research can be applied in the Northern Cape Province and may lead to a vibrant music industry that would contribute to economic growth in the region.

Chapter 2

Historical background and current state of the music industry in the Northern Cape Province

2.1 Introduction

The problem statement in the previous chapter states that the music industry in the Northern Cape is underdeveloped. This chapter will elaborate on the issues described in the problem statement (see section 1.9 above 1.8) by means of a literature review. Firstly, the aim is to track the historical events that led to the current invidious position in which the Northern Cape music industry finds itself. The inclusion of a historical perspective can be justified on the basis that it can shed light on the present and future, increase the understanding of humanity and provide an overview of the development of the music industry. Furthermore, it can contribute to an increased awareness of how decisions in the past have had long-term effects, positive and negative on the development of the industry. This historical perspective portrays the reality against which new ideas and innovations may be tested (Knowles, 2014). Secondly, valuable current industry information was collected through a combination of qualitative and quantitative research methods, which was required in order to avoid duplication and assist in applying best practice principles. Although there is no universally accepted method for designing a framework, it indisputably involves identifying and assessing current strengths as well as the assets required to successfully accomplish business goals and priorities, while keeping in mind weaknesses that might hinder this process (Alberta HR & Employment, 2007:1).

2.2 Historical developments that shaped music education and the music industry in the Northern Cape Province from the 1900s

The discovery of diamonds in Kimberley in the late 1860s led to the development of one of the first industrial communities in South Africa. By 1888, the myriads of individual diamond diggers were amalgamated under the control of De Beers Consolidated Mines. According to Le Roux-Allen (1990:39), rapid growth followed

at both the cultural and social level, and Kimberley transformed itself from a shanty town to a well-developed town with architectural gems such as the Kenilworth village, the Kimberley Town Hall, Regiment Drill Hall (originally the South African and International Exhibition Art Gallery), Dunluce, the Kimberley Club and many more. These were designed by leading architects such as Herbert Baker, Sydney Stent and Daniel Greatbatch. The combination of a largely cosmopolitan society (albeit mainly British colonials) and untold wealth for many fortunate diamond diggers brought about a rich cultural life that catered for all tastes.

Between 1860 and 1900, Kimberley was an important cultural centre hosting a variety of musical activities. Many great musicians, such as Coulson Tregarthen and Carl Rybnikar, visited the Diamond Fields in the 1890s (Le Roux-Allen, 1990:135-136). The hosting of an International Exhibition in Kimberley in 1892 provided a significant injection into the town's musical life. Many international musicians visited Kimberley for the event, and some of them stayed behind to settle in Kimberley, continuing their musical careers either in music education, performing or business in the "Diamond City". One of the first orchestras in the Diamond Fields, the Colesberg Kopje Amateur Band, was established in 1873 by J. Sanders. This was followed by many more orchestras and several musical activities dating back to 1875 when the Theatre Royal was opened in Kimberley (Le Roux-Allen, 1990:117). The Kimberley Musical Association was formed in 1901 with none other than Right Honourable Cecil J. Rhodes as the first chairman. The association formed a twelve-piece orchestra and a choir.

The University of the Cape of Good Hope was established in Cape Town in 1873, and several music students in South Africa made use of the Associated Board of the Royal Schools of Music (ABRSM) music examination system which was offered there (Weekly Free Press and Mining Journal, 1903:3). On 16 August 1894, the first candidate was examined in Worcester by Franklin Taylor. Later in the same year, others took their examinations in Paarl, Stellenbosch, Cape Town, Wynberg, George, Kimberley and Burgersdorp. Of the 269 candidates, 214 passed (UNISA, 2005:13). The University of the Cape of Good Hope was renamed the University of South Africa (UNISA) in 1916. The UNISA Music Department currently offers an extensive external music examinations system.

General education improved with the creation of the Kimberley non-denominational schools in 1887. During the first half of the 20th century, music education was limited to only a few schools on the Diamond Fields that offered music as part of the school curriculum. Some of the leading schools offered tuition in a few musical instruments such as piano, violin and singing, as well as in theoretical subjects. In some instances, attempts were made to establish specialised music schools, such as the Kimberley School of Music, which was established in 1902 and was situated at 110 Du Toitspan Road, Kimberley. The principal, Mr Sydney H. Rees, had a Licentiate in Music and offered lessons in voice production and singing, organ, violin and pianoforte. Theoretical subjects included harmony and counterpoint, orchestration, acoustics, form and tonic-solfa (Weekly Free Press and Mining Journal, 1902:5). A Kimberley branch of the South African Society of Music Teachers was formed as early as 1903, and remained active until the 1950s, to be replaced by individual memberships of the same society (Diamond Fields Advertiser, 1903:4). Music education thrived in the White schools (model C schools) during the apartheid years as more and more music teachers were appointed in the bigger cities and towns such as Kimberley, Upington, De Aar and Kuruman. The Diamond Fields Advertiser (1983:3) of 23 July 1983 reported on a course in modern and South African music presented by one of the lecturers in music from the University of Cape Town, Miss Helena van Heerden, to about eighty Northern Cape music teachers at Adamantia High School in Kimberley (1983:3).

Towards the end of apartheid in the early 1990s, economic pressures demanded the reduction of expenses on education, and music posts became an obvious target as music was considered a non-essential subject. The new South African government faced similar challenges after 1994, as limited financial resources had to be distributed evenly between races to serve all South African children equally. By 2000, the number of permanent governmental music posts in the Northern Cape Province was reduced to only two. The responses to the questionnaires for this research showed that in some of the more affluent primary schools, music teachers were appointed on an ad hoc basis, paid for by the parents. These events, together with recent, rather drastic curriculum

changes in the Further Education and Training (FET) Phase (Grades 10 to 12), effectively ended music education in its traditional form.

In Kimberley, the inherent resourcefulness and creativity of musicians came to the rescue at exactly the same time period. A group of enterprising musicians established the Kimberley Academy of Music (KAM) in a privately owned house in July 1994. Its subsequent success was a direct result of the vacuum that was created by the circumstances leading to the demise of music education in the Northern Cape and indeed the rest of the country. KAM was destined to grow into what became known as the first successful privately funded music education institution in South Africa (Temmingh, 1994). By 2005, KAM became a company incorporated under Section 21⁵ of the previous South African Companies Act and moved into the Old William Pescod building in New Park, Kimberley. One year later, three of its staff members became involved in the offering of tertiary music courses on behalf of the National Institute for Higher Education in the Northern Cape. In 2009, the Department of Sport, Arts and Culture of the Northern Cape Provincial government entrusted KAM with the task of establishing and administering the Mayibuye Academy of Music (MAM) in Galeshewe, Kimberley. By 2011, more than 500 students of all races were learning musical instruments, taught by fifteen music teachers at the two institutions (own research).

The Field Band Foundation⁶ established the first Northern Cape Field Band in 2000 in Galeshewe, followed later by two more: one in Greenpoint and another in Danielskuil. The Field Band Foundation involves more than 400 young people in the Northern Cape Province and contributes significantly towards music education in the area (Aaron, 2013).

⁵ These are companies that were registered in terms of Section 21 of the South African Companies Act to provide services and that do not intend to make, or to be judged by, the profits that they make. These "Associations Not for Gain" are often funded by donations and foreign funding. Section 21 companies resemble business-oriented (for profit) companies in their legal structure, but do not have a share capital and cannot distribute shares or pay dividends to their members. In 2008, the South African Companies Act changed the name to a Non-Profit Company.

⁶ A field band is a group of musicians and dancers performing together, usually in the open air in order to include formations and choreography as part of the performance. The Foundation identifies its role as follows: "To create opportunities for the development of life skills in the youth through the medium of music and dance" (Field Band Foundation, 2014:4).

2.2.1 Early music performances and infrastructure on the Diamond Fields

The thriving economy brought about by the diamond industry proved to be fertile ground for a prosperous music industry. The many playhouses and cultural societies presented regular productions of a large variety of art forms from poetry to plays, classical concerts to musicals and even opera, both indoor and outdoor. Many world-famous artists performed on the Diamond Fields. By 1890, seven opera companies had produced operas in Kimberley. Light comical opera, such as the works by the partners W.S. Gilbert and A. Sullivan and the operettas of J. Offenbach, were very popular amongst local audiences. Both local and imported productions were well attended and several artists made a living from these performances (Scheffler, 1976:108). Parker's Music Hall, dating back to 1871, was only one of a multitude of playhouses which graced the Diamond Fields during the 19th century. It was a 15 by 30-foot room in a shop on the banks of the Vaal River, made available by the then president of the Klipdrift Diggers' Association, Mr. Stafford Parker. He later moved this playhouse to a larger venue in Du Toitspan Road. The building was sold again in 1873 and became known as the Kimberley Hall for a short period (Diamond Fields Advertiser, 1983:5).

The history of Kimberley includes two Theatre Royals. The old Theatre Royal, a big wooden single-storey building with only a floor level and a stage, was built in 1871 in the village of Du Toitspan. It was moved to Du Toitspan Road in Kimberley in 1875, previously the Kimberley Hall. It had 450 seats and was very uncomfortable – cold in winter and hot in summer with its chairs close together. In 1887, it was sold for £265 to Mr Crouch, who removed the building and re-erected it in Beaconsfield, only to be sold again one year later for £1 350 to Mr Alexander of the Hotel Palmerton in Beaconsfield. The Lanyon Theatre was built on the corner of Du Toitspan Road and Jones Street in 1876 by two Americans and was known as the Loyal and Abell Hall. It was renamed The Lanyon in the same year to honour the Administrator of Kimberley, W.O. Lanyon. It could seat up to 1000 people and compared well with European theatres. Two years and seven months later, the terrain was bought by St. Cyprian's Church, and the theatre had to be demolished. The state-of-the-art Queen's Theatre was built in

Jones Street in 1887 at a cost of £8 000 and could seat 600 patrons. It burnt down in 1902.

The second and legendary Theatre Royal was initially designed by R.S. Day in 1887, but built according to a similar design by Daniel Greatbatch in 1897, at a cost of £15 000. The Greatbatch design was more suited to Kimberley's weather conditions and was similar to theatres built in London during the same time period (Du Toit, 2006:6). The opening night of the new Theatre Royal took place on 26 October 1897, with a performance of *The French Maid*. This production has been described as a musical comedy in two sets and was produced by Mr Ernest Searelles' London Opera. The new Theatre Royal boasted the largest stage in the southern hemisphere. Fire was a great hazard during the 1800s since most of the buildings were constructed of wood and other highly flammable materials. Candles and oil lamps, used before electricity, often fell over, causing fires. This was indeed the fate of the Theatre Royal. Tragically, it burnt down in February 1930. Other halls included the St. James Hall, Varieties Theatre, Kimberley Gaiety (later the Old Fellows Hall), Library Hall (later the City Hall), New Imperial Theatre, Alhambra Theatre and the Elton's Bijou Theatre (Le Roux-Allen, 1990:117).

2.2.1.1 Theatre Royal

By 1912, Kimberley had a thriving music industry and had taken the lead in the advancement of music amongst the urban areas of South Africa. Proof of this is reflected in the growth of its excellent musical associations, talented church choirs and individual devotees to music (Le Roux-Allen, 1990:134). The Theatre Royal was one of the most comfortable and best appointed theatres in South Africa, owned by the Kimberley Theatre Company Ltd. It boasted 800 seats and hosted the best artists who toured the sub-continent (Diamond Fields Advertiser, 1912:4). During the First World War, the Whistlers Company was formed (so named because their first production was called *Can you Whistle?*) with the aim of raising funds for the men at war. This was followed by more productions with the same purpose such as *Have You Seen?* (April 1918), *Frou, Frou from France* (July 1919), *Yes, Let's* (June 1918) and *The Sensors* (June 1920).

During the first three decades of the 20th century, the Theatre Royal continued to play host to many famous artists, productions and musical events. Visiting overseas performing companies never omitted Kimberley from their tour itineraries. In an attempt to escape the devastating financial effect of the depression of the 1930s, the theatre even ventured into screening “talkies”, a new invention of films with sound. Towards the end of 1929, plans were afoot to renovate the Theatre Royal at a cost of £15 000. On 13 February 1930, the Kimberley Town Clerk sent a telegram to the renovator with the following wording: “Please note theatre premises utterly destroyed by fire and proposals accordingly suspended”.

2.2.1.2 City Hall

The Roman Corinthian style Kimberley City Hall was designed by Scottish architect Fergus Carstairs Rogers and built in 1899. The venue was popular for a variety of events, and music was usually featured as an integral part of the proceedings. During the ensuing years, the Kimberley City Hall was used extensively for classical performances of local and visiting artists, such as the concert presented by the Cape Town Orchestra on 5 August 1926. Celebrated concert pianist Adolphe Hallis gave a piano recital in the Kimberley City Hall. This event was poorly attended, and concern was raised that cultural events of this nature were being neglected (Diamond Fields Advertiser, 1930:8). The Johannesburg Symphony Orchestra played an all-Beethoven programme on 25 November 1944, and in 1949, Harold Rubens, a talented young Welsh pianist, gave a recital in the Kimberley City Hall. The Kimberley Eisteddfod Society held its annual Grand Finalists’ Concerts in the City Hall. Visiting orchestras such as the Cape Town Municipal Orchestra (1959), the Symphony Orchestra of the Cape Performing Arts Board (1975) and the South African National Symphony Orchestra (1985) also used the venue (Diamond Fields Advertiser, 1949:7).

2.2.1.3 The Northern Cape Theatre

The Northern Cape Theatre (previously known as the Kimberley Theatre) was built in 1953, 23 years after the Theatre Royal burnt down. What was then the Northern Cape College Council decided to build a theatre, as opposed to a standard hall, to cater for college gatherings as well as musical and theatrical

productions of a large scale. Several visiting artists and companies subsequently performed in this state-of-the-art venue. On 4 November 1997, the College Council transferred the theatre to the Northern Cape Department of Sport, Arts and Culture (NCDSAC). Renovations had to be made before it could be used again. On 20 July 1998, re-opening plans were postponed due to the cancellation by South African music group Mango Groove. It was not economically viable for them to perform in Kimberley, and substitute group ABBA Gold could not get visas in time. Local singer Vusi Mahlasela, guitarist Louis Mhlange and the KAM Jazz Band were secured for the event that took place on 13 August 1998. During the following few years, the venue was used for many performances of different types (Diamond Fields Advertiser, 2008:4). Almost exactly ten years later, the Diamond Fields Advertiser of 17 October 2008 reported on alleged mismanagement and a lack of regular maintenance in an article entitled "Theatre Goes Bust". The Northern Cape Theatre was once more closed for business until further notice because of safety concerns (Diamond Fields Advertiser, 2008:4). At the time of this research attempts were afoot by the NCDSAC to renovate and reopen the venue once more.

2.2.1.4 Other venues and events of note

The annual Kimberley Music Week was inaugurated in October 1931 at the St Cyprians Cathedral by communal singing under the direction of Mr A.H. Ashworth. This was followed by an organ recital, a performance of Mendelssohn's Oratorio *Elijah* and a concert by the Kimberley Amateur Orchestra. Kimberley Music Week came to an end with the retirement of Ashworth a few years later (Diamond Fields Advertiser, 1931:4).

Many musical productions were brought to the Diamond Fields in the mid-20th century. In 1977, for example, several artistic productions were presented in Kimberley, such as a multiracial rock concert which was planned to be presented by local musicians in the St. Augustine's Hall in Kimberley. Being still under apartheid, the prevailing Department of Community Development required a permit for a multiracial concert, as such an event was considered a security risk. After much deliberation, only Europeans were allowed to attend the concert. In February 1977, Spotlight Promotions presented a live show at the Lyric Cinema in Kimberley with Cape Town pop group Flamingo. The Kimberley-based Black

group The Hornets appeared as guest artists. At the Galeshewe Social Centre, musicals were presented such as *Can You Take It?* (June 1977) and *Who is to Blame?* (Aug 1977), while the Galeshewe Recreation Centre hosted the music group The Stereos (Diamond Fields Advertiser, 1983:3).

Several attempts were made to establish at least one sustainable arts festival in Kimberley. Since the late 1990s, festivals such as Gatjol and Diamonds & Dorings have evolved. The latter is an annual festival on Easter Sunday, initially presented by the Sol Plaatje Municipality to create a platform for the development of the tourism sector. The management and hosting of the event has been outsourced to service providers outside of the province since 2010. Some of the requirements (as stipulated in the 2010 tender document) were an intention to stimulate economic growth and development in the area (Sol Plaatje Municipality, 2010:3). These include the following highly admirable deliverables:

- The service provider must collaborate with other local small, medium and micro enterprises (SMMEs)⁷ within the tourism sector.
- The event must stimulate new economic activity.
- Local and developmental artists must be a key focus area.
- Small businesses must participate in this event.
- Each business owner must receive training in relation to the event.
- Areas for selling food, drinks and crafts must be demarcated to enable businesses to sell and serve their clients optimally.

The Diamantveld Choir Festival was established by Esther Ford in 1983 to develop and promote choral music focusing on school choirs within the Diamond Fields area. The festival has taken place uninterrupted each year since then (Muller, 2014).

In Upington, the Rosyntjiefees was first held in 1992 and renamed the Kuierfees in 2001. During its initial years, the event was reliant on one big sponsor,

⁷ The development of SMMEs has been prioritised by the South African government because entrepreneurship is considered as the engine of economic development. The SMME sector has the potential to address socio-economic challenges. Without small business development, it is argued that economies stagnate, unemployment levels continue to rise and the general standard of living deteriorates (Makakane, 2014).

namely South African Dried Fruit. Later on, rather than one main sponsor, more sponsors became involved, each donating smaller amounts. Musicians of national and international stature are invited to perform at the festival (Bruwer, 2012).

In 2000, a group of private individuals established a non-profit company and held the first three-day-long Gariep Festival in Kimberley. This event grew both in size and stature to become the premier cultural event of the Northern Cape (Sutton, 2013).

The brand name "Music Week" was re-introduced by KAM in 2007 and a Music Week, presenting a musical performance every day for seven days, was held every year thereafter. This event was organised by the researcher for the first seven years.

2.2.1.5 Musical societies, associations and clubs

During the early years, Kimberley had a myriad of clubs and associations that flourished due to the large variety of performing arts on offer. The Kimberley Musical Association was established in 1900, and it presented three concerts per season and had a choir consisting of sixty members (Henderson, 1900:7). The Abantu-Batho Musical Association was established in 1920 for all musically inclined and talented native people (Diamond Fields Advertiser, 1920:3). A Music Club for Kimberley was established to add a link to the chain of cities in which local or visiting artists would be assured of audiences. Sir David Harris and Sir Ernest Oppenheimer were asked to be patrons (Diamond Fields Advertiser, 1926:8). The Kimberley Dramatic and Music Society was established in 1948 as part of the Department of Education Adult Education programme. This society gave four performances per year. One of its objects was to stimulate an appreciation for the arts (Diamond Fields Advertiser, 1950:7). Its membership, which at its inception was sixty, had grown to over 400 by 1951. The society offered two musical and two drama productions per year (The City of Kimberley, 1952:75). A Kimberley Music Society was formed in 1960. It hosted many visiting artists and arranged concerts featuring local musicians (Diamond Fields Advertiser, 1961:5).

The popularity and accessibility of choral music in the province culminated in the establishment of various organisations to co-ordinate activities. The first Northern Cape Chorale Association was established in 1984, followed by the Northern Cape Choirs in Contest and the Galeshewe Choral Society. The activities and functionality of these organisations were seriously hampered by the political unrest of the mid-1980s. By 1988, the first Northern Cape Choirs participated in the Old Mutual National Choir Festival. The province was well represented at this premier event every subsequent year. A centralised organisation to co-ordinate choral activities in the province was proposed by the NCDSAC, and the Northern Cape Choral Music Committee was then established in 2006. The committee soon disbanded because of logistical challenges such as the long distances between its members (Motsoare, 2013).

2.2.1.6 Performing groups and artists

According to Le Roux-Allen (1990:136), numerous orchestras, bands and singing societies existed before 1900, including the Colesberg Kopje Amateur Band, the Kimberley- and the Du Toitspan Philharmonic Societies, The Kimberley Orchestral Union, the Old-Fellow's Band and the Pirates Band. Military promenade concerts were very popular and featured the bands of the Diamond Fields Horse Brigade and the Victoria Rifles. Outdoor performances were held at the public park during the summer months. Entertainment flourished with many artists visiting the Diamond Fields both from within South Africa and abroad. The large number of choirs, music societies and concerts during this time is proof that music played a very important role in the lives of the residents. This high level of cultural activity amongst the mostly White English-speaking community placed Kimberley at the forefront of social and cultural development. The Kimberley Symphony Orchestra was inaugurated on 21 February 1923 under the baton of Wyllie Turnbull. The Kimberley City Choir began as the Newton Choir in 1968, comprising twelve teachers. In 1969, the mayor, Mr Shuttleworth, asked them to form a Kimberley Choir. By 1975, the choir had forty members and was under the leadership of Mr Frans Ter Haar. Later, the new conductor, Mrs Esther Ford, revived this choir and directed it until her retirement in 2008.

2.2.2 Music business in the early years

The active performance sector of the music industry was fertile ground for the music business sector during the early years. Handel House, one of the pioneers of culture and civilisation in Kimberley, was established 1897 in Stockdale Street. The owner, Mr S.C. Hawthorne, dealt chiefly with “pianoforte music, musical instruments of all sorts and a hundred and one articles of virtue” (Anon., 1902:94). Fred J. Woodward (organ and pianoforte tuner and repairer of 47 Jones Street, Kimberley) “kept all the musical equipment in pristine condition” (Henderson, 1900:68). In 1912, Mr. Sydney Rees opened the Sydney Rees’s Music Warehouse at 81 Du Toitspan Road, specialising in pianos, sheet music, gramophones and records (Diamond Fields Advertiser, 1912:4).

Carlton Furnishers (PTY) LTD, situated at 6-8 Jones Street, Kimberley, imported famous German pianos for R. Muller’s in the early 1970s. A few years later, the business was bought by Marilena Aliquo⁸ and renamed The Music Box. She had previously had a music business with the same name in Pietermaritzburg. The Kimberley business changed ownership a few times in the next decade until it was taken over by piano tuner and businessman Bernie van Schalkwyk, who renamed it Music Dynamic in 2005. A subsidiary business, Noord-Kaap Klavierdienste (Northern Cape Piano Services) operated from the same premises from 1986, servicing pianos in the province (Green, 2013).

Allen Horseman opened a music shop called Musikland in March 1984 (Noordkaap, 1984:38). A sound equipment factory opened in 1988 in De Beers Road, making Kimberley one of only two centres in the country where such equipment was made. Horseman opened the local factory with seven staff members (Diamond Fields Advertiser, 1988:16).

⁸ Marilena Aliquo was born in Cremona, Italy. Her aunt gave her a piano accordion and paid for her lessons, which was the start of a remarkable career as a performing musician. After recitals in Italian cities, she joined an all-girl piano accordion trio that travelled as far afield as Iran, where she spent a month at the Shah's court. At the age of twenty, she made a solo tour of African countries, including the Sudan, where she met her future husband. After marrying, the couple moved to South Africa and settled in Pietermaritzburg and later moved to Kimberley to start a music business.

2.3 The current status of the music industry in the Northern Cape

2.3.1 Music education sector

2.3.1.1 Department of Basic Education

The South African National Department of Basic Education Curriculum Statement, Grades R–12, was implemented during the period 2012 to 2014 and is a policy for learning and teaching in South African schools. The National Curriculum and Assessment Policy Statement (CAPS) is the policy for all the subjects listed in the National Curriculum Statement Grades R–12, which enables a learner to obtain a National Senior Certificate after completion of the full programme. Grade R is currently a preparatory year and is not compulsory. The first nine years of compulsory schooling is called Grade 1 to Grade 9, also known as General Education and Training (GET). It is divided into three phases: the Foundation Phase (Grade 1 to Grade 3), the Intermediate Phase (Grade 4 to Grade 6) and the Senior Phase (Grade 7 to Grade 9). The last three years (Grade 10 to Grade 12), known as FET, are not compulsory (Department of Basic Education, 2014:8). Table 1 illustrates how the thirteen years of the basic education system are divided into the various phases as described above:

Table 1: The South African schooling system (own creation)

GET									FET			
Gr R	Gr 1	Gr 2	Gr 3	Gr 4	Gr 5	Gr 6	Gr 7	Gr 8	Gr 9	Gr 10	Gr 11	Gr 12
Non-compulsory	Foundation Phase			Intermediate Phase			Senior Phase			Non-compulsory		
	Compulsory education											

- General Education and Training (Grade R to Grade 9):

Table 2 shows the different subjects that are taught in each of the three phases. From this diagrammatical presentation of the GET Phase, it can be deduced that music occupies an insignificant position with a low priority within the curriculum:

Table 2: Subject summary of the GET phase (Department of Basic Education, 2014) (own creation)

GET	Subjects	Study areas	Streams
Foundation Phase Grade R to 3	Home language		
	1 st additional language		
	Mathematics		
	Life skills →	Beginning knowledge	
		Personal & social well-being	
		Physical education	
		Creative arts →	Visual arts
			Performing arts: drama
			Performing arts: dance
			Performing arts: music
Intermediate Phase Grade 4 to 6	Home language		
	1 st additional language		
	Mathematics		
	Natural sciences		
	Social sciences		
	Life skills →	Religious and moral educ.	
		Physical education	
		Creative arts →	Visual arts
			Performing arts: drama
			Performing arts: dance
			Performing arts: music
Senior Phase Grade 7 to 9	Subject choice 1		
	Subject choice 2		
	Subject choice 3		
	Subject choice 4		
	Subject choice 5		
	Subject choice 6		
	Creative arts →	Music and dance, drama or visual arts	

- Foundation Phase (Grades R–3):

In CAPS, the core Foundation Phase subjects are languages (home and first additional), mathematics and life skills. The latter is an integrated subject that supports and strengthens the teaching of the other subjects. According to research done by the University of Cape Town's Centre for Social Science, the average school day in South Africa is 352 minutes long (Wittenberg, 2005:14). Approximately 25% of the available teaching time is devoted to life skills, and it has been organised into four study areas:

- beginning knowledge
- personal and social well-being
- creative arts
- physical education.

The creative arts study area receives roughly 25% of the teaching time available for the subject life skills. It exposes learners to four art forms, namely dance, drama, music and the visual arts. These are organised into two parallel and complementary streams: visual and performing arts (dance, drama and music). In the final analysis, music receives around 1.7% (6 minutes per day) of the total teaching time (Department of Basic Education, 2010a:6-8).

- Intermediate Phase (Grades 4–6):

The following six subjects are taught in the Intermediate Phase:

- o home language
- o first additional language
- o mathematics
- o natural sciences (including technology)
- o social sciences
- o life skills (creative arts, physical education and religious and moral education).

As with the Foundation Phase, music tuition at this level is situated within the life skills study area. It shares approximately 14.5% of the available teaching time, along with physical education and religious and moral education. Less than 5% (16 minutes per day) of available teaching time is devoted to music in the Intermediate Phase (Department of Basic Education, 2012a:10-15).

- Senior Phase (Grades 7–9):

The Department of Basic Education stipulates that schoolgoing learners must select seven subjects in the Senior Phase, which must include creative arts. Learners must select any two of the following disciplines: music, dance, drama or visual arts. The curriculum for music in the Senior Phase covers three topics in every school term, namely music literacy, listening and performing. Forty-five minutes per week, or nine minutes per day, are allocated for this (Department of Basic Education, 2010b:27, 86).

- Further Education and Training (Grades 10–12)

The number of subjects chosen by learners remains the same in FET as in the Senior Phase, that is, seven. The subject music is divided into three streams, namely Western art music, jazz and indigenous African music. A school may select and specialise in one or more of these streams. The minimum performance levels in both practical and theoretical music required in Western art music and jazz are comparable with external musical grading institutions such as the University of South Africa⁹. Minimum standards for indigenous African music are determined by the Department of Basic Education. Table 3 shows the practical music skill level expressed in grades, with Grade 1 being the least, and Grade 8 the most advanced levels, as required by the Department of Education.

Table 3: Minimum standard for music in the Department of Basic Education

School grade	Performance level	UNISA
Grade 10	Elementary	Minimum Grade 2
Grade 11	Intermediate	Minimum Grade 4
Grade 12	Advanced	Minimum Grade 5

To place these levels into perspective, entrance requirements for a BMus degree at the University of the Free State requires a UNISA grade 5 level for music literacy and grade 7 or equivalent level for music performance (Department of Basic Education, 2012b:6).

The study of music aims to develop the ability to perform a variety of vocal and instrumental music in a group and solo context. In addition, learners are exposed to the written and aural language of music through reading and writing music. Furthermore, the subject aims to develop the ability to create new music through improvising and composing, using both conventional and non-conventional compositional techniques. The content also enables learners to become informed listeners of music by actively listening to a variety of

⁹ The graded examination system for practical and theoretical music of the University of South Africa (UNISA) is structured the same as the British systems of the Royal Schools of Music and Trinity College of Music, London. It has been used as a benchmark by South African music teachers for several decades. The system provides for the classification of eight musical grade levels, followed by Diplomas, specialising in various music fields.

music ranging from Western, indigenous and popular music. If learners choose to study Music in the FET band, special effort should be made for them to develop the ability to perform instrumentally or vocally at an elementary level and have a good sense of rhythm and pitch. They should also be able to read staff notation by the end of Grade 9 (Department of Basic Education, 2012c:12).

2.3.1.2 Music tuition in schools

The Northern Cape Province is divided into 5 district municipalities and subdivided into 27 local municipalities (Northern Cape Province, 2015). The district municipalities are:

- Frances Baard District Municipality (Kimberley)
- John Taolo Gaetsewe District Municipality (Kuruman)
- Namakwa District Municipality (Springbok)
- Pixley ka Seme District Municipality (De Aar)
- ZF Mgcawu District Municipality (Upington).

According to Statistics South Africa (2004:45), there were 438 schools in the Northern Cape Province in 2004. The researcher gathered specific information with regard to the music education sector by means of a questionnaire and distributed these to 70 (16%) of these schools. These included 26 schools in Frances Baard, 19 in ZF Mgcawu, 14 in John Taolo Gaetsewe, 6 in Pixley Ka Seme and 5 in the Namakwa Districts. The results of these questionnaires have shown that there are currently 32 music teachers employed at these schools, of which only 15% are funded by the government. Of the 32 music teachers, 26 are appointed on a part-time basis (less than 25 working hours per week) and 5 on a full-time basis. This is about 0.5% of a total of 6 076 teachers in the province (Statistics SA, 2004:47).

Looking at these figures, it becomes clear that the subject of music is currently seriously neglected. A comparable subject, such as tourism, is taught by approximately 43 government-employed teachers in the province. This could be

one of the reasons for the small number of learners who choose music either as one of their subjects or as an extra-curricular activity.

Formal instrumental music tuition in schools is offered only in the Frances Baard and ZF Mcgawu districts. In the other three districts of the province, instrumental music tuition exists only as a private and informal activity, but organised choral activities can be found in many schools in all districts. The statistics in figures 6 and 7 below were collated from data collected by the researcher:

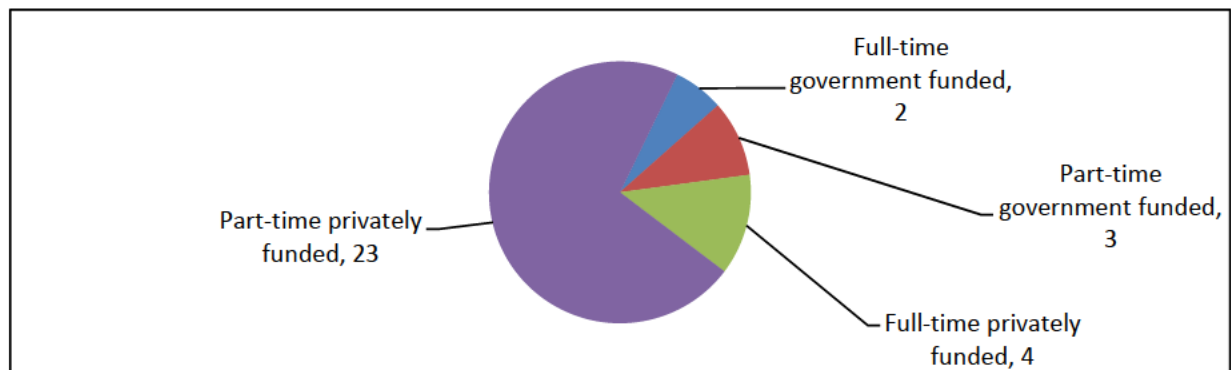


Figure 6: Music employment figures of the schools in the Northern Cape (own research)

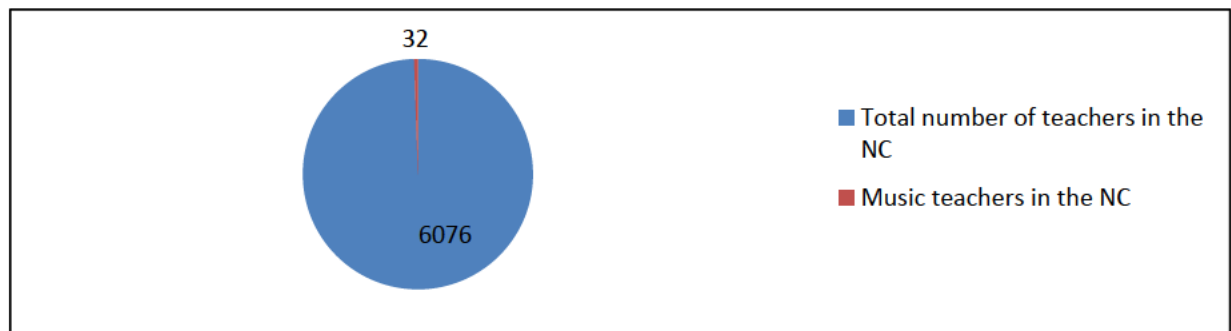


Figure 7: Total number of teachers in the Northern Cape (own research)

According to the results from the questionnaires and Statistics SA (2004:43), there are approximately 980 out of a total of about 209 000 learners in the province who take formal instrumental music lessons at school, of which only 4.38% take music as one of their subjects in the FET phase.

2.3.1.3 Music academies

The Kimberley Academy of Music is a private non-profit company which employs sixteen staff members: six on a full-time and ten on a part-time basis. A Board

of Directors governs two music academies, one in the Kimberley city centre, KAM¹⁰, and MAM in the neighbouring township called Galeshewe. The questionnaires revealed that the latter was established to cater for previously disadvantaged people of Kimberley. Figure 8 shows the number and different types of staff members at these institutions:

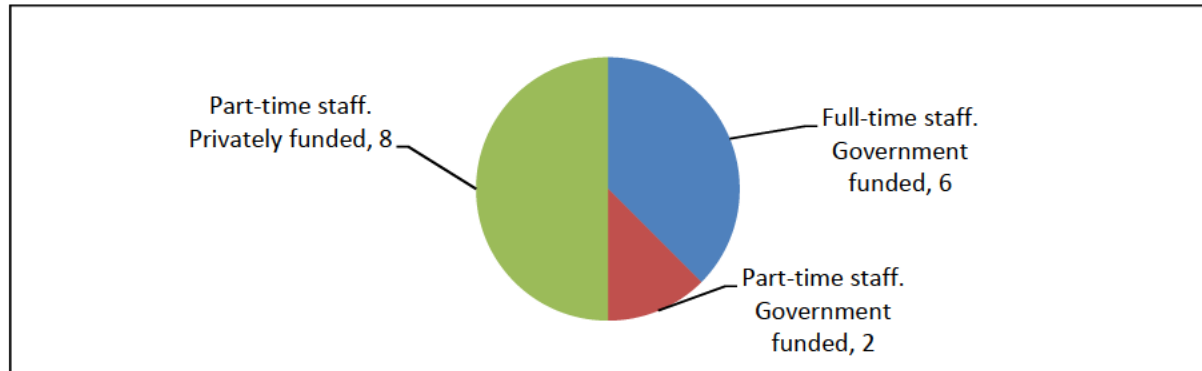


Figure 8: Music employment figures at music academies (own research)

The Department of Sport, Arts and Culture of the Provincial Government provided funding, through a service-level agreement with KAM, for the salaries of eight MAM staff members. Currently approximately 550 students receive musical training at these two institutions (Klemp, 2013).

The core business of these two schools is to promote music and to provide music education through individual and group lessons as well as school demonstrations. As part of the students' training, they provide entertainment in the form of concerts, festivals, background music and providing musicians for school musical productions. KAM gave more than 50 public concerts in 2012, varying from term concerts with choirs and orchestras to smaller concerts with solos and ensemble items. The most important event on the KAM calendar is the annual Music Week. In 2012, this event was held for the sixth time. Music Week was sponsored by the National Arts Council and Old Mutual. During this week, seven concerts were presented. These include a Heritage Day Picnic Concert, a Solo Competition and various other formal concerts, all presented by the staff and students of KAM. In addition, KAM regularly hosts national and international music workshops of

¹⁰ The company shares the name with the music institution. Efforts are underway to change the company name in order to distinguish between the two.

various types. At such occasions, many musicians from around the country and from abroad visit Kimberley to attend these events (own research).

As a non-profit company, the board, manager and staff of KAM design and plan projects and programmes and then pair them with suitable sponsors. Beneficiaries of sponsorships are deserving and financially challenged students. KAM has provided employment to more than 50 people in its two decades of existence. Since its inception in 1994, approximately 20 KAM-trained students furthered their studies and entered the music industry in Kimberley and in the rest of South Africa (Klemp, 2013).

2.3.1.4 The Field Band Foundation

According to the regional project officer, Mr Peter Aaron, there are currently seven projects (field bands) in the Northern Cape, all of them funded entirely by the private sector and international donors. There are projects in Kuruman, Danielskuil, Kathu and Postmasburg, as well as three projects in Kimberley. Each project has a minimum of 250 participating children divided into two groups of 125 each. They receive at least four hours of tuition per week, taught by five music tutors per project. At any given time, almost 2000 children and 66 employees are involved in this programme. Three of these tutors are employed on a full-time basis (Aaron, 2013). Figure 9 shows the number and different types of staff members employed at by the Field Band Foundation in the Northern Cape:

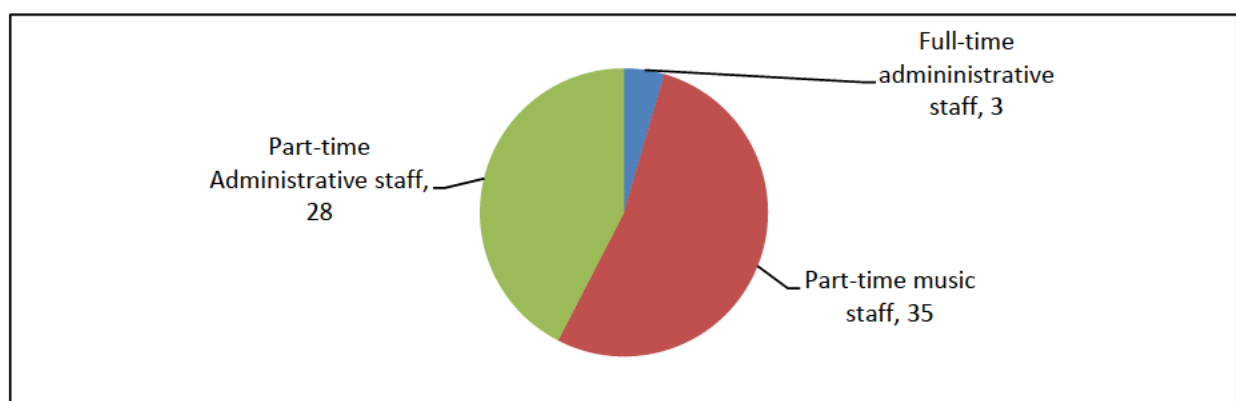


Figure 9: Employment figures of the Field Band Foundation in the Northern Cape (own research)

2.3.1.5 Music in Higher Education

The South African National Department of Higher Education consists of 6 universities of technology, 19 traditional and/or comprehensive universities and 50 colleges for FET (Department of Higher Education, 2012). On 15 January 2014, the Minister of Higher Education, Mr. Blade Nzimande, announced that all FET colleges would be renamed Technical Vocational Education and Training (TVET) colleges. The Northern Cape Province has two FET or TVET colleges. One of the two newest universities established post-1994, the Sol Plaatje University,¹¹ is situated in Kimberley. Training in music or skills development in related areas of the music industry are not offered at this educational level in the province.

2.3.1.6 Summary of the music education sector

From the above statistics, it can be deduced that there are currently 114 individuals employed in the music education sector of the Northern Cape. The questionnaires showed that of the total number of employees, only 13 ($\pm 11.5\%$) are funded by the government. Figure 10 shows the number and different types of staff members employed in this sector:

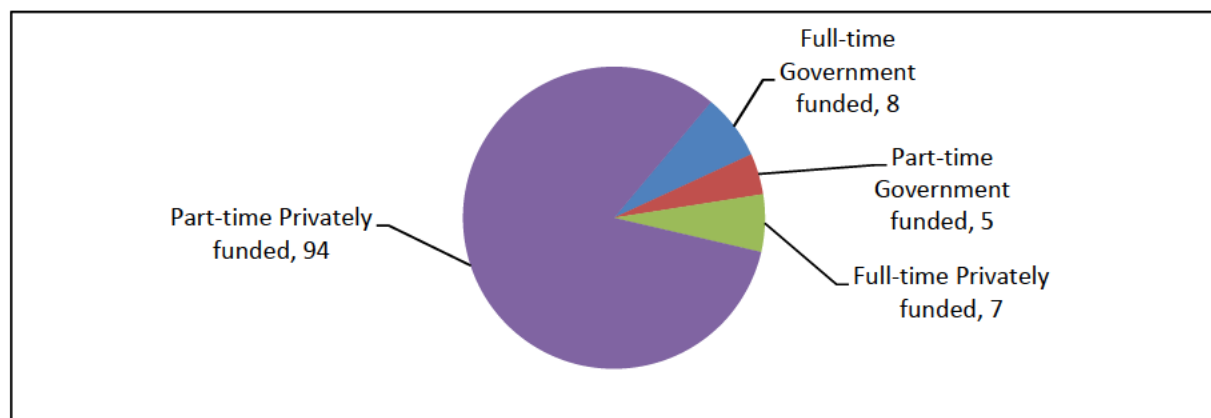


Figure 10: Summary of employment figures in the music education sector (own research)

Music education appears in the curricula of both the GET and FET phases of the South African school curriculum. In the Northern Cape Province, there are no specialised music education institutions that are run by the Department of Basic

¹¹ South Africa's newest university was established in 2013 and named after Solomon Tshekisho Plaatje (9 October 1876 – 19 June 1932), a South African intellectual, journalist, linguist, politician, translator and writer.

Education. Furthermore, the new Sol Plaatje University will in all probability not be offering tertiary programmes in music in the foreseeable future (Nkosi, 2013).

The questionnaires revealed that approximately 3 500 Northern Cape schoolgoing learners are learning to play musical instruments through formal music tuition at a school, a music academy or a field band. Forty-three take music as one of their grade 12 subjects. According to the 2012 Subject Enrolment List for public schools in the Northern Cape, 2600 learners have chosen tourism and 64 visual arts as a school subject (Northern Cape, 2012). Figure 11 illustrates the difference between learners taking music as a subject versus those who take music on an extra-curricular basis:

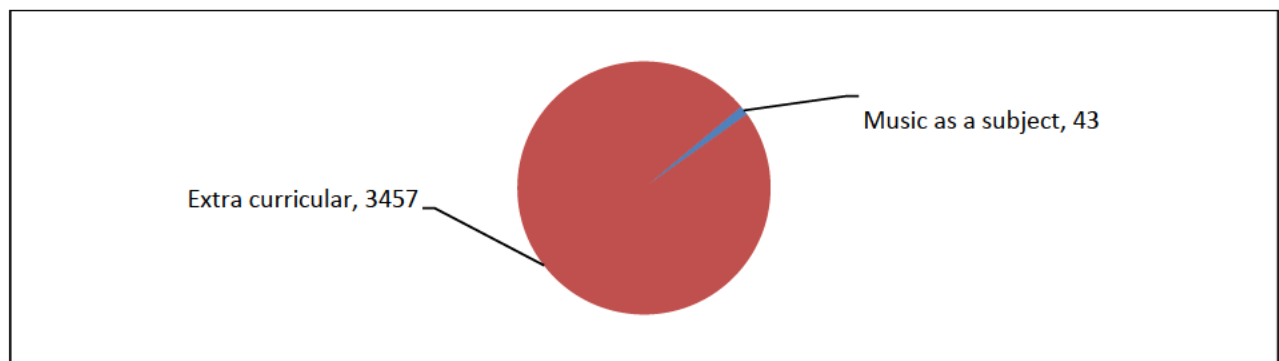


Figure 11: Instrumental music students in the Northern Cape (own research)

Although the private sector has made significant efforts to establish music education during the past few years, it has focused mainly on musical performance and theory, completely ignoring the supporting technological, financial and institutional aspects of the music industry. It can therefore be assumed that the current state of the music education sector in the province is not adequately aligned with the key principals of economic growth and development.

2.3.2 Music performance sector

I embarked on a process of research by means of interactive interviews with strategically chosen people in the Northern Cape Province during which information related to the music industry was gathered. Specific persons were selected because of their leadership positions or involvement in the organising of high-profile events. Festivals seem to be very popular in the Northern Cape, and

the main organisers of the Gariep Kunstefees, Kalahari Kuierfees, Diamonds and Dorings Music Festival, Diamantveld Choir Festival and Kalahari Desert Festival were approached. Festivals and events organised by the NCDSAC are very prominent and information was provided by a senior official at the Department.

2.3.2.1 Current community festivals in the Northern Cape Province

- Gariep Kunstefees:

The Gariep Kunstefees (Arts Festival) is an annual event which is held over a period of three days, usually at the beginning of September. The Festival is held in Kimberley and boasts an impressive line-up of artists, a craft market and an entertainment park. Musicians from all over the country consider this an important event which forms part of their regular income, and they value it as a marketing tool. In 2012, this festival included 98 musical performances, engaging the services of more than 300 musicians. Contractual obligations stipulated that income from performances should be split in a 60/40 ratio between the artists and the festival. The artists must cover their own operational costs.

More well-known musicians often negotiate a fixed amount, which is usually subsidised by the festival. At the 2012 festival, the musical performances cost almost four times more than what was generated in ticket sales, and had to be subsidised by income generated from gate fees and external sponsorships. Approximately 40% of the musicians were from the Northern Cape, albeit lesser known names. According to the artistic director of the festival (Sutton, 2013), employing Northern Cape musicians is problematic because they often charge exorbitant fees even if they are relatively unknown artists. They are unreliable, they behave unprofessionally and attendance of their performances is poor.

Additional forms of income for all musicians during the festival are limited to royalties paid by the two radio stations that broadcast from the festival terrain. No royalties are paid for performances because most musicians perform their own music. Some of the more established musicians sell compact discs and other products at their performances. Several general stall owners sell similar products at the open-air market. The festival employs five full-time staff members and three assistants. During the three days of the Festival, approximately 600 part-

time workers are employed. The service provision of infrastructure and other services is outsourced to companies outside of Kimberley. Local service providers are available but their services are usually inadequate for the requirements of the festival and/or they tend to overcharge. A similar phenomenon was also prevalent during the annual Diamonds and Dorings Music Festival (see section 2.2.1.4 above). There is a perception amongst local service providers that the Gariep Kunstefees and other similar events are highly lucrative, and this encourages them to charge exorbitant fees. In reality, the festival is a non-profit-making entity which relies on about 30 sponsors to help cover costs.

- Kalahari Kuierfees:

The Kalahari Kuierfees is held each year in Upington on the banks of the Orange River. Music plays a major role during the festival, and every year shows growth with new musicians performing. During the 2012 festival, four theatre productions were produced on the main stage, two of which were musical productions. More than 30 local (South African) musical productions were presented in the informal tent area. Of the 37 shows which were presented on an island known as Die Eiland, in the middle of the Orange River, 10 were musical productions. Music played an important part in the entertainment of children. 'Sing en Dans Saam' ('Sing and Dance Together') was performed 15 times in the Children's Tent. Various local bands capitalised on the opportunity presented by the festival and performed in and around Upington.

According to the festival's chairman (Bruwer, 2012), performers from outside the ZF Mcgawu District get more support than local artists, but they cost substantially more than they generate in ticket sales. Although Afrikaans music is still very popular, it has become evident that the public is ready for a new style of music.

The recent move towards alternative Afrikaans music could be attributed to this and is very popular. However, stalls and other types of entertainment are becoming more important than the music. Approximately 15 000 to 20 000 people visit the festival every year, with the majority of support coming from the Coloured community of the area.

- Diamonds and Dorings Music Festival:

Presented by the Northern Cape Government and promoted by outsourced producers, this festival is a one-day event which takes place at the Langleg resort, 15km north of Kimberley. It runs from midday on a Sunday until 12.30 am on Monday morning. Since its inception in 2007, many famous South African music groups and individuals have featured, including Hugh Masekela, Freshly Ground, The Lucky Dube Band and Mbombela Jazz. Early in 2013, the event was shrouded in controversy due to its exorbitant cost and the fact that the hosting was outsourced to a company from outside the province. According to the Sol Plaatje Municipality, local entertainment companies often do not adhere to the procurement rules of the municipality (Luphahla, 2013).

- Diamantveld Koorfees:

This popular choir festival is a project of the Diamantveld High School in Kimberley. Each year, approximately 30 school choirs, mostly from the Kimberley area, participate in this three-day event. All the organisers work on a voluntary basis (Botha, 2013).

- The Kalahari Desert Festival:

The first Kalahari Desert Festival was held in 2012. It is a convergence of dance, music and history in the Kalahari Desert, hosted by South Africa's #Khomani San. The Festival celebrates the rich diversity of indigenous groups through the arts (SA San Institute, 2013).

- Other Festivals in the Northern Cape:

Approximately 20 festivals of different types take place in towns and cities across the Northern Cape each year (Deysel & Swart, 2013:14-61). These focus mainly on aspects such as agriculture, food and engineering. Some of these include music performances as part of their programmes, or present ideal opportunities to include music with minimal adjustments to their programmes.

2.3.2.2 Northern Cape Department of Sport, Arts and Culture

The NCDSAC is a ministry of the Provincial Government. It promotes, supports, develops and protects the arts, culture and heritage of South Africa. The heritage sites, museums and monuments of the province also reside under this ministry.

In the 2013 national budget, the department received an appropriation of R9.1bn. The department's vision is to create a thriving arts, culture and heritage sector that contributes to sustainable economic growth and development. Its mission is to enhance job creation by preserving, protecting and developing arts, culture and heritage (Department of Arts and Culture, 2013). The nine provinces of South Africa each have their own Provincial Department of Arts and Culture, which falls under the National Department of Arts and Culture.

One of the organisational strategic objectives of the NCDSAC is to promote respect for cultural diversity and to advance artistic disciplines into viable industries. The NCDSAC programme is responsible for the three arts and culture facilities, namely the Mayibuye Centre, Warrenton Cultural Resort and the Northern Cape Theatre. The department's mandate includes the development of visual arts, crafts and performing arts by providing assistance to projects, programmes and community arts centres (CACs). In addition, it must ensure the proper functioning of statutory bodies, such as the Provincial Arts and Culture Council (Northern Cape Province, 2012b).

- Provincial Arts and Culture Councils (PACCs):

PACCs are governed by councils whose members are appointed by the Provincial Government's Members of the Executive Council (MECs) for the various Departments of Sport, Arts and Culture. The programme priorities of the various PACCs include reviewing and defining their mandate and functions, founding legislation, institutional configuration, funding models and human and financial resource management. Their duties include monitoring the progress and impact of their projects.

At present, the Eastern Cape Province has a completely autonomous Provincial Arts and Culture Council (ECPACC), which receives the largest allocation of funding of all provinces. ECPACC was established by means of Act No. 6 of 2000 (Eastern Cape) and is listed as a schedule three public entity of the Department of Sport, Recreation, Arts and Culture (ECPACC, 2013). The PACCs of the Free State, Gauteng, Western Cape and Kwa-Zulu Natal Provinces are functioning adequately as semi-autonomous organisations. In the remaining four provinces

(Limpopo, Mpumalanga, North-West and Northern Cape), the PACCs have either not been established or are basically dysfunctional (NAC, 2013).

- Northern Cape Has Talent:

Northern Cape Has Talent is an initiative of the MEC for the NCDSAC. The first competition took place during 2012/13, when a team of 20 organisers, adjudicators and technicians travelled across the whole of the Northern Cape Province for five months. The main purpose of the competition is to hunt for talent in all art forms. According to the organiser of the competition (Rapoo, 2013), the interest was overwhelming. More than 10 000 people offering 1 128 acts entered the first competition, with the majority of participants coming from the rural areas of the province.

Due to the levels of poverty and unemployment in the province, entrance to participation in or attendance of the competition is free. This means that the event generates no financial income, but rather focuses on upliftment and opportunity for exposure. The project's budget was R1.2m, and of that amount 40% was spent on transport, 35% on meals and accommodation, 15% on prize money and only 10% on employment (Rapoo, 2013).

- Other governmental events:

In adherence to its mandate, the Northern Cape Provincial Government, through the NCDSAC, presents celebratory festivals on the six national public holidays in the South African calendar. On each of these occasions, music plays an important role and musicians are hired to provide live music. In addition to this, events such as the annual Writer's Festival and Africa Day are held, requiring live music (Rapoo, 2013).

2.3.2.3 Choral activities:

Choral music is one of the most popular and accessible genres of music making of the people of the Northern Cape. This cultural activity is one of the most significant common denominators amongst people of different races. Participation can be divided into three main segments, namely school, church and community choirs.

According to the music adviser at the NCDSAC, most choirs in the province, and indeed the country at large, aspire to participate in the Old Mutual National Choir Festival. Each year, more than 2000 choristers from every province in the country and Swaziland gather at one place to compete for the top position in the competition. More than 6000 loyal supporters, many of whom travel from far, make up the audience. Durban won the bid to host this prestigious event in 2011 and 2012. Participation of choirs from the Northern Cape declined from 25 a few years ago to only 20 choirs in 2012 (Motsoare, 2013).

The Diamantveld Choir Festival is another popular event that takes place annually in Kimberley, and focuses on the promotion of choral music in the Diamond Fields area (Kimberley). In 2013, 30 choirs participated in this three-day event (Botha, 2013).

2.3.2.4 Church music

Music plays an integral part in most religions in South Africa. It is no different in the Northern Cape Province, where thousands of people participate in church music activities. This market segment contributes to the majority of sales of musical instruments and equipment at Pro Music, one of Kimberley's oldest and most important retailers (Van Schalkwyk, 2013). In some instances, musicians are paid on a part-time basis to lead the music during worship.

2.3.2.5 Professional performing musicians

The Police Band in Kimberley is the only institution that employs performing musicians. The band has 17 members employed on a full-time basis. A small number of musicians in the province supplement their income by playing live background music for events such as weddings and private, corporate or governmental functions (Tiltman, 2013).

2.3.2.6 Summary of music performance sector

Responses to the questionnaires showed that the music performance sector in the Northern Cape employs a total of 48 individuals. Seventeen of them are full-time positions and funded by the National Government. The remaining 31 are in the private sector. Figure 12 illustrates the employment figures of both the

government and the private sector in the performance sector of the music industry:

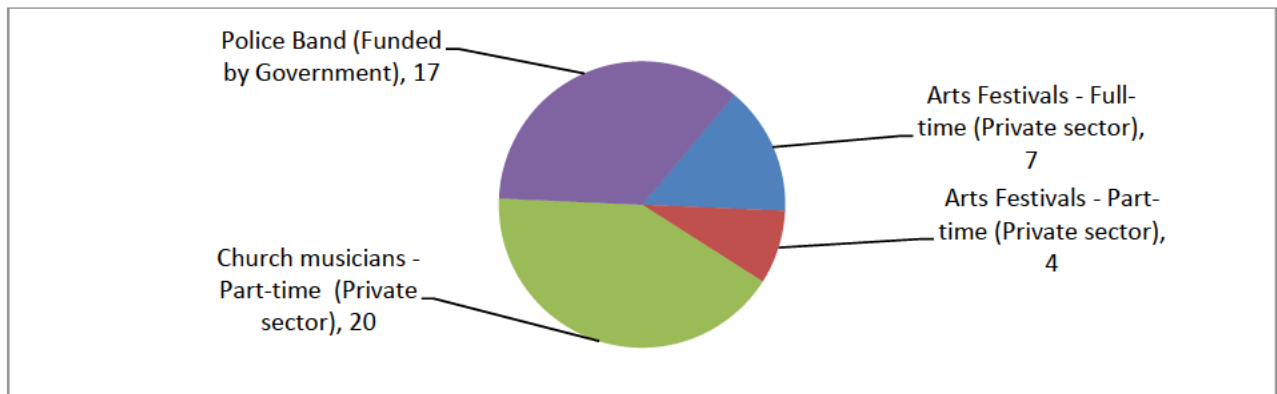


Figure 12: Employment figures of the music performance sector in the Northern Cape Province (own research)

2.3.3 Music business sector

2.3.3.1 Music shops

- Pro Music:

Music Dynamic became Pro Music in 2012, under the new ownership of Mr. Altu van Schalkwyk, the son of the previous owner. It is situated in Du Toitspan Road, Kimberley, where it has been located since the early 1970s. The shop currently employs four full-time and two part-time staff members. Both electronic and acoustic musical instruments are sold. According to the owner, electronic equipment and drum kits are the most popular merchandise sold (Van Schalkwyk, 2013).

- DV Village:

DV Village, the only other general music store in Kimberley, started doing business in November 2008 as DeeVee's Music. It was taken over by the Paul Bothner's Group¹² in 2012. The Kimberley branch is one of nine branches countrywide and is also the smallest branch. There are three full-time employees and the shop sells musical equipment and sheet music (Van Rooyen, 2013).

¹² Paul Bothner's Music was established in 1903 in Cape Town and is the importer of some of the more well-known brands in musical equipment.

- Musiekhoekie:

Musiekhoekie is the only music shop in Upington, the capital of the ZF Mcgawu District of the province. A variety of musical equipment can be obtained there. The business was established in 1973 and provides employment for one part-time and two full-time employees (Vercueil, 2013).

- Musica:

The first Northern Cape branch of the well-known South African music company Musica opened its doors to the public in 2000 in Jones Street, Kimberley. Since then, two more branches have opened in other parts of Kimberley. There are two more branches in the province, one in Upington and another in Kathu. Merchandise such as CDs, DVDs and music accessories (e.g. earphones, portable speakers, etc.) are sold in these stores. Each branch employs four full-time staff members and three part-time staff members. According to the branch manager of the Diamond Pavilion Mall Musica, Mr Chris van der Linde (2013), the most popular genres in Kimberley are Afrikaans, followed by rock and pop and thirdly, local gospel. He further states that, although the industry is still profitable, music piracy such as illegal internet downloads and pirate vendors in and around the Kimberley central business district pose a serious threat to the profitability of the business.

2.3.3.2 Recording studios

- The Noise Recording Studio:

The Noise Recording Studio (previously Warriors Recording Studio) started as a home industry in Kimberley in 2000. Two qualified specialists are employed on a full-time basis and a small number of session musicians are hired on an ad hoc basis to provide backing for solo artists. The studio has a limited number of regular customers, built up over a number of years, some of whom are from outside the province. According to business owner, Mr Etienne van der Merwe (2013), the current market in the province is too small to be sustainable for a recording studio.

- Other studios:

The NCDSAC started a studio, called TNI Recording Studios, in Kimberley in an attempt to contribute to Black Economic Empowerment. Other smaller recording

studios, such as T-Records and Malgraf Recording Studio, are run by private individuals in and around Kimberley and Upington. These institutions are unregistered and provide a semi-professional service to local musicians (Kau, 2013).

2.3.3.3 Broadcasting in the Northern Cape Province:

- Radio Teemaneng:

Radio Teemaneng¹³ started broadcasting in November 1995 as a community radio station to provide media access to the previously disadvantaged community of the Northern Cape. The signal has a 150km radius from Kimberley, which is the source (Kau, 2013). The station currently has a listenership of approximately 134 000, mostly within the Sol Plaatje municipal area (Kimberley), comparing relatively well with OFM, a commercial radio station in a neighbouring province with a listenership of approximately 500 000 (Stroebe, 2013). In accordance with its license agreement¹⁴ (Independent Communications Authority of South Africa (ICASA), 2006:15), figure 13 demonstrates its commitment to music:

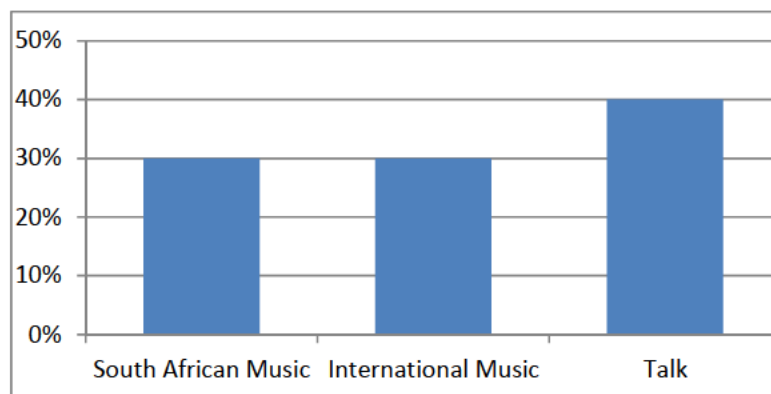


Figure 13: Radio Teemaneng's 2013 broadcast schedule distribution (Kau, 2013)

In an attempt to prevent piracy, Radio Teemaneng is prohibited from broadcasting music that is not registered with the South African Music Rights Organisation (SAMRO). Due to the fact that no musicians from the Northern Cape Province are registered at SAMRO, their music cannot benefit from being broadcast by their local radio station. An initiative called Eksê Mamela was launched in 2003 by Malik Kau to educate musicians with regard to music rights

¹³Teemaneng is the Setswana word for diamond.

¹⁴ The license agreement is governed by the ICASA. All broadcasts are recorded and the above is verified by ICASA.

through workshops and information sessions. This initiative lost impetus due to a lack of funding and support.

Financial compensation in the music industry is based on a system of royalties which are payable on each record sold by a record company, who then in turn pay the artist. According to SAMRO CEO Gregory Zoghby, "A royalty is a payment or fee that is due to people who have created something and own certain rights therein, such as compensation for the usage thereof by others" (Shaw, 2010:128). Shaw (2010:82) further states that a royalty must be paid where users broadcast a sound recording. This is commonly known as needletime.

By their own admission, Radio Teemaneng has never contributed any monies for royalties to SAMRO or the South African Music Performance Rights Association (SAMPRA)¹⁵. This is because firstly, most of the 179 community radio stations in South Africa are registered as Section 21 companies without financial gain. Payment of royalties is therefore not possible. The collection of royalties by SAMRO is geared towards community radio stations. Secondly, CDs are supplied to community radio stations by the various South African record companies. New artists make demo CDs and record companies distribute them to community radio stations at no cost for broadcasting. Community radio stations therefore play an important role in promoting new and up-and-coming artists.

Radio Teemaneng further employs 15 full-time staff members on fixed term contracts and 37 part-time staff members are employed for three hours each per day. Due to the unsatisfactory financial position brought about by its non-profit-making status as well as to the fact that it loses major advertising revenue to OFM, the salaries are far too low to be economically viable (Kau, 2013).

Many community radio stations are represented by the National Community Radio Forum (NCRF), which was formed in 1993 to lobby for the diversification of

¹⁵ SAMPRA is a collective licensing society of copyright owners of music sound recordings. Its mandate is to collect and distribute royalties to the members of the Recording Industry of South Africa (RiSA) whenever their recordings are broadcast, diffused or communicated to the public (Info is info, 2010)

broadcasting and to promote the development and growth of the community radio sector. It has 120 members, of which 88 were on air in 2012. The NCRF is currently negotiating with the government regarding the dilemma surrounding royalties. Possible solutions are that all community radio stations pay an affordable flat rate or that the Department of Communication (government) should subsidise community radio stations to enable them to pay royalties.

- Other Radio Stations in the Northern Cape Province:

There are currently three other community radio stations in the Northern Cape: Radio Kaboesna in Calvinia, Radio Riverside in Upington (NCRF) and X-K FM Online Radio.

Radio Riverside was launched in 1999 in Upington. The name "Riverside" was arrived at after the public was invited to submit name proposals for the radio station. The station serves only the people of Upington and immediate surrounds. Funds were received from the Open Society Foundation, Northern Cape Department of Arts and Culture, Swedish International Development Co-operation Agency and The South African Government's Reconstruction and Development Programme (Radio Riverside, 2013).

X-K FM is a free internet radio station that broadcasts from Platfontein, 20km west of Kimberley. Platfontein has been a San settlement from 2003. The !Xun and Khwe are the two main clans living there. The broadcast content focuses mainly on community issues and on traditional and other music (Media Club South Africa, 2015).

2.3.3.4 Repairs and maintenance

The repairs and maintenance of musical equipment is generally divided between electronic equipment (e.g. keyboards and amplifiers) and acoustic instruments (e.g. pianos and symphonic instruments), in colloquial language also referred to as unplugged equipment. The servicing, design and manufacture of this equipment is an important aspect of the music industry, offering several employment opportunities in a musically active environment.

The Northern Cape Province has only one business which deals exclusively with piano services. Noord-Kaap Klavierdienste (Northern Cape Piano Services) is situated in Kimberley, and its core business is the servicing, repairing and selling of pianos in the Northern Cape. The business has been in existence since 1986 and provides employment for three full-time workers, including its manager who is also the owner. Another piano tuner in the province, Mr Hendrik Esterhuizen, lives in Kathu and runs a one-man business. Despite nearing retirement, Esterhuizen travels all over the province to tune pianos (Esterhuizen, 2013).

2.3.3.5 Summary of the music business sector in the Northern Cape

The questionnaire responses indicated that a total of 121 individuals are employed in the music business sector, of which 63 are employed on a full-time basis. All of these posts are funded by the private sector. Figure 14 shows how these are distributed:

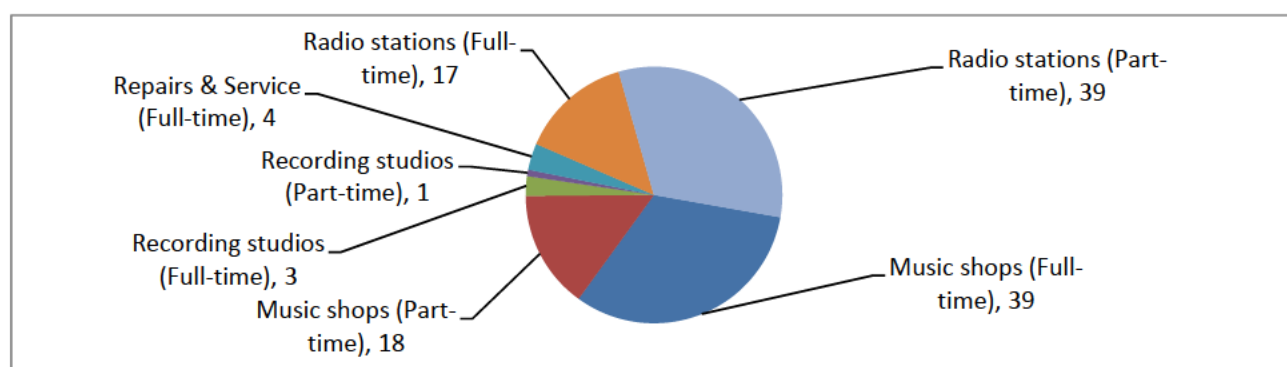


Figure 14: Employment figures of the music business sector in the Northern Cape (own research)

2.3.4 Overview of the Northern Cape music industry

According to Statistics SA (2004:43), only 40% of the population of the Northern Cape was employed in 2004. This percentage translates into a figure of approximately 230 000 people. Approximately 283 people or 0.1% of the labour force were employed in 2013 in the three-tiered music industry in the Northern Cape. Of these 283 people, 96 (34.7%) were employed on a full-time basis. The remaining 65.3% vary between a few hours to approximately 25 hours per week. These part-time positions cannot be considered as sustainable employment. Based on the questionnaire responses, only 8.6% of those working in the music

industry are employed by the government, as opposed to 91.4% who work in the private sector. Table 4 shows the employment figures of the three sectors of the music industry:

Table 4: Current employment figures of the Northern Cape Province (own research)

	MUSIC EDUCATION SECTOR: 114			PERFORMANCE SECTOR: 48			MUSIC BUSINESS SECTOR: 121				TOTALS
	Schools	Music academies	Field bands	Arts festivals	Police Band	Church organists	Radio stations	Music shops	Recording studios	Repairs and service	
FTG	2	6	0	0	17	0	0	0	0	0	25
PTG	3	2	0	0	0	0	0	0	0	0	5
FTP	4	0	3	7	0	0	17	39	3	4	77
PTP	23	8	63	4	0	20	39	18	1	0	176
TOTALS	32	16	66	11	17	20	56	57	4	4	283

Key:

FTG	Full-time government funded
PTG	Part-time government funded
FTP	Full-time privately funded
PTP	Part-time privately funded

This research has shown that of all three sectors of the local music industry, the music business sector provides the most employment opportunities, followed by the education sector. The hypothesis can be put forward that these two sectors should form the basis upon which the performance sector is built. The basis must be wide enough to support the performance sector on top of the pyramid. Figure 15 demonstrates the employment spread between the three sectors of the music industry:

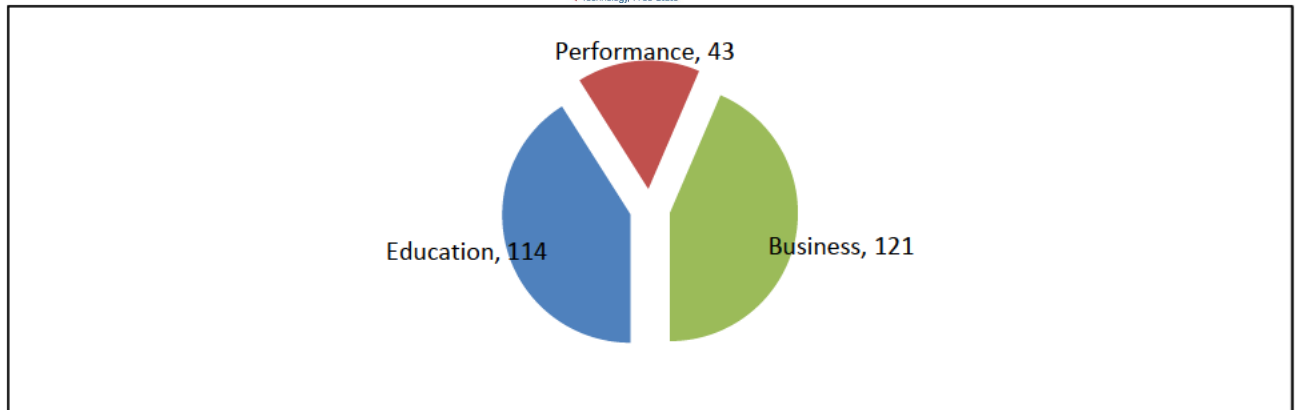


Figure 15: Employment figures per sector (own research)

The biggest employer in the province is the community services industry, which accounts for just more than 30% of the local labour market of approximately 230 000 people (see section 2.3.4 above). Wholesale and trade, agriculture and private households (who employ domestic workers) are also significant employers (Development Bank of Southern Africa, 2015). These figures render the music industry employment figure of 0.1% almost insignificant.

2.3.4.1 Strengths, weaknesses, opportunities and threats in the Northern Cape music industry

During an interactive workshop held in Kimberley on 29 October 2014 with 17 key music industry role players (representing approximately 5% of the industry), a number of strengths, weaknesses, opportunities and threats were highlighted. Table 5 contains a list of the delegates who attended the workshop. They were selected on the basis of their involvement in the music industry of the province. Each one was an active participant in one or more of the three pillars (performance, education and business) of the music industry.

Table 5: Northern Cape music industry workshop delegates (own research)

SECTOR	NAME	INSTITUTION	POSITION
Education	Ian Marais	Sol Plaatje University	Administrator
	Estelle Vorster	KAM	Manager (admin)
	Hettie Rossouw	KAM	Manager (academic)
	Kobus Malan	MAM	Manager
	Phyllis Kriel	Kby Girls High School	Music teacher
	Anne Solomon	St Patricks Junior School	Head of music
	Mervyn Solomon	St Patricks Junior School	Music teacher
Performance	Shalala Rapoo	DSAC NC	Manager
	Teresa de Wit	Freelance musician	Performer
	Bernice Sutton	Garipeffes	Director

Business	Kim Malan	Music Matters	Director
	Philip Vorster	Executive Council	Councillor
	Elize Brand	KAM Board	Accountant
General	Charl de Witt	Music enthusiast	Farmer
	Piet le Roux	CUT	Supervisor
	Vida Allen	DSAC NC	Curator

The strengths, weaknesses, opportunities and threats identified at the workshop are captured in the following SWOT analysis with regard to the status quo of the music industry in the Northern Cape Province:

Table 6: A SWOT analysis of the music industry in the Northern Cape Province (own research)

	Music education sector	Music performance sector	Music business sector	General
Strengths	• KAM providing quality music education • MAM providing opportunities to study music to mostly disadvantaged people • Quality music education in some affluent schools • Active choir culture • Department of Sport, Arts and Culture • Field Band Foundation	• Professional Police Band • Variety of Festivals • Northern Cape Has Talent • Gospel music • Choir culture • Talented and music-loving community • Diversity in cultures • Infrastructure such as Northern Cape Theatre and William Humphries Art Gallery • Northern Cape Arts Festival	• Retail outlets in Kimberley • Well-organised Chamber of Commerce and Industry • Community Radio stations	• Commendable efforts made in education sector • Potential exists in performance sector • Strong tourism industry • Natural resources, e.g. SKA, Mining, Game farming, etc.
Weaknesses	• Lack of strategic provincial framework for effective music education • Music is neglected in most schools • Almost non-existent in districts other than Frances Baard • No tertiary music education available • Focus only on music performance, neglecting other aspects of the industry • Inadequate funding and support for private education initiatives • Not enough qualified music teachers	• No professional orchestra other than small South African Police Services band • No audience development • Inadequate performance venues • Lack of indigenous music development • Limited performance opportunities • Few quality musicians	• Limited retail outlets in districts other than Frances Baard • Limited recording facilities • No record labels • Lack of IT skills that are required for e-commerce • No repair and maintenance facility for both electronic and acoustic equipment	• Creative industries not identified as economic priority • Patchy and disconnected supply chain • Lack of management • Low level of entrepreneurship • Weak infrastructure • Poor connection to outside markets • Small domestic market • Non-maintenance of existing infrastructure
Opportunities	• Opportunity for a new educational model or framework • Opportunity for Sol Plaatje University to offer unique music courses • Expanding of music programmes in the New Apostolic Church involving large numbers of students	• Untapped indigenous music • Potential of new music products due to diverse cultures in the area • Gospel music	• Potential for growth with establishment of Sol Plaatje University	• Internet for e-commerce • Traditional music • Multicultural society • Northern Cape Arts and Culture Council • Skateboarding venue • Kimberley collection of indigenous instruments
Threats	• Government's disregard for the importance of music education limits any real development in the industry • Apathy amongst parents and youth	• Loss of potential talent and income • Private individuals find it difficult to make a living when the industry is so segmented • Losing indigenous NC music	• Small local market	• Talent drains to other parts of SA • Reliance on part-time labour • Narrow-mindedness • Decline in political and private sector support/interest • Political interference. • Americanisation of our musical culture

From the above analysis it can be deduced that despite a lack of infrastructure and funding, there are pockets of excellence in music education, albeit mainly in

the Frances Baard District. The newly established Sol Plaatje University offers the opportunity to develop this sector. In the performance sector, there are opportunities to develop local and indigenous music and musicians, but very few efforts to make full use of this source. The music business sector is negatively affected by the above-mentioned conditions and thus limited to the more densely populated areas.

2.3.5 Closing remarks

Kimberley, the capital city of the Northern Cape Province, was highly industrial and flourished economically during the late 1800s and early 1900s. From 1871 until 1914, 50 000 men dug the famous Big Hole with picks and shovels more than a kilometre deep and 463m wide, yielding 2 722kg of diamonds. By 1873, Kimberley (previously named New Rush) was the second biggest town in the country with a population of more than 40 000 people (Sol Plaatje Municipality, 2015).

From a historical perspective, it is clear that the music industry played an integral, although economically insignificant role in the Diamond Fields during the early years. Although very active and fashionable, its main purpose was entertainment, a social activity for the wealthy and mainly White colonial audience. Musicians were mostly imported from abroad, and the focus was on performance rather than training. A small number of music business ventures and music educational institutions were established to service the small local demand with essential merchandise and tuition in a limited variety of musical instruments. A number of tailor-made buildings were erected, renovated, relocated or refurbished, some of which still bear testimony to the era. The diamond industry provided a financially secure and sheltered platform for musicians to perform, albeit highly cosmetic and not self-sufficient by any means. After the closure of the Kimberley Mine in 1914, music was no longer a high-profile activity. The burning down of the Theatre Royal in 1930 marked the end of an era in many ways. As the diamond industry began to lose its sparkle, so did the music industry.

Numerous attempts were made to revive the once lively industry after 1950, intensifying in frequency towards the new millennium. A new and very different music industry started to emerge from the 1990s, not only in the Northern Cape, but nationwide. Gradually music and musicians increased their own accessibility by moving from inside concert halls to outdoor venues and events. The rise of arts festivals provided musicians with easy access to the modern concertgoer. A more populist approach became the norm, as opposed to the elitism of the diamond era. Recent socio-economic changes brought about by a new political dispensation and a technological revolution opened the doors for all races, classes and musical tastes to participate in the music industry in a new way.

By 2013, the music industry in the Northern Cape employed 283 individuals. In the formal education sector, 3 500 music students, mostly school children, are currently learning to play musical instruments. Although music teaching in the private and informal industry has not been investigated, this could increase the numbers to approximately 300 employees and 4 000 students in the province, that is, roughly by 10%. It must be noted that these figures fluctuate and are subject to new initiatives and events. The overarching intention is not to be statistically accurate, but rather to provide an overview of the current industry. Such an overview furthermore investigates the viability of the industry and what needs to be done to develop it to the point where it can contribute to economic growth and development in the region.

An overall view of the current Northern Cape music industry can be seen in Figure 16. All related ventures fit into one of the three main sectors:

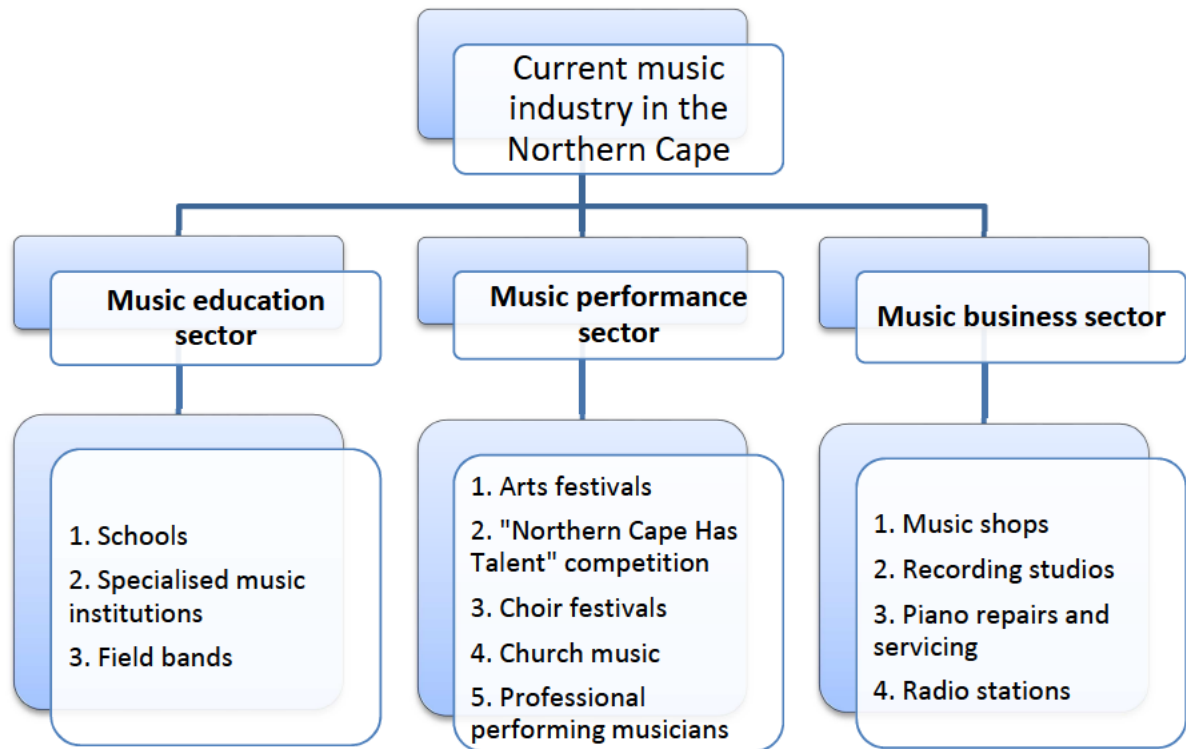


Figure 16: Current Northern Cape music industry (own research)

The 102 individuals employed on a full-time basis (see section 2.3.4 above) can support their families financially, which translates to approximately 400 people. The remaining 181 who have part-time jobs can support themselves. Therefore, it can be deduced that at least 580 people form part of the mainstream economy of the province and do not have to be looked after by government (own research).

The ratio between the three pillars of the music industry in its present state forms an ideal basis for further development. The purpose of this study is to propose a framework which will grow this basis to a level where the music industry can make a real contribution to the economic growth and development in the province.

Chapter 3

Benchmarks: International and local music industries and systems

3.1 Introduction

In this chapter, four examples will be analysed in order to assist in the construction of the proposed music industry framework for the Northern Cape. These are:

- o the National System of Youth and Children's Orchestras of Venezuela ("El Sistema")
- o the music industry value chain of Senegal
- o an overview of the music industries of four countries within the SADC region, namely Zimbabwe, Namibia, Botswana and Mozambique
- o the three-tiered structure of the Free State Province of South Africa, which comprises the Free State Musicon, the Odeion School of Music of the University of the Free State and the Free State Performing Arts Council.

The purpose of this chapter is to provide a brief overview of the music industries and systems of the four examples above and the systems and processes that were employed by them to achieve their specific goals. Conclusions will be drawn to determine best practice options that can be implemented in the Northern Cape Province. The above examples were chosen because of their representativeness and reputation. Furthermore, there are many physical, financial and other commonalities between them and the Northern Cape Province which are highlighted in the chapter.

The Republic of Venezuela has earned itself the envy of many countries globally with its unique programme of education and empowerment, especially of the poor, through classical music. This is an example of how music education in particular is utilised as a powerful tool to educate hundreds of thousands of destitute youths and give them a skill that they can use to earn a living or simply

teach them and their families the value of discipline and teamwork. El Sistema has been in existence for over forty years and has since produced many of the world's top musicians. The principles of musiconomy, as explained in section 1.4.2 above, are evident in the philosophies of El Sistema and therefore well worth investigating.

The music industry of Senegal was selected as an example on the African continent where indigenous music was identified as a marketable product, especially in European countries. In the discussion of this example, specific steps are described to achieve this.

Although the SADC region comprises 15 countries, the study focuses only on the 4 countries bordering South Africa. These countries are most likely to be influenced by the South African music industry, which is dominant in this region. A brief overview of the general characteristics of these countries is included in order to draw comparisons between them and local circumstances. Each of the four countries discussed share certain commonalities, such as their geographical positions, their respective colonial backgrounds (to a certain degree), and their current struggle to promote local music in a world where international artists tend to flood the market and obscure home-grown talent.

Finally, the Free State Province's model of formal music education has produced extraordinary results for more than four decades, as the majority of the South African National Youth Orchestra members are often products of this system (SANYO, 2007). The three-tiered system of the Free State Musicon (a music education institution), the Free State University and the Performing Arts Council play an exemplary role in the South African music industry, and is an example of integration that can be utilised in a framework such as the one proposed in this study.

3.2 Bolivarian Republic of Venezuela

3.2.1 Background

The Bolivarian¹⁶ Republic of Venezuela is located on the northern coast of South America, covering around 916 445 square kilometres with an estimated population of approximately 30 085 000. Figure 17 shows some geographical and other details of the country:



Figure 17: Map of the Republic of Venezuela (CIA, 2013)

The country is rich in natural resources such as petroleum, natural gas, iron ore, gold and hydropower. With some striking similarities to South Africa, Venezuela is currently facing several serious social and economic challenges. The country

¹⁶ Simón Bolívar was a South American soldier who was instrumental in the revolutions against the Spanish empire during the early 19th century. After France invaded Spain in 1808, he became involved in the resistance movement. He also played a key role in the Spanish American fight for independence. In 1825, the Republic of Bolivia was named after this inspirational leader, hailed by many as El Libertador (The Liberator).

has a very high crime rate and has become a major drug trafficking corridor. Although almost 38% of the population live below the poverty line, most of the country's citizens can read and write, and the unemployment rate is only 8.5%. Oil revenues account for roughly 95% of export earnings, about 45% of state budget revenues, and around 12% of GDP, which was \$510 billion in 2014. In the same year, the Gini Index¹⁷ of the country was 39. The South African index was 63 in the same report (The World Bank, 2015).

Venezuela continues to wrestle with a housing crisis, high inflation, an electricity crisis and food and goods shortages. By the end of 2014, the inflation rate stood at 62.2%, the highest in Latin America. Nationalisation of firms in the agribusiness, financial, construction, oil and steel sectors have damaged the private investment environment, reduced productive capacity and slowed non-petroleum exports. Despite record oil prices in 2012, the government budget deficit reached 17% and public debt increased to 49% of the GDP (CIA, 2013). In the same year, the South African deficit was 5.2% (Maswanganyi, 2013).

3.2.2 The national music education system of Venezuela

3.2.2.1 Background

According to the Simón Bolívar Music Foundation (2013), the National Music System of Venezuela (also known as "El Sistema") is a policy of the Venezuelan government to promote, motivate and foster the formation of networks and circuits between the main participants/role players in the country's music industry. The Simón Bolívar Music Foundation is the governing body of El Sistema, which was founded in 1975 by economist and musician Maestro José Antonio Abreu. Its mission is to regulate music education and to promote the collective practice of music through symphony orchestras and choruses as means of social organisation and community development. The foundation aims to help young people to achieve their full potential and acquire values which favour their growth and have a positive impact on their lives in society. Its vision is to be an

¹⁷ The Gini Index measures the extent to which the distribution of income or consumption expenditure among individuals or households within an economy deviates from a perfectly equal distribution. A Gini Index of 0 represents perfect equality, while an index of 100 implies perfect inequality.

organisation committed to social development through an innovative and hope-instilling music education programme, distinguished by its excellence and for having a positive impact on the communities where it is implemented (Simon Bolivar Music Foundation, 2013).

Since its inception in 1975, it is estimated that 310 000 Venezuelan children have participated in 280 teaching locations, called *núcleos*. About 500 orchestras and other ensembles, from preschool groups using paper cut-outs of instruments to the world-class Simón Bolívar Symphony Orchestra, fall under El Sistema's umbrella. The goal is to reach 500 000 children by 2015 (Wakin, 2012).

3.2.2.2 Principles of El Sistema

The Organization of American States¹⁸ compiled a document which defines El Sistema and describes its goals and objectives as well as other related operational details (Organisation of American States, 2004). The following critical principals can be drawn from this document and are worthy of further investigation and possible implementation in the Northern Cape:

- Due to the fact that El Sistema is a policy of the Venezuelan government, it works through a cultural funding programme, which allows artists and creators to obtain governmental resources to develop cultural projects in different areas. It is funded by the Vice-Ministry of Culture and the National Council of Culture, contributions from municipalities, government departments such as Welfare and Social Development and the private sector.
- An important aim is to organise the Venezuelan music community, which is made up of a broad spectrum of musical styles throughout the country. This is done by the consolidation and creation of associations with similar missions directed at all the creators, artists, groupings or institutions that participate in the musical activities of the country.

¹⁸ The Organization of American States is the premier regional forum for political discussion, policy analysis and decision-making in the bureau of Western Hemisphere affairs. It was established in 1948 to achieve an order of peace and justice, to promote solidarity, to strengthen collaboration and to defend sovereignty, territorial integrity and independence among its 35 member states.

- El Sistema works towards establishing a music industry with financial and technological resources that will benefit culture and promote and develop the economic potential of related industries such as video and film, music printing and publications and the production of musical instruments.
- It strives to elevate the role of musical creators as a force that contributes to the nation's transformation.
- El Sistema covers the entire Venezuelan territory and places special emphasis on areas with poor musical development, guaranteeing access to cultural activity in regions far from urban centres.
- It is based on a carefully designed framework that develops all types of music through institutions such as centres of musical training, youth and professional symphonic orchestras, choir groups, bands and various organisations that support music.

3.2.2.3 Approach to music education

El Sistema's approach to music education emphasises group learning, peer teaching and the joy of learning music from a young age. Its success hinges on two critical principles: It firstly connects the senses, imagination and thought through music, and secondly develops an affiliation and sense of belonging through living with and for others. In order to achieve this, the students are exposed to the variety of orchestras and choirs within the system, from the lowest level to the internationally successful Simón Bolívar Youth Orchestra. Orchestras and choirs are considered to be much more than artistic structures, as they enable the establishment of social groupings where children can learn about social interaction, solidarity and teamwork. It aims to create a daily haven of safety and joy that builds every child's self-esteem and sense of value. Discipline is relaxed but well enforced. Most of the El Sistema teachers and *núcleo* leaders are former students of the programme who understand both the social and musical mission of the programme. Any building or site is used to establish a *núcleo*. Tuition sometimes takes place outside under trees. Students practise their music every day. Group teaching is used as a general teaching method to keep down costs. The teaching philosophy is based on "passion first,

perfection later”. Standard conventional music teaching methods are used and there is an emphasis on high standards (Von Willigh, 2013).

3.2.2.4 Contribution to economic growth and development

In its more than three decades of existence, El Sistema has increased the likelihood that its beneficiaries would live longer and healthier lives, have access to knowledge, have a decent standard of living and fully participate in their communities. El Sistema seeks to create both great musicians and to contribute to the socio-economic development of Venezuela by changing the life trajectory of hundreds of the nation’s high-risk children. Measuring benefits such as a decrease in school dropout rates and a decline in crime, the Inter-American Development Bank calculated that every dollar invested in El Sistema was reaping about \$1.68 in social dividends. It uses the arts as an indirect tool to bring about economic growth, development and prosperity (Bolivar, 2012). Many students become professional musicians or follow other careers. An interesting phenomenon is that most of them plough their skills back into El Sistema, often on a voluntary basis.

One of the most famous export products of El Sistema is the world famous-conductor Gustavo Dudamel. Currently serving as Music Director of both the Simón Bolívar Symphony Orchestra of Venezuela and the Los Angeles Philharmonic, his impact on the classical music industry is evident on four continents. He composed the score for the film *Libertador* (about the life of Simón Bolívar) and recorded it with the Simón Bolívar Symphony Orchestra of Venezuela. Gustavo Dudamel is one of the most decorated conductors of his generation (Newbanks, 2013).

3.2.2.5 Lessons learnt

This programme can be seen not only as a conventional tool for alleviating poverty, but rather as a broad platform for social inclusion that simultaneously renders social, psychological and artistic results through a singular intervention (Marciano, 2011:75). The extraordinary success of El Sistema prompted many countries across the world to implement music education strategies based on El Sistema. These countries include the United States of America, Argentina,

Australia, Bolivia, Canada, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, England, Guatemala, Honduras, India, Jamaica, Korea, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Dominican Republic, Scotland, Turkey, Trinidad and Tobago and Uruguay.

Venezuela is economically perpetually poor, which is largely due to large scale corruption and mismanagement by the Chavez government. The country has one of the world's largest fiscal deficits, some of the highest inflation rates, some of the worst cases of misalignment of the exchange rate, some of the fastest-growing debts, and one of the most precipitous drops in productive capacity, including that of the critical oil sector. Moreover, during the Chávez era, the nation fell to the bottom of the rankings that measure international competitiveness, ease of doing business and attractiveness to foreign investors, while rising to the top of the list of the world's most corrupt countries (Naim, 2013).

In stark and paradoxical contrast, El Sistema produces capable citizens with strong social skills, endurance, resilience and confidence, a deep sense of value and excellence and a sense of trust in group process and co-operation. Students who spend some years in El Sistema complete high school and go to university in higher percentages than their peers (Booth, 2008).

The key aspects responsible for the success of El Sistema are (Booth, 2008):

- It involves mass participation by the youth through a group teaching method that promotes passion and a feeling of security. The primary focus is building self-esteem and creating a daily haven of safety, joy fun, as well as a sense of value.
- Music tuition is accessible and available in all areas of the country.
- El Sistema is mainly government funded with limited contributions from the private sector. Revenue does not come from arts ministries but rather from social welfare.
- Associations are consolidated and created that support and develop the music industry.

3.3 The music industry in Senegal



Figure 18: Senegal (World Atlas, 2015)

Senegal (figure 18) is a West African country bordering on the Atlantic Ocean with Dakar as its capital city. It has a diverse and active popular music industry and a number of Senegalese musicians, such as Youssou Ndour and Baaba Maal, have widespread international acclaim. In a comprehensive report, Pratt (2004:35-43) makes a number of useful policy recommendations to assist the Senegalese government to utilise music as a tool for economic growth and development. He aims to change government's attitude towards the music industry and to make it realise that the industry can produce employment, income and export earnings, and he advocates a ministry of music to promote the music industry. He divides the music industry value chain into four main segments, namely content origination, production, distribution and, finally, consumption. These segments correspond clearly with the four stages of the Shaw value chain, which are creators, enablers, revealers and consumers (Shaw, 2010:34).

3.3.1 Content origination (creators)

The theoretical context in Chapter 1 of this study describes this segment as the creators, and it includes composers, arrangers, improvisers, etc. Pratt highlights issues of concern at this level in Senegal which are mainly the stability of income

and the management of intellectual property rights. He proposes the following (Pratt, 2004:35):

- the establishment of resource agencies to promote a system of intellectual property rights management
- professional training and development in the areas of basic business skills and the rights and responsibilities of musicians and managers
- educating and training audiences and future musicians in issues of copyright and intellectual property
- including music education across all musical styles at all educational levels
- protecting the indigenous musical heritage of Senegal by establishing a National Sound Archive with the objective to record and document as much existing live music as possible, especially traditional music.

3.3.2 Production (enablers)

Senegal has an adequate number of recording studios, but a shortage of music arrangers, producers and sound engineers contributed to the fact that local music cannot be produced for export. The following recommendations are made to improve the role of industry enablers (Pratt, 2004:7):

- Introduce local recording studios as a regional resource by attracting international musicians to record in Senegal.
- Establish a CD producing capacity in Senegal.
- Facilitate easy access to musical equipment by lowering import taxation and establishing instrument repair facilities.

3.3.3 Distribution (revealers)

The report proposes the establishment of independent record labels and joint ventures with international recording companies. In addition, it advocates promoting and exposing local music on domestic radio and television to boost local consumption and to develop the local market (Pratt, 2004:7-8).

3.3.4 Consumption (consumer)

One of the main threats to the development of the Senegal music industry is piracy. Combating this scourge is identified as one of the government's main priorities. This process can only be effective once market intelligence and industry information have been collected to accurately measure the output and growth of the music industry. This process will also provide regular and up-to-date information regarding the state of the music industry. The development of informed audiences is another priority which can be achieved through the media. Similarly, professionalism amongst musicians and their agents must be developed by providing appropriate training in the above-mentioned fields. Musicians must furthermore be encouraged and supported to tour in order to take local music abroad. This could assist in the process of marketing Senegalese music as "world music", thus capitalising on this genre's recent popularity. Finally, the report advocates the promotion of music-related tourism, such as regular regional music festivals and the improvement of related infrastructure (Pratt, 2004:17).

3.4 The music industry of selected SADC countries

3.4.1 Background

SADC is a regional economic community comprising 15 member states: Angola, Botswana, the Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia and Zimbabwe. It was established in 1992, and its main objectives are to achieve economic growth and development, and peace and security within this area (SADC, 2012). A brief overview of the music industries of the four SADC countries that share borders with South Africa, (Zimbabwe, Namibia, Botswana and Mozambique) is provided below.

Ambert (2003:5-6) states that there is a critical lack of qualitative and/or quantitative information about the condition of the music industry across the different countries of the SADC region and within each of these countries. The African and SADC markets are small because they have not realised their

potential for development. This is in contrast with other international markets, which are well established and nearing saturation. Figure 19 illustrates the locations of these countries:



Figure 19: Member states of the SADC (SADC, 2012)

3.4.2 Zimbabwe

3.4.2.1 Background

The Republic of Zimbabwe is a landlocked sub-Saharan African country measuring 390 580 square kilometres. Agriculture (most notably tobacco), mineral exports and tourism are the main foreign currency earners of Zimbabwe. Of its 13.7 million citizens, 72% live below the national poverty rate. The GDP was US\$10.81 billion in 2012 (The World Bank, 2013).

The country is facing a wide variety of economic problems. The recent land reform programme has damaged the commercial farming sector, turning Zimbabwe into a net importer of food products. Until early 2009, the Reserve Bank of Zimbabwe printed money to fund the budget deficit, causing

hyperinflation. The power-sharing government formed in February 2009 has led to some economic improvements, including the end of hyperinflation by replacing the Zimbabwe dollar with the US dollar and by removing price controls. The economy is currently registering its first growth in a decade (The Telegraph, 2013). There are 16 official languages in the country, of which English, Shona and Sindebele are most common.

3.4.2.2 Performance sector

The National Arts Council of Zimbabwe (NACZ) was established in 1985 by an Act of Parliament. Its main function is to develop the arts, and its mission is to lead the arts and cultural sector in social and economic growth and development, and to foster national identity. The NACZ is at the forefront of organising regular musical events on national and international scale across the country (National Arts Council of Zimbabwe, 2013).

Zimbabwean music includes both traditional and popular music. The mbira, or thumb piano, and the marimba are popular traditional musical instruments often used in Zimbabwean music. There are a number of popular genres in Zimbabwe, and I shall name but a few here. One of these genres is the native Chimurenga (liberation), a style of music based on a fusion of traditional Shona mbira and modern music using electronic instruments with politically inspired lyrics. Soukous is a genre of dance music based on the rumba that originated in the Congo in the 1940s. American rap, hip hop, R & B, soul and other international music genres became popular in the 1990s, often merging with traditional Zimbabwean music. Local music was boosted by the 100% local content policy which was in effect between 1990 and 2000, which required all radio stations to play only music by Zimbabwean artists. Gospel music is currently one of the fastest-growing styles and constitutes around 50% of the music played on state radio. A Zimbabwe Music Festival, also referred to as Zimfest, is held annually in the Pacific Northwest of the United States of America and attended by people from all over the world. The first festival was organised in Seattle in 1991 by a small committee of former students of the late Dr Dumisani Maraire, the dynamic Zimbabwean musician who first introduced marimba and mbira music to the Pacific Northwest (Zimbabwean music festival, 2012).

During the first decade of the present century, the once vibrant Zimbabwean music industry was in crisis due to the economic decline which was caused by the ZANU-PF government's controversial land reform programme. A general shortage of money steadily reduced music sales and public attendance of music events. AIDS took its toll on a number of Zimbabwe's musicians in an alarming series of untimely deaths. Recently, however, the broadcasting of ruling party propaganda songs has been reduced on both state television and radio and has been replaced by more international music (Sibanda, 2011). Despite the existence of several government institutions and acts for the protection and promotion of culture, very little attention has been given to its impact on the Zimbabwean economy. It is not perceived as a viable industry for development and therefore given low priority. As a result, government financial support has been inadequate to ensure meaningful and sustainable growth in the sector (IFCD, 2013).

3.4.2.3 Music education sector

Music education is a compulsory subject from Grade 0 to 7 in all primary schools in Zimbabwe. According to Palmberg, as cited in Delport and Dhlomo (2010:1), the music curriculum is not implemented properly due to the absence of a clear policy on arts education and cultural activities in Zimbabwean schools. The music syllabus was last revised in 1989 and its approach is based on a purely Western tradition, neglecting indigenous African music. Furthermore, the teachers have not been trained to present the subject. The Zimbabwe Academy of Music is situated in Bulawayo, the second biggest city in Zimbabwe. It is a non-profit-making trust and a registered welfare organisation recognised by the Ministry of Education, Sport, Arts and Culture. It offers individual tuition in various instruments and voice. The enrolment is 170 with an age range of 6 to 80 (Zimbabwe Academy of Music, 2012). Music Crossroads Zimbabwe recently opened its first music academy in Harare, the capital city of Zimbabwe. Similar initiatives were launched in Malawi and Mozambique. Music Crossroads Zimbabwe offers a year-long professional certificate programme covering traditional and contemporary instruments and the necessary theoretical subjects. Business knowledge, necessary to pursue a career in music, forms an important part of the curriculum (Sibanda, 2013). Tertiary music education is offered at the Zimbabwe College of Music in Harare where a bachelor's degree, diplomas and the national certificates in music are offered (Zimbabwe College of Music, 2015).

3.4.2.4 Music business sector

- Recording:

The company Shed Recording Studios was active in Zimbabwe from 1975 to 2000. It started as a partnership between private individuals and Rhodesia Television in 1975 in Salisbury and has since recorded many bands and produced music for various advertisements and films. The "Shed" record label pressed vinyl under licence by Gramma Records, one of the biggest recording companies in Zimbabwe. From 1985, several hit songs were recorded and sold internationally (Music in Africa, 2015).

Several recording studios, such as the Rhodesville Recording Studio and Crossline Music and Video, have been established in the past decade. These are found in the densely populated area of Harare. The Zimbabwe Standard reports that Mbira songstress Diana Samkange has established a new recording label that will assist upcoming artists (Marwizi, 2013). Afro-Jazz musician Willom Tight acquired equipment from South Africa to set up his recording studio (Tembo, 2013).

- Retailing:

Express Toll is the only formal music retail outlet and trades in Bulawayo and Harare. Other types of business, such as clothing stores, also sell music merchandise (Ambert, 2003:18). The amount of music retailing has improved along with improved economic conditions brought about by the power-sharing government of the past decade.

- Broadcasting:

The Zimbabwe Broadcasting Corporation is owned exclusively by the government. It operates one television channel and five radio stations. Due to strict government control, private and community radio stations struggle to obtain broadcasting licenses, and when they do, transmission time is limited (Chiumbu, Minnie & Bussiek, 2009:41).

3.4.2.5 Closing remarks

The recent explosion of *kudubba* (copying) and the selling of pirate copies of CDs and DVDs by street vendors at popular shopping malls in Zimbabwe are destroying the music industry. On top of this, Zimbabwean musicians have to deal with weak enforcement of intellectual property laws and royalty collection as well as the negative effect of internet file-sharing software.

In October 2011, the Zimbabwe Association of Recording Industries produced a budget CD and DVD for the same price as pirated products. The only problem is that the budget CD can accommodate only six tracks, while the pirated copies contain complete albums. It is also much easier for the buyer to purchase from a street vendor than it is to enter a shop. According to The Herald Online, Gramma Records considered selling music on MP3s and memory cards in a bid to curb piracy (Gwabanayi, 2012). While these measures to combat piracy are being implemented, the market is becoming so used to illegal copies that the culture of paying for music will soon be totally foreign.

3.4.3 Namibia

3.4.3.1 Background

The Republic of Namibia is a large and sparsely populated country on the Atlantic coast. It shares land borders with Angola, Zambia, Botswana and South Africa. English, Afrikaans, German and indigenous languages are spoken by its 2 031 000 citizens (Random House, 2007:146). The low population can be attributed to the country's harsh geography which includes the coastal Namib Desert, central semi-arid mountains and the Kalahari Desert east of the mountains. The country covers a vast area of 824 292 square kilometres with the capital city, Windhoek, located in the north. The main economic drivers are agriculture, herding, tourism and the mining industry. The latter focuses on diamonds, uranium, gold, silver and base metals. Mining is the most valuable economic activity and accounts for almost 90% of exports. Approximately half the population live below the international poverty line, and the nation has suffered heavily from the effects of HIV/AIDS. The GDP per Capita is US\$6 900, and the country's literacy rate is 84% (National Geographic, 2013).

3.4.3.2 Performance sector

The National Arts Council of Namibia (NACN) was founded through the National Arts Fund Act (1 of 2005), and provision was made for it to act as an advisory body in the utilisation of the National Arts Fund. The main function of NACN is to distribute funding to Namibian artists and art organisations on a representative basis (National Arts Council of Namibia, 2013).

Comparable to other Southern African states, popular music in Namibia is represented by a number of folk styles as well as pop, rock, reggae, jazz, house, kwaito and hip hop. On the classical front, the Namibian National Symphony Orchestra and Namibia Symphonic Choir are active in Windhoek, presenting regular concerts and events such as the annual Concerto Festival. The bands of the armed forces such as the police, prisons and military employ musicians on a professional basis. The Namibia College of the Arts Youth Choir and the Maranatha Singers have existed for several years and perform music of various styles and cultures. Several events of note also take place in the country. At the Bank Windhoek Arts Festival, local and international musicians have the opportunity to perform. The Sanlam-NBC Music Awards and the Namibian Music Awards are presented annually to achieving musicians. The Namibia Society of Composers and Authors of Music have helped promote Namibian music within and outside the country. The Swakopmunder Musikwoche (Swakopmund Music Week) is an annual music event established in 1965 in the town of Swakopmund under the patronage of the German Evangelic-Lutheran church. Once a year, about 300 national and international music specialists and amateur musicians get together for workshops and lectures. The event culminates in a series of concerts offered to the public (Swakopmunder Musikwoche, 2013). An annual gathering of Namibians in the Americas is held in Washington, DC each year. The mission of the Namibian Community in the Americas is "to build community and a sense of unity among Namibians" as well as to promote active participation in Namibia's development (Kamwanyah, 2013).

3.4.3.3 Music education sector

Namibia has compulsory free basic education for 10 years between the ages of 6 and 16. Curriculum development, educational research and the professional

development of teachers is centrally organised by the National Institute for Educational Development. Most of the more than 1 500 schools in Namibia are state-run, but about 100 private schools are also part of the country's education system. The arts learning area comprises arts in pre-primary and grades 1-7; arts in culture, visual arts and integrated performing arts in grades 8-10; and art and design in grades 11-12 (Republic of Namibia, 2009:14). The curriculum for music in government schools provides merely an outline of the subject, and the focus is mainly on choir singing. Specialised music education can be found only in some of the private schools (Uiras, 2014).

The Namibia College of the Arts (previously known as the Windhoek Conservatorium) consists of various campuses in Windhoek, and a number of satellite centres under the National Arts Extension Programme.¹⁹ It employs a large number of artists as part-time lecturers. Music courses are offered at the main campus in Windhoek. Indigenous African music is introduced to music students through a course designed to stimulate career opportunities in African Performing Arts, primarily as a teacher, stage performer and/or composer and arranger. Students receive practical and theoretical tuition that include individual and group performance skills in music, dance, drama and ethnomusicology. Teaching method, arts administration, English and computer skills are also included in the curriculum. Lessons in various musical instruments are offered as well as vibrant choral and instrumental groups. A fully functioning recording studio is also available (College of the Arts, 2011).

The Namibia Arts Performance Centre (APC) is a non-profit organisation under Swiss management which provides training in various musical instruments as well as general life skills to the poorest of the nation. The first APC was established in 2003 in Oshikuku, in the north of Namibia. Since then, similar development projects have been established in other parts of the country and are now recognised and supported by the government (Hidber, 2013).

Studies at tertiary level are provided by four teacher training colleges, three colleges of agriculture, a police training college, a polytechnic (at university

¹⁹ The Namibian National Arts Extension Programme takes arts education to various regions of the country with satellite centers in more than 20 rural towns.

level), and a national university. The University of Namibia offers a two-year Diploma in Music with five subjects: principles of music and dance, ensemble or choral studies, principle instrument, music appreciation and music video production. In the four-year Bachelor of Arts degree, music can be studied as a major or a minor subject. As a major subject, the curriculum includes the above-mentioned subjects with the addition of ethnomusicology and music technology (University of Namibia, 2013:127, 212, 228).

3.4.3.4 Music business sector

- Recording:

Mshasho Records and Gazza Music Productions are the two leading Namibian record labels and were founded in 2003 and 2004 respectively. Yaziza Entertainment (formerly known as Green House Entertainment) was founded in 2006. Attempts are underway to consolidate the Namibian Recording Industry. For this purpose and to run the Namibian Music Awards, a new entity called RINA (Recording Industry of Namibia) was launched in Windhoek in 2013. RINA is based on the principles of RiSA (Recording Industry of South Africa), which runs the South African Music Awards. RINA has 15 record companies as its members, amongst them 7 leading labels (Guchu, 2013). It has managed to obtain a pre-endorsement from the Ministry of Sports, Youth, National Service and Culture to revive organisations like Oruuno²⁰ and the DJ Association, and to instigate the formation of new ones such as a music and video producer's guild. In addition to this, the entity has established an operational base and funded music industry workshops and conferences (Beukes, 2013).

- Retailing:

In most of the region, the purchase and delivery of music in formal retail outlets takes place in supermarkets. A local newspaper reports that the distribution of Namibian music has been a true reflection of the current state of the industry as a whole, and can only be described as disorganised due to the lack of proper distribution channels, with artists being left to do it on their own (Namibian, 2013).

²⁰Namibian Artists' Union.

- Broadcasting:

The broadcasting sector is dominated by the state-run Namibian Broadcasting Corporation (NBC), which offers a TV station as well as a "National Radio" in English and nine language services in locally spoken languages. The nine private radio stations in the country are mainly English-language channels, except for Radio Omulunga (Oshiwambo) and Kosmos 94.1 (Afrikaans). Privately run One Africa TV has been in competition with the NBC since the 2000s (Taylor, 2011:11-12).

3.4.3.5 Closing remarks

At a glance, the Namibian music industry seems to be vibrant and active, but in reality it remains undeveloped. A lack of focus on producing economically viable Namibian music products and the absence of effective marketing and distribution structures are two of the factors hampering the development of the local music industry. There are efforts underway by industry role players to address the situation. A reporter for the newspaper The Namibian made the following statement:

The Namibian music industry is suffocating due to a lack of proper regulations, enabling industry environment and good music infrastructures. Music (and art and craft in general) is part of a larger economic growth and development issue worthy of public policy consideration. The economic and social imperatives to develop and protect the Namibian music industry include the promotion of responsible citizenship, self-reliance, self-employment, productivity, creativity and innovation. Most importantly, music is not just an economic industry or mere entertainment. It is more than that. It is a soul for nation building, unity in diversity and reconciliation. That is where public policy should come in to correct this apparent failure, which is market failure, of the Namibian music industry in order to protect artists and musicians, especially their creative creations, through legislation, policies and infrastructure (Kamwanyah, 2013).

3.4.4 Botswana

3.4.4.1 Background

Botswana is a landlocked country in south-central Africa with a total area of 600 370 square kilometres. Gaborone is the capital city and has almost 200 000 citizens. The various ethnic groups in Botswana include Tswana, Kalanga, Basarwa and Kgalagadi, of which the Tswana is the largest (79% of the total population). There are small groups of Khoisan people who live mainly in the south-western districts of the country. Unlike most other SADC countries, Botswana has no arts council (Bakwena, 2013).

3.4.4.2 Music performance sector

Music forms an integral aspect of the culture of Botswana. Church choirs are plentiful throughout the country. There are a number of different forms of folk music, such as the Gumba-gumba jive, a form of modernised Zulu and Tswana music mixed with traditional jazz. The word gumba is derived from the township slang for party. Kwasa-Kwasa, which is basically an African version of a Rumba, is popular in central and western Africa. Several festivals, at which music plays an integral role, are held in Botswana throughout the year. The Maitisong Festival is one of the most important performing arts festivals which are celebrated in the country. Commercial music is extremely popular in Botswana and is obtained mainly from South Africa, the United States, Europe and other parts of Africa. Hip hop and kwaito are two very popular genres that were imported to Botswana in the early 1980s (MapXL, Inc, 2015).

According to Lebethe (2003:2), the performing arts in Botswana operate at an amateur level with little support from the government. There are no professional companies, and formal structures are limited to one national theatre, Maitisong. The Botswana Defence Force Band wing offers musical services to the public. These include performances by the Military Band, Dance Band, Pipe Band and traditional, Pantsula and Kwasa-kwasa Bands.

3.4.4.3 Music education sector

According to Segomotso (2011:14), Botswana's basic education programme runs for ten years. The first seven of these are spent by the learners in primary schools, while the last three are completed in junior secondary schools. At the primary level, music is taught under the banner of creative and performing arts. The Botswana International University of Science and Technology and the University of Botswana are the only public universities in the country. At these institutions, music is limited to music education modules offered by the Primary Education Department. The colleges of education also include music within their diploma programmes, although the coverage is limited. The Botswana government has taken several steps to address the shortcomings in the music education sector, in particular the contents of the music curriculum at school level (Segomotso, 2011:33). Government interventions include an increase in the number of in-service music teachers sent for further training. Music as part of the curriculum has also been rolled out to 30 more junior secondary schools. A purpose-built music education facility functioning at the Molepolole College of Education, and a similar facility for the creative and performing arts disciplines, have been built at the Serowe College of Education. Construction of a college dedicated to applied arts at Oodi is complete, and will soon be opened to receive its first students. In addition, there have been recruitment drives, targeting persons with a music education background, to fill positions of education officers in the Ministry of Education and Skills Development (Segomotso, 2011:44).

3.4.4.4 Music business sector

- Recording:

The Botswana recording sector is still small and undeveloped. Labels such as Phat Boy and Slash Beats Productions are noted hip-hop record labels. Gaborone-based recording company, Diamond Studios, has expanded into Zimbabwe, where it has set up an office and a recording studio in Harare. This initiative helps to create a market for Botswana musicians in Zimbabwe and vice-versa (Mpofu, 2009).

- Retailing:

Almost no music retailing businesses exist in Botswana. CDs are sold mostly online and through bigger department stores such as Game.

- Broadcasting:

There are two state radio channels providing radio services to the public. Radio Botswana 1 broadcasts cultural and entertainment programmes with a local content of at least 60%. Radio Botswana 2 features contemporary entertainment and provides recording facilities. There are three commercial radio stations focusing mainly on conversation, youth and music. Eight international stations and one pan-regional station are also broadcasting in Botswana. In addition, there are two television stations, one state-owned and one privately owned (Department of Information and Broadcasting, 2013).

3.4.4.5 Closing remarks

In 2008, Keoreng (2008) reported that the Botswana music industry is facing serious challenges. Music by international musicians, with big marketing budgets, is taking over the market. Several factors have conspired to retard the growth of the music industry in the country, and these include the global economic recession, soaring fuel prices and digital downloads, which have sent record sales tumbling. Limited liquor trading hours have killed live music shows, and copyright infringement further damaged the industry. Keoreng (2008) advocates the establishment of an Anti-Copyright Theft Unit within the Botswana Police Service as well as an arts council, saying that Botswana is the only country in Southern Africa without such a council.

3.4.5 Mozambique

3.4.5.1 Background

Mozambique is a large country with a total area of 801 590 square kilometres and a population of 23 515 934. Despite impressive economic growth during the late 1990s, Mozambique has suffered setbacks because of severe flooding in 2000 and 2001 (Infoplease.com, 2008). The economy, which is largely based on natural resources, specifically coal, gas and aluminium, was set to continue growing at 8.5% and 8.0% in 2013 and 2014 respectively. Inflation was at 2.7%

in 2012. Despite the positive outlook, weak human capital and infrastructure have slowed the expansion of the economic structure (African Development Bank, 2013).

3.4.5.2 Performance sector

Mozambican music has developed in leaps and bounds since independence in 1975 and includes a variety of styles. Timbila is a sophisticated style of music from the southern coastal area of Inhambane, played on the mbila, a type of marimba, which has also become a symbol of renewal. Marabenta, Mozambique's main urban dance rhythm, is a fusion of Latin American calypso and salsa, and Angolan merengue. A distinctive form of Mozambican jazz-fusion, using traditional instruments, has developed in the past two decades. The mixture of Mozambican culture includes Arab, Brazilian, Portuguese, Western and Southern African influences, and makes fusion a spontaneous form of musical expression. It is important and encouraging to note that traditional rhythms played on traditional instruments can still be heard in the rural areas of Mozambique, even though hip-hop has become very popular recently. Even in this case, a new style of hip-hop developed, similar to Zimbabwean Chimurenga. Some of the country's best jazz musicians are now based in South Africa (World Music Network, 2011).

The *Centro Cultural Franco Mocambicano* (CCFM) is situated in Maputo, the capital city, where most cultural festivals are held. The CCFM, previously an old colonial hotel built in 1896, was inaugurated on 13 July 1995 by Mr Pascal Mocumbi, Prime Minister of Mozambique, and by Mr. Didier Destremeau, Ambassador of France in Maputo. Dedicated to the development of cultural diversity, the CCFM is one of five French cultural centres in Africa.

Important musical events include the Festival of Hope, to raise HIV awareness, usually attended by many popular bands from southern Africa and beyond. The Maputo International Music Festival includes classical music, jazz workshops, opera performances, jam sessions and even film screenings. Independence Day is the most prominent of all the national festivals, during which Maputo stages a large-scale outdoor concert at the stadium featuring local and international musicians. The Tambo International Art Camp and Festival celebrates cultural diversity, and the Chopi Music Festival aims to preserve traditional music. An

August Festival is held in Maputo to promote cultural diversity in the country, and the Moya International Music Festival is staged in Beira over several weeks. The annual open-air AZGO Music Festival is held in Maputo over three days, and the popular Subterranean Rhythm and Blues Festival has grown from humble beginnings to an event featuring 20 live bands. Finally, religious festivals such as Christmas and Easter are also celebrated with music, midnight masses and choirs (Siyabona Africa, 2015).

3.4.5.3 Education sector

Although music is part of compulsory education in the country's schools, trained teachers are few, partly due to the fact that music is not taught at the teacher training colleges. Development in this sector is limited to a few private initiatives, mostly funded by international organisations. The American International School of Mozambique operates as a private school for international students. The facilities comprise a multi-level library-media centre, four computer labs, an auditorium and a fine arts complex for drama, music, visual arts and design technology (Heatherington, 2013). The Xibuwewe Music School communicates social justice issues to the community by means of musical, dance, poetry and theatrical performances. Music Crossroads Academies, supported by the Norwegian Ministry of Foreign Affairs, were established in 2013 in Malawi, Zimbabwe and Mozambique. Their purpose is to provide young musicians with the skills they need for a career in music, while contributing to the development of music education and the music industry in Southern Africa. The programme involves 270 students who are being trained by 30 music teachers. A Professional Certificate Programme in Music is offered, focusing on the musical traditions and instruments of each country. The Maputo National Music School has been in existence for more than 20 years and has produced renowned musicians like Moreira Chonguica, a respected ethnomusicologist, and Ivan Mazuze, an international jazz saxophonist (Music Crossroads International, 2013).

3.4.5.4 Business sector

- Recording:

Although indigenous music forms a very important part of everyday life in Mozambique, limited to almost no access to local recording and production facilities make it difficult for local artists to produce and release their own music. Media coverage is also sparse and of varying quality. The Centre for Culture and Development is an initiative of the Danish government which grants project funding for cultural exchange between Denmark and developing countries. This organisation funds a project that aims to strengthen the recording, production and release facilities for traditional and contemporary live music in Mozambique. The project consists of two stages, namely the upgrading of recording facilities in collaboration with Radio Mozambique and the installation of facilities for the production of CDs and DVDs, including the technical training of personnel (CKU, 2013).

- Retailing:

Music retailing is virtually non-existent in Mozambique, and similar to many other Southern African countries, a limited selection and mainly imported CDs, DVDs and other musical merchandise can be obtained only in general stores.

- Broadcasting:

Radio Mozambique and Television Mozambique are two state-owned companies. Five commercial TV stations and eight commercial radio stations are presently on air in Mozambique. Three groups of community broadcasters have emerged in Mozambique since 1993. One is funded by the state, a second by the Catholic Church and a third by various international donors. The programming includes news, current affairs and recreation. In April 2008, a total of 43 community radios were registered (Open Society Foundation, 2010:56-59).

3.4.5.5 Closing remarks

The diversity of the ethnic groups in Mozambique has resulted in a rich variety of musical styles. On the one hand, there is a growing number of professional musicians in all styles of music, and the numerous music festivals reflect the extent of these musical genres and styles. On the other hand, musicians are

fighting a losing battle against the scourge of piracy, a lack of infrastructure and the bombardment of international music flooding the market.

3.4.6 Lessons learnt from the music industries of the SADC countries

Despite the fact that the music industry in the SADC region is dominated by South Africa, only 23% of South African music sales are of local music, and the remaining 77% is of international artists. Throsby (2002:16,17) states that growth of the industry in this region is affected by the absence of a well-developed legal and commercial infrastructure. He claims that even though local music has the potential to develop domestic music industries, it requires effective protection of intellectual property rights. Although piracy provides a means for local entrepreneurs to make money, it undermines long-term domestic and international growth potential.

According to a comprehensive study conducted by Ambert (2003:3), market trends, conditions of employment and piracy have a major impact on the growth of the music industry in the SADC region. She identifies the following key issues as challenges relating to the music industry in the SADC region:

3.4.6.1 The industry and the market

- Due to the fact that the SADC countries (except South Africa) are not represented by the International Federation of the Phonographic Industry²¹ (IFPI), there are no statistics regarding the recording industry for the region (Ambert, 2003:5). Therefore, the validity of the IFPI's statistics is problematic, and industry role players find it difficult to make informed decisions with regard to investments and related aspects in the SADC music industry.
- According to the IFPI's figures, the African music market is the world's smallest regional market, worth only US\$207 million in 1998 and representing a mere 0.6% of total global sales (Ambert, 2003:6). More than 90% of the SADC market is in South Africa.

²¹ IFPI is an international organisation that represents the interests of the recording industry globally. Its mission is to promote the value of recorded music, safeguard the rights of record producers and expand the commercial uses of recorded music.

- Effective circulation requires effective music buyers and sellers. In countries where the market is based on live performance and/or piracy, the legal circulation networks for recorded music are weak.
- Producers cannot accurately determine market tastes and the level of sales. Audience development and feedback are weak and must rely on initiatives such as fan clubs and associations, competitions and awards as well as skilled musical journalism. These aspects are virtually non-existent in these countries.
- The music industry in the SADC countries is dominated by specialised record labels located primarily in Europe. This market offers an important opportunity for SADC artists and composers, yet no specific and uniquely African music genres are developed and produced for the international market.
- Stakeholders and co-ordinating bodies are institutionally weak and lack adequate legitimacy to operate as representatives of the music industry. Musicians' associations or unions supposedly represent composers and musicians, but they either do not exist or are weak and lack administrative and technical support.
- Weak economies in the region and unfavourable exchange rates make it difficult for industry role players to acquire materials needed to practise their trade. As in most other industries, a well-developed infrastructure is required to operate optimally.
- Music education is largely absent from most school curricula. Those involved in the management of the industry have also not been exposed to music business education.
- HIV/AIDS infection rates are as high as 25% of the population in some countries of the region, and role players in the music industry are extremely vulnerable to this pandemic. It also poses a real macroeconomic threat in that it has the potential to reduce the size of the local market.

3.4.6.2 Conditions of employment

- Artists who are active in the live performance sector often achieve high record sales. Performance is also the primary means of income generation for some artists. If this sector is disorganised in terms of contractual arrangements, the

local music industry is threatened by pirate networks that record and distribute illegally.

- The inaccessibility and absence of lawyers and managers to musicians and composers lead to bad conditions of employment of artists in the region. Musicians often find themselves in a situation where they have to make contractual arrangements themselves, without having the necessary skills and experience in this field, leading to poor remuneration and working conditions.

3.4.6.3 Protection of intellectual property and piracy prevention

- The intellectual property and livelihoods of musicians in this region are largely unprotected. Piracy has a negative impact on all role players in the music industry, and regional trade in legal music products is extremely undeveloped, a situation which further stimulates piracy. Although significant efforts have been made to develop copyright protection legislation, there is still a lack of capacity to apply, monitor and enforce it. Some copyright protection agencies exist only in name, and industry actors are ignorant with regard to their rights.

3.4.6.4 Opportunity in the SADC music industry

Because the recording industry is in an embryonic stage, there is an opportunity for independent record labels to play a developmental role with regard to the development of local artists in the region. The quota system for the broadcasting of local music content, albeit for dubious reasons in some instances, stimulated the growth of local music. The popularity and the success of various music festivals, both locally and abroad, are also important marketing tools to promote local music. International audiences are hungry for new sounds, and indigenous African music can fill this niche. Music retailing is virtually non-existent in many of the SADC countries, which also provides opportunities for retailers to generate income.

Further development of the music industry as a whole will give rise to a range of other activities and industries, such as the building industry for the construction of music venues, the printing industry for providing sheet music, the tourism industry and the transport industry. Music can play a key social development role

that could positively affect other pressing issues such as HIV/AIDS, poverty and unemployment. World music has become a popular music genre globally and is an important niche market for the region.

3.4.6.5 Summary

Growth of the industry in the SADC region – and in South Africa, although to a lesser degree – is affected by a number of issues which are summarised in table 7 below (Ambert, 2003:31-40). Also included in the table are the corresponding lessons learnt:

Table 7: Summary of lessons learnt from the music industries of the SADC region (own creation)

CHALLENGES IDENTIFIED IN THE SADC REGION	LESSONS LEARNT
The industry in general:	
1. No or very few statistics exist for the region regarding the recording industry. 2. Legal circulation and distribution networks for recorded music are weak. 3. The music industry in the SADC countries is dominated by specialised record labels located primarily in Europe and the USA. 4. Weak economies in the region and unfavourable exchange rates make it difficult for industry role players to acquire materials needed to practise their trade. 5. HIV/AIDS infection rates are as high as 25% of the population in some countries of the region and role players in the music industry are extremely vulnerable to this pandemic. It also poses a real macroeconomic threat in that it has the potential to reduce the size of the local market.	1. Accurate data regarding the recording industry must be managed by industry facilitators (such as RiSA in South Africa). 2. Distributors (revealers in the value chain) also require training and development. Effective distribution requires effective music buyers and sellers, and vice versa. 3. Because the recording industry is in an embryonic stage, there is an opportunity for independent record labels to play a developmental role with regard to the development of local artists in the region. 4. Effective economic and political management is required in all spheres of government. Development of the music industry as a whole will lead to economic growth and development because it will give rise to a range of other activities and industries such as the building industry for the construction of music venues, the printing industry for providing sheet music, the tourism industry and the transport industry. 5. Music can play a key social development role (e.g. music with a message) that could positively affect other pressing issues such as HIV/AIDS, poverty and unemployment.

6. There is a lack of physical music-related infrastructure. 7. There is limited access to capital to acquire the tools of the trade (music instruments, sound engineering equipment, PA systems, production equipment). 8. There is a critical lack of integration of the various role players in the industry. Many role players are missing in the SADC region and those that are present do not operate as a team.	6. As in most other industries, a well-developed infrastructure (such as studios, concert halls and music education facilities) is required for musicians to operate optimally. 7. Industry growth requires access to capital to acquire equipment. 8. Integration is an important prerequisite for the development of a well-functioning music industry. Rampant piracy and undeveloped markets are the results of non-integration of the industry.
The market:	
1. Markets are small. 2. No or very few statistics exist regarding consumer behaviour. 3. More than 90% of the SADC market is in South Africa. 4. The SADC market is mainly based on live performance and/or piracy. 5. No or very little audience development is taking place. 6. No specific and uniquely African music genres are developed and produced for the international market.	1. The general well-being of an economy is a pre-requisite for a music industry, as a secondary industry, to flourish. Well-planned marketing strategies are required for industry growth. 2. Market intelligence is a requirement and it is the joint responsibility of music bodies and government to maintain this information. 3. The Northern Cape Province is ideally situated to become a gateway for SADC member countries to produce and distribute their music as it is centrally situated and borders on two other SADC countries. 4. Music producing and distributing facilities must be adequate before the industry can grow. Artists who are active in the live performance sector often achieve high record sales. 5. Audience development initiatives must be put in place, and this is a government responsibility through its Department of Arts and Culture. 6. World Music has become a popular music genre globally and is an important niche market for the region. World markets offer an important opportunity for SADC artists and composers.
Education and skills development:	
1. Music education is largely absent from most school curricula.	1. Effective music education at all levels is a primary priority for a successful music industry.

2. Limited training opportunities for those involved in the management of the industry and music business education.	2. Education and training in non-musical but industry-related skills must be included in all curricula.
Co-ordinating bodies:	
1. Representation for musicians by musicians' unions is ineffective. 2. Co-ordinating bodies are institutionally weak and lack adequate legitimacy to operate in support of the music industry.	1. Conditions of employment are often subject to abuse in the absence of unions (facilitators). 2. Various forms of support are required by musicians. Co-ordinating bodies must be maintained as they form an important link between role players in the value circle.
Protection of intellectual property:	
1. There is an inaccessibility and absence of lawyers and managers to represent musicians and composers. 2. Intellectual property and livelihoods of musicians in this region are largely unprotected. 3. Industry actors are ignorant with regard to their rights.	1. A lack of legal support leads to poor conditions of employment for artists, and the local music industry is threatened by pirate networks that record and distribute illegally. 2. Piracy has a negative impact on all role players of the music industry. 3. Musicians must be trained in knowing their rights. This information must be captured in the curricula of educational institutions.

3.4.7 The trilateral music system of the Free State Province of South Africa: 1965-2013

3.4.7.1 Introduction

According to the current Head of the Odeion School of Music of the University of the Free State (Viljoen, 2013), the establishment of a comprehensive orchestral training programme in Bloemfontein in the mid-1960s has had a far-reaching influence on music education and training throughout South Africa. This programme was an incentive for the establishment of similar programmes elsewhere in the country, thereby fertilising the music education landscape of South Africa.

3.4.7.2 Historical background

According to Sean Kierman (2013), the Orange Free State Teachers Training College appointed four string players²² in 1960 to form a professional string quartet under the leadership of Prof. Jack de Wet and to start an instrumental programme for the schools in the Bloemfontein area. The members of the quartet were Jack de Wet, Noel Travers, Frans Bougegnon and Harry Cremers. An added short-to-medium term goal was to establish the Performing Arts Council of the Orange Free State (PACOFs) Youth String Orchestra. The project was funded jointly by the Orange Free State Department of Education and PACOFs, the latter having been established together with other arts councils in the country around the time when South Africa became a Republic. Oboist²³ Toon van Dongen joined the programme in 1969 (Steenkamp, 1983:154). During the early years, there were several premises for the Orange Free State Department of Education Instrumental Programme. Initially, most of the lecturers taught from their homes. Sean Kierman joined the team in 1970, adding brass instruments²⁴ to the programme. The first two years were spent doing marketing in the form of school demonstrations. Approximately 3 500 names of school children, whose parents approved their participation in the programme, were collected (Kierman, 2013).

3.4.7.3 The rise and fall of the three-tiered music system

- PACOFs:

The officials of the Orange Free State Education Department soon realised that the province could establish a semi-professional symphony orchestra. All that was required was to appoint a core of 26 instrumental lecturers who could double as orchestral players as part of their duties. The Director of Education, Dirkie de Villiers, approved the project and availed the necessary funding in collaboration with PACOFs. The Orange Free State Symphony Orchestra was established by PACOFs in 1974. The first building to be utilised for orchestral rehearsals was at the St Michaels School (near the centre of Bloemfontein), which stood on the premises of the current Sand du Plessis Theatre. The building soon proved to be too small, and the street noises distracted the musicians. The orchestra moved

²² A string player is a professional musician playing a stringed instrument such as a violin or cello.

²³ A person who plays the oboe, a musical instrument made of wood.

²⁴ Instruments made of brass, such as the trumpet or trombone.

to the Old Brebner School (in the east of Bloemfontein), to the Greenhill Convent and finally to the premises of the President Brand Primary School. The state-of-the-art Sand du Plessis Theatre and Opera House, one of the best equipped venues in the southern hemisphere at the time, was built on the premises of St Michaels School and opened its doors in August 1985 (PACOFs, 2013).

During this period of growth, the PACOFs Symphony Orchestra became known as the most inexpensive orchestra to administrate and run due to the fact that its 26 members were used as instrumental music teachers as well as performing musicians. While PACOFs received similar funding from the national budget to any other Provincial Arts Council during the 1980s, its orchestra consisted of part-time musicians who were paid on an hourly basis without any benefits. The more advanced music students were employed at a reduced rate to play in the orchestra, increasing its ranks to a full-size orchestra of as many as 70 players when needed (Henkins, 2013). During these glory days, PACOFs produced regular opera productions, 12 symphony concerts as well as various ballet productions each year. Both the Department of Education and PACOFs contributed to the costs and considerable income was generated by ticket sales (Kierman, 2013). This situation was lucrative and led to the establishment of a second orchestra in Bloemfontein, namely the PACOFs Opera Orchestra. This could not be sustained for very long because the composition of the personnel was administration-heavy. Approximately only a third of the annual budget filtered down to the musicians and artists, the rest having been absorbed by administration and the maintenance costs of the facilities.

The organisation gradually imploded from the early 1990s due to financial pressures caused by its administration-heavy structure and high infrastructure maintenance costs. With the advent of democracy in South Africa, the newly established National Department of Arts, Culture, Sport and Technology appointed the Arts and Culture Task Group (ACTAG) to investigate the arts sector in 1995. The ACTAG report formed the basis for the 1996 White Paper for Arts, Culture and Heritage and subsequent arts and culture legislation. The report states that the Performing Arts Councils would receive declining subsidies from central government over the following three years. At the end of this period, government would subsidise the core infrastructure, core staff and

essential activities of the Provincial Arts Councils. All other allocations would be funded through the National Arts Council (Department of Arts, Culture, Sport and Technology, 1996:20). By 1997, the National Arts Council was firmly established and took over the role of funding cultural projects countrywide through a system of sponsorship applications. This system presents its own share of problems because of bureaucratic red tape, mainly due to corruption phobia (Henkins, 2013). The acronym PACOFS has been retained, although it now stands for the Performing Arts Centre of the Free State. The orchestra was taken over by the University of the Free State, and the Sand du Plessis Theatre has been dark for most of the time.

- The MUSICON:

The President Brand Primary School was renamed MUSICON,²⁵ which gave birth to a music education institution that became one of the most prolific music schools in South Africa during the ensuing two decades. Each of the 26 PACOFS orchestra members taught students. Some taught as many as 40 students so that the student numbers grew to more than 500. The MUSICON experienced a parallel course of events as the orchestra. During the early years, it fell under the Department of Education, benefitting from a large portion of the national budget. With a staff of 36 teachers and 4 administrative officers, the MUSICON provided internationally renowned music education to approximately 800 students. Amongst its regular activities were seven active youth orchestras as well as satellites in Welkom, Kroonstad and Sasolburg. When the reality of a change of political regime in South Africa became clear during the early 1990s, stagnation set in due to political uncertainty, leading to the start of a gradual decline of the music education sector in the province (Henkins, 2013).

After 1994, the new government placed the MUSICON under the control of the Department of Sport, Arts and Culture. Staff members who retired during the subsequent years were not replaced, resulting in a rapid decline of staff numbers. Currently, there are only 11 teachers on the staff (Henkins, 2013). This resulted in the closure of all the satellites and a decline in traditional activities such as orchestral playing. Bizarrely, there was not a noticeable decline in student numbers. This could be accredited to the aggressive promotion of

²⁵ MUSICON is an acronym of Music Conservatorium (Henkins, 2013).

outreach projects to poorer and disadvantaged communities. The Mangaung String Project, under the guidance of legendary string teacher Peter Guy, is a case in point. The Mangaung String Project contributes about 75% of the current number of students at the MUSICON. Many of these students have reached considerable levels of excellence and some are accomplishing good results at an international level. The MUSICON is currently poised for further growth due to an expansion of its staff complement and suite of programmes offered (Adlem, 2013).

- The University of the Free State:

Leo Quale, renowned British conductor at the time, started the music department of the University of the Orange Free State in 1958. As a result of the PACOFS Orchestra system, where deserving students were paid to play as ad hoc members, many students were attracted to this university to study music. Simultaneously, part-time lecturers at both the MUSICON and the University held principal positions in the orchestra, serving as mentors for the students and also leading sectional rehearsals. This proved to be a successful and affordable arrangement as the student numbers grew and the department became well known for delivering high standards in tertiary music education (Henkins, 2013).

When the PACOFS Orchestra and the MUSICON started to show signs of a decline, notable from the 1990s, the Music Department of the University of the Orange Free State suffered losses in terms of its undergraduate student numbers. In addition, an institutional rationalisation process resulted in the loss of staff numbers. However, even during these difficult years, the university's music department aimed for quality tuition in both its undergraduate and postgraduate programmes. When the first democratically elected government came into power in 1994, some of the borders and names of the provinces in South Africa changed, and the word "Orange" was omitted and it became the Free State Province. During the past five years, the University of the Free State Department of Music invested in some innovative changes. They renamed the music department the Odeion School of Music, and there are currently more than 30 full-time and part-time lecturers employed in the school. They serve 45 full-time undergraduate students. Apart from the standard musicological subjects,

the current curriculum includes some industry-related subjects such as music technology, arts management and sound engineering. A substantial postgraduate programme forms the academic backbone of the institution, with 33 registered postgraduate students. While the Free State Symphony Orchestra (previously the PACOFS Orchestra) now no longer falls under the Odeion School of Music, it functions as an independent non-profit company. Deserving students are still afforded the opportunity to play in this professional orchestra under the guidance of their lecturers (Viljoen, 2014).

3.4.7.4 Lessons learnt

A unique three-tiered music education system developed in the Free State Province over a period of five decades and reached its pinnacle around 2007. Many schools, albeit only White schools, started appointing music teachers on their staff from the 1970s, a phenomenon that also took place in the Cape Province (which is now known as three provinces: Western Cape, Eastern Cape and Northern Cape). Many of the country's top young classical musicians were products of this system. Some of them made their mark on the local and international stage as professional performing musicians; others went into music business or music education. In 2007, the 75-piece South African National Youth Symphony Orchestra toured to Europe to attend the highly acclaimed international Beethoven Fest in Bonn. Of the orchestra's members, 40% were products of this system (SANYO, 2007). As a result, the music industry grew rapidly as several music shops, such as Munn's Music Land (later renamed Savvy's Music), opened its doors. National Music Distributors sold mainly sheet music countrywide from 1970 until 2007. Figure 20 illustrates the collaboration and hierarchy of the three-tiered music education system in the Free State Province:

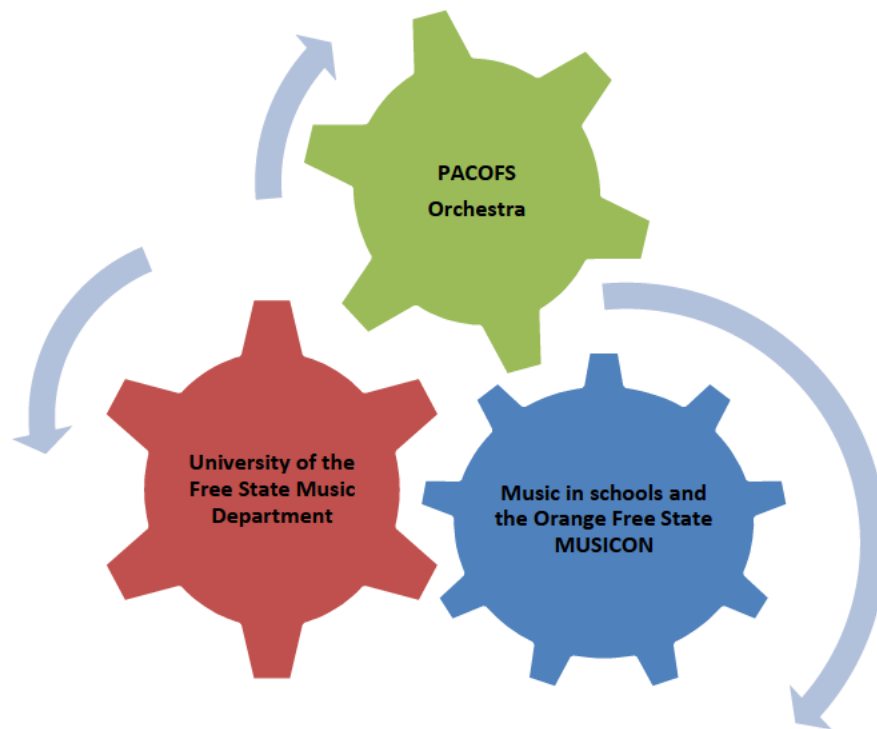


Figure 20: The three-tiered music education system of the Free State Province (own creation)

The three-tiered system underwent a small revolution during the past two decades. From a period of abundance and excellence, it deteriorated to be barely functioning, and it now shows signs of recovery in some areas. This could partly be attributed to the fact that the three-tiered system in essence excluded all music that was not part of the genre of Western art music and, until the late 1990s, excluded all people who were not White. The new South African dispensation could simply not continue supporting such a biased music education sector. The gradual change towards a more inclusive approach, coupled with the managerial inexperience of a new regime resulted in the initial decline.

Despite this inherent flaw in the system's initial design, there are still valuable lessons to be learnt. A successful music industry is reliant upon various contributing and integrated factors. In this example, the key to its initial success included a multiple funding strategy, where more than one government department as well as self-generated funds contributed to the overall cost of the project. Once the tree-tiered system was in place and started functioning as it was intended to, the music business sector followed suit and became one of the country's most active suppliers of music merchandise. A further by-product was

the creation of several jobs in the education, performance and business sectors. A classical symphony orchestra can be one of the costliest activities to run, as its income alone cannot match the personnel costs. This model not only provides an inexpensive alternative, but also on-the-job skills training for new recruits and the productive use of staff.

On the negative side, an oversized administrative staff body and the high cost of building maintenance clearly compromised the sustainability of the Performing Arts Council. The previous funding model was replaced by a centralised and single funding agency, namely the National Arts Council. This resulted in enormous amounts of bureaucratic red tape, which often made it very difficult to acquire the necessary funding. The music education sector suffered without the necessary strategic planning when the governance of the MUSICON was transferred to the Department of Sport, Arts and Culture. This had dire consequences for the once flourishing university music department, as its feeding system became gradually depleted. The once vibrant and successful three-tiered system, which took more than 30 years to build, almost completely collapsed within a period of only 5 years (Henkins, 2013).

3.4.7.5 Closing remarks

This chapter briefly outlined and assessed a number of examples of music initiatives or industries, internationally and locally. This information is required to identify strengths, weaknesses and opportunities that can be utilised (or avoided) in the construction of a framework for the design of a music industry in the Northern Cape Province. The chapter highlighted a number of research questions that deserve future study. These are:

- the unintentional protection and subsequent unexpected development of local Zimbabwean music caused by state media control and limitation on international music imports
- effective control of music piracy in the SADC countries
- an integrated framework for a music industry in Namibia and Botswana
- saving Mozambican music from international invasion and piracy
- the rebuilding of and a new direction for the three-tiered music system of the Free State Province.

It can be deduced from this research that, as is the case in Venezuela, music education and related facilities belongs with the people and must be taken to where they live, including those living in rural areas. Furthermore, integration of all aspects of society is an important prerequisite for the development of the music industry. Valuable lessons can be learnt from the music industries of the SADC countries, where many role players are missing and the industry is not integrated. This is the cause of the many problems in that area, such as rampant piracy and undeveloped markets.

All of the above can be divided into the following key areas of industry requirements:

- A music curriculum should be designed that is geared towards the advancement of the music industry as a whole. It should be interconnected at all levels of education and should develop the skills that are required for diverse sectors of the industry.
- A physical and administrative environment should be provided and should be conducive to further development and support of the performance industry.
- An enabling business environment should be created that includes enterprise development and financial incentives that will ensure economic participation.

Although interconnected, the three objectives above correspond to the three pillars upon which the entire music industry is built, namely education, performance and business. The application of best practice principles will ensure the creation of job opportunities, which in turn is the key to economic development. Accurate information is required regarding music creators (artists, composers and performers) in the area. New "raw material" must be created on an ongoing basis and should correspond to internal and external demands. Conditions conducive to productivity, such as contractual and financial stability, training in artistic performance, lifestyle management and access to equipment and instruments must be created for these creators. Musicians (creators) must have easy access to production facilities (enablers) – both existing recording and

production facilities and newly developed facilities – to manufacture products that meet the expectation and purchasing capacity of the market. Similarly, both existing and new circulation and distribution (revealers) channels must be developed to make products accessible and affordable to the market. Detailed information, clearly identifying the existing market (consumer) and its needs, is required. A strategy must be developed to ensure that consumers spend more of their money on locally produced products, less on international repertoire and none on pirated products. The available market must increase and a new market must be generated. Strategic partnerships in fighting piracy, copyright protection and skills training must be developed to protect and promote local business, and relationships with broadcasters and the media should be developed to stimulate growth. Global, national and regional trends affecting the music industry must be analysed, and finally, the response to obstacles and opportunities must be geared towards maximising growth in the industry.

Chapter 4

Regional economic development in theory and practice

4.1 Introduction

This chapter consists of two main sections, namely the theoretical and philosophical principles of regional economic development (RED) based on a literature study, and examples of such theories as applied in different scenarios. These principles are condensed and applied in the following chapter where they are relevant to the proposed framework for the development of the music industry in the Northern Cape Province.

4.2 Regional economic development

The broad concept of economic development in general has been defined in detail in section 1.4.1. The International Economic Development Council (IEDC) (2016) defines it as “a programme, group of policies, or activity that seeks to improve the economic well-being and quality of life for a community, by creating and/or retaining jobs that facilitate growth and provide a stable tax base.” RED is “a process in which local governments or community based organisations are engaged to stimulate business activity and/or employment within a specific area” (Miller, 2011:22). In the words of James E. Rowe, economic development can also be described as “a complex process that is created from a successful fusion of entrepreneurship, education and a skilled community, driven largely by market forces, requiring a favourable business environment and a supportive regulatory framework” (Rowe, 2009:6).

These characteristics require an increased focus on social capital as a key asset which can be used to achieve RED and advancement, similar to economic capital (e.g. money and property) and human capital (e.g. education and health). During the 1990s, the World Bank declared social capital as the final ingredient in the development process (Willis, 2007:111).

According to Mcgahey (2008:5), globalisation brought about a renewed interest in RED in the United States of America during the past few decades, and incentives such as tax cuts and subsidies have been employed to encourage people to establish businesses in a certain region. This strategy has come under fire from various fronts arguing that governments should compete for business by providing a general economic climate or milieu conducive to growth rather than spending tax payers' money on incentives. The latter, more multifaceted approach to economic development includes factors such as overall taxes, regulations and labour legislation, educational and environmental quality, skills development, per capita income, job creation, business expansion, small business start-ups and broad infrastructure.

4.2.1 Characteristics

Economic regions can be any size, urban or international. They are made up of people living in the same area, sharing a common interest in commerce and trade with other parts of the world, or in other words, to provide a product or a service to another area. The globe is divided into various recognised international economic regions, namely North and Latin America, Eastern and Western Europe, Japan, Asia, Oceania and the southern and northern parts of Africa. Although on a much smaller scale, the Northern Cape Province is a legitimate example of an economic region. Its key economic sectors include agriculture and aquaculture, mining, tourism and renewable energy.

An economic region is an area within specific administrative or geographical boundaries where particular types of commerce take place. Such boundaries can be based on state lines, international borders, natural geographic landmarks, labour migration or consumer behaviour. It can be a creation of government or can originate coincidentally due to natural circumstances or conditions (e.g. areas with fertile land and ideal weather conditions for specific crops). According to Dawkins (2003:133), a region must be defined in terms of a spatially interdependent or nodal labour market, which is an area organised around a focal point that is defined by economic interactions or connections.

4.2.2 Historical background of RED

There are many definitions in the economic literature to describe what a region is. An early definition was given by Walter Christaller, a German geographer, in his book *Central Places in Southern Germany* (1933). His central place theory defines regions as central places whose primary purpose is the provision of goods and services to another market area. Central places earn this status once they become economically viable. They are then referred to as lower-order or higher-order central places, depending on their business footprint and market size. Lower-order places are smaller and higher in number than higher-order places, which have more purchasing power (Briney, 2013). The German economist August Lösch expands on Christaller's work in his book *The Spatial Organization of the Economy* (1940). According to Lösch a bottom-up approach towards development is more appropriate for RED, starting from the smallest scale of economic activity and gradually developing into richer areas (Encyclopaedia Britannica, 2014).

According to Rücker and Trah (2007), RED activities focus initially on attracting external investors with financial incentives such as tax breaks and/or reduced costs for services. This was replaced by developing the endogenous economic potential through the support of existing businesses, the promotion of entrepreneurship and the establishment of new businesses. Since the late 1990s, a more holistic approach to RED has become prevalent and focuses on the following issues:

- providing a competitive local business environment
- encouraging and supporting networking and partnerships
- facilitating workforce development and education
- focusing inward investment to support cluster growth
- supporting quality of life improvements.

Throughout the evolution of RED, an integrated conglomeration of elements from a variety of disciplines were employed. This bears testimony to the fact that RED requires a myriad of networks and integrated systems and interactions to be successful (Rücker & Trah, 2007:12,13).

4.2.3 RED Theories

Szajnowska-Wysocka (2009:76) relates the development conditions of regions to two theoretical approaches, namely the classical concept of regional development and the concept of endogenous regional development.

4.2.3.1 Classical theories on RED

There are numerous classical theories for RED that have been designed and implemented in the world. The following summary (Szajnowska-Wysocka 2009) highlights examples of such theories:

- The concept of economic base: Stimulate economic development by dividing the economy into two types of activities, namely exogenous (export) and endogenous (local), both activities being interdependent upon each other.
- The new theory of trade: Production is specialised according to regional strengths and assets.
- The basic product theory: Long-term specialisation and improved organisation of production is employed to lower costs and improve quality. It requires investing in infrastructure and supporting co-ordinating bodies and related services.
- The concept of growth poles: This theory is based on the assumption that specific successful firms become leading propulsive enterprises which act as growth poles for a whole economy. Local authorities are responsible for the creation of new growth poles.
- The core and peripheries model: The larger metropolitan centres dominate over the peripheral regions, similar to the growth pole theory.
- Regional innovation networks: This theory emphasises the role of local environments as generators of innovative behaviour directed at acquiring new production skills.
- The theory of production cycle: It combines economic development with the process of new products' manufacturing and improvement, and standardisation of production. RED is stimulated by technological innovativeness or creative series of goods and services.
- The theory of flexible production: This theory views an industrial district as a separated area with small and medium-sized enterprises, operating with local

capital and management. The workforce is connected to the region rather than the firm.

- The theory of industry clusters (see section 4.2.3.3 below): According to Porter, quoted in Szajnowska-Wysocka (2009:81), clusters are “[g]eographical concentrations of interconnected companies with close supply links, specialist suppliers, service providers, and related industries and institutions. Hence, clusters appear to be a system of integrated enterprises and institutions”.

Terluin²⁶ (2003:330-331) divides RED theories into four main groups, namely traditional models, pure agglomeration models, local milieu models and territorial innovation models. The traditional models comprise the neo-classical growth theory (the availability of capital and labour) and the export base theory (growth in export activities funds regional development activities). In the pure agglomeration models, the growth pole concept stimulates other industries and businesses through the multiplier effect. In the local milieu models, skills and “know-how” as well as social and institutional structures affect the revenues from investments and labour. These are examples of endogenous or local economies (see section 4.2.3.2 below) characterised by entrepreneurship, and smaller district economies acting as catalysts for broad economic development. Territorial innovation models emphasise the necessity of innovation at all levels of the value chain in order to be competitive.

Ascani, Crescenzi and Iammario (2012:5-7) argue that there is increasing awareness across the world that globalisation is gradually increasing the importance of RED, that national economic growth tends to be determined by the success of local economies and that bottom-up development policies unleash indigenous economic potential. This approach appears to be extremely relevant in a period of increasing globalisation, as discussed above. The more fluid borders become due to globalisation, the more important regions become (Szajnowska-Wysocka, 2009:75).

²⁶ Dr. Ida J. Terluin has been employed as a researcher at the Agricultural Economics Research Institute LEI in The Hague since 1999. Her research topics include aspects of the Common Agricultural Policy, with emphasis on structural and rural developments.

4.2.3.2 Endogenous and exogenous factors in regional development

Endogenous factors refer to the internal elements of a regional economy such as its home-grown labour force, institutions of education, policies and finance. Endogenous factors include entrepreneurship, innovation, the adoption of new technologies, leadership, institutional capacity and capability and learning (Rowe, 2009:169). These factors stress the importance of social development, the growth of human capital, the role of local communities and their activities in regional development (Szajnowska-Wysocka, 2009:87).

Endogenous development is closely related to and dependent upon exogenous development, which refers to factors and events that occur outside of the model, beyond the control of an area, such as the international oil price. Exogenous factors influence endogenous development and have an impact on the strategic planning, production and growth of an area. Rural development is considered to be transplanted from elsewhere into particular regions and determined by external factors or powers, and benefits are exported from the region. Exogenous practices fell into disrepute since the late 1970s as they did not contribute to growth (Terluin, 2003:232).

A more balanced approach is a mixed endogenous/exogenous model which emphasises the interaction between local and external factors. Actors in RED should be involved in both networks in which resources are mobilised and those in which control is shared between local and external forces (Terluin, 2003:233).

4.2.3.3 Economic clusters

This study places particular emphasis on the theory of industry clusters because of the commonalities between this theory and the proposed framework for the development of the music industry in the Northern Cape Province. The integrated framework, as described in Chapter 6, is comparable to the geographical concentrations of interconnected companies with close supply links and related institutions of the industry clusters. A music industry requires the same level of integration and co-operation with other role players.

Michael Porter of the Harvard School of Business advocates region-specific clusters of economic activity, which clearly underlines the legitimacy of the integrated framework for the music industry, as proposed in Chapter 5 of this study. He describes a cluster as follows:

A cluster is a group of firms, related economic actors, and institutions that are located near one another and that draw productive advantage from their mutual proximity and connections. They may be connected by functional relationship (e.g. the various actors in the value chain) or by competition for similar markets. The most successful clusters are found where participants can easily interact and leverage the same pool of labour and training assets. Firms that are part of robust clusters are in a stronger position to compete successfully in the global economy and thus to contribute to regional prosperity (Porter, 2007:1).

Clusters have been around for decades, and in some instances for centuries, and they exist in all parts of the world. In South Africa, the town of Uitenhage is a case in point, being famous for its manufacturing of automotive and associated parts. Industry started in the area in the late 1800s with wool-washers playing an important role in the economic development of the town. Volkswagen established itself in the area by the mid-1900s and very soon an industrial area was created around it. Today, the cluster includes tyre manufacturer Goodyear as well as many other automotive component manufacturers. Although globalisation is continuously changing the geography and the landscape of markets (and indeed all other factors of the value chain) across the world, clustering remains remarkably area-based. The establishment of new and the support of existing clusters are important developmental tools for governments because clusters boost innovation, which leads to improved employment opportunities, higher productivity and wages and thus improved regional sustainability. It usually takes many years for clusters to evolve, but their common denominator is that they all require entrepreneurs and creative thinkers in order to sprout. As more companies and businesses form, a support structure develops, creating an excitement that attracts even more companies from elsewhere, and thus new opportunities are generated (Cummings, 2015).

4.2.3.4 Requirements for cluster development

Clusters are often interdependent due to the overlapping nature of their business. Their formation can be coincidental or planned by government, and they generally thrive in regions where policies are conducive to growth and programmes are in place to support development. Porter (2007:1) identifies the following six initiatives, mostly falling within the responsibility of the government, which can contribute to cluster success:

- Establishing a solid foundation:

The ultimate success or failure of clusters requires effective growth strategies to be developed. A solid foundation for cluster development further includes quality education, developing cluster-specific infrastructure, encouraging creativity, and aligning different role players.

- Building mutually beneficial relationships between firms:

Inter-firm collaboration can be beneficial as various employees have expertise and companies have practices that may be shared to facilitate cross-pollination. Governments can contribute by establishing and supporting associations and co-ordinating bodies.

- Developing talent and skills:

Governments can establish cluster-training consortia at training facilities to nurture cluster-focused skills through development programmes and vocational guidance. The curricula of educational institutions can further be adapted to encourage the development of talent and expertise in a specific field.

- Aligning innovation investments:

The state must invest in various types of innovation, not only that which is usually found in science and technology, but in other areas that are part of the value chain.

- Accelerating entrepreneurship:

Governments should support research and development initiatives as well as entrepreneurship to turn good ideas into reality. Small business centres must be established around cluster expertise to encourage entrepreneurship.

- Opening up global opportunities:

Governments should support the attendance of international events such as conferences, tours and trade shows and provide export assistance in the process of internationalisation.

4.2.3.5 Strategic planning for RED

Bartik (1995:2) defines an economic development strategy as a plan which brings about changes that affect a local economy's capacity to create wealth for local residents. The World Bank (2004) proposes the following five-step planning process to be integrated with other local planning processes when designing an economic development strategy:

- Stage one: Organising the strategy

The community, guided by the local government, starts the strategic planning process by identifying the people, institutions and organisations that have an interest and could bring resources and skills to the table. Working groups or committees must be established to support the strategy development and its implementation. The collective efforts of the public, private and community sectors are important in creating a triple helix effect to manage the process effectively. At this point, a "home" for the strategy must be established within the local government to ensure that someone takes responsibility.

- Stage two: Conducting a SWOT analysis

Detailed information is required about the attributes of the community in order to identify its strengths and weaknesses. The goal is to create an economic profile that highlights the comparative competitiveness of the community. Examples of this information include:

- o demographic information, such as statistics regarding the population, levels and areas of education, employment figures and skills

- o economic information to provide an understanding of the local economy, such as statistics on business activity in the area
- o investment climate information to determine how the local government treats its business community with regard to issues such as taxation, business support, access to funding and general bureaucracy
- o hard infrastructure information, such as the status of water, electricity, roads, etc.
- o regional and national information to determine what is happening in other areas with regard to collaboration and other opportunities.

- Stage three: Developing the strategy

A long-term vision of the preferred economic future must be developed by all stakeholders. This will form the basis upon which the goals, objectives and programmes will be based. The vision must provide consensus on what is to be achieved, how it is to be achieved, by when it is to be achieved and who will be responsible. The strategy must be monitored and assessed against the budgetary constraints as well as the resource capacity.

- Stage four: Implementing the strategy

The successful implementation of the strategy is driven and monitored by the preceding steps. Key considerations at this level include unequivocal information on:

- o who the responsible persons or institutions are
- o output, timing and financial targets and the route towards these
- o reporting structures and channels
- o performance monitoring and evaluation systems and their effectiveness
- o resource requirements.

- Stage five: Monitoring and evaluation

Any strategy should be reviewed at least annually to ensure that it remains relevant. It provides the opportunity to critically evaluate the SWOT analysis, any new information that might change the circumstances and the progress of the project. It furthermore assists in quantifying outcomes and justifying expenditures and actions.

4.2.4 Funding an RED strategy

Bartik (1995:3) argues that because RED programmes are usually run by a wide variety of organisations (e.g. cities, Chambers of Commerce, non-profit organisations, independent public agencies, community colleges and universities), they should be funded by a wide variety of sources (e.g. local government general and special funds, private contributions, state grants, fees from assisting businesses and revenue from property redevelopment).

During budget time, all government departments (e.g. housing, health and education) compete for scarce resources. Officials often struggle to justify funding long-term plans as opposed to immediate needs that are often perceived to be more urgent. Despite these challenges, an RED strategy must have a realistic budget which will ensure that funds are available over a long period of time. Sources of such funding may include:

- local authority revenue raised from the usual sources, including taxes
- sale or renting of local authority-owned property
- national and provincial government
- international donor grants and loans
- private sector funding, such as corporate donations
- foundations, especially for environmental improvements, human resource initiatives and poverty alleviation.

4.3 Theory versus practice

Economic development theory and practice should not be two separate entities because there cannot be economic development practice without theory on how it ought to be practised. Similarly, it is anomalous to conceive theory that exists purely in a descriptive form and is devoid of purposeful action. Practice is underpinned by theory (Rowe, 2009:17). The desired outcomes of RED formulation and implementation strategies must match the processes and theories that created them. The challenge lies in how to achieve a connection between the outcomes and theories and is further complicated by the

unpredictability of exogenous factors (Rowe, 2009:169). In RED, there must be a continuous awareness of both *process* and *product*.

In order to support the above theories with empirical evidence, Terluin (2003:333) advocates a process of pattern-matching, consisting of three steps. First, a theory is specified as a pattern of events against which data can be compared. Secondly, information on all events is collected and stored in a pattern, and finally, both patterns are matched. For the purpose of this study, a less complicated methodology is used by briefly analysing various development strategies. This is followed by a summary of activities that can be identified, and their corresponding RED theories are outlined. An economic development framework should be developed through the recommendations made in the SWOT analysis otherwise the practitioner will not be able to connect the theory with the practice (Rowe, 2009:18).

The following examples of development strategies are briefly analysed:

- the Metro Atlanta Regional Economic Competitiveness Strategy, USA
- the City of Portland Economic Development Strategy, USA
- an economic growth strategy for the Essex County Council, England
- Phillips and Pittman's framework for community and economic development.

The purpose of this exercise is to identify examples of RED theories and best practice which can be applied to the music industry in the Northern Cape.

4.3.1 Examples of RED strategies

4.3.1.1 The Metro Atlanta Regional Economic Competitiveness Strategy

The Metro Atlanta is the most populous metro area in the state of Georgia in the United States of America. The region comprises ten counties and has enjoyed tremendous growth in recent decades, although the recession halted all job growth since the start of the new millennium, resulting in unemployment, a crumbling housing market, budget cuts and many related challenges. This prompted officials to draw a clear road map to address these challenges (Market Street Services, 2012:3). In the Metro Atlanta Regional Economic

Competitiveness Strategy, three key issues are identified that should be succinctly clear before and during the implementation of a strategic plan (Market Street Services, 2012:60). They are:

- Strong leadership, in the form of an implementation committee, is needed to support and drive the project. This committee comprises members representing all spheres of the community that have the necessary knowledge and interest to make lasting contributions and take ownership of the outcomes. This committee should be supported by various sub-committees or working groups, overseeing specific tasks.
- Implementation priorities must be graded by assigning a value from 1 to 5 to actions that range from unimportant to critically important. These ratings assist in determining time frames.
- Performance measurement allows the monitoring of progress and the tracking of the implementation of recommendations as well as their impact and return on investment.

4.3.1.2 The City of Portland, Tennessee

The City of Portland is located in northern middle Tennessee. For most of its history, Portland was known as the “Strawberry Capitol” of the USA (City of Portland, 2015). After the worst economic downturn in 60 years in 2008, together with the evolution away from a century-long dependence on carbon-based technologies, the City of Portland decided to confront the subsequent increase in job losses and economic decline in the area. In this example of an RED implementation plan, namely the Portland Economic Development Strategy, three important elements of effective implementation are identified (Portland Development Team, 2012:30-33):

- an implementation plan developed in collaboration with public and private sector partners throughout the region, supervised at the highest political level, including specially promulgated advisory and oversight committees at government level
- a funding plan that meets the needs of the strategy and expands the sources of available funding for multi-year financial support products to encourage

existing and new businesses as well as regulations and policies to be designed to promote growth

- performance measurement metrics against which the goals of the strategy are compared on a regular basis.

4.3.1.3 An economic growth strategy for the Essex County Council

Essex is a county situated in close proximity to London on the eastern side of England, with Chelmsford as its biggest city. This example was chosen because the county has a population similar to that of the Northern Cape Province and it has the same goals as this study, namely to unlock growth, create jobs, create the conditions for long-term economic growth and strengthen communities (Essex County Council, 2012:5). The Essex County Council Economic Growth Strategy (ECCEGS) does not create jobs, but rather proposes ways to create a business environment that stimulates growth. The strategy consists of several projects, all sharing the following principles, enterprise and innovation; education, employment and skills development; locations for growth; and infrastructure.

- Enterprise and innovation

ECCEGS proposes several ways to attract investment to the area and stimulate existing businesses, and it focuses on activities that create and retain/sustain jobs. It highlights the strengths of Essex County and promotes the area as an outstanding business environment. The strategy undertakes to support new businesses while investing in existing ventures. A "Key Account Management Programme", consisting of the top 100 senior executives, manages challenges that might affect business. ECCEGS endeavours to make Essex competitive by improving productivity through innovation. This includes incentives for SMMEs. It aims to increase exports by assisting companies with specialist support programmes and establishing links with the BRICS countries (Brazil, Russia, India, China and South Africa). ECCEGS promotes new business ventures by providing support to entrepreneurs, advice to new businesses and access to finance (Essex County Council, 2012:18).

- Education, skills and employability:

ECCEGS advocates an employer-led skills development process to address the specific skills requirements of all industries. Employers must participate through SMMEs and apprenticeships and must be represented on an Employment and Skills Board. The number of apprenticeships is increased significantly for this purpose. Investment in the development of existing employees is done through an industry-backed development programme. Technical skills training for the unemployed as well as an adult learning programme is provided in specific areas as required by each industry. These training initiatives are linked to educational institutions (Essex County Council, 2012:18).

- Locations for growth:

ECCEGS consulted all role players, such as the city, council and district, to reach an agreement on where future growth should take place. It was decided to identify priority locations by focusing on existing strengths in the area, linking these with the requirements of the various development projects. These are referred to as "Enterprise Areas" (Essex County Council, 2012:19).

- Infrastructure:

Any economy depends on an efficient transport and communications network at competitive prices, to provide access to markets and suppliers. Other infrastructure needs include readily available water, electricity and gas supplies. ECCEGS also looks at private sector funding options as it is unlikely that public sector will be available to construct the business development projects (Essex County Council, 2012:19).

4.3.1.4 A framework for community and economic development: Phillips²⁷ and Pittman²⁸

Community development (also referred to as community regeneration) has been around for a long time. Greg Wise, as cited in Phillips and Pittman (2008:4), identifies the first examples taking place during the post-World War II period,

²⁷ Rhonda Phillips is a professor in the School of Community Resources and Development at the Arizona State University. She focuses on community planning, development, arts and cultural development and tourism planning (ASU, 2014)

²⁸ Robert Pitman is a senior principal at Janus Economics, a provider of economic development consulting services.

when many reconstruction efforts were afoot to rebuild war-damaged countries and to improve less developed countries (Phillips & Pittman, 2008:3). Many earlier examples of community development exist, albeit disguised in the form of social movements such as the Sanitary Reform Movement of the 1840s in the USA, and more recently, the South African Reconstruction and Development Programme. From 1950 onwards, many Community Development Corporations were established in the United States of America and the United Kingdom, for example, to address poverty-stricken rural areas and other social challenges such as housing needs. Today there are more than 4 000 Community Development Corporations in the USA, mostly focusing on housing needs. According to Phillips and Pittman (2008:4), community development has evolved into a recognised discipline, and they believe that there is a strong link between community and economic development which is often overlooked in research and practice. Their framework was selected as one of the guiding philosophies in the establishment of a framework for the development of the music industry in the Northern Cape because it places community development at the forefront.

Music is a valuable tool for community development (O'Luanaigh, 2013:69). This approach relates to the concept of musiconomy, which was described in detail in section 1.4.2. Phillips and Pittman (2011:3) state that community development is an important prerequisite for economic development and that the two disciplines are related, both being a process and an outcome. Developing and enhancing the ability to act collectively is the process, and taking collective action and the result of that action for improvement in a community is the outcome. Social capital, which is the capacity of the members of a community to co-operate effectively in order to set and achieve goals, is required to attain community development. Social capacity-building is the process of increasing social capital or capacity. Economic development is the process of creating wealth by utilising all available resources to generate sellable and quality products and services.

The key to wealth creation, and thus higher living standards, is commonly considered to be the creation of new jobs. Phillips and Pittman (2011:8) use the analogy of a three-legged stool to illustrate what creating jobs involves, namely recruiting new businesses, retaining and expanding businesses already in the community and facilitating new business start-ups.

The location of these businesses depends on the location of the customers, labour, resources, cost factors or any other strategy-related reasons. Communities can alleviate some of the factors that push businesses away by implementing business retention and expansion activities such as tax incentives and labour training. In short, communities must make the environment “business friendly”. Factors which improve quality of life, such as good educational institutions, health care, safety and cultural activities, can play a role in determining locations for new businesses to start. When businesses close down and move out of an area (as was the case with De Beers Consolidated Mines relocating from Kimberley to Johannesburg during the 1990s), communities must be educated and enlightened to be able to recruit other types of industries to fill the void that is left behind. Successful communities invest appropriate resources and implement well-designed programmes over long periods of time. They have a direct influence on their own destiny, realising that this group effort involves all citizens.

4.4 RED in a South African context

4.4.1 National government

Since 1994, the South African National Government has adopted numerous policies to stimulate economic growth, such as the National Framework for Local Economic Development, the Poverty Alleviation Strategy, Growth Employment and Redistribution and the Joint Initiative on Priority Skills Acquisition. Despite good intentions, many of these policies have been unsuccessful due to the inability to implement their strategies (Bergrivier Municipality, 2009:8). In 2004, the South African Government was mandated to implement the Accelerated Shared Growth Initiative for South Africa (ASGISA). It was not a policy, but rather a list of projects with shared objectives, namely to halve poverty and unemployment by 2014 and to stimulate growth in areas other than the main development hubs of the country (e.g. Johannesburg, Durban and Cape Town). A number of priority sectors were identified as critical areas that could assist in the growth of the economy as a whole. These priority sectors included tourism, biofuels, agriculture and agro-processing, amongst a few others. ASGISA is

briefly highlighted in this study because it identifies a number of additional significant sectors as being important tools to achieve this goal. These sectors include chemicals, metals beneficiation, clothing and textiles and the creative industries (crafts, film and TV and music). According to ASGISA (The Presidency: RSA, 2004:13-19), the following strategic steps were to be implemented to stimulate growth in these areas:

- Education and skills development:

This would include the development of skills in all sectors, but with particular focus on the critical sectors as mentioned above.

- The elimination of the second economy:

The second economy refers to those activities that are informal and survivalist in character. Due to South Africa's historical inequalities, there is a gap between the first and second economies which must be bridged if the economy is to grow. This would be done by implementing a number of strategies, such as increased public expenditure, the promotion of small business and Broad-Based Empowerment through access to finance, attention to the development of women and the youth, review of labour laws with an impact on small business and infrastructure development (Department of Economic Development, 2015).

- Attention to macro-economic issues:

Macro-economic issues that have a direct or indirect influence on economic development are identified, with an undertaking by national government to scrutinise and improve policies relating to them. These include issues such as inflation, currency value and improved government budgeting and expenditure.

4.4.2 Provincial governments

The nine provincial governments of South Africa are responsible for implementing the strategies of ASGISA. In order to assist in this process, the National Framework for Local Economic Development was drafted (Department of Provincial and Local Government, 2006:17). This framework characterises successful local economies as follows:

- The people of the region are resourceful, skilled and innovative. They produce locally made and branded products for the domestic and international market that are affordable yet of high quality and appeal to the needs of different consumers.
- Their leaders inspire confidence and mobilise resources for the advantage of local communities. They also make, manage and implement economic development strategies that are participatory, realistic, feasible and viable, yet creative, innovative and visionary.
- The workforce is well capacitated and is appropriately skilled and remunerated. These economies provide a competitive edge for the businesses and industries functioning in the local area and serve as an attraction for new businesses and industries.
- The local assets (e.g. natural, physical, financial, human and social capital) are harnessed and attract private sector investment.
- The infrastructure and public services are accessible and efficient and they enable local residents to develop their skills and potentials in order to participate fully in the local economy. The natural and physical environment is maintained, appealing and desirable, which in itself is a constant source of work for local people.
- They are linked up with local, provincial, national, continental and global economies with easy access to information and support structures.
- They have a range of partnerships with different parties that enhance economic growth and provide support to local enterprises.
- Local income is largely spent in the local area which generates revenue for municipalities in order to help fund infrastructure and services.

4.4.3 Local governments

For the purpose of a brief comparative analysis and the application of the principles of best practice to the proposed Northern Cape music industry framework, the following three examples of RED within the South African context were selected:

- Kopanong Local Municipality Development Framework
- Mpumalanga Economic Growth and Development Path (MEGDP)
- West Coast District Municipality.

The above examples were selected because each of them shares specific characteristics or commonalities with the Northern Cape Province, such as geographical area or size, population size or economic challenges, and the methods used in both the planning and implementation of the development plans offer valuable contributions towards the NCMIDF.

4.4.3.1 Kopanong Local Municipality

The Kopanong Local Municipality recently embarked on a study to develop and implement an integrated strategic framework to develop the local economy. Kopanong falls within the Xhariep District Municipality and is situated in the Southern Free State (see figure 21). It covers a large surface area (15 190 square kilometres) and consists of nine towns.



Figure 21: Kopanong Municipality (Kopanong Local Municipality, 2015)

Their local economic development strategy identifies the following five programmes to guide the municipality's economy into the future (Kopanong Municipality, 2013:35-36):

- The specific sector growth programme includes the development of the agricultural, tourism, manufacturing and retail sectors.
- Infrastructure development is identified as a critical aspect in order to create conditions conducive to growth for all communities.
- Social upliftment programmes are introduced to assist in alleviating poverty in a holistic way by facilitating access to community services for an enhanced quality of life.
- Business and economic environment development is achieved by providing advice, technical support, information and resources to help individuals set up and operate their business effectively.
- Institutional development is required to establish the capacity to drive and manage the development process.

4.4.3.2 The Mpumalanga Economic Growth and Development Path (MEGDP)

With a surface area of only 76 495 square kilometres, Mpumalanga is the second smallest province in South Africa, yet it has the fourth largest economy. The main economic drivers are tourism, agriculture and industry, and manufacturing. It is bordered by Mozambique and Swaziland in the east, and Gauteng in the west. Mbombela (formerly Nelspruit) is the capital. Other important towns are Witbank, Standerton, Piet Retief, Malelane, Ermelo, Barberton and Sabie (Mpumalanga, 2013).



Figure 22: Mpumalanga Province (Rainbow Nation, 2015)

According to the MEGDP (2011:1), Mpumalanga is a province rich in resources, people and heritage. However, it is plagued by large-scale joblessness, poverty and inequality. These challenges are seriously hampering the provincial government's development plans, namely to address its social, economic and environmental needs (2011:1). The primary objective of the MEGDP is to foster economic growth that creates jobs and to reduce poverty and inequality in the province. The following job drivers were utilised to secure strong and sustainable growth in the decade that was to follow (2011:60-80), and are important aspects that can play a role in the NCMIDF (Mpumalanga Department of Economic Development, 2011:60-80).

The provincial government argues that several jobs can be created in the construction and operation of new infrastructure, expanded maintenance and the manufacture of components for the infrastructure programme.

- Job creation in specific economic sectors:

The growth path will focus on specific areas which were identified as strengths and potential economic growth points within the Province. They are agriculture and forestry, mining and energy, manufacturing, tourism and the cultural and creative industries.

- Seizing the potential for new economies in particular:

New growth potential is recognised in the green industries (e.g. recycling and renewable energy) and the information and communication technology industries.

- Investing in social capital and the public service:

Social capital refers to the social economy which includes a myriad of not-for-profit institutions that provide goods and services where the public service can employ large numbers of people in areas such as health, education and police, while providing skills development programmes at the same time.

- Spatial development and rural development:

Spatial development refers to the upgrading of public infrastructure and the provision of housing in rural areas. It also aims to provide special incentives to businesses for investment in these areas. In addition, co-operation with regional and international markets is envisaged for mutual trade and investment.

The MEGDP (2011:77-81) highlights the following principles which would contribute to unlocking the economic growth and employment potential in the area:

- Broad-Based Black Economic Empowerment (BBBEE), which will contribute to poverty alleviation
- strategic procurement procedures to benefit local business
- labour and skills development (the establishment of a university, sector education and training authorities and business development programmes)
- government support for co-operatives and SMMEs to expand their business in the provinces
- access to finance and funding.

In addition, a number of high-level interventions, policies and bulk infrastructure problems such as land claims, the provision of water, transport and electricity as well as communications were identified, all of which needed attention as these are some of the larger issues that have an impact on economic growth. For the MEGDP to realise its objectives, it had to be supported by other provincial development plans, sector education and training authorities namely the spatial, infrastructure, industrial, water management, skills, environmental and energy development plans. Special institutional arrangements in the form of an “Implementation Forum” and “Sector Forums” had to be put in place by the provincial government to support the implementation of the MEGDP. These forums were led by the different MECs, and they were responsible for driving the economic development agenda of the province. Finally, monitoring and evaluation of the MEGDP was left to the Office of the Premier in collaboration with the various departments, municipalities, the private sector, labour and industries related to the MEGDP (Mpumalanga Department of Economic Development, 2011:81-84).

4.4.3.3 West Coast District Municipality

Moorreesburg is the seat of the West Coast District Municipality, which is located in the Western Cape Province. It covers an area of 31 124 square kilometres. It consists of five local municipalities, namely Swartland (Malmesbury), Bergrivier (Piketberg), Matzikama (Vredendal), Cederberg (Clanwilliam) and Saldanha Bay (Vredenburg). It is also bordered by the Atlantic Ocean to the west (West Coast District Municipality, 2015). Figure 23 shows the location and size of the province:

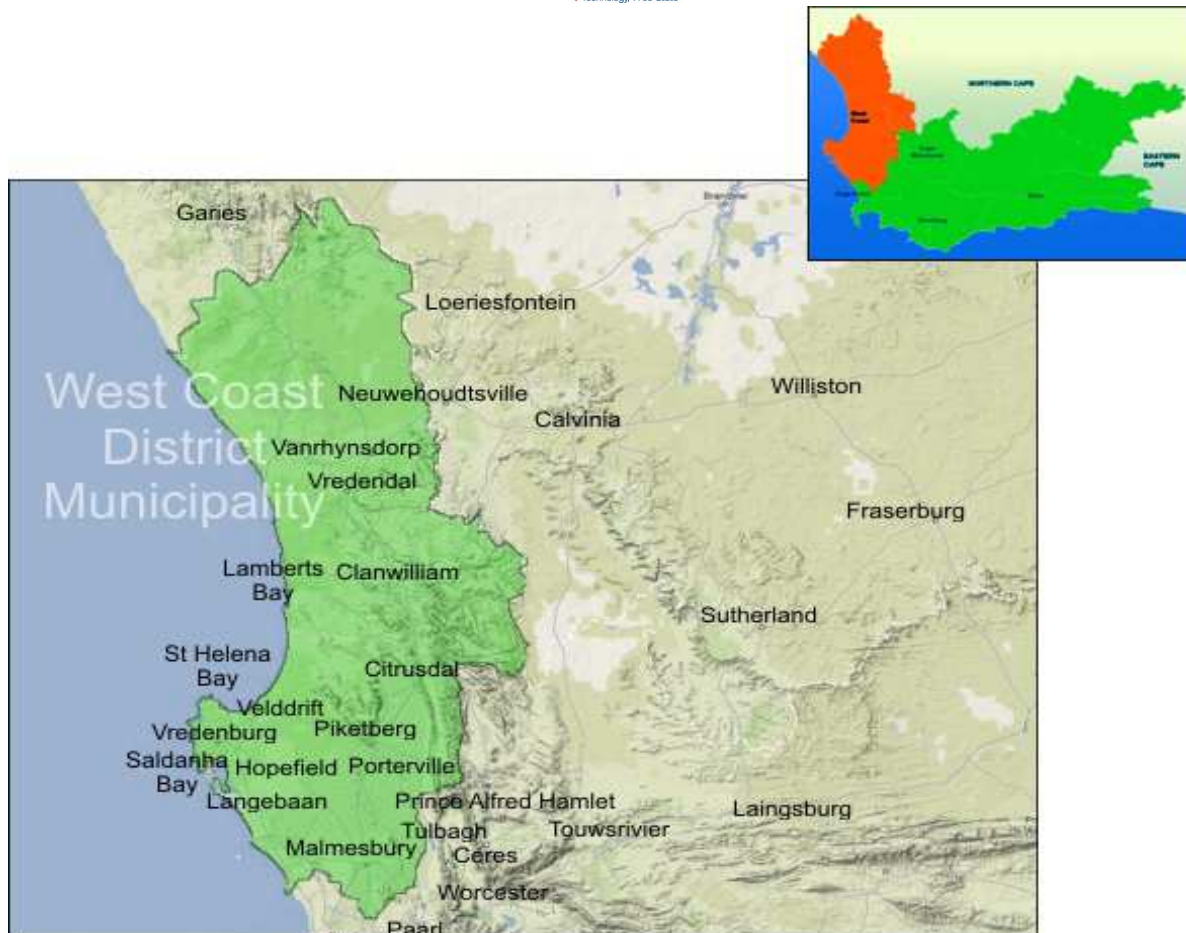


Figure 23: West Coast District Municipality (Western Cape Province, 2013)

The West Coast Regional Economic Development Strategic Framework (WC REDS) was compiled in 2007 as a five-year implementation plan aimed at accelerating economic growth, job creation and empowerment in the area. It is a strategic framework which is based on the principle of competitive growth and the building of the second economy, focusing on key economic foundations and growth opportunities. Pre-requisites of the WC REDS are firstly, a demand that it must evolve and be updated regularly and secondly, that all stakeholders in the district (public, private, community and trade unions) must be involved in its implementation. In order to achieve these goals, three strategic phases of action were prioritised by the WC REDS and specific programmes were put in place to facilitate their implementation (West Coast District Municipality, 2007:10). They are:

Phase 1: The creation of an enabling business environment with sound economic foundations

- bulk infrastructure development and maintenance
- a clear skills development strategy
- improvement of municipal administrative efficiency and a reduction of bureaucracy (red tape)
- the establishment of a special unit to facilitate and develop partnerships
- small business development, including infrastructure, BEE²⁹ development and availability of industrial land for SMMEs
- expanded public works programmes to accelerate growth of small contractors and local service providers.

Phase 2: Existing business retention and expansion

- designing and implementing a business retention and expansion programme
- restructuring and improved competitiveness for important existing sectors such as agriculture and agri-processing, fishing, and clothing and textiles
- growth strategies for existing labour-intensive sectors such as tourism, construction, property development and arts and crafts.

Phase 3: Growth opportunities

- the promotion of local and international trade and investment
- The establishment of strategies to develop new sectors such as film and oil and gas.

As part of the implementation plan of the WC REDS, various partnerships are needed to leverage resources and expertise, including development agencies, FET and higher education institutions and SMMEs. Other requirements are highly skilled human resources, access to finance and effective monitoring and evaluation systems. Finally, the WC REDS strategy should be reviewed at least annually to ensure that it is still relevant. The strategy should evolve

²⁹ Black Economic Empowerment.

continuously to respond to the ever-changing competitive environment (2007:21).

4.4.4 Summary

When scrutinising the various strategies and different approaches to economic development above, a number of commonalities in their approaches are evident at national, provincial and local levels. The most evident of these priorities, which are geared towards the achievement of economic development, are listed below. They form important parts of the ingredients required for the NCMIDF:

- job creation and poverty reduction
- education and skills development
- infrastructure development
- focus on strong and priority sectors
- business development and support.

Other priorities that are present in two or more of the above strategies are:

- export of locally produced goods and services
- leadership development
- institutional development
- development of social capital and human resources
- development of new economies such as the green economy, creative industries and film
- effective monitoring and evaluation of economic development strategies
- improved quality of local products
- establishing networks and partnerships.

4.5 Closing remarks

This study targets the Northern Cape Province (geographically described in Chapter 2) with the music industry as a tool to contribute towards its economic development. The region will be divided into sub-regions, each with its own music industry taking on the role of an industry cluster with close supply links, specialist suppliers, service providers and related industries and institutions.

Each cluster must be integrated and linked with other clusters in other sub-regions within the province, on a micro level (within the broader music industry) as well as on a macro level (with other industries).

The theoretical foundation of the Northern Cape music industry must therefore be based on a conglomeration of classical and other economic development theories which are deemed to be pertinent to the characteristics of the area and its people. The economic development theory for the Northern Cape will focus on the following important factors:

- investment in music industry-related infrastructure
- supporting its co-ordinating bodies and related services as important cornerstones for industry development
- generating innovative behaviour, directed at acquiring new products and distribution methods, through education and skills development, local talent and entrepreneurship
- endogenous (local) and eventually also on exogenous (export) activities.

At the level of implementation, the following factors applicable to the Northern Cape are gleaned from the research:

- the appointment of strong leadership in the form of a steering committee at the highest political provincial level with task teams at local level, overseeing progress at the various regions
- an implementation plan that sets out priorities and time frames as well as performance measurement systems
- the creation of a conducive business environment with a funding plan, access to funding for music businesses and economic policies that promote growth
- activism in the promotion of entrepreneurship, enterprise and innovation through continuous focus on music education, skills development and job creation within the music industry
- the identification of suitable areas in the province to accommodate music industry growth
- the development of existing and new infrastructure to house music industry activities.

According to Phillips and Pittman (2008:3), social capital, which is the capacity of the members of a community to co-operate effectively to set and achieve goals, is required to attain community development, which in turn is a prerequisite for economic development. I am of the opinion that a developed community will be a spontaneous outcome of a developed music industry, as outlined in the philosophy of musiconomy.

Chapter 5

Components of a hybrid economic development framework for the Northern Cape Province

5.1 Introduction

The construction of the proposed NCMIF, as described in Chapters 5 and 6, is based on a number of foundations. Despite the researcher's first-hand experience in all three of the pillars of the music industry in the province, valuable information was gathered during a variety of music-related projects contributing fundamentally to the proposed framework. This corresponds with the anti-positivistic methodology of the study, which focuses on qualitative analysis, such as personal interviews, participant observations and the accounts of individuals.

Proposals in this chapter with regard to institutions, human resources, infrastructure, equipment and the implementation processes thereof are based not only on the research done in the previous chapters of this study, but also on information collected through consultations with experts at leading academic, educational and governmental institutions. Comprehensive consultations and collaboration over several years with the then Director and Deputy Director of the National Institute for Higher Education in the Northern Cape as well as senior members of the Human Resource and other related clusters lead to the compilation of the different organograms proposed in this study. The NCDSAC, through its Head of Department and Senior Managers, provided guidance and information which are widely captured in most chapters of the study, but particularly with regard to the construction of the proposed framework. Music teachers in schools across the province as well as the music academies were another source of information. The results of various interviews with the artistic and administrative directors of the Gariep Festival, Kalahari Kuierfees and the organisers of the Diamond and Dorings Festival at the NCDSAC, leading music businesses and music services were analysed and collated to formulate the proposals around the music business sector. Furthermore, in-depth studies were

made of provincial government strategies on economic development, both locally and elsewhere.

The proposed hybrid theoretical framework for the Northern Cape is based on the information gathered in previous chapters, taking into consideration current physical and economic characteristics of the province as analysed in this study. This will provide a firm foundation for the design and further development of the proposed framework, and eventually for the practical application in the Northern Cape. In this chapter, the various components that were found to be important elements of and requirements for economic growth and development are highlighted with a view to implement them in the NCMIDF.

In Chapter 1, for example, a music industry value circle was proposed within which all the stages are integrated and with music education playing a central role. This is also referred to as micro-integration and forms the basis of Pratt's argument in his strategy for the development of the Senegalese music industry (see section 3.3 on page 3-78). Macro-integration (see section 1.8.1 on page 1-18) suggests that the music industry is integrated with other industries (see section 6.2 on page 6-165). Pratt (2004:6) also encourages the development of audiences, as well as skills development through education of the supporting services in the music industry. Professional supporting services include several non-musical industries such as legal, financial and broadcasting. The NCMIDF uses the value circle as its point of departure, placing music education at the centre. This corresponds with the Venezuelan philosophy, which focuses on music education where existing infrastructure is utilised and both government and the private sector are required to support and fund the development of the music industry. In addition, the Free State Province provides another example of integration through its successful three-tiered system and unique training symphony orchestra, which will be included in the NCMIDF. Phillips and Pittman (2011) argue that community development and social capital are prerequisites for any form of economic development. This study therefore promotes musiconomy, as described in section 1.4.2 on page 1-7, as key for the success of the NCMIDF.

The NCMIDF is based on a mixture of economic development theories, but with an emphasis on the economic theory of structuralism, as discussed in section 1.4 on page 1-6, which requires government investment to create the right preconditions for “take-off” (Contreras, 2013). Various components of the four main groups of Terluin’s RED theories (the traditional, pure agglomeration, local milieu and territorial innovation models) are also prevalent in the mixture (see section 4.2.3 on page 4-114).

Finally, the strategy implemented by the Essex County Council focused mainly on innovation, education, locations for growth and infrastructure. The following eight key principles derive from this research and are identified as crucial elements for implementation in the NCMIDF. They are applicable to and geared towards job creation in the three pillars of the music industry (Essex County Council, 2012:5):

- education and skills development
- community development
- infrastructure and locations for growth
- business development and support
- innovation
- partnerships
- marketing
- internationalisation.

5.1.1 Education and skills development

5.1.1.1 Rationale

The objective of this study is to identify the education and training needs of all the role players in the music industry value circle of the Northern Cape. Music education involves far more than just mastering the art of playing an instrument. It includes a multitude of aspects, such as skills development in business management and technology, professional services and many other ad hoc industry-related subjects. According to Ambert (2003:43), the near absence of dedicated artist management capacity to support musicians in their trade is a major obstacle for further growth and development of the music industry. Formal

music education from a primary to a tertiary level and industry-specific training programmes must provide the platforms for this development to take place.

Music education (and skills development) is placed in the centre of the value circle because it affects every other aspect of the industry. A composer or songwriter, for example, cannot write down music without having studied the theoretical and artistic principles of the subject. To become an accomplished composer, songwriter or improviser requires many years of training. It is beneficial for the creator to be formally educated, as it enhances the quality of the product and the productivity of the composer. A similar argument applies to performers or instrumentalists who require several years of practising to perfect their art. Freddie Mercury, one of the most talented and innovative singers of the rock era, is a case in point. He studied piano in India and attended the Ealing College of Art in London in the 1960s. All the members of the famous group Queen, who sold almost 60 million records, were educated musicians (Melody Maker, 1981). It is paradoxical, yet important to note, that very few successful artists in the commercial or popular music industry were ever exposed to formal music education. The consequence is that most of these musicians are unable to read or write musical notation, which often results in hindrances to their personal growth as musicians, and in turn, the growth of the industry. Such musicians are unable to commit their compositions to paper without external help. Recording companies often offer to perform this task and then in return lay claim to composing rights. This can also negatively affect the marketability and recordability of their work because most studios require that music be transcribed to facilitate the recording and music engineering process. Similarly, orchestral conductors, arrangers or music teachers must first master their art through a process of music training.

Further along the value circle, the enablers are those entities or individuals who provide support services to the creators. They make it possible for the creators to convert their products into a tangible format, or they provide the tools to do so. In some cases, more than one type of enabler is required to reach this goal, but the common denominator is that some degree of music education is important at this level. Even the successful manager must be skilled not only in administrative, legal, marketing and related aspects, but must also have a

deeper understanding of the psychology of the musician. One very effective way to acquire this skill is to learn to play a musical instrument. Musically educated recording artists or sound engineers will undoubtedly have a more artistic approach to their trade and will produce better results than those who were not musically educated. It is unthinkable for a music publisher, repairs and maintenance technician or manufacturer of musical equipment to be musically ignorant.

Revealers are the places where music (such as the internet, live music facilities, concert halls, mobile devices, press, broadcasters and retailers) is exposed. Even in some of these cases, music education is essential. Responsible media reporting and informed advice to clients cannot take place without an informed musical background.

Audience development (see section 5.1.2.2 below) is also an important segment of music education as it is beneficial for the development of an informed market with an appreciation for good quality music. This development will stimulate a wider interest and contribute to a bigger market of listeners, concert goers and buyers.

5.1.1.2 Curriculum content

The current curricula for music education in South Africa, as described in section 2.3.1.1 on page 2-41, include the tangential aspects of the music industry to some degree, although not nearly adequately enough to address the real needs of industry growth. Musicians who are formally educated seldom studied or mastered the non-musical skills required to cope in their profession. This problem is captured by South African jazz artist Vusi Khumalo, who says (quoted in Ambert, 2003:14), "In music schools, they teach you to make music, not how to be a musician". In a Cuban report on the economic potential of the music industry, it is clearly stated that if the full economic benefits of the music industry are to be realised, it is essential that, amongst others, human resource skills should be upgraded in the marketing and commercial aspects of the music industry (UNCTAD/WIPO, 2001:36). The report highlights a number of additional areas in which musicians require training. These can be consolidated into three

main areas, namely marketing, legal and financial skills. A critically important area that has been omitted from this report is music technology. Since the report has been written, technology has had an enormous impact on the global music industry and has evolved almost every aspect of the industry (Kilmer, 2010:7). Almost all the segments of the music industry value chain are affected by technological development. It has become essential for creators of music to equip themselves with music notation software programmes to commit their work to paper. Most performers of music require skills and technical knowledge in electronic music equipment. Musicians can now perform, record and market their own products without using the facilities of a record company, provided they possess the necessary music technological skills to perform these tasks themselves. Enablers need a sound knowledge of aspects such as sound engineering, publishing or manufacturing. Revealers are synonymous with technology as these are the mediums through which music is distributed today, including radio, mobile devices or internet. Even the consumer is required to be technologically educated due to the increased use of e-commerce in the music industry (own research).

5.1.1.3 Objectives of the music education sector in the framework

As previously stated, quality music education forms the basis of a vibrant music industry. In order to provide this indispensable service to the industry in the Northern Cape Province, a number of key elements must be functioning optimally and must be effectively integrated with each other. The research conducted in this study has highlighted the strategic objectives of the music education sector. They are:

- to contribute to the social capital and development of the community of the entire Northern Cape
- to develop the skills required by musicians and the capacity to support musicians in their trade
- to develop and maintain a quality music workforce
- to combat piracy through technological innovation and consumer education (audience development).

5.1.2 Community development and social capital

According to Phillips and Pittman (2014:1), community development is a combination of firstly, the process of the physical, social and economic improvement of a community and secondly, the outcome thereof, or the ability of communities to act collectively and enhance their ability to do so. The process of economic growth and development, in contrast, requires the creation and maintenance of specific programmes and the mobilising of resources. This leads to the outcome of job creation and a subsequent increase in standards of living (Phillips & Pittman, 2014:14). These authors agree that the process of community development is about capacity building and developing the ability to act (empowerment), which leads to the outcome of taking action and a “development ready community” or social capital. A report from the Asian Productivity Organisation defines social capital as “institutions, relationships, attitudes, and values that govern interactions among people and contribute to economic and social development” (Ishada, 2006:12). This report further considers social capital as an effective weapon against poverty and as enhancing the well-being of people in poverty-stricken rural areas of developing countries (Ishada, 2006:10).

The proposed NCMIDF can contribute to the formation of a development ready community and the resulting social capital, which is the underlying characteristic of the concept called musiconomy (see section 1.4.2 on page 1-7), which in turn forms part of the knowledge economy.

5.1.2.1 The knowledge economy

The key component of a knowledge economy is a greater reliance on intellectual capabilities than on physical inputs or natural resources (Powell & Snellman, 2004:199). According to Kozma, as quoted in Hracs (2009:1), knowledge, unlike raw material, can be used multiple times by many people simultaneously without it depreciating in value. Investment in knowledge creation can lead to continuous growth as it creates a special workforce that can take new ideas and turn them around to create more innovation. Music, as part of the creative industries, finds

itself at the heart of the knowledge economy. The presence of musicians attracts other talents, professionals and scientists, growing the pool of talent and drawing in new businesses, jobs, innovators and consequently, sources of wealth (Hracs, 2009:1). The present study thus proposes that music can contribute significantly to broadening the knowledge economy for the Northern Cape Province, provided that the principles of musiconomy are applied throughout the province.

5.1.2.2 Audience development

Audience development is required to keep music markets vibrant and responsible. Numerous arts festivals have emerged over the past decade, many of which are used as tools to reach large audiences and sponsorship. Musicians are beginning to attain a greater profile in the press, which provides a more detailed understanding by the public of the music industry and how its operations relate to the success of artists (Department of Arts and Culture, 1998:71).

5.1.2.3 Development of local talent

According to Thornton (2011:23), the music industry depends fundamentally on talent, which must be developed and supported to reach its full potential. This is the responsibility of the education system, from school level through to colleges and universities. Creative activities in school education and at community grassroots level are crucial. Community music projects such as festivals provide a wide range of people with the opportunity to participate in music activities and develop their skills and talents. In addition to the considerable social benefits that such initiatives create, they are also an important part of the talent development infrastructure that feeds the music industry itself. In contrast with other SADC countries, the music industry in South Africa is dominated by overseas artists. This situation inevitably results in the underdevelopment of the local talent.

5.1.3 Infrastructure and locations for growth

Strategic objectives for any country include creating new and revitalising existing physical infrastructure, along with community development, which collectively lead to economic growth. Physical infrastructure includes basic physical systems such as transportation, communication, sewage, water and electricity. These are

high-cost investments, vital to a country's economic development and prosperity. As in any industry, the music industry requires specific and specialised infrastructure, beyond the above-mentioned basic physical systems, in order to function optimally. The education sector, for example, requires teaching facilities and equipment, the performance sector needs concert venues and the business sector requires recording studios, shopping malls and broadcasting facilities. A lively entertainment landscape is an essential element in stimulating local music talent, giving young and aspiring musicians a wide range of venues to practise and master their art. Therefore, the development of additional local live music venues is an important contributing factor (Briggs, 2005:5). Increased tourism is also linked to a vibrant nightlife. Shaw and Rodell (2012:109) indicate that a lack of live music venues is a major stumbling block. They advocate the revamping of multi-purpose community centres and theatres as a viable solution.

5.1.4 Business development and support

The term music business refers to all those initiatives that sell music products to the public. The product may be tangible merchandise such as sheet music, or it could be live or recorded music. It also includes those businesses which make a living by servicing the music industry, such as recording artists, technicians and repairpersons. Professional services refer to those aspects of the industry that musicians require to be able to complete the full industry value circle in order to reach the consumer, which is the ultimate goal. Even at the level of music education, well-qualified teachers are required for the provision of quality music education. Furthermore, the musician needs the services of arts administrators, managers and agents to guide and support them in the management of their careers. Legal expertise is needed when dealing with aspects such as performing and copyright laws as well as contractual issues. Financial and business knowledge are also an essential part of the musician's daily needs and require expert guidance. Finally, the music industry requires fiscal policy measures to facilitate growth. Music businesses must be incentivised through favourable fiscal policy, as described in section 5.1.4.2 on page 146, so that new businesses and related services can follow as the industry grows. According to Ambert (2003:35), the degree of economic liberalisation and the availability of seed

capital for potential music entrepreneurs has a direct impact the access of music industry actors to the “tools of the trade”.

5.1.4.1 Co-ordinating bodies (facilitators)

Co-ordinating bodies are those institutions or associations that facilitate the development of the industry. They provide a single voice for their membership. There are many such associations in South Africa, and most of them can contribute to industry development in the Northern Cape Province by broadening their respective networks to reach out to this province. Table 8 provides a selected list of those co-ordinating bodies that exist elsewhere in the country and should be part and parcel of the proposed NCMIDF (Shaw, 2010:35):

Table 8: Co-ordinating bodies for the NCMIDF

ACRONYM	NAME	FUNCTION
CWUSA	Creative Workers Union of South Africa	CWUSA provides for the economic, labour and legislative needs of musicians.
AIRCO	Association of Independent Record Companies of South Africa	AIRCO serves the independent companies by lobbying government and liaising with other bodies.
CASA	Composers Association of South Africa	CASA supports the composition and publication of new works.
ICASA	Independent Communications Authority of South Africa	ICASA regulates the broadcasting industry according to a legislative framework.
NORM	National Organisation for Reproduction Rights in Music	NORM administers mechanical rights (copyrighted material that needs to be transferred from one format to another)
NMSA	New Music South Africa	NMSA creates awareness of South African composers.
RISA	Recording Industry of South Africa	RISA has a wide range of functions which include the combat of piracy and unfair practice, ensuring transparency, protecting artists, organising the SA Music Awards and collecting royalties.
SACS	South African Choral Society	SACS seeks to develop choral music in South Africa.

5.1.4.2 Fiscal policy measures to facilitate growth

- Tax rebates for music sponsorships

Currently, according to section 18A of the Income Tax Act, tax-deductible donations by individuals or corporations to worthy causes are limited to only 10% of taxable income (Howell, 2014).

- Import duties and value added tax (VAT) on musical equipment

Import duties and taxes are due when goods are imported into a country. In most SADC countries, musical instruments and music recording equipment are not manufactured locally and have to be imported (Ambert, 2003:34). In South Africa, musical equipment is not subject to import duty, but VAT applies at 14% of the sum of the value of the goods. Examples of zero rated³⁰ goods include many types of food and beverage, donated goods sold by charity shops, equipment for the disabled, prescription medications, water and sewage services, books and other printed publications, children's clothing and financial services. South Africa's tax regime is, in global terms, neutral towards the music industry, being neither particularly positive nor negative (Department of Arts and Culture, 1998:79).

- Social investment initiatives

South African legislation requires that corporations donate at least 1% of their annual net profit to socio-economic development programmes (Skyways, 2014:38). While some big companies handle corporate social investment (CSI) with the seriousness and professionalism it deserves, it is often an afterthought for others, or not implemented and monitored effectively. Innovative solutions are offered by organisations such as CSI Solutions in the form of a "CSI Toolkit", to assist companies and non-governmental organisations (NGOs) in strategic planning, implementation and reporting. They aim to closely monitor and evaluate projects to ensure that investments are utilised to their full potential and to increase projects' chances of sustainability (CSI Solutions, 2014).

³⁰ Zero rated goods refer to products that are not subject to VAT.

According to Neil Robinson (2014:39) of Relate Bracelets,³¹ not enough government money is channelled to NGOs. He also states that without the vital role that NGOs play, "South Africa will be in dire straits."

– Budget allocation for the arts

The proposed budget expenditure for recreation and culture has been increased by 10.5%, which was the third highest increase. Despite this injection, the sector receives only 0.8% of the total national budget (Department of Arts and Culture, 2014).

5.1.4.3 Effective intellectual property protection and piracy prevention

Most governments in the SADC region have made significant efforts to develop copyright protection legislation. Piracy has a negative impact on the music industry across the globe and must be combated by all means possible. The International Federation of the Phonographic Industry estimates that CD piracy is worth US\$4.5 billion globally per year and that cassette piracy is highly active in the developing world (IFPI, 2005).

5.1.4.4 Accurate industry statistics and indicators

As stated by Shaw and Rodell (2012:106), accurate music industry statistics not only provides effective tools to all the role players within the value circle, it also contributes to music industry growth in general, as follows:

- It enables investors to formulate strategies on the basis of scientific data.
- It provides a platform for the analysis of the strengths, weaknesses, opportunities and threats of the South African music industry.
- It assists in drawing up comparative information with international music markets, information which in turn is ploughed back into the development of the domestic music industry.
- It supplies valuable information to institutions such as advertisers and broadcasters that enables them to identify target markets.

³¹ Relate Bracelets is a not-for-profit social enterprise that does not rely on funding, but rather on the creation and sale of decorative beaded bracelets.

- Creators benefit by staying abreast of the latest trends, both nationally and internationally.
- It allows for the evaluation of any programmes put in place.

Thus, to ultimately uplift the industry in the long term it is important to improve industry research and information flow for all stakeholders at all levels.

5.1.5 Innovation

Innovation in the field of economics can be defined as the application of new ideas to the products, processes, or other aspects of a business that lead to increased value. Economists differentiate between two distinct types of innovation, namely product and process innovation. Product innovation refers to the introduction of a new product or a change in an existing product, while process innovation refers to a new process for making or delivering goods and services (Princeton, 2014:5).

One of the aims of the NCMIDF is to be innovative in both the process and the product. Firstly, the process of developing the industry through a framework that integrates different role players effectively and through the emphasis on the concept of musiconomy (see section 1.4.2 on page 1-7) is an innovative process. Secondly, the development and promotion of local talent as part of the world music genre and other initiatives, to be discussed in Chapter 6 of this study, are examples of product innovation. These include the integration of the music education, performance and business sectors, the establishment of independent record labels, the establishment of a unique Northern Cape Symphony Orchestra (NCSO) and operational plan (see section 6.4.6 on page 6-201) as well as the combating of piracy through technology (see section 6.5.2.3 on page 6-211).

5.1.6 Partnerships

Effective partnerships contribute to a number of music industry-specific initiatives, such as the protection of business interests in terms of fighting piracy, protecting intellectual property, capacity building and skills training. Relationships with broadcasters and the media are critical for the marketing of musical products. A symbiotic relationship between the government at all levels,

the music industry as well as the community (the market) is reflected in the triple helix approach, which describes a model of innovation that captures multiple reciprocal relationships among what are assumed to be dissimilar institutions (Viale & Ghiglione, 2005:2). The term refers to an ancient Mesopotamian hydraulic system invented to raise water from one level to another. It is used in modern economics as a metaphor for the integration of three sectors, each taking the role of the other, producing hybrid organisations (Etzkowitz, 2007:6). In a statist regime (triple helix I), government plays the lead role, driving academia and industry. In a more relaxed regime (triple helix II), industry is the driving force, with the other two spheres as ancillary support structures. In a knowledge-based society (triple helix III), universities and similar institutions play an increasing role, in partnership with the other two (Etzkowitz & Ranga, 2002:2).

Throsby (2002:17, 18) advocates strategic government intervention to create the conditions for sustainable growth of the music industries in the Southern African region. On a national level, the South African government has, over the past decade, been very active and supportive of the music industry through its Department of Arts and Culture, the National Arts Council and related commissions. The state is in a unique position to attract investment and successfully grow a sustainable entertainment industry (Louisiana Entertainment, 2010:3). It is primarily the government's responsibility to define and implement the facets required for the establishment of a milieu conducive to growth and development of the music industry, especially in respect of policy and legislation issues and taxation systems (Ambert, 2003:40). Every stage within the value circle (individually and/or collectively) will be influenced by the condition of these facets. As in any other industry, the music industry requires fertile soil and ideal conditions to flourish and reach its maximum potential.

In a Music Strategic Framework Report commissioned by the Gauteng Government, Shaw and Rodell (2010:111) state that their strategy requires the successful collaboration of a wide range of stakeholders. The global city framework and Intergovernmental Relations Framework Act of 2005 both call for better co-ordination, synergy and collaboration between national, provincial and local government departments, in particular the departments of Trade and

Industry, Labour, Education, and Arts and Culture. Support programmes such as SMMEs, BBBEE, skills development, investment and tourism promotion, infrastructure development and market growth are key issues needing increased integration. One can argue that the same collaboration will be required in the Northern Cape Province, as there is a similar goal. Table 9 is an adaptation of the Shaw and Rodell (2010:11) list of music industry stakeholders for Gauteng, remodelled to suit the realities of the Northern Cape Province:

Table 9: Industry partnerships and stakeholders

National government departments	Provincial government departments	Local government	Private sector	Parastatals	Development sector
• Arts and Culture • Basic Education • Higher Education and Training • Finance • Home Affairs • Labour • Science and Technology • South African Revenue Services • Social Development • Tourism • Trade and Industry • Transport • Small Enterprise Development Agency • Industrial Development Corporation	• Sport, Arts and Culture • Economic Development Agency • Arts and Culture Council • Transport • Public Works	• Housing and Local Government • Arts, Culture and Heritage • Tourism • Economic Development • Social Development	• Business associations • Training providers • Tourism sector • Wholesale and retail sector • Creators • Agents	• Sector Education and Training Authority	• NGOs • Community Based Organisations • Tourism Enterprise Partnership

5.1.7 Marketing

Marketing includes every action taken by a business venture that leads to the sale of a product or service to a consumer. It is a plan which synchronises the needs of the customer with the core business of the firm. These actions aim to educate targeted consumers about the firm's products and services. An effective marketing strategy relies on a tapestry of unique and robust marketing activities to meet growing customer sophistication with regard to affordability, convenience, service and quality (Kotler, 2001:9-10). Despite the call for originality, all marketing strategies must include four main elements, often referred to as "the four Ps" (Burgess & Bothma, 2007:11). These are:

- the conceptualisation and development of the *product*, its packaging and services
- a *price* that offers value to the customer and profit to the supplier
- effective *promotion* of products and services
- distribution (also referred to as *place*) of products and services through the applicable distribution channels.

The four Ps are also the factors which represent the traditional marketing mix. They are the controllable factors that make up the micro environment of the business world, as opposed to the macro factors such as political, legal, economic and technological circumstances (Burgess & Bothma, 2007:12).

According to Kotler and Armstrong (2001:5), a marketing model is based on five core concepts, namely 1) customer needs, wants and demands, 2) products and services, 3) value, satisfaction and quality, 4) exchanges, transactions and relationships and 5) markets. These authors describe the above concepts as follows:

- Customer needs, wants and demands:

Needs refer to either a feeling of deprivation or very real physical and social needs. Wants can be similar to needs or can be shaped by culture and/or

personality. Demands come into play when needs and/or wants are backed by buying power.

- Products and services:

Products and services refer to anything that can be offered to satisfy a need or a want. It can be physical products, services, experiences, persons, places, organisations, information or ideas.

- Value, satisfaction and quality:

Kotler and Armstrong (2001:6) differentiate between value gained by owning and using a product and the value attached to the cost of obtaining the product. Both concepts can be valued in a monetary sense or another form of worth. Customer satisfaction relates to the perceived performance of the product or service, relative to expectations. Quality is closely related to satisfaction and can refer to the number of defects or the ability to satisfy customer needs.

- Exchange, transactions and relationships:

Exchange is obtaining a desired object from someone by offering something in return, such as money, a product or a service. Transactions are trades of values between two parties, as in monetary or barter transactions. Relationships can be long-term relationships with valued customers and partners. A marketing network or a company and all its supporting stakeholders can also be seen as relationships.

- Markets:

A market can be a place (virtual or physical) where buyers and sellers (the industry) meet or it can be a set of actual and potential buyers of a product.

5.1.8 Marketing to grow the music industry

According to Lathrop (2003:24), the music industry has its own unique marketing requirements, although it also requires the four Ps as described in section 5.1.7 above.

- Product:

All activities relating to product development fall into this component of the marketing process. This includes the quality of the product and the value to the client. The product must always strive to be unique, appealing, economical and easy to produce. Music products can consist of various different formats, which can be divided into four main categories:

- o audible music (recorded or live music)
- o printed music
- o merchandise (musical instruments, equipment and paraphernalia)
- o services (e.g. repairs and maintenance, education, technical, etc.).

- Price:

Here a balance between affordability, profitability and competitiveness must be achieved. The price of music products is more of a concern to consumers than inelastic products such as bread or petrol. This is because music is not a basic necessity, and consumers will rather do without music and wait for a reduced price, whereas they cannot do without inelastic products, regardless of the price (Shaw, 2010:125). There is nevertheless limited room for flexibility in the pricing of music products, as it is inextricably linked to uncontrollable factors such as production costs and other economic factors. Utilising local infrastructure and talent as opposed to hiring expertise from outside is the only way in which the industry can limit these costs.

- Promotion:

Effective promotion can be described more appropriately as marketing communication. It involves various methods of bringing messages such as advertising, personal selling and other forms of publicity to consumers. It must include the necessary steps to make consumers aware of the product and convince them that it is valuable. In the music industry, style, genre and uniqueness are the factors that play a role in a consumer's choice of audible music products and must be considered when analysing the customer's profile and in collecting market intelligence. Other music products, such as musical instruments, equipment and printed music, can use similar promotion methods

to most merchandise, although branding, packaging and labelling are important, supported by promotional events such as trade shows and a music week.

- Place:

The fourth P refers to the distribution of a product from where it is manufactured to the place where the consumer is found, using the appropriate distribution channels. The product must be available to and easily obtainable by consumers. Issues such as the movement of products and services from manufacturer to consumer in the right quantities and at the right time and place must be considered. This involves the structure of distribution channels and the identification of and working with intermediaries such as performers, enablers and revealers (see music industry value circle on page 1-12).

5.1.8.1 Marketing mix for the music industry

According to Pitt (2003:26), a good strategy is to segment the market into different groups by putting together the right mix of the four Ps to meet the particular needs of the different types of consumer. The different components of the marketing strategy must interact. For example, live performances or TV appearances generate both fees and publicity. Such events can even be used to enhance the distribution of the product. The four Ps should therefore reinforce each other to generate sales. Lathrop (2000:25) differentiates between short-term sales and long-term transactions. The latter are a form of brand or audience building during which customer loyalty is developed through ongoing relationship building. Music provides ample opportunity for artists to build a deep emotional relationship with their supporters, which in a way guarantees sales of CDs and related merchandise. In some cases, the artist could become the most important aspect in the life of a supporter, which almost catapults the music into the area of inelastic products. Lathrop (2003:27) refers to this phenomenon as unique to the music industry and calls it "the Holy Grail" of marketing which can only be achieved through a multi-tiered marketing strategy.

The product forms the nucleus of the music industry. The three main pillars of the music industry (education, performance and business) each sell products in one way or another. The music education sector sells tuition in all aspects of the industry, contemporary teaching methods leading to results and a gateway to



future employment in the music industry. The performance sector sells live performances, the performer, culture, entertainment and upliftment towards a higher intellectual, moral or spiritual level. The business sector sells audible music products, merchandise such as souvenirs, sheet music, instruments and equipment. Product development for all three sectors involves all the activities devoted to making the various products marketable. This includes identifying an audience, highlighting the selling points of each product and what makes it better or different from the competition, the delivery methods, packaging and finally, determining the right price (Lathrop, 2003:28).

5.1.8.2 Industry profile

The music industry is a secondary industry,³² although the creator in the music industry value circle might be considered by some to be part of the primary industries. The music industry falls within the knowledge economy and functions within the areas of entertainment, arts and education. The current size of the music industry in the Northern Cape has been discussed in detail in Chapter 2 of this study, and includes a SWOT analysis in section 2.3.4.1. The remaining characteristics of the industry which will be highlighted include a product portfolio and the current industry trends. As discussed in section 5.1.8 above, the product portfolio consists of audible music, printed music, merchandise and services. Special attention must be given to world music as an example of a unique product. Ethnomusicologist Robert E. Brown invented the term “world music” in the early 1960s at Wesleyan University in Connecticut (Finkelman, 2013). It refers to a genre incorporating or even fusing many different styles of music from around the world and attempts to classify non-Western traditional music. Ambert (2003:38) reports that the recent rise and growing popularity of world music should be seen as a strong signal for the opening up of international markets to receive music from the SADC region. The Northern Cape Province has a rich variety of cultures ranging from the Khoisan to the Batswana and Western cultures, all of which can produce a similarly rich variety of musical styles and fusions of new sounds.

³² A secondary industry is the industrial sector of an economy that manufactures finished products, unlike a primary industry, which collects raw materials for manufacture.



5.1.8.3 Competitor profile

There is a host of institutions, activities and events in the Northern Cape that are competing for market attention and profits. The local entertainment, tourism and hospitality industries offer many activities besides music events, such as restaurants, movies, sport, etc. The question is how to become the product or activity of choice in a competitive market. The answer lies in innovation, marketing and innovative marketing. According to Krippendorff (2013), a business should practice the five “IDEAS” habits every day. Each letter in the word refers to a habit: *imagining* a unique product, *dissecting* it to find a leverage point others do not see, then *expanding* the idea to generate more strategies than its competitors do, *analysing* the market to generate ideas which customers will prefer and competitors will not copy and finally, *selling*.

5.1.8.4 Customer profile

One of the most important aspects of marketing is to define the ideal customer. In order to expand the existing customer base, it is important to first understand the existing customer types and what it is that makes them purchase specific products. Criteria such as demographics (age, gender and income), psychographics (personality types, preferences) and behaviours (hobbies, sports) must be used in this process. Thereafter, it must be determined to what places they are attracted, whether physical or cyber. To further understand their purchasing preferences, it is necessary to review the needs and benefits that make them purchase a product or service. It is important to have contact with existing customers through surveys or questionnaires to gain insight into their purchasing habits. A customer profile can be created which describes the specifics of current clients. This will provide a clear picture of the type of customer that should be targeted (The Whole Brain Group, 2012).

The three pillars of the music industry require three different customer profiles. The music education sector, for example, may target the youth and their parents, as well as adults who are serious about educating themselves. The performance sector may focus on a broader sector of society as live and recorded music is omnipresent, and the business sector may target the middle to upper class of society, emphasising the youth.

To facilitate strategic thinking in the music industry, audience reception must be monitored through regular market research in areas such as sales, airplay and competitions. This information must be used to refine marketing strategies in relation to our understanding of the market and in our selection and development of artists, repertoires, genres and music products, promotion and advertising, production and circulation, and distribution processes (Ambert, 2003:34).

5.1.8.5 Market penetration

According to the Cultural Industries Growth Strategy, multinational record companies dominate the South African market, and this is a worldwide phenomenon (Department of Arts and Culture, 1998:27). The greatest market share in South Africa belongs to independent company Gallo Africa, and four of the six multinationals (BMG, EMI, Polygram and Sony) have subsidiaries in the South African market. Together these five companies control the bulk of the South African market and own a significant proportion of the entire music value chain including the manufacturing, distributing and retailing sectors of the industry (Department of Arts and Culture, 1998:20-30). None of these multinational record companies are represented in the Northern Cape Province.

Broadcasting forms an important link in the entire marketing process as it contributes to introducing new as well as promoting existing artists. The internet has opened a new channel through which music can be promoted and purchased. Consumers can order albums online and the product is either physically delivered or downloaded onto their hard drives. The internet presents artists with new and easy marketing possibilities, and it provides both artists and record companies with the opportunity to access global markets with relative ease. Furthermore, it holds the potential to avoid the traditional route of releasing an album through a record company. However, copyright holders have expressed concerns that the direct downloading of music from the internet may lead to an increase in piracy as well as difficulties in tracking transactions.

5.1.9 Internationalisation

Internationalisation refers to the increasing importance of international trade, relations, treaties and alliances. Globalisation, meanwhile, refers to global economic integration into one economy, mainly by free trade. Internationalisation is required to increase the customer base because of domestic market uncertainty and to offset increasing costs of doing business locally. In South Africa, high energy prices, import duties and a weak currency contribute to low profits for businesses. Because of its weak currency, foreign earnings denote high income on exported goods. Internationalisation furthermore contributes to gaining prestige and credibility with customers at home (Daly, 1999). This rings especially true for the music industry.

To achieve the status of a local or national competitor in any business requires a carefully planned business strategy and regular market research. This provides a solid domestic base which is required for the competitive, complex and expensive venture of exporting music products. According to Burgess and Bothma (2007:12), it may be feasible for a firm to be an occasional exporter with small consignments initially. Over time, these sporadic exports can become more regular to the point where they contribute to the turnover of the business. Indirect exporting can also be an option, where one firm sells its products to another local company (or export trading company), which takes care of all the administrative arrangements of multi-national marketing and selling of the same products abroad.

In deciding to enter the international arena, the necessary market research and risk assessment must be carried out initially to develop a potential client profile, assess the market demand, assess distribution systems and determine the level of competition. Factors that could adversely affect overseas operating activities include cultural and language barriers, exchange rate fluctuations and government regulations. In preparation for entering this market, there must first be a presence of local musicians at international music events.

5.2 Closing remarks

In the final analysis, the long term goal is to grow the existing underdeveloped music industry in the Northern Cape Province into a viable, sustainable and contributing music industry. Economic growth and development is characterised by an increase in productivity, innovation, jobs and, eventually, prosperity (Essex County Council, 2012:7). According to Jannie Durand, CEO of Remgro, South Africa needs an entrepreneurial state rather than a development state, and we must teach our children to create work rather than to seek work (Williams, 2014:4) . These statements must be applied in the Northern Cape Province's music industry.

In Chapter 1 of this study, the current average professional musician is described as either not equipped with the knowledge of or not interested in the economics of their trade and therefore not able to make a financial success of their careers. The NCMIDF rejects this attitude and promotes multi-skilled musicians who are pro-growth and pro-business. According to Ambert (2003:43), sound business growth strategies must be based on a passion for music as well as on adopting sound business practices with regard to the various stages of the value circle. This paradigm shift will be accomplished by developing the musical and entrepreneurial skills of the musicians in the Northern Cape music industry, creating sustainable jobs opportunities, increasing productivity and innovation, and building new and improving on existing infrastructure.

The principles of musiconomy will assist in triggering this growth and launch the Northern Cape Province towards becoming the location of choice where business and residents can grow to reach their full potential.



Chapter 6

Contextual framework for the music industry in the Northern Cape

6.1 Introduction

In the previous chapters of this study, a foundation was laid for the proposed music industry framework by investigating the history and current state of the Northern Cape music industry, and by a benchmarking exercise to determine best practices. The importance of integration in the music industry, and the various role players (in the private sector and government) that have either a direct or indirect impact on the music industry were identified.

This chapter is the sum and substance of the topic as it takes into account all the preceding information and proposes the actual framework, provides specifics with regard to the “who” and the “how” of the integration and contains details of the implementation process. The chapter is divided into three main parts which correspond with the three pillars of the music industry.

6.2 Framework overview

The South African Government consists of 46 departments. It can be argued that as many as 14 of these have a direct or indirect impact on the music industry. The Northern Cape Provincial Government consists of ten departments of which six play a significant role in the music industry framework. (South African Government, 2014). They are (table 10):



Table 10: Government departments that have an impact on the music industry (own creation)

South African National Government	Northern Cape Provincial Government
Arts and Culture*	Sport, Arts and Culture*
Basic Education*	Basic Education*
Higher Education*	-
Trade and Industry*	Economic Affairs
Economic Development	-
Labour	-
Public Enterprises	-
Public Works	-
Science and Technology	-
Social Development	Social Development
SA Revenue Services	Finance
Sport and Recreation	-
Statistics	-
Tourism	Tourism
Defence	-
Police	-

* Government departments that have a direct impact on the Northern Cape music industry

An integrated music industry framework implies that from construction to implementation, co-operation is required by all stakeholders. This process must be steered by government, or more specifically, the Departments of Basic and Higher Education, Arts and Culture, and Trade and Industry. These three ministries cover the three main pillars upon which the music industry rests, namely the performance, education and business sectors. Community music initiatives and entrepreneurship are additional elements that are inextricably linked to this framework in a symbiotic relationship with government. Private sector stakeholders that have a direct impact on the music industry in the Northern Cape are business entities trading in music-related products, recording studios, commercial and community radio stations and music education institutions in the province. Many of these entities are represented at



government level by the Northern Cape Chamber of Commerce and Industry.³³ Other stakeholders include companies that fund music programmes through their CSI programmes.

This chapter proposes an integrated framework to develop the music industry in the Northern Cape Province to its full potential. A birds-eye view of the proposed industry in the Northern Cape is portrayed in Figure 24.

³³ The Northern Cape Chamber of Commerce and Industry, Kimberley, was established on 22 February 2000 by the amalgamation of the Chamber of Business and the Kimberley Afrikaanse Sakekamer. These two organisations had served the business community of Kimberley for the previous 130 years (Frontier Market Intelligence, 2008).

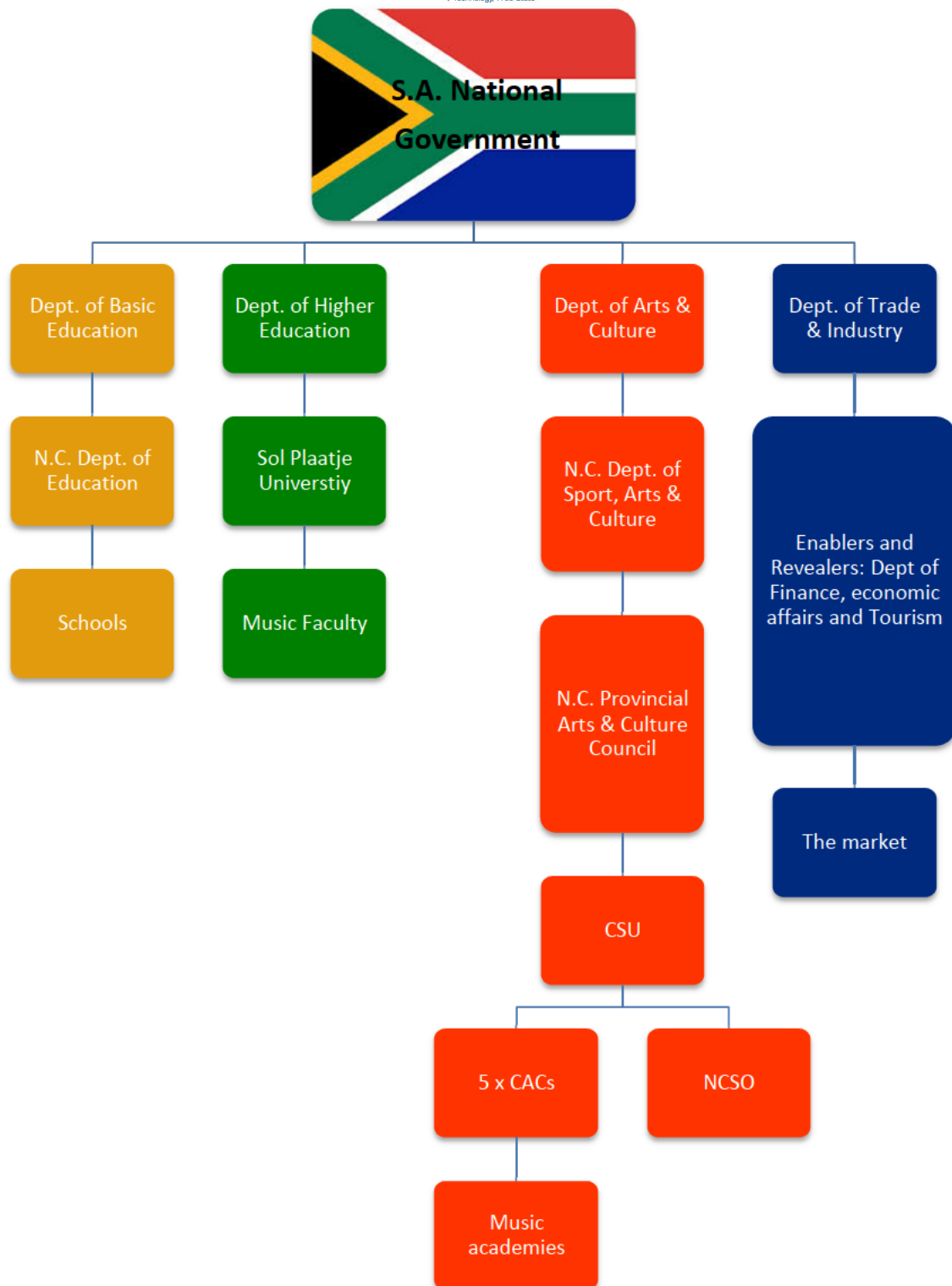


Figure 24: Main entities forming part of the NCMIDF (own creation)

6.3 The framework part 1: Music education

Music education should be strengthened at all levels with qualified teachers, suitable materials and infrastructure, aimed at both industry entry and audience development. Professional development is a key success factor, and music education needs to acquire an integrated and synergetic front to access opportunities. Government plays an integral role in this process and requires a significant degree of co-ordination to achieve these aims. Thus, the education and skills base across the value circle in the industry, and at all levels, needs to be improved, and the only way to achieve this is through education (Shaw & Rodell, 2010:107).

6.3.1 Music in the current national basic education curriculum

Basic education in South Africa spans from Grade R to Grade 12, of which Grades 1 to 9 are compulsory for all South African citizens. Music forms part of the current curriculum, and its content was described in detail in Chapter 2.

6.3.1.1 Critical analysis of the current curriculum for music

Music is positioned as a subdivision within the broader subject of life skills, one of the core Foundation and Intermediate Phase (Grade R–6) subjects, receiving between 2% and 5% of the available teaching time. At this level, life skills deals with the holistic development of the learner through three different but interrelated study areas, namely Personal and Social Well-being, Physical Education and Creative Arts. The latter provides exposure to and study of a range of art forms including dance, drama, music and visual arts.

Creative Arts are studied in two parallel and complementary streams: visual arts and performing arts, which include dance, drama and music. Its purpose is two-fold. Firstly, it aims to develop learners as creative, imaginative individuals, with an appreciation of the arts. Secondly, it provides basic knowledge and skills to be able to participate in creative activities. By the end of the Intermediate Phase Creative Arts, learners should have a basic knowledge and appreciation of all four art forms, and should be able to make an informed choice about the two art forms on which they would like to focus during the Senior Phase (Department of



Basic Education, 2012d:10). In the Senior Phase (Grade 7–9), Creative Arts becomes an independent subject that can be selected as one of a compulsory suite of seven subjects prescribed for this level (Department of Basic Education, 2012d:9). This current scenario forms a very good basis if compared to other countries within the SADC region. Although the curriculum design is adequate for a mediocre music industry, it does not meet the demands of a music industry with developmental and competitive intentions. In summary, the virtue of this curriculum is that the music curriculum in the Foundation and Intermediate Phases is adequate for fostering a general appreciation of the arts, which contributes towards general and basic audience development. However, there are also a few limitations, namely:

- Regular and devoted practice of music on a musical instrument forms an inextricable part of being a musician, yet it is unclear when, where or how exactly a learner is required to start learning to play a musical instrument.
- There is a lack of specialised teachers in the Northern Cape (see Chapter 2) to offer meaningful instruction in music industry-related subjects.
- No attention is given to entrepreneurial, legal, business and other skills required in the industry.
- Limited time allocated to music in the GET years cannot be extended significantly enough to address the problem, as a balance with other subjects must be maintained.
- The Department of Basic Education cannot address the needs of the industry alone. Integration with other stakeholders, such as the Department of Arts and Culture and the private sector, is essential.

6.3.1.2 Proposed curriculum for music in basic education

The subject of music consists of many different aspects. Each of these aspects belongs in one of the three pillars of the industry and is also present in the industry value circle. Table 11 identifies most of these aspects:



Table 11: The different aspects of the subject of music (own creation)

PRACTICAL MUSIC	MUSICOLOGY	NON-MUSICAL
Music performance Composition Conducting Arranging	Genres and styles Music theory and harmony General music knowledge Music history Musical form and analysis	Music retail Recording Music rights Legal services Music agencies Repairs and maintenance Manufacture Infrastructure design and building Music technology Entrepreneurship Sound engineering

Many of the above-mentioned aspects are neglected in the current school curriculum for music, which focuses mainly on practical and musicological content. Notwithstanding the limitations with regard to resources, touching on specific content aimed at developing the music industry should be included in the curriculum. Learners should at the very least be exposed to the hidden aspects of the industry in order for them to make informed decisions with regard to career choices. Table 12 highlights the aspects of music that are covered by the current South African National Curriculum Policy Statements (2014), including proposed additions by the researcher:

Table 12: Proposed additions to the current music curriculum (own creation)

GET	CURRENT CURRICULUM	PROPOSED ADDITIONS
Foundation (Gr R–3)	Creative games and skills Improvise and interpret	Music technology
Intermediate (Gr 4–6)	Warm up body and voice, and play musical games Improvise and create Read, interpret and perform Appreciate and reflect on a range of music	Music technology Music rights
Senior (Gr 7–9)	Music literacy Music listening Performing and creating music	Music technology Music rights Sound engineering
FET	CURRENT CURRICULUM	
Gr 10–12	Musical performance and improvisation Music literacy General music knowledge and analysis	Music technology Music rights Sound engineering Music entrepreneurship E-commerce



In order for the proposed additions to be offered, the necessary infrastructure and equipment must be available, such as basic computer and recording equipment. New technology makes it possible for these subjects to be presented without having to acquire expensive equipment.

6.3.2 Music in tertiary institutions in the Northern Cape

The closest University to the Northern Cape offering music education at tertiary level is the University of the Free State, situated in Bloemfontein, 165km to the east of Kimberley. Some of the more affluent Northern Cape families send their children to this university and other institutions in the country for tertiary education in music. The vast majority of students in the Northern Cape Province, however, are from poor backgrounds and therefore unable to afford the fees associated with studying away from home. South African State President, Mr Jacob Zuma, announced in 2010 that a new university would be established in the Northern Cape. The Sol Plaatje University was launched in 2013 with a view to grow from the foundation that has been laid by the interim tertiary institution, the National Institute for Higher Education in the Northern Cape, which had more than 1 000 students at the time and a reasonably well developed administrative and physical infrastructure.

6.3.2.1 Proposed curriculum for tertiary music education in the Northern Cape

A number of areas of concern in the current South African music industry have been identified in section 3.4.6 on page 3-96. These either require urgent development, or the individuals participating in the industry require skills development in these areas. Tertiary education will contribute to addressing these areas of concern, which are:

- lack of industry and market information
- small markets
- undeveloped circulation and distribution of products
- undeveloped audience reception and feedback
- European and American dominance
- weak representation for musicians
- lack of capital and physical infrastructure

- no training and capacity building
- under-regulated live performance subsector
- absence of contractual/legal guidance
- lack of protection of intellectual property and piracy.

In section 2.3.4.1 on page 2-64, other music industry skills that need to be developed were identified in a SWOT analysis. They are:

- music technology
- information technology required for e-commerce
- recording artists and sound engineers
- repair and maintenance of musical equipment
- entrepreneurship
- management and administration skills.

In an Entertainment Industry Strategic Development Plan prepared for the Northwest Alabama Council of Local Governments, it was recommended that the University of North Alabama's curriculum include more classes in the international music and music business, in film and television and in the independent world of labels and publishers. The advent of music sales in cyberspace requires of the music industry to adjust to be an incubator for dot-com music company start-ups (Briggs, 2005:5). In section 3.4.7.3 on page 3-102, the University of the Free State was cited as an example where, apart from the standard musicological subjects, the current curriculum includes some industry-related subjects such as music technology, arts management and sound engineering. The newly established Sol Plaatje University is perfectly positioned to take up this challenge and become the first tertiary institution to offer a unique curriculum aimed at addressing the specific and current requirements for a successful music industry in the province.

In order to address the skills shortages identified here and in previous chapters, a comprehensive curriculum is proposed for this new university that stretches over four levels of undergraduate studies, namely foundation, certificate, diploma and degree levels. The following curriculum proposal (table 13) serves only as an organisational tool from which a detailed syllabus with sufficient options and



electives may be compiled for specialisation in different areas of the music industry:

Table 13: Proposed curriculum for tertiary music education at the Sol Plaatje University (own creation)

Music Foundation* (1 year)	Certificate Programme* (1 year)	Diploma* (2 years)	Bachelor's Degree* (4 years)
<u>Prerequisites:</u> 1. GET Certificate (Grade 9)	<u>Prerequisites:</u> 1. Senior Certificate (Grade 12) 2. Music Theory Gr 2 3. Practical Music Gr 2	<u>Prerequisites:</u> 1. Senior Certificate (AP 21) ³⁴ 2. Music Theory Gr 3 3. Practical Music Gr 3	<u>Prerequisites:</u> 1. Senior Certificate (AP 28) 2. Music Theory Gr 6 3. Practical Music Gr 6
<u>Curriculum:</u> 1. Musicology (Gr 1–2) 2. Music performance (Gr 1–2) 3. Acoustic instrument building, repairs, maintenance and transport 4. electronic instrument building, repairs, maintenance and transport 5. music entrepreneurship 6. stage management	<u>Curriculum:</u> 1. Musicology (Gr 3) 2. Music performance (Gr 3) 3. Acoustic instrument building, repairs, maintenance and transport 4. Electronic instrument building, repairs, maintenance and transport 5. Music entrepreneurship and business 6. Stage management 7. Music technology	<u>Curriculum:</u> Year 1 & 2 1. Musicology (Gr 4–5) 2. Music performance (Gr 4–5) 3. Acoustic instrument building, repairs, maintenance and transport 4. Electronic instrument building, repairs, maintenance and transport 5. Music entrepreneurship and business 6. Stage management 7. Music technology 8. Choral, orchestral and field band training 9. Sound engineering 10. Marketing and distribution 11. IT and e-commerce	<u>Curriculum:</u> Year 1–4 1. Musicology (Gr 7+) 2. Music performance (Gr 7+) 3. Acoustic instrument building, repairs, maintenance and transport 4. Electronic instrument building, repairs, maintenance and transport 5. Music entrepreneurship and business 6. Stage management 7. Music technology 8. Choral, orchestral and field band training 9. Sound engineering 10. Marketing and distribution 11. IT and e-commerce 12. Music bibliography 13. Arts management
No exit	Exit point 1 (NQF 4)	Exit point 2 (NQF 5)	Exit point 3 (NQF 6)

*All music grades must be seen as a guideline of level or standard and can be compared with examination systems such as UNISA, ABRSM, Trinity College, etc.

³⁴ AP = Aptitude point

6.3.2.2 Staff requirements

The proposed curriculum for tertiary studies in music includes 13 different subjects. Six of these are present in the syllabus of the Music Foundation course, seven in the Certificate programme, eleven in the Diploma and all thirteen in the Bachelor's degree. Lecturing staff for two of the subjects, practical music and choral, orchestral and field band training, can be sourced from the NCSO, which forms part of the NCMIDF. Apart from the administrative staff, the faculty will require five additional full-time lecturing staff members (table 14):

Table 14: Lecturing staff requirements for a tertiary music faculty

	Subjects	Classes
1	Acoustic instrument building and maintenance	8
	Stage management	8
2	Music technology	7
	IT and e-commerce	6
3	Marketing and distribution	6
	Entrepreneurship	8
	Arts management	4
4	Musicology	8
	Music bibliography	4
5	Electronic instrument building and maintenance	8
	Sound engineering	6

6.4 The framework part 2: Music performance

A second pillar of the music industry is the music performance sector. This sector includes activities generated by the performance segment of the value circle, as explained in Chapter 1. Performers include instrumentalists, musicians, conductors and DJs who are involved in the production of a live musical product. A musical product always originates from a live music performance as its first version. Once this has been achieved, the other role players of the value circle can start to play their part. The performer is to a large degree, but not exclusively, the proverbial goose that lays the golden egg as far as industry income generation is concerned.

The Northern Cape musical heritage comprises several different cultures and is rich in traditional music deriving from a variety of peoples. The earliest inhabitants of the area were the Khoi and the San. The Batswana arrived from 1500 onwards, and during the 1780s, the Griquas, a truly multiracial tribe, moved to the Orange River region. Other historical events, such as the discovery of diamonds in 1866 and the Anglo-Boer War, contributed to the variety of cultures that are still prevalent in the area today. It is highly likely that, in ancient history, the predecessors of the San discovered that they could produce music by using their voices in combination with the tools they used for daily chores. It is therefore conceivable that this eventually led to something instinctively human, namely the First Song, the first of many examples of world music. The Northern Cape Province is one of the last few places in Southern Africa where these ancient people live and still practise their culture.

Just as the rich Southern African traditional music roots led to many modern genres such as Mbube, Isicathamiya, Marabi, Mbaqanga, Kwela, Cape Jazz and Kwaito, the music of the peoples of the Northern Cape is waiting to be mined, mixed and rearranged to become the latest contribution to world music, which is arguably one of the most popular music genres today.

6.4.1 Northern Cape Department of Sport, Arts and Culture

The DSAC is a department of the Northern Cape Provincial Government that promotes the arts in the province. It plays an integral role in the music industry framework and is instrumental on both the music education and music performance fronts. The present study found that music education in its broadest form cannot be left to the Department of Education alone. In section 6.3.1.1 above, other stakeholders are called upon to contribute in an integrated way towards developing the skills that are required for a successful music industry. It is for this reason that the Northern Cape DSAC should involve itself not only in the performance sector, but also in music education and the development of related skills, provided it is fully integrated with the curriculum as described in sections 6.3.1.2 and 6.3.2.1 above. The following design (figure 25) therefore inextricably links all three pillars of the music industry together:

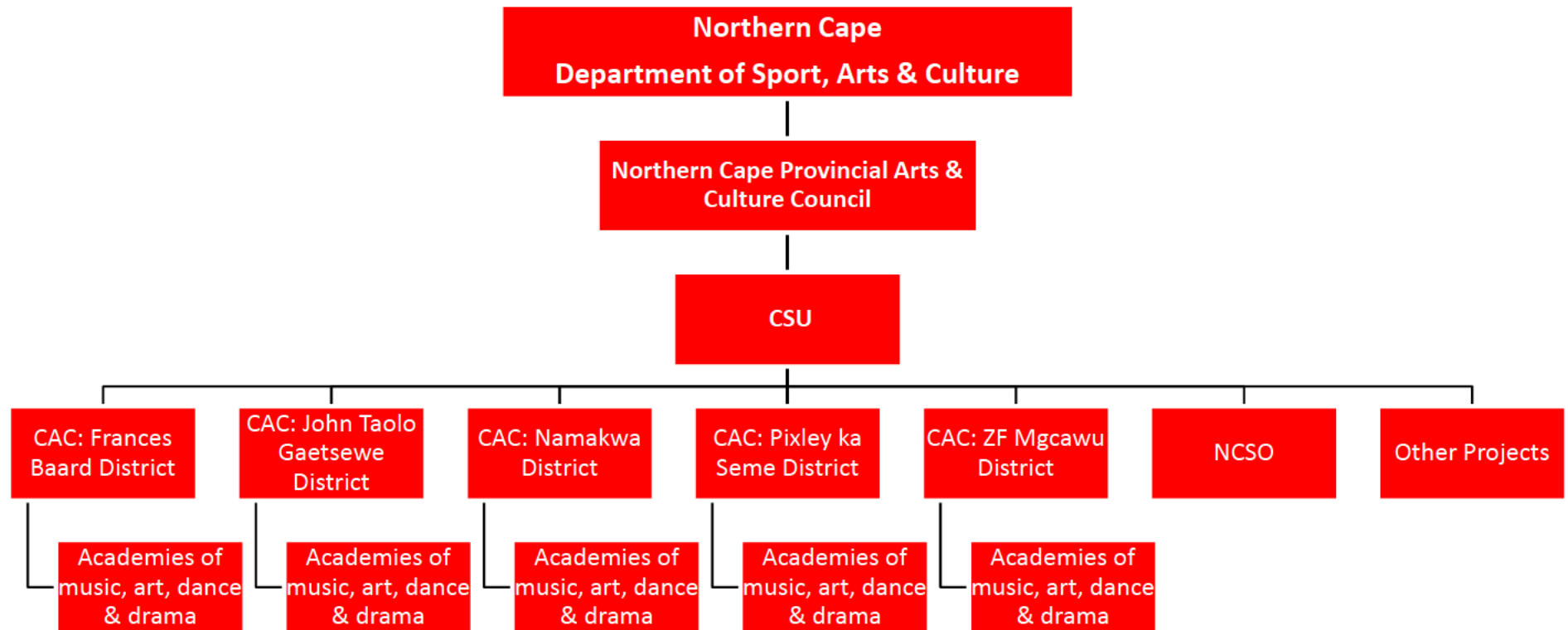


Figure 25: NCDSAC map (own creation)

6.4.2 Northern Cape Arts and Culture Council

The Northern Cape Arts and Culture Council was established during September 2011. This entity aims to ensure the establishment of CACs that will assist in the nurturing of talent at a local level (Williams, 2012). This statement formalises and confirms the decision of the Northern Cape Government to pursue the route of an Arts and Culture Council, governing CACs in the province. While this move by the provincial government should be commended, no evidence could be found of any further planning or blueprint within which this initiative would be launched and eventually operate. The purpose of the present study is to propose such a framework, based on best practice and previous research, that will maximise the impact that these institutions will ultimately have on the fledgling music industry of the province.

In the following paragraphs, numerous posts and positions with related and general duties are proposed. This study does not focus on specific job profiles, functions or responsibilities in accordance with recognised human resource principles, because these aspects do not form part of the study. The purpose of this study in this instance is merely to provide a description of the job content.

6.4.3 Central Services Unit

This study proposes that the function of the Northern Cape Provincial Arts and Culture Council (NCPACC) (figure 26) should include the establishment of a Central Services Unit (CSU) or administrative hub in support of the following:

- CACs in each of the five districts of the province
- NCSO and other related projects.

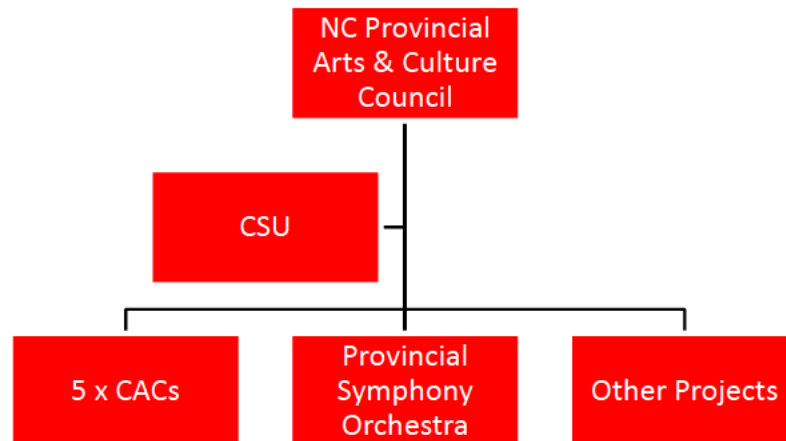


Figure 26: Components of the NCPACC (own creation)

This unit must be established first when constructing the proposed integrated framework and will be responsible for the shared needs of the CACs, such as artistic, administrative and logistical aspects. The unit should be housed in a building such as the Northern Cape Theatre. It will consist of three levels of personnel, namely management, staff and assisting staff. The middle management level is reserved for the managers of the music academies and the conductor of the NCSO.

Figure 27 and table 15 below demonstrate the composition of the CSU:

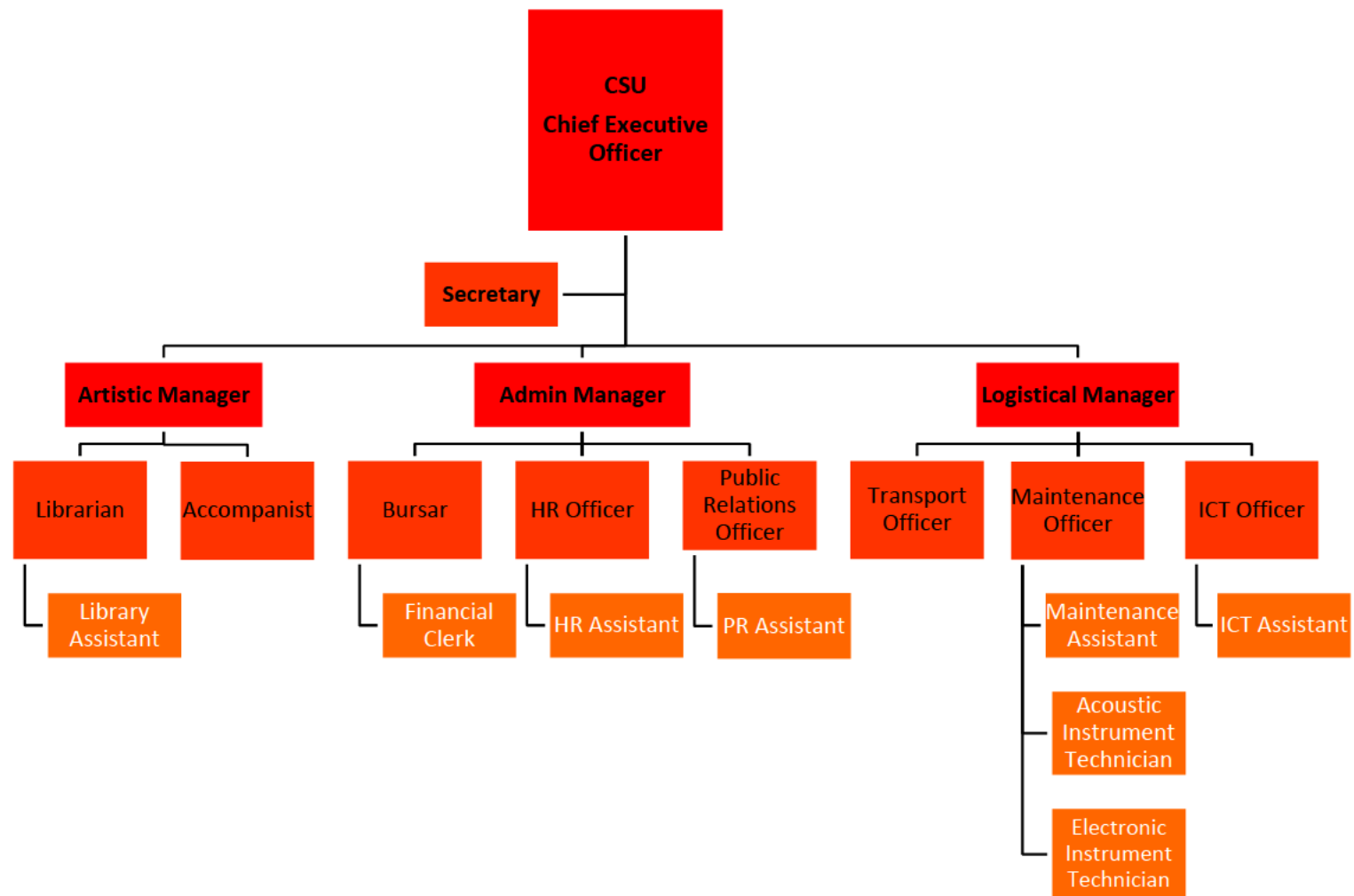


Figure 27: Organogram of the CSU (own creation)

Table 15: Proposed staff of the CSU (own creation)

Post	Immediate supervisor	General duties
Management		
Chief executive officer	Reports to and is a co-opted member of the NCPACC	Responsible for the general management of the CACs, the NCSO as well as other related projects. Duties will focus on strategic planning and fundraising
Secretary	CEO	Provide administrative support exclusively to the CEO
Senior manager: Artistic	CEO	- Plan, organise, direct, control, co-ordinate and promote artistic and cultural policies, programmes, projects and services for all projects of the CACs in the province - Provide artistic guidance, leadership and support to the NCSO
Senior manager: Admin	CEO	- Support operations by supervising staff and by planning, organising, and implementing administrative systems - Assist with strategic long-term financial planning - Provide administrative guidance, leadership and support to the NCSO
Senior manager: Logistical	CEO	- Manage infrastructure, resources and in-house services, such as maintenance and ICT, as well as out-sourced services, namely transport, cleaning and security services - Provide logistical guidance, leadership and support to the NCSO

Staff		
Librarian	Artistic manager	• Administrate an effective library to which the CACs, NCSO and other projects will have access • Maintain statistical and financial library records using library systems and specialist computer applications • Perform other library-related roles or work as requested by the artistic manager
Accompanist	Artistic manager	• Provide piano accompaniment to individual students of an advanced level for solo performance or evaluation purposes • Perform other music-related roles or work as requested by the artistic manager
Public relations officer	Admin manager	• Plan, develop and implement PR strategies • Liaise with colleagues and key spokespeople • Write and distribute in-house publications, website and press releases • Organise events, including press conferences, exhibitions, open days and press tours • Source and manage speaking and sponsorship opportunities • Perform other PR-related roles or work as requested by the artistic manager
Bursar	Admin manager	• Collate, prepare, interpret and manage reports, budgets, accounts and financial statements • Control income, cash flow and expenditure • Develop and manage financial systems • Manage salaries and taxation requirements • Perform other finance-related roles or work as requested by the admin manager
Human resource officer	Admin manager	• Maintain staff complement, job descriptions and records • Organise development programmes for and counselling, disciplining, monitoring and appraising of employees • Recommend, plan and implement pay structure revisions • Ensure legal compliance with reference to labour-related matters • Recommend human resource policies and procedures • Perform other HR-related roles or work as requested by the admin manager
Transport officer	Logistics manager	• Co-ordinate institutional transport requirements and liaise with outsourced company to provide transport for these needs • Perform other transport-related roles or work as requested by the logistics manager
Maintenance officer	Logistics manager	• Maintain a safe, efficient, comfortable and clean working environment for staff and visitors of the CSU and CAC buildings, including health and safety issues • Perform other maintenance-related roles or work as requested by the logistics manager
ICT officer	Logistics manager	• Provide ICT support for users by providing technical support and troubleshooting for all aspects of computer hardware, network and software • Keep ICT asset inventory and backup records • Perform other ICT-related roles or work as requested by the logistics manager

Assistant staff		
Library assistant	Librarian	• Compile records • Sort and shelve books • Issue and receive library materials • Register members • Perform any related task as requested by the librarian
Public relations assistant	PR officer	• Maintain and create media lists and editorial calendars • Manage databases, photo files and records • Assemble and distribute press kits and PowerPoint presentations • Production supervision • General administrative duties (faxing, filing, copying, phone calls) • Perform any related task as requested by the PR officer
Financial assistant	Bursar	• Process and maintain a variety of financial and other business reports, records and documents • Answer inquiries and provide information to students, staff and the public on fiscal policies and procedures • Process requisitions for salaries, supplies and equipment • Perform any related task as requested by the bursar
Human resources assistant	HR officer	• Assist with: ◦ recruiting and staffing logistics ◦ performance management and improvement tracking systems ◦ employee orientation, development and training logistics ◦ recordkeeping ◦ employee relations ◦ committee facilitation and participation ◦ company employee communication ◦ compensation and benefits administration and record-keeping ◦ employee safety, welfare, wellness and health reporting ◦ employee services • Perform any related task as requested by the HR officer
Maintenance assistant	Maintenance officer	• Assist in the repair and installation of various items, systems and components as may be required for the purpose of maintaining facilities in a safe, comfortable and operating condition • Maintain tools and equipment for the purpose of ensuring the availability of equipment in safe operating condition • Respond to emergency situations for the purpose of resolving immediate safety concerns
Electronic instrument technician	Maintenance officer	• Install, operate and maintain a variety of electronic equipment used in audio production or broadcasting, including recording devices, speakers, dubbing equipment, amplifiers and sound mixing boards • Perform any related task as required by the maintenance officer

Acoustic instrument repairperson	Maintenance officer	• Perform basic repairs on all acoustic brass, woodwind, stringed, percussion and keyboard instruments • Travel to CACs to work on instruments on site • Perform any related task as required by the maintenance officer
ICT assistant	ICT officer	• Provide technical support and assist in the development, implementation and support of student and staff technical systems and equipment of the CSU and all CACs • Ensure backup of systems, data security and confidentiality • Perform any related task as required by the ICT officer

6.4.4 Community Art Centres

6.4.4.1 A historical perspective of CACs

Alongside the imposing Performing Arts Councils of the previous government, civil society in South Africa established CACs across the country in the form of NGOs since the 1960s. Notable examples are Funda (Soweto), Dorkay House (Johannesburg), the Community Arts Project and the Stable Theatre (Durban). Although their organisational capacity was often weak, these institutions (and the arts in general) were effectively utilised as a tool for empowerment and a weapon against the apartheid state. However, with the gradual dismantling of apartheid during the 1990s, most of these centres were confronted with financial problems as their traditional international funders started withdrawing funding, often referred to as “struggle money” (Daniel & Southall, 2005:288). At first, in the new South Africa, the arts were no longer seen as serving the anti-apartheid struggle, and as a result, many CACs collapsed. Only a few managed to recover and adapt to a new funding environment (Lochner, 2012:137).

The first democratically elected government developed 42 CACs in poor Black townships through the Department of Arts, Culture, Science and Technology between 1996 and 2000. Their purpose was to provide opportunities for disadvantaged communities to participate in artistic, craft and cultural activities and to train the youth for purposes of recreation, cultural enrichment, social development and income generation (Hagg, 2010:164). The centres were initially funded through the Poverty Alleviation Fund in the 2000/01 financial year and soon after by the National Treasury, when the government recognised that culture has a critical role to play in development and that investing in culture can contribute to economic development and poverty reduction. As a result, the Department of Arts, Culture, Science and Technology received funding for the “Investing in Culture” Poverty Alleviation Programme (Department of Sport, Arts, Culture and Technology, 2002). This programme has also partially failed due to fragmented policies, institutional weaknesses and inadequate capacity in both government and the arts sector. Donors of the project, for example, had to channel all funding through the Reconstruction and Development Fund of the

state in an attempt to co-ordinate international funding. This resulted in a disabling bureaucracy (Hagg, 2010:166). The new government increasingly centralised its policymaking and implementation, involving specialist consultants rather than civil society, and organisations representing civil society were increasingly ignored in policymaking. Furthermore, placing the centres within Black townships distanced the centres from the markets, leaving them far from places of economic, cultural, recreational and educational and tourism activity.

The NGO art centres, however, were not included in government funding or programmes and the few surviving ones continued to struggle on (Lochner, 2012:138). According to Hagg (2010:170), only one of the NGO arts centres was selected for upgrading, and none of them were consulted for their experience, despite the fact that they were often located in marginalised communities and were managed by community members. A vast body of knowledge, years of experience and opportunities for real democratisation of culture were ignored.

Two research projects, involving a national audit of the Reconstruction and Development Programme CACs by the Human Sciences Research Council (HSRC) between 2002 and 2006, found that several ideological, political, institutional and organisational disjunctures and shifts resulted in an ambiguous role of government in community arts in society, preventing role players from optimising the arts centres as development mechanisms. The projects concluded that the sustainable functioning of CACs depends on a clear vision of the state's role in cultural development, coherent cultural policies at sub-national level, effective intergovernmental co-operation, an increased partnership between the state and civil society and the diversification of community arts services (Daniel & Southall, 2005:288).

Hagg (2010:163) states that in order to function optimally, the CACs require "A policy-driven approach by a facilitative government, in partnership with civil society, focusing on policy implementation rather than policy-making, and on



realistic programmatic output by capacitated local organizations rather than infrastructure”.

6.4.4.2 CACs in the Northern Cape Province

The success of the El Sistema model in Venezuela lies partly in the fact that the system is active and visible in all the regions of the country through the establishment of *núcleos* in all districts. CACs can play a similar role in the five districts of the Northern Cape Province (figure 28):

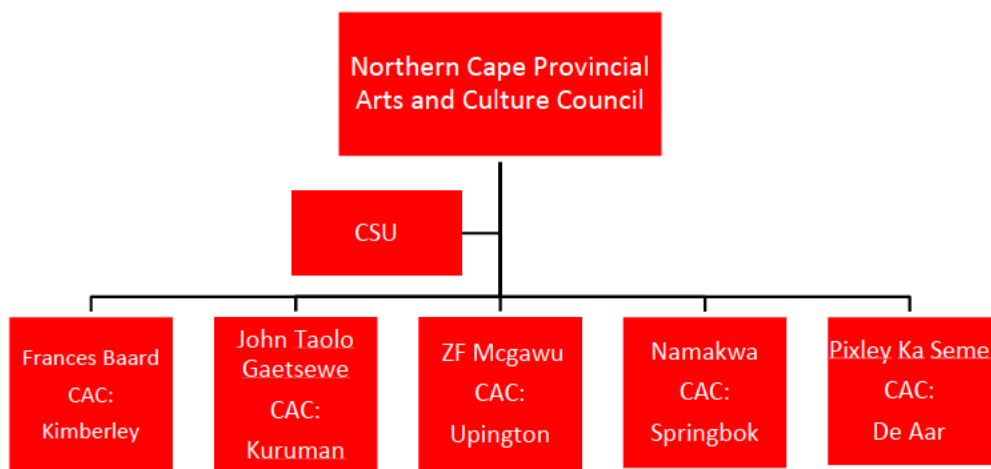


Figure 28: CACs in the Northern Cape (own creation)

A CAC is an institution that facilitates the provision and maintenance of the physical infrastructure, equipment and resources required to practise and develop the different art forms through a cluster of arts academies or learning institutions, namely an academy of music, dance, drama and visual arts, populated by a number of both full-time and part-time staff and students drawn from the surrounding areas (see organogram in figure 29).

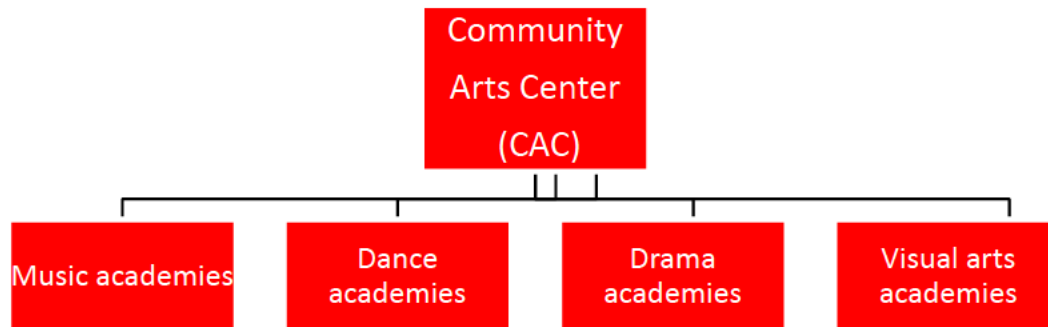


Figure 29: Components of a CAC (own creation)

The province has a total population of 1 145 861 people distributed across the districts as follows. The Frances Baard and ZF Mcgawu districts are the two most densely populated, comprising 54% of the total population (Frith, 2011). Figure 30 illustrates the population density per district:

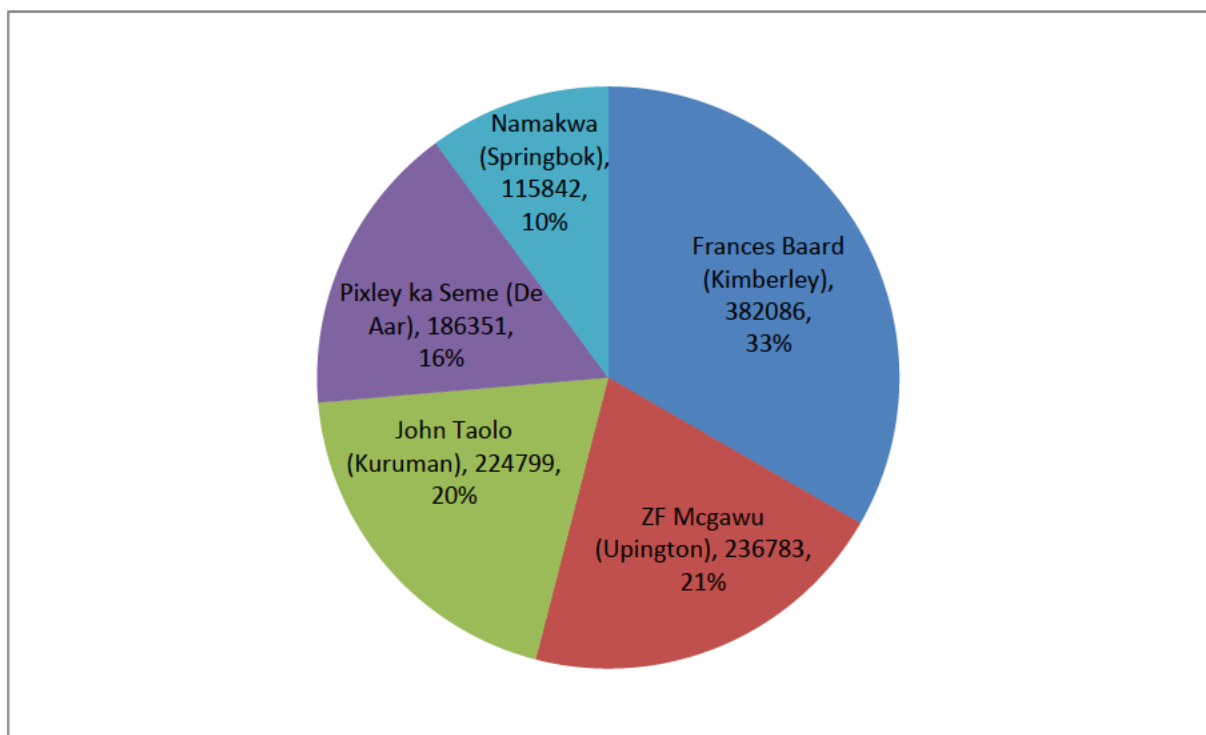


Figure 30: Population density per district (Frith, 2012)

The CACs in each of the five districts provide guidance and support to the various academies that in turn provide specialist tuition in the arts as well as opportunities to market and sell the different artistic products such as music, dance, drama and visual arts. Each CAC must have at least one academy for each art form, except in the Frances Baard District, where the population density



necessitates multiple academies within the same CAC. The programmes and courses offered by each academy will differ according to the specific needs of the area. Students of all ages must register at one of the academies to study their chosen art form. A nominal quarterly or monthly fee will be charged to registered students and will enable them not only to study music, but also to have access the enablers of the industry (see section 4.2.4.4). These include recording, producing, distribution and marketing facilities. At the very least, the Frances Baard CAC must indeed provide these facilities. Other districts may offer these services as and when financial resources become available in order to capture potential talent that might be hidden in the distant and remote areas of the province.

CACs are answerable to the CSU and are run by a management team consisting of a CAC Manager and a Secretary (table 16).

Table 16: CAC staff (own creation)

Post	Immediate supervisor	General duties
CAC manager	CSU artistic manager	• Oversee and take care of the general management of all artistic activities, equipment and infrastructure as well as personnel matters of the CAC • Effect growth and development of all activities within the CAC and all of its academies towards serving and developing the community • Perform strategic planning of programmes and activities geared towards economic upliftment of and job creation in the community in partnership with academy directors • Organise musical events such as festivals and competitions to develop local talent and audiences
CAC secretary	CAC manager	• Assist the CAC Manager in reaching the strategic goals of the CAC • Perform any related admin tasks as requested by the CAC Manager

6.4.5 Music academies

For the purpose of this study, the focus will be on music academies only. These institutions will fall under a CAC and will be run by a manager, who will be appointed at middle-management level, and a receptionist, at assistant level. The proposed curriculum, activities and related personnel of the music academies of the Frances Baard (Kimberley) CAC are discussed separately and are more

extensive, as this district municipality comprises 33% of the total population of the province (Frith, 2011). For the sake of cost-efficiency, certain subjects and training programmes, such as music technology, sound engineering and instrument repairs, will only be offered at the Frances Baard CAC. The remaining four CACs, namely ZF Mcgawu (Upington), John Taolo Gaetsewe (Kuruman), Namakwa (Springbok) and Pixley ka Seme (De Aar) will focus more on instrumental music and will be discussed jointly as they will be similar in structure and less comprehensive.

Relevant instrumental, theoretical music and industry-related subjects will be offered to students on an individual and/or group class basis. The curriculum and evaluation systems will be integrated with that of the Department of Basic Education and will be applied throughout the different academies of the province for purposes of standardisation, parity and quality assurance. Musical skills requiring development in the community will be identified by analysing answers on the application forms for tuition. During the first session of recruitment at MAM, as a case in point, application forms were collected and analysed, and mostly revealed the following needs:

- a general need for tuition in basic music theory
- a need for training in staff notation (as opposed to tonic sol-fa) and stylistic aspects for instrumentalists, community choirs and choir conductors
- worship and gospel music
- greater interest in keyboard and guitar music than in other instruments (although brass instrument students show the biggest numbers, its popularity is rather a result of direct recruitment, availability of instruments and a tangible culture of field band activity).

Other styles of music that require focused attention and provide economic potential and opportunity for the industry in the province are jazz and indigenous music. Jazz music is a music genre that “belongs” to the community. It speaks to the African heart and should be included in the curriculum of all the music academies in the province. It must be understood that classical music always forms a fundamental learning platform for all types of music.



In certain communities, such as the San and Griqua in the Northern Cape, indigenous music still forms an integral part of daily community culture. This includes “old” culture, such as indigenous poetry, buildings, musical instruments and other undocumented historic artefacts, as well as “new” cultural heritage “in the making”, such as rap music and cross-cultural influences. These new creations could make a contribution to the growing popularity of world music. Old culture may be on the brink of extinction and must also be conserved. It may be indicated here that more than 40 of the initial applicants showed a definite interest in acquiring knowledge and skill in traditional music at MAM. In the multicultural expanse of the South African social fabric, the Northern Cape represents a huge spectrum. Western music as well as African traditional music and other art forms are represented in this framework.

South Africa is internationally applauded for its choir music, with special reference to African choirs performing both Western and traditional music. Choral music has always played a major part in the lives of the people of the Northern Cape Province. Several schools and churches boast their own choirs, many belonging to the Northern Cape Choir Association. The present framework will therefore be incomplete without the inclusion of a sustainable choral training system catering for all ages and various styles of music.

The Northern Cape has many untapped operatic voices which are calling out to be developed. A vocal studio under the brand name Diamond Voices, based on the highly successful concept of the Black-tie Ensemble in Gauteng, needs to be established in the Northern Cape to provide gifted singers with the opportunity to develop and nurture their talent in order to give them career opportunities as professional singers. KAM will be most suited for this activity due to readily available infrastructure, transportation, accommodation and other considerations. Candidates from all over the province be auditioned and approximately 20 will be chosen, with an average of 2 singers per voice type³⁵. In this vocal studio, they will receive not only vocal training, but also piano and theory lessons, acting classes and basic language instruction to equip them for a career as a classical singer. Individual members of the training programme will be chosen to perform for the Diamond Voices as a soloist or in an ensemble, and

³⁵ Soprano, mezzo soprano/alto, tenor, baritone and bass.



they will perform locally and away. In order to cover the living expenses of the singers, each will receive a minimal stipend per month, as this intensive three-year course will not allow them be employed while studying. Successful students will qualify after three years and then be encouraged to sing professionally in the open market.

In section 1.3.1, reference was made of the musician's lack of knowledge and skills in areas such as business, finance, intellectual property protection and music technology issues. Music literacy and background knowledge of the subject are areas that also need development to ensure successful growth and development. One of the many aims of the present framework is to offer these subjects as part of the curriculum with a view to address these shortcomings. The framework therefore proposes tuition in music theory and harmony, general music knowledge, music technology (notation software), sound engineering and recording skills and music entrepreneurship.

A further area that requires skills and offers employment opportunities in the music industry is instrument repairs. There is also a vast difference in the mechanics of acoustic and electronic instruments, requiring specialist skills. Once the framework is implemented, a market in this area will develop as a by-product.

6.4.5.1 The Frances Baard CAC (Kimberley)

Certain components of the CAC are already in existence in the Frances Baard District. In Chapter 2 of this study, detailed reference was made to the establishment of the Mayibuye Centre in Galeshewe as well as the privately run KAM. The NCDSAC erected the Mayibuye multipurpose centre in 2006 in order to offer tuition in various art forms as well as other educational ventures to the community. The building is already accommodating a music, dance, drama and visual arts academy, amongst other ventures that are taking place under the same roof. This institution lends itself to becoming the Frances Baard CAC with minimal adaptations. Due to the population density and community profile of the district, it is important that a fully supported music academy should be established not only in Galeshewe, but also in the Kimberley city centre and a third in the suburb of Roodepan. The current privately run KAM must be

incorporated into this framework, as it is already a mature institution with a track record of two decades. Figure 31 below illustrates the various components or disciplines that should be catered for in the Frances Baard CAC:

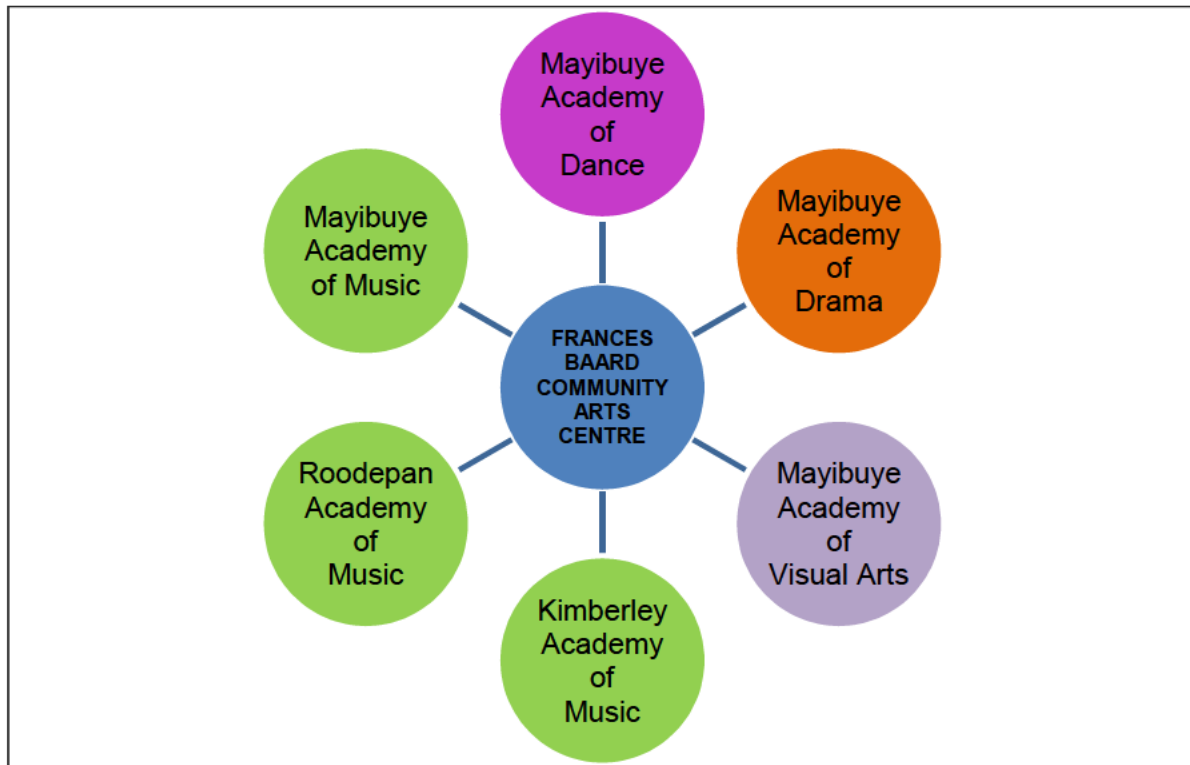


Figure 31: Components of the Frances Baard CAC (own creation)

MAM opened its doors in 2009 when the first five staff members were appointed. It is fully funded by the NCDSAC and during the first five years of its existence, the NCDSAC made use of the services and legal status of KAM to appoint staff and establish administrative systems. KAM was established in 1994 as a private initiative and is currently managed by volunteers with limited financial support from a few private donors. The eight private teachers of KAM offer a wide variety of musical subjects and activities to almost 300 students, and despite very real challenges, this institution has managed to make a significant contribution to the music industry in South Africa (Klemp, 2013).

Kierman (2008:25) refers to the establishment of a third music academy in the Roodepan area on the outskirts of Kimberley. The area is economically challenged and most of the community members cannot afford to travel to either of the other music academies for tuition. The Roodepan Academy of Music (RAM)

will form an integral part of the integrated framework, as some of the staff and students will be included in the proposed NCSO, as described section 6.4.6. It is further proposed that RAM focus on group activities in order to involve as many young people as possible. Drumming groups, Orff classes, recorder groups, keyboard laboratories, etc. are ways to include large numbers of students. Individual music tuition for the more talented students may be offered on an ad hoc basis. According to the Northern Cape Schools Masters List of 2009, there are ten primary, three intermediate and three high schools in the Roodepan and surrounding areas, translating into more than 10 000 learners.

6.4.5.2 Framework for the three music academies of the Frances Baard CAC

MAM and KAM will require a staff complement of a number of full-time and part-time persons, while RAM will require only full-time staff. Full-time staff will consist of mainly two types of personnel, namely administrative and non-orchestral³⁶ staff. All the musicians in the proposed NCSO, as described on page 6-202 will be utilised as part-time teachers on a peripatetic basis, for all the music academies of the province.

Table 17 below demonstrates the staff requirements and the musical and academic activities necessary to fulfil the needs of the framework at this level. Apart from general duties as required by the immediate supervisor, specific duties related to the particular post are highlighted.

³⁶ Personnel that are not in the NCSO, e.g. piano, guitar, singing and theoretical teachers.

Table 17: Staff and activities for the three music academies of the Frances Baard CAC (own creation)

Department	Post	Subjects	Specific duties	FB CAC		
Management				MAM	KAM	RAM
Management	1. Music academy manager	NA	- Perform administrative tasks required for the effective running of the music academy - Provide guidance to staff with regard to administrative and musical leadership and maintain discipline and a good work ethic amongst staff and students - Co-ordinate and organise regular performances by staff and students of the music academy - Plan and implement fundraising and promotional activities - Plan and schedule rehearsals and performances, classes and evaluations and all related details	•	•	•
	2. Receptionist	NA	- Answer the telephone and deliver messages to staff - Receive the public and supply basic information - Receive monies from and issue receipts to customers - Manage petty cash system - Issue accounts and follow up on bad debts of customers and clients - File all documentation relating to financial transactions in an orderly manner - Set up monthly part-time staff salary requisition based on information received	•	•	•
Practical music				MAM	KAM	RAM
Keyboard instruments	1. Piano teacher	Piano	- Teach piano to students on an individual basis - Prepare students for regular evaluations and public performances - Provide limited accompaniment services to instrumental students	•	•	-
	2. Keyboard teacher	Keyboard groups	- Teach keyboard to students in groups - Prepare students for regular evaluations and public performances - Provide limited accompaniment services to instrumental students	•	-	•
String instruments	• String teacher	Violin, viola, cello	- Teach violin, viola and cello to students on an individual basis, in groups and in ensembles - Prepare students for regular evaluations and public performances	-	-	•
	• Part-time violin teacher*	Violin	Teach practical music as specified on a part-time basis to music academy students individually, in groups and in ensembles	•	•	-
	• Part-time viola teacher*	Viola	Prepare students for regular evaluations and public performances	•	•	-

	• Part-time cello teacher*	Cello		•	•	-
	• Part-time double bass teacher*	Double bass		•	•	-
	• Classical guitar teacher	Classical guitar		-	•	-
	• Commercial music guitar teacher	Rhythm, lead and bass guitar		•	•	•
Woodwind instruments	• Recorder teacher	Recorder	• Teach practical music as specified to music academy students on an individual basis, in groups and in ensembles • Prepare students for regular evaluations and public performances	-	-	•
	• Woodwind teacher	Flute, clarinet, saxophone	• Teach flute, clarinet and saxophone to students on an individual basis, in groups and in ensembles • Prepare students for regular evaluations and public performances	-	-	•
	• Part-time flute teacher*	Flute	• Teach practical music on a part-time basis to music academy students individually, in groups and in ensembles • Prepare students for regular evaluations and public performances	•	•	-
	• Part-time oboe teacher*	Oboe		•	•	-
	• Part-time clarinet teacher*	Clarinet		•	•	-
	• Part-time saxophone teacher*	Saxophone		•	•	-
	• Part-time bassoon teacher*	Bassoon		•	•	-
Brass instruments	• Brass teacher	Trumpet, horn, trombone, euphonium, tuba	• Teach all brass instruments to students on an individual basis, in groups and in ensembles • Prepare students for regular evaluations and public performances	-	-	•
	• Part-time trumpet teacher*	Trumpet	• Teach practical music as specified on a part-time basis to music academy students individually, in groups and in ensembles • Prepare students for regular evaluations and public performances	•	•	---
	• Part-time French horn teacher*	French horn		•	•	---
	• Part-time trombone teacher*	Trombone		•	•	---
	• Part-time tuba teacher*	Tuba, euphonium		•	•	---

An integrated framework for the development of the music industry in the Northern Cape Province

Percussion instruments	Part-time percussion teacher*	Percussion, Orff Schulwerk	- Teaching of practical music as specified on a part-time basis to music academy students individually, in groups and in ensembles - Prepare students for regular evaluations and public performances	•	•	---
Singing	Singing teacher: classical music	Classical voice training	- Teach all classical vocal art of all voice types to music academy students on an individual basis, in groups and in ensembles - Prepare students for regular evaluations and public performances	---	•	---
	Singing teacher: commercial music	Commercial music voice training	- Teach all forms of commercial singing and voice types to music academy students on an individual basis, in groups and in ensembles - Prepare students for regular evaluations and public performances	•	•	•
	Language coach	Language and acting	Teach correct use of language, pronunciation and diction as well as acting skills for operatic requirements to individual students and choirs	-	•	-
	Choir conductor	Children's choir, youth choir, adult choir, choral conducting	- Direct and train the children's, youth and adult choir - Administrate all aspects related to the choirs - Teach choral conducting to music academy students	•	•	•
Pre-school	Pre-school music teacher	Music appreciation, movement, singing	Teach music appreciation, movement, singing and other activities related to pre-school music tuition to young children in groups	•	•	•
Indigenous music	Indigenous music teacher	Instrumental and vocal music	- Teach indigenous music to students on an individual basis and in groups - Promote indigenous music to the public through the creation of performance opportunities, media presence and other means	•	---	---
Theoretical subjects				MAM	KAM	RAM
Theoretical music	Theoretical music teacher	Music theory and harmony, general music knowledge	Teach basic music theory, harmony and general music knowledge to music academy students	•	•	•
	Music technology teacher	Music technology (notation software), sound engineering and recording skills, music entrepreneurship	- Teach Sibelius notation software - Teach sound engineering principles with Adobe Audition recording software - Teach music entrepreneurship, including business, financial and legal principles of the music industry to music academy students	•	-	-

Instrument repairs and maintenance				MAM	KAM	RAM
Instrument repairs	Instrument repair teacher: acoustic instruments	Acoustic instrument repairs	- Teach instrument repairs and maintenance of all acoustic instruments - Teach piano tuning skills	•	-	-
	Instrument repair teacher: electronic instruments	Electronic instrument repairs	- Teach instrument repairs and maintenance of all electronic instruments - Teach repair and maintenance of sound equipment	•	-	-

6.4.5.3 CACs in the other districts of the province

The remaining 67% of the population of the Northern Cape live in the other four districts of the province (Frith, 2011). The second most densely populated area of the province is the ZF Mkgawu District, where 21% of the population reside. There are 30 schools with almost 15 000 learners in the town of Upington alone. Currently, only about 100 of these learners are learning to play a musical instrument (Engelbrecht, 2012). Research done in the area shows that commercial music and informal “bands” are very active in the townships and that so-called “Boeremusiek” is still very popular amongst the White Afrikaans-speaking community (Du Preez, 2012). It is clear that some musical activities are taking place, albeit underdeveloped, leaving room for expansion. The John Taolo Gaetsewe District (Kuruman) is home to 20% of the population with 165 schools in and around Kuruman. Many of these schools have relatively low student numbers and apart from only a few private initiatives, formal instrumental music tuition is not offered at any of these schools. The Pixley ka Seme District (De Aar), with 16%, and the Namakwa District (Springbok), with only 10% of the population, also have no music educational institutions of note, according to the questionnaire responses.

It is proposed that the ZF Mkgawu, John Taolo Gaetsewe, Pixley ka Seme and Namakwa CACs each house one music academy and that they are situated in the main city or town of each of the various districts. These are outlined in table 18:

Table 18: CACs and music academies in the other districts (own creation)

Community Arts Centre	Music academy
ZF Mkgawu CAC	Upington Academy of Music (UAM)
John Taolo Gaetsewe CAC	Kuruman Academy of Music (KuAM)
Pixley ka Seme CAC	De Aar Academy of Music (DAAM)
Namakwa CAC	Springbok Academy of Music (SAM)

6.4.5.4 Framework for the music academies of the other CACs

These music academies will require a different staff complement to that of the Frances Baard CAC as described in Table 17. One significant difference is that

due to the distance from Kimberley, the musicians in the proposed NCSO cannot be used to teach on a part-time basis at these institutions. Full-time staff will have to be employed to deliver this service. Table 19 demonstrates the different subjects and activities to be offered by the Music Academies of the other four CACs as they were found to be relevant to this particular community profile. Specific duties of each incumbent are omitted in this table as they are generic and fully described in Table 17 above:

Table 19: Staff and activities of the music academies in other districts (own creation)

Department	Post	Subjects
Management	1. Music Academy Manager	NA
	2. Receptionist	NA
Keyboard	3. Piano teacher	Piano
	4. Keyboard teacher	Keyboard groups
Strings	5. String teacher	Violin, viola, cello
	6. Commercial music guitar teacher	Rhythm, lead and bass guitar
Woodwind	7. Recorder teacher	Recorder
	8. Woodwind teacher	Flute, clarinet, saxophone
Brass	9. Brass teacher	Trumpet, horn, trombone, euphonium, tuba
Percussion	10. Percussion teacher	Percussion, Orff Schulwerk
Singing	11. Vocal art teacher	Commercial music voice, children's choir, youth choir, adult choir, choral conducting
Pre-school	12. Pre-school music teacher	Music appreciation, movement, singing
Theoretical music	13. Theoretical music teacher	Music theory and harmony, general music knowledge

6.4.6 Northern Cape Symphony Orchestra

6.4.6.1 Introduction

The establishment of the NCSO will contribute significantly to the development of the music industry of the region. It must be clearly understood that such an orchestra does not only perform classical music on a formal stage, but rather participates in and contributes actively to all stages of the music industry value circle. The NCSO will consist of a skeleton of principal musicians expanded with music students coming from within the integrated system of music education. It will be established over a three-year period to spread the financial impact and give the teachers the opportunity to train the student musicians. The orchestra will be governed by the Northern Cape Provincial Arts and Culture Council as described in Figure 26 above. The NCSO will be micromanaged by a conductor



and supported by the CSU as well as a dedicated stage assistant. The conductor will be a middle management appointment and will be answerable to the CEO of the CSU.

6.4.6.2 Framework for the Northern Cape Symphony Orchestra

The modern symphony orchestra consists of up to 80 musicians playing approximately 15 different instruments. The conductor is in control of the musicians and is ultimately responsible for the final product. The present framework proposes a smaller version, consisting of a skeleton of professional musicians as well as student musicians. The following orchestral layout consists of 53 musicians and is the minimum requirement for a sustainable and artistically acceptable ensemble:

String instruments:	16 violins, 6 violas, 8 cellos, 2 double basses	= 32
Woodwind instruments:	2 flutes, 2 oboes, 2 clarinets, 2 bassoons	= 8
Brass instruments:	2 trumpets, 4 horns, 3 trombones, 1 tuba	= 10
Percussion:	1 timpani, 2 auxiliary percussionists	= 3

A total of 24 of the above musicians will be sourced and appointed over a period of three years. The remaining 29 places will be reserved for deserving and advanced students within the music academy system. This format has been used with great success in the Free State Province as described in section 3.4.7.3 on page 3-102.

6.4.6.3 Establishment plan

Year 1:

- Appointment of a conductor on a three-year contract basis by the CEO of the CSU
- Hiring and setting up of rehearsal venue, concert venue and office space in the current Northern Cape Theatre complex
- Appointment of the first string quartet, a wind quintet, a percussionist and a double bass player by the conductor
- Start with teaching programmes at the relevant music academies
- Appointment of a stage assistant by the conductor

- Presentation of various educational and professional concerts by the above-mentioned musicians, including outreach programmes to the rest of the province
- Hiring of extra players as needed and presentation of one symphony concert in the Northern Cape Theatre

Year 2:

- Appointment of the second string quartet and a brass quintet by the conductor
- Presentation of various educational and professional concerts by the above-mentioned musicians, including outreach programmes to the rest of the province
- Hiring of extra players as needed and presentation of two symphony concerts in the Northern Cape Theatre

Year 3:

- Appointment of the third string quartet by the conductor
- Presentation of various educational and professional concerts by the above-mentioned musicians, including short concert tours to the rest of the province
- Hiring of extra players as needed and presentation of three symphony concerts in the Northern Cape Theatre

6.4.7 Arms of service bands

According to WO2 Jack Simpson (2014), Director of the Informal South African National Defence Force School of Military Music, the South African Armed Forces are the biggest employers of professional musicians in the country. The South African Armed Services include the Army, Navy, Air Force, Police and Prisons Services. All of these institutions employ professional musicians that constitute the various bands used for official purposes such as parades, church services, morale boosting, community services, public relations, state visits and funerals. Simpson estimates that the Defence Force employs approximately 325 musicians in eight military bands around the country and the South African Police Service more than 250 with 11 professional bands. This type of musical ensemble requires at least 30 players, including the conductor, in order for it to be



musically acceptable and sustainable. Anything less than this will expose the group to unnecessary risks in case of absenteeism or in terms of the quality of the product.

6.4.7.1 South African Police Services Band (Kimberley)

There is currently one Police Band in Kimberley with 17 members (see section 2.3.2.5 on page 2-56), far from the standard size of 47 members. The Northern Cape can accommodate a second police band, to be situated in Upington, due to the great distances between the main cities of the five municipal districts and the variety of official and non-official activities that take place in remote areas (Tiltman, 2014).

6.4.7.2 Military bands

There are eight military bases in the Northern Cape Province, five of which are situated in Kimberley. The total number of people employed by the military in the province may be as much as 5 000. This warrants the establishment of a fully-fledged military band with at least 47 members in Kimberley, where most of the activity takes place. Currently, bands from as far as Kroonstad or even Cape Town have to travel to the Northern Cape for official performances (Simpson (WO2), 2014).

6.4.7.3 Freelance performing musicians

Music is interwoven into the fabric of many African cultures, where everyone is a musician to some degree, which results in a strong emphasis on unity, a sense of belonging and nurturing of the human spirit. This, combined with the principles of musiconomy, proves that music adds significantly to the quality of our existence, and our society would be a better place if there were many more musicians. There are only a limited number of music-related job opportunities in the formal sector, which makes freelancing³⁷ an obvious solution for future job seekers in the industry. To be a freelance performing musician, various entrepreneurial skills are required to create income generating opportunities. Entrepreneurship in the performance sector of the music industry calls for

³⁷ A freelancer is someone who works for different organisations, including self-employment, as opposed to working for a single organisation.

extraordinary musical and non-musical skills, demonstrating the need for effective training at all levels of education. By employing innovative ideas, entrepreneurs can enjoy successful careers by either focusing on a single aspect, or combining a vast array of employment opportunities (see page 6-218).

6.4.8 Festivals, competitions and events

The importance of discovering and developing local and regional talent and of promoting audience development are some of the issues discussed in sections 5.1.2.2 and 5.1.2.3, respectively, while section 2.3.2.1 referred to the current events that are organised by the NCDSAC. Some of these events contribute considerably in reaching these goals, although more activity is required in this area. If the above CAC framework is in place, it is probable that an even greater need for such events will develop. It should be the responsibility of the CAC employees to ensure that every opportunity is used to present a platform for artists to perform in public. In addition to existing events such as Northern Cape has Talent, a Provincial Music Week is proposed during which all the role players can contribute towards the development of local artists and audiences. According to Ambert (2003:45), original song contests are an effective way to achieve this as they can be linked with some form of talent grooming and recording arrangement. It is also easily linked to mass media events, offering attractive opportunities for leveraging corporate sponsorship. Existing arts festivals, such as the Gariep Festival in Kimberley and Kalahari Kuierfees in Upington, must be supported by local and municipal governments and expanded to each and every district in the province.

6.4.9 Church musicians

According to Elphick and Davenport (1997:319-325), the first occurrence of Western church music in South Africa was when Bartolomeu Dias and his Portuguese sailors landed near Mosselbay in February 1488 and sang the hymn "Te Deum". The Dutch introduced the Calvinist Dutch Reformed Church as the only religion in the Cape after their arrival in 1652. Many churches were built and missions established during the second half of the 19th century. Most of the churches were designed to accommodate a pipe organ and a choir. The Dutch Reformed Church music focused on the organ, which explains why South Africa

can boast with a number of magnificent church organs today. The Coloured mission churches had their own hymn books and focused more on choir music. More secular music based on folk tunes was printed and imported from the Netherlands, England and America by 1860. By 1930, the Dutch Reformed Church introduced the *Halleluiah Song Book* which consisted of a collection of more popular melodies. With the rise of the charismatic movement in the 1970s, more popular music was gradually introduced, often using instruments other than the organ for accompaniment. By the 1980s, the apartheid barriers started to collapse and Black choirs were invited to perform in White churches. Exposure to different styles of music encouraged more fusion, including American spirituals, gospel songs and even freedom songs. Churches in South Africa now realise the value of including different styles of music and accompaniments.

The NCMIDF cannot be as presumptuous as to attempt to prescribe a music framework to the religious world. It is simply taking cognisance of the fact that religious music forms a very big part of the industry with obvious economic implications. The real impact of religious music on the industry is virtually impossible to measure as it involves large numbers of people spending significant amounts of money on music and musical equipment. Religious music is alive and flourishing, a harbinger, perhaps, of a future ecumenical society. According to Shaw, the All Media and Products Study produced in 2009 by the South African Research Foundation, found that genre popularity has not changed much from 2003 to 2009 and that gospel music dominates the market significantly. The research indicates that almost 20 million South Africans prefer gospel music. The nearest competitor, with almost 10 million supporters, was music that falls in the category labelled "other", referring to music not mentioned in the All Media and Products Study list of 18 different common genres. This was followed by kwaito, house, jazz and hip-hop, to name but a few.

6.5 The framework part 3: Music business

6.5.1 Conditions for growth

Government should take the lead to ensure that the milieu within which music business entities operate is supportive of their trade and conducive to their development. Section 6.1 above highlighted the responsible parties in this regard. In order to develop the business sector of the industry, the following three steps must be taken:

- establish and grow a balanced bouquet of successful music businesses in the province
- develop a vibrant music community
- develop new and maintain existing music industry-specific infrastructure.

Successful music businesses will grow when the following steps are put in place:

- the continuous development of business skills and entrepreneurship through programmes such as short courses and workshops
- gaining access to the market and market information through networking events and market research
- the provision of business development support such as advice on planning, finance, marketing and digital distribution
- mentoring programmes for new entrants into the business sector
- being innovative by creating new business models, technology and digital distribution methods as well as e-commerce
- producing a unique product
- access to finance through SMMEs, sector education and training authorities and low-cost bank loans
- internationalisation through trade shows, missions and, tours.

6.5.2 Types of music businesses

A balanced bouquet of businesses refers to all the services required to address the various needs of the industry. The enablers and revealers in the music

industry value circle give clear indications to what these needs are and can be grouped as follows (table 20):

Table 20: Music business types (own research)

Music business sector		
Administrators	Technical services	Distributors
• Managers • Promoters • Agents	• Recording studios • Sound engineers • Record labels • Music publishers • Repairs and maintenance • Design and manufacturing • Acousticians	• Internet • Advertising agencies • Live music facilities • Mobile devices • Media (press, radio, TV) • Retailers (sheet music, musical equipment, CDs, DVDs, etc.)

A vibrant music community will be developed only once local talent and local products have been developed via an effective and relevant educational framework, as discussed in section 6.3 above. Community projects such as festivals, live performance, competitions and music events contribute to a vibrant music community.

Infrastructure development includes accessible and affordable rehearsal space for musicians as well as studio provision for producers and sound engineers. Professional services such as promoters, managers and the multitude of other services in the industry require office space to operate effectively.

6.5.2.1 Administrators

This form of business falls under professional services to performers and depends on the effective functioning of the other sectors of the industry, highlighting once again the importance of integration. Administrators will have no work if there is not enough top-selling or first-class performing musicians in the area. A musician must also generate enough income to justify the acquisition of the services of an administrator, as these individuals usually work on a commission basis. Music administration is arguably one of the most neglected and also undervalued areas of the industry. Highly qualified and skilled administrators are required to vie in a competitive industry, because trading in its broadest sense is required to make a



contribution to economic development, breaking into local, national and international markets. One administrator can service a number of musicians simultaneously, which means that there can only be a small number of these positions in a given area. A musician may also opt to employ different specialists in every field of the industry. A typical job description of an administrator must include the following aspects (Passman, 2004:27):

- Performance management:
 - o Generate or initiate performing, broadcasting and recording opportunities for musicians
 - o Organise the logistical and other arrangements of performances
 - o Manage venue hire, bookings and itineraries
 - o Perform pre-performance checks
- Marketing:
 - o Handle all promotion, marketing and advertising aspects for the artists
 - o Collect and interpret market intelligence and audience feedback
- Legal support:
 - o Act as a go-between with regard to contractual issues and legal matters
- IT support:
 - o Provide guidance and support with regard to e-commerce
 - o Manage internet presence
- Financial management:
 - o Income and royalties
 - o Investments
 - o Taxation

The establishment of an organisation or a union that looks after the needs of freelance musicians is an important requirement for this segment of the industry. The American Federation of Musicians of the United States and Canada (AFM) is a case in point, and freelance musicians represent as much as 80% of their total membership (AFM, 2005). In South Africa, most freelance musicians continue to



work professional gigs without union representation. The implementation of the NCMIDF places the Northern Cape in the ideal position to pioneer an organisation that can become a truly inclusive musicians' union, whose efforts must include a strong commitment to the values of "collective action" and to identify and address the concerns of freelance musicians.

A musicians' union has a three-fold purpose:

- to lobby for legislation that protects musicians' interests
- to negotiate collective bargaining agreements with those entities that use the services of musicians for improved wages and working conditions for its members
- to facilitate and/or provide services such as insurance (liability, equipment, travel and unemployment), financial assistance (personal loans and study bursaries), discounts (equipment, sheet music and general services) and legal support.

6.5.2.2 Technical services

The provision of the necessary technical support to performing musicians includes services that require special skills that are not necessarily musical in nature. The current scenario with regard to the availability of recording studios in the province is hardly adequate (see section 2.3.3.2 above), and it calls for the establishment of at least one recording studio in each of the CACs, as proposed in section 6.4.4.2 above. Sound engineers are therefore required to produce quality recordings that can compete in an international market.

The world market is dominated by six multinational record companies, of which four have subsidiaries in the South African market, namely BMG, EMI, Polygram and Sony. The greatest market share, however, belongs to independent company Gallo Africa, which is licensed by Warner (Department of Arts and Culture, 1998:28). Record companies traditionally make a profit from selling copies of recorded music, both new releases and remixes. Music publishers derive their revenues from four sources, namely performances (public performance of copyrighted music, including radio broadcasts, background music in clubs, bars, shops etc. and live performances), reproduction synchronisation

(music for television programmes, films, commercials, games and music videos) and distribution (the sale of printed sheet music) (Leurdijk & Nieuwenhuis, 2012:28). There is currently no active link between any of the above record labels or music publishers and the musicians of the Northern Cape, and the establishment thereof is a distinct business opportunity or niche market within the integrated framework.

Once the industry starts to grow, the need for qualified repair and maintenance technicians for both electronic and acoustic instruments will become obvious. Although the manufacturing of musical equipment and instruments requires significant capital investment as well as access to an expansive market, it should form part of the framework to service musicians.

6.5.2.3 Distributors

The term “distributors” refer to all those entities that play a role in distributing music or music-related products to the market. These entities include the internet, advertising agencies and live music facilities such as concert halls, mobile devices, retailers and the media. The internet has changed the music industry dramatically. Table 21 explains the difference between the old music industry, dominated by multinational record companies, and the new digital music industry as characterised by four basic features:

Table 21: The differences between the old and the new music industry (own research)

Old music industry	New music industry
There were strong connections between the music firms and the audience. Agents, record companies, promoters and radio stations played an important role in determining to what the market is exposed.	It is characterised by high connectivity and little control. Digitisation, the internet, and social networks have disrupted the relationship between big companies and the consumer. Physical distribution is now redundant, and musicians can sell directly to their audience.
The content and the physical product (medium) were inseparable.	Access to a service is more important than owning the physical product.
Audiences were prescribed to by distributors.	Audiences have more choice in the to which music they listen.
Musicians were dependent upon record companies.	Record companies are dependent upon musicians.

E-commerce has become the most important way to market and sell recorded music, and this requires of musicians to develop the necessary skills to make use



of this facility. This requirement is aptly described by Cutler (2010:94), who says, "If it is not on the internet, it is invisible."

- The internet

Next to pornography, music is the most popular attraction on the internet (Passman, 2004:395). According to Shaw (2010:475), the internet has prompted some researchers to refer to the "post-scarcity media economy", where information is available in abundance. It is the ultimate democracy of music consumerism where the public determines popularity and not a record company.

Traditionally, a record company will sign up an artist if the company is of the opinion that such an artist will sell. In the case of commercial or popular music, the company invests in the artist by funding the production cost of preferably an album, which consists of a collection of songs, as well as all contractual and legal aspects. Royalties are paid by a collection agency (the South African Music Rights Organisation) to the artist and the performers whenever the particular track is aired in public or used in synchronised formats such as television, video games or ringtones. A distributor is traditionally responsible for shipping units of records or CDs from the point of manufacture to shops around the country or the world. In the new and digital music industry, the physical format of music has been overtaken in popularity by digital formats. This makes distribution of the product much easier, provided it is available for sale digitally on websites that specialise in selling music online, such as iTunes, Amazon, Beatport, Juno and many others (Musicradar.com, 2011).

The unit of sale is also shifting from albums to single tracks (also called singles) as consumers find it easy to download a single song from the internet (Shaw, 2010:474). There are three delivery methods for music over the internet, namely downloading, interactive streaming and webcasting. Downloading allows for multiple playbacks after the user has paid a once-off amount, while the data is discarded with streaming and webcasting. Each time a user calls up a song from the last two methods, a royalty needs to be paid (Shaw, 2010:477). Digital distribution is supplied by an aggregator such as iTunes, which is a service or website that collects songs from various sources and gathers the information in one place. YouTube is another example that collects user generated content and



makes it available to the public to see. Many musicians make use of this service to assist them in making their product known. Record labels have responded to the challenges posed by the internet by entrenching themselves in a symbiotic relationship with aggregators, who in turn see them as providers of mass content. Other methods of digital distribution include social networks such as www.myspace.com and www.facebook.com that have provided an easy and free way to create a website that can accommodate music and pictures. Online retailing offers unlimited opportunity for the music business to trade with a range of selling options, from all types of merchandise to the download of audio or sheet music. Musicians can also have personal websites from where they can sell their own music.

The internet has also rendered musicians fairly vulnerable to piracy, as many opportunistic users try to download music without paying. Digital rights management (DRM) is an attempt to curb the potential for large-scale piracy of music on the internet. DRM applies certain methods to restrict the use of a music file, such as the number of times a downloaded file can be played or copied. Although DRM is very unpopular with customers, it needs to be developed further because it can become a new and innovative way to control music sales on the internet as well as the scourge of piracy. In the meantime, websites can include advertising of other products, which generates money for the artist while music can be downloaded for free. The website www.loadtheshow.com is a case in point, where the advertising space on the site is sold to pay the artists for their music.

Digital music consumption has become mainstream as the internet revolutionised the way in which music can be transmitted (Shaw, 2010:478). New business models for trading on the internet are evolving on a regular basis and these include auctioning or the selling of music to the website owner for a commission.

To date, the most epoch-making and innovative way to generate an income, pay artists trading on the internet what is due to them and curb piracy at the same time, is undoubtedly a subscription system. Users can subscribe to a service that allows them free downloads of music onto the device of their choice, e.g. cell phones or CD disks. This method can also be extended where part of the annual



internet subscription is paid to music rights holders, and is comparable to the fuel levy where 5% is used for the road accident fund (Shaw, 2010:481).

- Retailers

Retailers provide a valuable service to the music community. Apart from aiding in the distribution of music, they make the tools of the trade available to musicians, educators and other role players in the industry. Section 2.3.3.5 above made mention of the current retailing situation in the Northern Cape, which demonstrates the bleak scenario in which the industry finds itself, especially in the smaller districts. Future growth will create a need for services to be extended to all the districts of the province. In order to achieve a balanced bouquet of music businesses, it is necessary to evaluate the current scenario as described in section 2.3.3.5 and determine the looming shortages.

- Mobile music commerce

Portable devices such as cell phones and even radios make instant connection to the internet and broadcasting modes possible. Cell phones are effective music marketing devices as more South Africans own cell phones than computers (Shaw, 2010:497). Users can receive samples and purchase music, while DRM is easily controlled. Ringtones for cell phones are a lucrative way of generating money for musicians, while podcasting and satellite radio offer advertisement-free music broadcasting. Traditional radio broadcasting forms part of the mobile network and remains an effective way of distribution.

6.5.3 A balanced bouquet of businesses

The current music business sector in the Northern Cape offers limited services to the musicians of the area. Table 22 illustrates how many businesses there are and where they occur:

Table 22: Current music businesses in the Northern Cape (own research)

District municipality	Current Northern Cape business sector							
	A	B	C	D	E	F	G	H
Frances Baard (Kimberley)	2	3	1	2	0	0	2	0
ZF Mcgawu (Upington)	1	1	0	1	0	0	1	0
John Taolo Gaetsewe (Kuruman)	0	1	0	0	0	0	0	0
Namakwa (Springbok)	0	0	0	0	0	0	0	0
Pixley ka Seme (De Aar)	0	0	0	0	0	0	0	0

Key:

A. Music shops (sheet music and musical equipment)	B. CD and DVD shops
C. Repairs and Maintenance	D. Recording studios
E. Music administrators	F. Commercial radio station
G. Community radio station	H. Record company

Table 23 demonstrates what would be required to support and sustain the proposed framework, if implemented in totality. This information was collated by the researcher, with the envisaged outcomes of the proposed framework in mind, as described in this chapter:

Table 23: Proposed music businesses for the Northern Cape (own creation)

District municipality	Proposed business sector							
	A	B	C	D	E	F	G	H
Frances Baard (Kimberley)	2	3	1	2	3	1	2	1
ZF Mcgawu (Upington)	1	1	1	1	2	0	1	0
John Taolo Gaetsewe (Kuruman)	1	1	1	1	1	0	1	0
Namakwa (Springbok)	1	1	1	1	1	0	1	0
Pixley ka Seme (De Aar)	1	1	1	1	1	0	1	0

6.6 Summary

The implementation of the proposed framework as described in this chapter will make a significant contribution to employment figures and the resulting economic spin-off in the province. This is referred to as the economic multiplier effect, which is described as follows in the third edition of *The American Heritage New Dictionary of Cultural Literacy*:

An effect in economics in which an increase in spending produces an increase in income and consumption greater than the initial amount spent. For example, if a corporation builds a factory, it will employ construction workers and their suppliers as well as those who work in the factory. Indirectly, the new factory will stimulate employment in laundries, restaurants, and service industries in the factory's vicinity (Hirsch, Kett & Refil, 2005).

The multiplier effect therefore implies that every job created will contribute to growth and development in other areas of the economy. Furthermore, music is an exportable product, which was identified in section 1.4 above as one of the most important preconditions for real economic growth, as it brings in money from the outside and not only circulates the same money.

The above framework must be implemented in its totality in order for a music industry to make an economic contribution to the province. Figure 32 summarises the key role players in the framework:

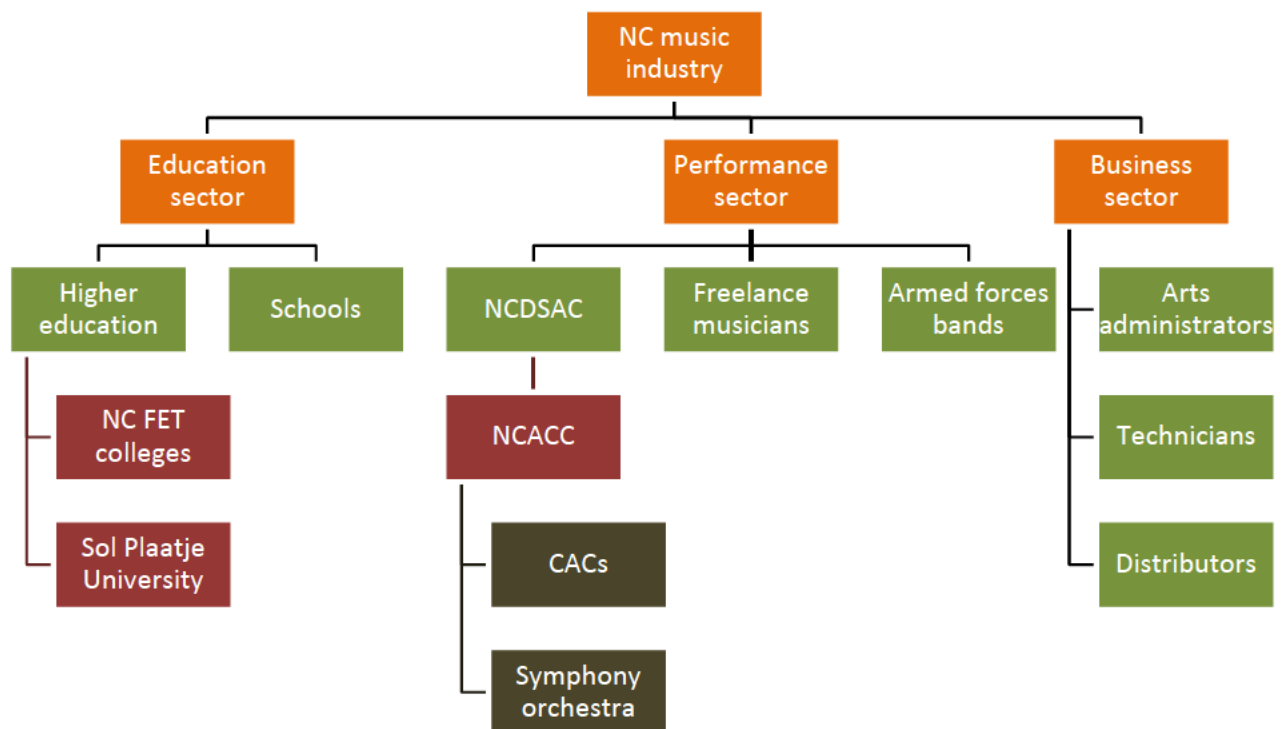


Figure 32: Key role players in the proposed music industry for the Northern Cape (own creation)

6.6.1 Statistics

At full implementation, this framework will create approximately 358 permanent and 66 part-time jobs in the Northern Cape and an unknown number of informal or freelance jobs (table 24). These job opportunities are distributed throughout the various industry segments outlined in table 22 above:

Table 24: Potential employment figures of the proposed framework (own research)

Level	Posts/job opportunities	Full-time jobs	Part-time jobs
1	CSU chief executive officer	1	0
2	Central services senior managers	3	0
3	CAC managers, conductor, faculty head	7	0
4	Music academy managers, CEO's secretary	8	0
5	CSU staff, teachers, lecturers, orchestral players	139	0
6	CAC secretaries	5	0
7	Assistant staff, receptionists	15	0
NA	Sound engineers	6	0
NA	Record company	5	5
NA	Repair and maintenance technician	5	5
NA	Music shops	6	6
NA	CD and DVD shops	4	4
NA	Community radio stations	45	45
NA	Commercial radio station	15	1
NA	Military and police band musicians	94	0
NA	Freelance musicians	?	?
	TOTAL	358	66

Of the above employees, approximately 102 will be teaching students individually and in groups. The number of school-based learners taking music is not expected to rise dramatically from the current number because the framework suggests only a few additions to the curriculum. The total number of students enrolled at the various music academies and at the university in the province can be as much as 5 550 at full capacity, with each music academy contributing the following number of students (figure 33):

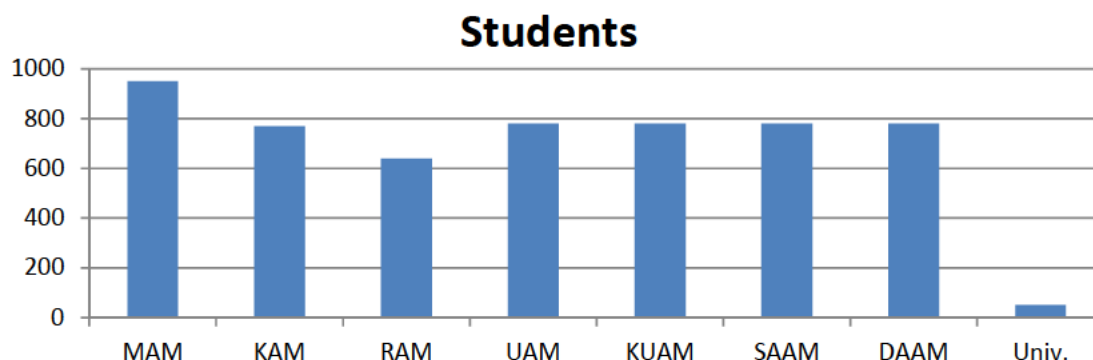


Figure 33: Student numbers per music academy (own research)

Key:

MAM	Mayibuye Academy of Music
KAM	Kimberley Academy of Music
RAM	Roodepan Academy of Music
UAM	Upington Academy of Music
KUAM	Kuruman Academy of Music
SAAM	Springbok Academy of Music
DAAM	De Aar Academy of Music
Univ	Sol Plaatje University

6.6.2 The music entrepreneur

There are a multitude of options open to the freelance musician and music entrepreneur in which to make a living. The ripple effect caused by the implementation of the NCMIDF contributes to the creation of even more job opportunities. Table 25 demonstrates some of these options:

Table 25: Job opportunities for the entrepreneur (own research)

Job opportunities in performing	Details
Formal concerts	- School or community halls - Own private home or in the home of a friend or relative - Concert series with a theme
Background music	- Private parties - Business functions - Special events/days - Cruise ships - Pubs, casinos and restaurants
Ad hoc players in professional orchestras	- Reservists in the police band - Performance of large-scale works by professional orchestras countrywide



Music for commercials	- Studio recordings for radio or TV
Concert tours	- Local or international tours
Church music	- Organists - Church bands - Church choirs
Musical directorships	- Training of choirs, orchestras and bands - Musical stage productions
Guest performances	- Soloist with other groups - Guest conducting - Performing at special events
Job opportunities in education	Details
Educational concerts	- Instrument demonstrations - Theme concerts
Workshops	- Lecturing or teaching - Performing
Master classes	- Any aspect of music, e.g. instrumental composition, conducting, arranging, recording, marketing, etc. - At existing or own events
Ensemble training	- Group tuition for educational institutions
Holiday courses	- Course content such as orchestral work, music academic work, music technology, entrepreneurship, legal, financial, etc.
Adjudication	- Eisteddfods - Competitions - Examinations - Festivals
Private teaching studio	- Single teacher studio - Private music academy - In a private home or linked to existing educational institutions
Job opportunities in composing and arranging	Details
Commissions	- Live performance events, e.g. music festivals, workshops, competitions, etc. - Radio or TV - Larger musical productions
Royalties for printed publications	- Sheet music of own compositions
Royalties for performance and needletime	- Performance of own compositions by other musicians - Broadcasting - Shopping centres, restaurants
Copy work	- Printing of sheet music for composers
Educational work	- Teaching of musical subjects such as composition, arranging, harmony, theory, history, etc. - Music teaching method books - Compositions for educational purposes



Selling music online	- Websites such as Payloadz are platforms for selling digital goods - Edit own or popular songs and turn them into ringtones using special software - Publish sheet music of own compositions on the internet - Sell audio recordings of own compositions online - Produce downloadable music for video games, play stations, websites
Film music	- Composing music for film soundtracks
Other	Details
Music technology	- Sound engineering - Mixer, editor or producer for a recording studio
Retail	- Musical instruments and equipment - Sheet music - CDs and DVDs - Online sales
Repair technician	- Acoustic instrument repairs - Electronic instrument repairs
Music author	- Music critique journalism - Programme notes for performers - Grant proposals

6.6.3 Key initiatives for a music industry framework in the Northern Cape Province

- Develop and integrate the three pillars of the music industry as described in this chapter.
- Develop the hidden indigenous musical treasures of the province and expose them to tourism by offering a Northern Cape Music Trail, including the music of the Khoisan, African and European cultures.
- Devise a marketing strategy which drives the brand and message that the Northern Cape music industry is the new frontier for music business development.
- Develop a trademark Northern Cape Musical Expo or Extravaganza, along the lines of the International Exhibition that was held in Kimberley in 1892 (see section 2.2), that will create awareness and opportunities for business development and showcase Northern Cape talent.

- Change the perception among key thinkers away from "Northern Cape as an underdeveloped province" to that of a naturally creative place, receptive to innovation, original thought and business growth.
- Focus on exporting the local music product to the outside world, including international markets, by establishing the necessary production and distribution facilities locally and building links with trade internationally.

6.6.4 Timeline for implementation

Tables 26, 27 and 28 below give a seven-year implementation plan of the proposed framework in each of the three pillars of the music industry:

6.6.4.1 Part 1: Music education framework

Table 26: Timeline for implementation of the music education sector framework (own creation)

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
Foundation (Gr R–3)	Music technology	Music technology	etc.				
Intermediate (Gr 4–6)	-	Music technology Music rights	Music technology Music rights	etc.			
Senior (Gr 7–9)	-	-	-	Music technology Music rights Sound engineering	Music technology Music rights Sound engineering	etc.	
Gr 10–12	-	-	-	-	Music technology Music rights Sound engineering Music entrepreneurship E-commerce	Music technology Music rights Sound engineering Music entrepreneurship E-commerce	etc.
Music foundation	-	-	-	-	1 st intake	2 nd intake	etc.
Music certificate	-	-	-	-	-	1 st intake	2 nd intake
Music diploma	-	-	-	-	-	1 st intake	2 nd intake
Bachelor's degree	-	-	-	-	-	1 st intake	2 nd intake

6.6.4.2 Part 2: Performance sector (including music academies)

Table 27: Timeline for implementation of the performance sector framework (own creation)

	Year 1 Q 1*	Year 1 Q 2	Year 1 Q 3	Year 1 Q 4	Year 2 Q 1	Year 2 Q 2	Year 2 Q 3	Year 2 Q 4	Year 3 Q 1	Year 3 Q 2	Year 3 Q 3	Year 3 Q 4
NCPACC	Finalise appointment of council members by the MEC	Appoint CSU CEO and 3 CSU managers Secure venue for NCSO	Appoint 5 CAC managers, 7 music academy managers and conductor									
CSU			CEO to appoint CSU secretary Managers to appoint CSU staff and assistant staff									
NCSO				Conductor appoints first 11 musicians and assistants	First outreach and educational concerts		Conductor appoints 9 new musicians	Symphony concert		Symphony concert	Conductor appoints 4 new musicians	Symphony concert with first students participating
CAC				Manager to appoint secretary	Set-up process of CAC begins Purchase of equipment				First musical events take place			
Armed forces					Establishment process of an SANDF band begins				Establishment process of a SAPS band begins			
Music academies				Managers to appoint receptionists and full-time teachers	Recruitment	Teach first students					Produce first students for NCSO	Full capacity

6.6.4.3 Part 3: Music business sector

The implementation of the various music businesses throughout the province cannot be prescriptive because it depends largely on free enterprise and on private initiative. The following timeline serves only as an illustration of the ideal and to complete the three-pillar implementation strategy.

Table 28: Timeline for implementation of the business sector framework (own creation)

District	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8
Frances Baard	-	-	-	EEE	-	-	F	H
ZF Mcgawu	-	-	C	EE	-	-	-	-
John Taolo Gaetsewe	A	-	C	E	D	G	-	-
Namakwa	A	B	C	E	D	G	-	-
Pixley ka Seme	A	B	C	E	D	G	-	-

Key:

A. Music shops (sheet music and musical equipment)	B. CD and DVD shops
C. Repairs and maintenance	D. Recording studios
E. Music administrators	F. Commercial radio station
G. Community radio station	H. Record company

6.7 Closing remarks

The central theme of this chapter revolved around the components and the construction of a framework for the music industry in the Northern Cape. It suggests of what each of the pillars of the industry should consist, and a building plan for future growth, by integrating some of the best and most appropriate economic theories of the Western world. In the initial stages, the framework requires major government intervention, as illustrated in the economic theory of structuralism, to reach the preconditions to take-off, as described in the linear stages of growth model. This is followed by the take-off and ultimately by high mass-consumption. Finally, the framework requires reduced state intervention, deregulation and privatisation, which coincide with the goals of the neo-classical theory, widely recognised as the best model for economic development across the world today. Continued and adequate state funding of the education sector and the NCACC is a precondition as it is the responsibility of any government to fund these services. The business sector and the music product of the performance sector will generate sufficient funds for its own sustainability and contribute to the state coffers through taxes.

Implementation of this framework should, within one decade, steer the Northern Cape Province towards becoming the leading authority on a successful music industry, creating approximately 358 sustainable, 66 part-time and many freelance job opportunities. More than 5 000 students will study music at the various music academies, schools and the university. This will have an economic ripple effect that will improve the lives of thousands of people in the province and through the new sounds of the Northern Cape, bring joy into the homes of many more. This meets the conditions of real economic development.



Chapter 7

Conclusions and recommendations

7.1 Introduction

7.1.1 Objectives of the study

The main objective of this study was to develop a framework to stimulate the development of the music industry of the Northern Cape Province. One of the main prerequisites of the framework was that it had to be integrated at various levels to ensure a multi-pronged approach and combined effort when implemented. This objective has been achieved by means of a triple helix approach in which government, the community and the music industry co-operate in numerous innovative ways to create integrated development opportunities within the three main sectors of the music industry, namely music education, performance and business. The framework further proposed a music industry that is integrated on a micro level (integration within the music industry value circle) and a macro level (with other industries).

Two of the four secondary objectives of the study were to conduct a literature review to determine the historical events that shaped the music industry in the Northern Cape Province and to determine the current status of the music industry in this province. These two objectives have been achieved in Chapter 2 of the study through the use of both quantitative and qualitative research methods. The quantitative research was carried out mainly but not exclusively by searching for historical information, while qualitative research methods, including questionnaires and interviews, were used to gather data with regard to the current state and size of the Northern Cape music industry.

Another secondary objective was to document local and international examples of successful integration of the music industry with economic growth and development. Chapter 3 achieved this objective through quantitative research methods. This benchmarking exercise was extended to areas other than just the music industry, with a focus on various RED theories and practices in Chapter 4.



A final secondary objective was to create the framework for a music industry in such a way that it can contribute to economic development in the region. This was achieved by investigating best practises, which were derived from various benchmarks. The study falls within the realm of applied research, and if all the recommendations of the study and the philosophy of musicconomy are implemented, the general economy of the province will indeed flourish and develop.

7.1.2 Retrospection

I was fortunate to have spent more than two decades of the best years of my life in Kimberley. During this time, I was employed as a music teacher in a school for the first seven years, and I was involved in the establishment and management of the KAM, a private music education institution. During the last eight years of my tenure, I was also employed by the National Institute for Higher Education, an institution that offered tertiary programmes of other universities to students in Kimberley. In my capacity as director of KAM, which is a company not for profit, I gained invaluable experience in management, fundraising and donor etiquette. It was these aspects of my work that prompted me to compile a comprehensive sponsorship proposal for the S.A. National Lottery Board (LOTTO) with the help of several of my colleagues, aimed at establishing an integrated music industry for the entire Northern Cape Province by doing this research. Although it was a great disappointment when the LOTTO declined our application based on trivialities, the experience and insight gained into the Northern Cape Province was the impetus that I needed to embark on further research, and led to this study. Conducting the research was no easy task, and I found various obstacles along the way. During the journey I made a number of discoveries.

Firstly, as a passionate music teacher and a practising musician, I often found it challenging to be engrossed in matters of a purely economic nature. It was only through the excellent guidance of my promoters that I managed to conquer this shortcoming. It also took a special effort to better understand music industry-related aspects outside of my field of experience, such as legal, financial and administrative concepts. However, looking back, I know I have gained insight from this experience. Secondly, I found the enormous physical size of the



Northern Cape Province and the lack of information on the music industry a significant challenge to overcome. Data gathering involved a fair amount of travelling, correspondence and investigative research. I also encountered noticeable apathy and disillusionment, particularly amongst music teachers at schools in the province. A successful interactive workshop was held towards the end of the research period to present the proposed framework to a selected group of key music industry role players. During this event, first-hand advice and comments were captured in a SWOT analysis and the presentation of the conceptual framework.

During the research process, I was also actively involved in the establishment of a tertiary music faculty for the proposed Sol Plaatje University in Kimberley. A major obstacle and disappointment occurred when, in January 2013, I was informed by my employer, the National Institute for Higher Education, that there would not be any music at the new university. This decision highlighted the folly of the decision makers and the urgency of this study.

7.2 Conclusions

The conclusions will be summarised in two sections, namely the literature review and the survey results.

7.2.1 Conclusions with regard to the literature review

Chapter 1:

1. The economic potential of local music is untapped and underdeveloped in the Northern Cape and there is no framework to empower the local music industry (1.1).
2. This research revealed that during the early years, almost all the activities of the Northern Cape music industry were limited to Western classical music, mainly in Kimberley and the surrounding Diamond Fields. The music industry flourished because of the wealth brought about by the diamond industry. Today, approximately 150 years later, the diamond industry has declined dramatically and the music industry followed suit (1.1 & 2.2.1).



3. Music education develops intelligent and adaptive minds that imagine, create and produce. It also contributes to achieving better results in non-musical subjects and as a result, a decrease in school dropout rates and crime (1.3.1 & 1.4.2).
4. A music industry must be based on the principles of a combination of different economic theories (1.4.1).
5. The music education sector requires good infrastructure to provide quality training and produce skilled musicians with an improved output capacity (1.4.1).
6. Economic growth and development does not only consist of business entities, but is shaped by an integrated array of networks, systems and interactions. A 21st century economy requires technical and media literacy, effective communication, critical thinking, problem-solving and collaboration skills (1.4.2).
7. Musiconomy contributes to community development, which is in turn a prerequisite for economic development (1.4.2).
8. The internet has disrupted the traditional music industry value chain and made it possible for a music product to move in any direction and even take shortcuts to reach the market. Large multinational recording labels no longer control the industry (1.7).
9. The true economic value of the music industry is hidden behind a host of related industries involved in the process of creating and consuming music products. The ripple effect is much wider than its industry-specific impact (1.8).

Chapter 2:

10. Music education occupies between 1,7% and 4,5% of available teaching time of the GET curriculum in South Africa. This allocation is not adequate to allow for meaningful music education (2.3.1).
11. The study of music in South African schools aims to develop the ability to perform and create music. Non-musical industry-related aspects are neglected (2.3.1.1).
12. The national budget allocation for the arts in South Africa is a mere 0,8% of the total budget, which is inadequate for the achievement of the objectives stated in this study (2.3.2.2).



13. Although the Northern Cape Department of Arts and Culture is very supportive of local artists, the Northern Cape Arts and Culture Council is dysfunctional (2.3.2.2).

Chapter 3:

14. Music education initiatives in the Northern Cape Province will have to reach approximately 30 000 students to compare with the Venezuelan figures of 1,6% of the population receiving their music education by El Sistema (3.2.2.1).
15. Innovative teaching methods, based on enjoyment and high moral values that are accessible in all areas of the province, are required for successful music education (3.2.2.5).
16. Broadcasting of local music boosts the development of local music (3.4.2.2).
17. Gospel music, kwaito, hip hop and indigenous African music are some of the most popular musical genres in the SADC region (3.4.2.2).
18. Local music has the potential to develop local music industries (3.4.6).
19. Legal circulation networks for recorded music, intellectual property protection, audience development and industry statistics are weak and underdeveloped in the SADC region, except in South Africa. Piracy, together with a bombardment of international commercial music, is suffocating indigenous music and thus harming the local music industry in the entire SADC region (3.4.2.5).
20. The music industries in the SADC countries are seriously threatened by underdeveloped industries and markets, weak employment conditions for musicians and a lack of protection for intellectual property (3.4.6).
21. There is an opportunity for independent record labels to do business in the Northern Cape and thus play a vital role in the development of local artists (3.4.6.4).
22. Weak economies and unfavourable exchange rates added to limited access to capital make it difficult for industry role players to acquire materials to practise their trade (3.4.6.5).
23. Ineffective co-ordinating bodies contribute to weak employment conditions and the abuse of musicians (3.4.6.5).

Chapter 4:

24. Social capital is a key asset which can be used towards RED and advancement, similar to economic capital (e.g. money and property) and human capital (e.g. education and health) (4.2).
25. The Northern Cape Province meets the requirements of an economic region (4.2.1).
26. The economic development theory of industry clusters has several aspects in common with the development of a music industry in the Northern Cape Province (4.2.3.3).
27. Job creation and poverty reduction, education and skills development, infrastructure development, focus on strong and priority sectors and business development and support form important parts of the ingredients required for the NCMIDF (4.4.4).

Chapter 5:

28. The framework is based on a mixture of economic development theories, with a slight emphasis on structuralism, which requires government investment to create the right preconditions for take-off (5.1).
29. Music education and skills development is placed in the centre of the value circle as it affects every other aspect of the industry (5.1.1.1).
30. The price of music products is fairly elastic (unlike, for example, the price of fuel), which means that consumers will tend to buy them mostly when these products are cheaper (5.1.8).
31. Music products can be divided into four main categories, namely audible music, printed music, music merchandise and music-related services (5.1.8).

7.2.2 Conclusions with reference to the survey results

1. There was a noticeable decline in the number of music posts in Northern Cape schools between the 1980s and the year 2000 due to limited financial resources which had to be distributed evenly between all races (2.2).
2. Only five teachers are employed by the Northern Cape Education Department on a full-time basis, which proves that music is currently seriously neglected (2.3.1.2).



3. The various festivals in the Northern Cape are not co-ordinated by a central body nor integrated with other industries. As a result, they currently do not bring money into the province but instead leak money to outsiders. There are many festivals that do not include music, and these are lost opportunities for the music industry (2.3.2.1).
4. Afrikaans music is very popular at festivals. A shift towards alternative Afrikaans is noticeable (2.3.2.1).
5. Music tuition is offered at only ten schools in the Kimberley area and five schools in Upington. All of these schools are situated in the more affluent areas near the city centres. There is currently no formal music tuition in the schools of the Black and Coloured communities in the province (2.3.1.2).
6. Private initiatives such as the music academies stimulate music industry growth (2.3.1.3).
7. There is no musical education at tertiary level in the Northern Cape (2.3.1.5).
8. Although a fair number of learners in Northern Cape schools play musical instruments, very few do music as a subject (2.3.1.6).
9. The current state of the music education sector in the province is not adequately aligned with the key principals of economic growth and development (2.3.1.6).
10. Arts festivals in the province are well attended but still rely on sponsorships for survival. They are an important marketing tool and source of income for local artists and they contribute to audience development. There are many festivals that are held each year, but most do not make use of live music (2.3.2.1).
11. Both local (Northern Cape) musicians and entertainment service providers are guilty of unprofessionalism, weak service and overcharging (2.3.2.1).
12. Events such as Northern Cape Has Talent are valuable tools to source and develop local talent (2.3.2.2).
13. Music business entities such as retail and broadcasting are not represented adequately in all the district municipalities of the province (2.3.3.5).
14. The current Northern Cape performance sector is too small to be viable because there are very few professional performing musicians (2.3.2.6).



15. A training symphony orchestra is not only inexpensive to run, but also provides on-the-job skills training as well as a large part of the teacher corps for the music education sector (3.4.7.4).
16. An oversized administrative staff body together with high infrastructure maintenance costs compromise the sustainability of music initiatives (3.4.7.4).
17. Formal music tuition at Northern Cape schools is in a downward spiral due to the following reasons:
 - Technology (internet and mobile phones) provide plenty of instant entertainment, and most children are not interested in learning to play an instrument which takes many hours of practice to master.
 - Most parents believe there is no future career in music.
 - There are few committed music teachers in the junior schools.
 - The new curriculum for music is not conducive to effective music education.
 - The Northern Cape Department of Education learning area manager does not care about the decline.

7.3 Recommendations

7.3.1 Recommendations based on the literature review

1. The music industry must be integrated on a micro level, within its own value circle, as well as on a macro level, which refers to integration with other industries (1.8.1).
2. As in the case of Venezuela, music education must be accessible in all areas of the province and should involve mass participation utilising innovative group teaching methods which focus on building self-esteem, passion and a feeling of security (3.2.2).
3. The music industry should be financed by a combination of more than one government department, the private sector and self-generated funds (4.2.4).
4. Performing musicians require training in marketing, legal, financial and technological skills (5.1.1.2).

5. To function optimally, the music industry requires general infrastructure, such as electricity and roads, as well as specific and specialised infrastructure, such as concert halls and recording facilities (5.1.3).
6. The music business sector requires support in the form of co-ordinating bodies, financial incentives and accurate industry statistics (5.1.4.1).
7. Innovation and creative thinking are required for the development of the music industry (5.1.5).
8. A triple helix approach is needed to integrate the relationship between the government, the community and the music industry (5.1.6).
9. Local music must be marketed and sold outside the borders of the Northern Cape in order to bring about real income (5.1.8).
10. The price elasticity of music products calls for effective marketing. The affordability of such products is of paramount importance (5.1.8).
11. The Northern Cape Province is divided into five districts of which the Frances Baard District is the most densely populated. The main activities of the proposed NCMIDF should be located in this district (6.4.4.2).
12. In order for the music industry to reach out to all areas of the province and to spread the talent net as widely as possible, each of the five districts must be involved. CACs must be established in the main cities of each of the five districts with certain activities such as the NCSO and other specialised services located in Kimberley (Chapter 6).

7.3.1.1 Theoretical preconditions for growing the music industry

Key principles for industry development

The study identified eight key principles that can be used as requirements for most industries to be successful. The same key principles must be applied to the music industry to be successful. They are:

- education and skills development
- community development and social capital
- infrastructure and locations for growth
- business development and support
- innovation
- partnerships



- effective marketing
- internationalisation.

The above concepts are briefly revisited below.

- [Music] education and skills development:

Currently, between 1,7 and 2,5% of the national school curriculum is devoted to music education in our schools. This allocation must be increased and music programmes must also be offered at tertiary level. Existing specialised music education institutions such as music academies and field bands must be stimulated and supported. Non-musical skills, such as marketing, legal, financial and technological skills, must be included in music curricula across all levels. Professional and supporting services for the music industry such as legal, marketing, broadcasting, distributing, finance, repairs and service, design, etc. must be improved.

- Community development and social capital:

Musiconomy contributes to economic development by attracting other talents, professionals and scientists, growing the pool of talent and drawing in new businesses, jobs, innovators and consequently, sources of wealth.

- Infrastructure and locations for growth:

General bulk infrastructure like roads, electricity and libraries are required for any economic growth to take place. The music industry requires music-specific infrastructure such as concert halls, recording studios and education facilities that are accessible in all areas of the Province, although they should be positioned near densely populated areas that are or can become active within the three sectors of the music industry. The education sector requires teaching facilities and equipment, the performance sector needs concert venues, and the revamping of multi-purpose community centres and theatres is a viable solution. The business sector requires recording studios, shopping malls and broadcasting facilities. Existing infrastructure can be upgraded and used as opposed to building new infrastructure.

- Business development and support:

A carefully planned music business growth strategy is required for the music industry to work in harmony with the performance and education sectors in order to provide optimum services. Existing businesses in the Northern Cape Province must be maintained and supported, and new business opportunities must be unlocked to attract new businesses to the area. This can be achieved through the continuous promotion of investment in the music industry and through the provision of financial incentives to music businesses by means of a fiscal policy that stimulates growth. Global, regional, national and local music trends, contextual obstacles and opportunities must be analysed to determine how they affect the music industry.

- Innovation:

Innovation and creative thought are required to capture the imagination of a well-educated world market. Concepts such as musiconomy, a new local music product, integration, independent record labels, a unique symphony orchestra and the fighting of piracy through technology are all stepping stones for further innovation. Innovation requires creativity, hard work and endurance. Table 29 provides an overview of some of the prerequisites for effective innovation (Cutler, 2010:295):

Table 29: Innovative ideas for the music industry

THE PRODUCT	
Good quality	Quality of performance, production and presentation
Unusual	Strive to be unique by producing a new sound, style or look
Easy	Easy to purchase and to use through technological innovation
Legal	Run an ongoing and aggressive "Say no to piracy" campaign and emphasise ethics
Fashionable	Promote each product as the latest trend and style
Design	Physical products must be beautiful, quirky and fun
Approved	Use a respected organisation such as an educational or religious institution
Endorsed	Designed by someone trendy or by a celebrity
Green	Promote the fact that music does not adversely affect the environment or harm it
Local	Home-grown talent and produced locally
More daring	Address issues such as politics, religion, race, etc. through lyrics in songs

THE SERVICE	
Customer service	Music education, performance and business must become more customer orientated (e.g. by offering free gifts)
Availability	More favourable opening hours
Delivery	Quick response to orders
Technology	Online purchases must be simple to use and efficient
Website	Efficient, interesting, reliable, quick and easy to use
Employees	- The gender, age, expertise and demeanour of employees must be carefully planned to suit the customer profile - Employees can wear uniforms
THE BUSINESS	
Music village	- Make the shopping experience more attractive to keep customers satisfied - Include other activities, e.g. music lessons, live concerts, tea garden, internet café or a gift shop - Create a "music village", "one-stop music shop" or "music mall" concept
Products	Offer a wide range of products under one roof
Financial	Offer honest deals with good payment options
Location	Products and services must be close to the customers, e.g. schools, concert halls or shopping malls and must be in pleasant premises
Outdoors	Outdoor concert venue with refreshments
Charity	Present events in aid of a charity organisation

- Partnerships:

Strategic partnerships must be developed to ensure that the music industry receives adequate support in its three sectors. The key to success in achieving the goal of an integrated framework for the development of the music industry in the Northern Cape Province lies in an integrated and co-ordinated effort between various stakeholders. At this point, the three sectors of the industry, which have been examined separately up until now, must be reunited in mustering a combined effort towards the development of the industry. Governmental institutions must take hands with private sector initiatives to form an authoritative parastatal power which can establish and support such a framework. The music industry is an interactive industry that requires effective co-operation with other industries and other forms of entertainment. The triple helix approach, as visualised in figure 34, can be applied in the music industry. In this model, government has a direct impact on the music industry value circle

as it takes on the responsibility of creating conducive environments for the three sectors of the industry.

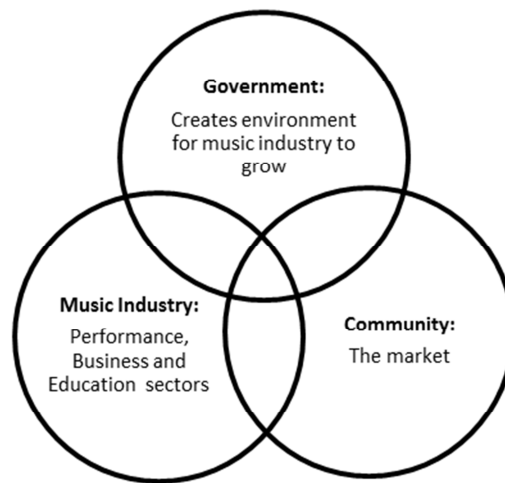


Figure 34: The Triple Helix model (own creation)

- **Marketing:**

Basic marketing principles demand a thorough analysis of the strengths, weaknesses, opportunities and threats of the current music industry in the Northern Cape. In addition, a clear picture must be formed of the competition profile and the target market for music products. The music industry must also find its niche through an aggressive branding exercise. A carefully planned marketing strategy is required by considering the four Ps, namely product (how to develop the product), price (affordability), place (distribution) and promotion (branding and image).

An effective marketing strategy for a music industry in the Northern Cape Province must include all the elements of a traditional marketing mix, namely product, price, promotion and place. Apart from a thorough knowledge of the existing music industry in the Northern Cape Province (industry profile), a good marketing strategy must also include information on the potential competition, the customer profile and how to penetrate the market.

Recording facilities form an important link in the marketing chain. This is evident in the growth in the number of independent studios and labels in other regions of South Africa, such as Sheer Sound (est. 1994), a South African independent

record company, credible market leader and a respected player in the South African music industry, focusing on quality music of all kinds (Info is info, 2010). This company could be an example for the Northern Cape Province as to how to develop not only the local market for local production but also the export market.

Distribution channels must make music and related products accessible and affordable to the market. The existing, albeit rather limited, local distribution channels in the Northern Cape Province must be developed, and new channels must be established in order to penetrate markets locally, regionally and internationally. The internet presents artists with new and easy marketing possibilities, and it provides both artists and record companies with the opportunity to access global markets with relative ease.

- Internationalisation:

In order for any business to trade internationally, it is recommended to participate and achieve success in the domestic market first, focusing on selling within a city or province. Internationalisation may be achieved through tours for local artists and full utilisation of the possibilities for trade which are presented by the internet and e-commerce. Once a thorough investigation of conditions has been done, local music business could break into overseas markets, and new sounds originating from the undiscovered indigenous musical wealth of the Northern Cape Province will join the existing genre of world music as an export product. The export of local products to markets outside of the province, both nationally and internationally, is the final test of success.

7.3.1.2 Contextual preconditions for growth

The key initiatives for the development of an industry framework in the Northern Cape include the development and integration of the music education, performance and business sectors of the music industry, with an emphasis on education. The hidden indigenous musical treasures of the various Northern Cape cultures should be branded internationally as the latest addition to the world music genre by means of a marketing strategy that brands the Northern Cape as the new frontier of music business development. Trademark expos and extravaganzas, resurrecting the International Exhibition of 1892, will contribute to this effort and give local artists an opportunity to develop. The industry



requires a new focus on exporting local music products by establishing the necessary distribution facilities locally and building links with international trade.

- General recommendations

Numerous studies such as the Cultural Industries Growth Strategies, Cape Music Industry Draft Strategy and the Gauteng Music Strategic Framework have been done to analyse and describe how the South African music industry is integrated. The factors that influence the industry have been defined in great detail by these authors. The 37 recommendations made by the Music Industry Task Team to the South African government is a case in point. The Music Industry Task Team was appointed by the Department of Arts, Culture, Science and Technology in May 2000, and many of its recommendations are directly applicable to the Northern Cape. If implemented, it will go a long way in enhancing the current struggling industry in the province. The recommendations most applicable to the Northern Cape Province are:

- o The issue of piracy should be researched and international best practice should be used, such as implementing the banderol³⁸ system, implementing a blank cassette levy to limit copying and employing technology to combat piracy.
- o The present local broadcast content quota of 20% is too low and should be increased to at least 50%.
- o Legal advice should be commissioned to find the most advantageous definition for the status of the musician in this industry.
- o Social security should be funded and administered within the entertainment industry.
- o An ombudsman should be established for the music industry in order to resolve disputes
- o The Department of Arts, Culture, Science and Technology has to explore the possibilities of international aid for music development.
- o The National Arts Council (NAC) should explore ways in which arts NGOs can make better use of existing tax laws in their attempts to secure private sector sponsorship.

³⁸ Digitally marking recordings as original copies.

- o The Department of Arts, Culture, Science and Technology should continue to work with the Department of Trade and Industry to ensure that appropriate incentives are made available to the music industry, particularly with regard to export and the establishment of live music venues.
- o Companies related to the music industry must use their social responsibility and sponsorship funds primarily to stimulate the development of musicians,
- o The Department of Arts, Culture, Science and Technology must establish a team of experts to research a feasible and low-cost plan to include music in the school syllabus.
- o Indigenous African music should be taught.
- o Training programmes should be organised by the sector education and training authority must target musicians and related workers.
- o A legal aid facility must be established for musicians and related workers.
- o Baseline economic data should be established on an ongoing basis in the cultural industries to quantify their impact on the South African economy.
- o Significant contributions of artists should be recognised and honoured.
- o Musicians should be appropriately compensated for their labour when employed by government.
- o Recording infrastructure should be created in areas outside of Gauteng as part of the Cultural Industries Growth Strategy of the Department of Arts, Culture, Science and Technology.
- o The NAC must actively solicit proposals for music development outside of Gauteng in particular and the major cities in general.
- o The SABC must play a more active role in recording and broadcasting music in the various provinces.
- o Partnerships should be formed with local and provincial government and the private sector to link music venues to urban regeneration programmes and tourism initiatives.

Additional intervention is required with government taking the lead to empower industry actors and stakeholders. The setting up of an enabling environment is needed for industry growth, and this can be done by supporting music businesses in terms of access to infrastructure, nurturing new music business

ventures, training in the use of technology, import permits and providing for tax relief on music equipment. Discovering local and regional talent and promoting audience development can be achieved through original song competitions, regional music festivals, the promotion of local content in broadcasting and the boosting of existing events such as Northern Cape Has Talent. Co-ordinating bodies must play their respective roles in terms of promoting intellectual property protection, rights management, relief on import costs, local repertoire promotion and other professional services. The development of accurate industry statistics such as the number of persons employed by the music industry, both directly and indirectly, is required to analyse how the music industry operates, determine its employment capacity, what multiplier effect it generates and how it contributes to the local and regional economy.

The parties and institutions responsible for the above are government actors (in respect of policy, legislation and taxation issues), recording industry stakeholders, royalty collection and intellectual property organisations, co-ordinating bodies (namely musicians' associations and unions as well as arts councils), individual musicians and performers, broadcasters and training institutions involved in music education and/or business education.

- Music education sector

Music teachers at school level and lecturers at tertiary level must be adequately trained and equipped. Well-constructed curricula that include a variety of subjects are required to provide the industry with quality teachers. These curricula must include music subjects as well as other industry-related subjects such as business studies, entrepreneurship, arts administration, legal studies and technology (Ambert, 2003:34-37). The broadening of the entire music curriculum, at all levels of education to include the teaching and development of all the different skills required in the industry, will produce entrepreneurs.

- o Curriculum for music studies in basic education:

The current music curriculum is not geared towards training learners in all levels and sectors of the industry. This study recommends a new curriculum that will cover the three main aspects of the subject, namely practical music, musicology and non-musical (but industry-related) aspects. Proposed additions to the

existing curriculum include music technology, music rights, sound engineering, entrepreneurship and e-commerce.

- o Curriculum for music studies in tertiary music programmes:

The Sol Plaatje University must include programmes in music in its curriculum in order to address the skills shortages identified in this study. This includes four levels of undergraduate programmes, namely National Certificate (one year), Higher Diploma (one year), Diploma (two years) and Bachelor's Degree (four years). As with basic education, this study recommends the inclusion of practical music, musicology and non-musical, industry-related aspects into the curriculum.

- o Development of local talent:

In order to develop local talent, South Africa should, on the one hand, restrict international trade as far as the importation of musical products is concerned to protect our domestic industry and employment. On the other hand, government should facilitate rather than enforce the development of local talent by creating opportunities and a milieu conducive to growth (Van Rooyen, 2010).

- o Infrastructure for music education:

In addition, the music education sector requires a well-constructed strategy and the infrastructure to effectively reach all the main centres of the Northern Cape Province, which is geographically the biggest province in the country. For this, CACs are proposed to bring music to the five municipal districts of the Northern Cape Province.

- o Access to finance for skills development:

Funding must be made available through the existing system known as sector education and training authorities for students in this industry. According to the Skills Development Act (RSA, 1998), the Minister of Trade and Industry may, in the prescribed manner, establish a sector education and training authority with a constitution for any national economic sector.

- o Audience development:

For the sustainable development of the music industry, it is important that audience development takes place continuously. Music education programmes from pre-school to tertiary level are essential to inform consumers of how the music industry operates. In addition, consumer education is required to inform the consumer of the importance of buying legal music products as opposed to the dangers and risks of purchasing pirated materials (Ambert, 2003:42)

- Music performance sector

This study recommends that the NCDSAC establish a framework over a period of seven years that will provide an opportunity for the performance sector to grow. Section 6.6.4.2 illustrates this clearly by means of a performance sector map. The Northern Cape Arts and Culture Council is at the helm of the framework, and the members have already been appointed by the provincial government. The CSU should be established and should be responsible for the shared logistical and other needs of the various CACs and the NCSO. CACs must be established in each of the five district municipalities of the province. Each CAC has one music academy, except the Frances Baard District, which has three due to population density in this area. The NCSO serves as a performing entity and provides the teaching corps for the Frances Baard CAC. It also runs apprenticeship programmes for aspiring orchestral musicians from within the system. The study further recommends the expansion of the armed services bands to include two police bands and an army band. One of the most important roles to be fulfilled by the various CACs is to host events such as festivals, music weeks and expos. This is particularly important for the discovery and development of local music, which is required for producing a new local music product. Multicultural and trans-regional festivals provide an ideal platform for local artists to become known and gain industry experience.

- o Protection of intellectual property:

More can be done in this regard, such as policing and prosecuting offenders to ensure fair treatment and working conditions that are conducive to the development of the industry. Musicians should be educated about their rights to ensure that these conditions prevail, and this can be done by including legislative information in the curriculum of formal music studies and ongoing information sessions.

- o Local talent development:

A signature Northern Cape conference or expo should be developed that will create awareness of the industry and opportunities for business development, showcase local talent and assets and provide a platform for learning, collaboration and innovation. Such an initiative could contribute to business growth.

- o Infrastructure:

The performance sector requires various facilities such as live music venues and recording facilities. The revamping of existing buildings and theatres is a viable solution. Government, through the Department of Public Works, must take on this responsibility.

- o Access to finance:

Performers must be enabled to present their work to the market to become known. Live performances, in the form of provincial, national and international tours, are ways to achieve this, although funding is a major stumbling block. Funding is also required for the recording, marketing and distribution of their products. The government's programme of sector education and training authorities must make funding available for this and must be accessible to artists.

- Music business sector

Conditions that encourage and support music businesses to grow must be cultivated by the provincial government. Such conditions require business skills development, access to market information, innovation and access to finance and international trade possibilities. But most importantly, training in entrepreneurship and technological aspects is required. A balanced bouquet of music business types must be available in the five district municipalities of the province, representing music administrators, technical services and distributing channels as described in section 6.5.3.

The local music industry should take stock of its supply chain activities to boost local initiatives and identify savings such as shortened distribution channels and



e-commerce. Local talent and industry role players must be scouted, sourced and given exposure.

- o Accurate industry statistics:

Accurate data on the industry will ultimately lead to greater investment from the private sector, both nationally and internationally.

- o Financial policies that are conducive to growing the music industry:

Although excess donations may not be deducted from tax, it is proposed to allow the excesses to be carried forward and deducted in a later year (Mazansky & Rood, 2013) which will encourage more investment in the arts. Musical equipment and sheet music contribute to job creation and should therefore be VAT zero rated when purchased by educational institutions. Government should create initiatives such as tax rebates and preferential treatment when awarding state contracts to those companies that sponsor the arts. Rewarding companies for sponsoring the arts would contribute to growth in the music industry.

7.4 Contribution of this research

Due to the fact that literature focusing on the historical aspects of the Northern Cape music industry is limited, the research contributes to this bank of knowledge which will ensure that we do not repeat the mistakes of the past, but rather build on its successes. Research done on the current status and size of the music industry also adds to this shortage of information, but more importantly reminds us that the industry is in decline, especially as far as music education is concerned. If we do not make a concerted effort to capture and grow our Northern Cape music, we stand a real chance to lose some of our precious indigenous musical heritage and become swamped with international and commercial music. This is also an opportunity to develop communities, through the principles of musiconomy, to become creative contributors to the economy of the province in general.

7.4.1 Direct contribution

The research highlighted the current weaknesses in the local music industry and provided several recommendations to address these weaknesses. The contextual

framework provides a clear map and a corresponding timeline for the implementation thereof. Specific guidelines were formulated to provide a framework for the three sectors of the Northern Cape music industry. These guidelines include a curriculum suggestion for the GET and FET phases as well as tertiary programmes. With regard to the performance sector, the study proposes a comprehensive framework to be driven by the Northern Cape Department of Arts and Culture as well as private initiatives. This strategy deals with the establishment of a network of CACs in all areas of the province. It further includes a NCSO, providing apprenticeship opportunities and teaching staff for the CACs. A business sector is proposed, focusing on developing existing and starting new businesses in the province, as well as on developing business skills such as entrepreneurship, marketing, financial, legal and many other music industry-related aspects.

7.4.2 New knowledge

The study provides a number of examples of new information or of fresh looks at existing knowledge which can be applied to the music industry. Firstly, the information gleaned through the quantitative research methods such as questionnaires and interviews provides new insight into the current condition of the music education sector in the province.

Categorising the music industry into three sectors and integrating them with each other, as illustrated in figure 35 below, provides a new overview of the industry:

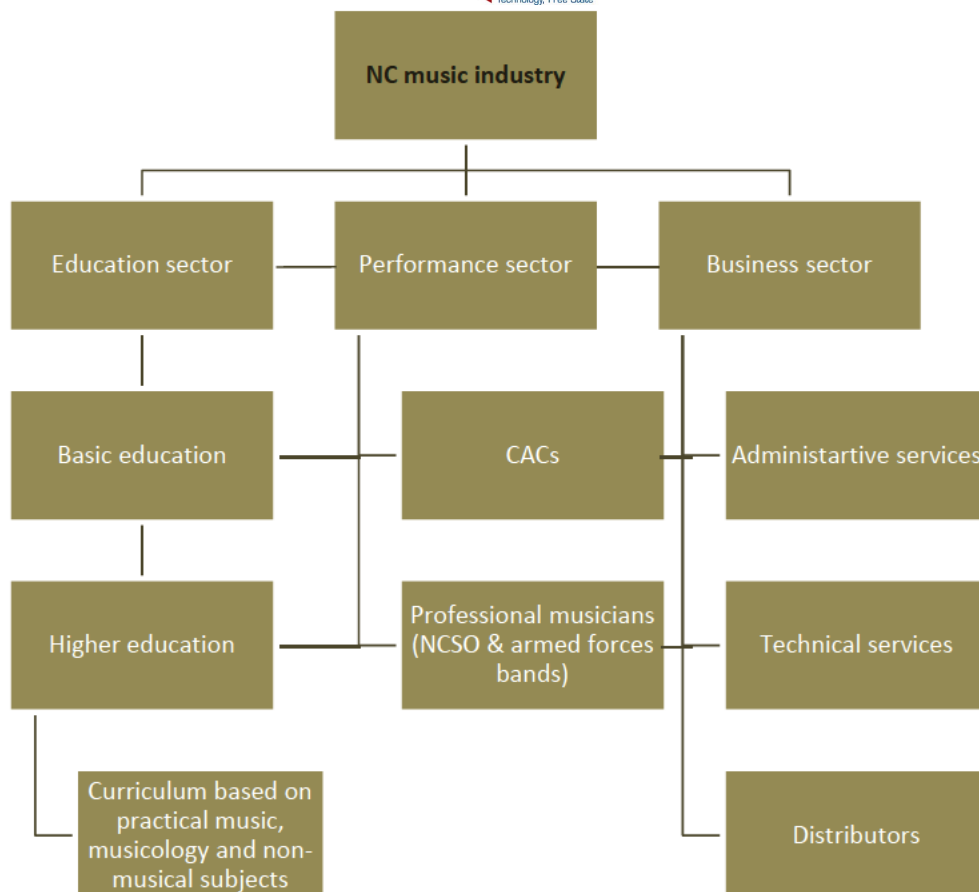


Figure 35: Micro-integration overview (own creation)

Chapter 5 highlighted eight key principles for the development of an industry. The study applies these principles to the Northern Cape music industry in such a way that each principle becomes music industry specific and contributes to the requirements of each role player within the value circle, which in itself is a new interpretation of the traditional industry value chain. A new approach to branding the music industry is promoted, utilising colloquial concepts such as “sexy”, “cool” and “hip”. It also proposes various images for music to use in order to position itself, for example, “educational”, “value for money”, “exclusively for everyone”, environmentally friendly” or “good for you”. The latter originated from other innovative and new initiatives such as the concept of musiconomy, which aptly describes both the direct and indirect contribution that the music industry can make to an economy. The study also collected and described innovative suggestions to curb the scourge of piracy in the music industry through technology.

7.4.3 Further research possibilities

Based on the findings of the completed research, it is proposed that the following aspects be further researched:

- the unintentional protection and subsequent unexpected development of local Zimbabwean music caused by state media control and limitation on international music imports
- an integrated framework for a music industry in Namibia and Botswana
- protecting the indigenous music of the SADC countries from the invasion of international commercial music and rampant piracy
- the rebuilding of and a new direction for the three-tiered music system of the Free State Province.
- The social development impact of the music industry.

7.5 Summary

The potential reality of a vibrant music industry in the Northern Cape Province has largely been ignored until recently. The government at all levels should take the lead to ensure that the milieu within which music industry role players operate is supportive of their trade and conducive to its development. In the final analysis, economic development is the overarching aim, regardless of the industry. It is a widely accepted premise that a location's quality of life, along with the economic and cultural opportunities it offers residents, has a distinct and measurable influence on the success of its economic development efforts. If the recommendations of this study are implemented as proposed, the principles of musiconomy will be realised and contribute to prosperity.

End

REFERENCES

Aaron, P. 2013. Kimberley.

Adlem, A. 2013. Bloemfontein.

AFM 2005. *Freelance Musicians Association*. [online]. [Accessed 4 May 2014]. Available from World Wide Web: <<http://www.freelancemusicians.org/>>

African Development Bank 2013. *Countries: Mozambique Economic Outlook*. [online]. [Accessed 12 August 2013]. Available from World Wide Web: <<http://www.afdb.org/en/countries/southern-africa/mozambique/>>

Alberta HR & Employment 2007. *Strategic Workforce Planning. Guidelines for Industry and Employers*. [online]. [Accessed 25 April 2014]. Available from World Wide Web: <<http://work.alberta.ca/documents/strategic-workforce-planning.pdf>>

Ambert, C 2003. *Promoting the Culture Sector Through Job Creation and Small Enterprise Development in SADC Countries: The Music Industry (SEED Working Paper No. 49)*. Geneva.

Anderson, J & Poole, M 2009. *Assignment & Thesis Writing*. Cape Town: Juta.

Ascani, A, Crescenzi, R & Iammarino, S 2012. *Regional Economic Development: A Review*. European Commission.

ASU 2014. *Rhonda Phillips*. [online]. [Accessed 23 September 2014]. Available from World Wide Web: <<http://webpage4.asu.edu/directory/person/1094035>>

Bakwena, R 2013. *Botswana needs arts council*. [online]. [Accessed 20 November 2014]. Available from World Wide Web: <<http://www.mmegi.bw/>>

Barefield, A 2003. *Basic Economic Development Strategies*. [online]. [Accessed 25 June 2014]. Available from World Wide Web:

<srdc.msstate.edu/rcci/files/insti_03/barefield_strategies.ppt>

Bartik, T J 1995. *Economic Development Strategy*. Kalamazoo: Upjohn Institute for Employment Research.

Bergrivier Municipality 2009. *Revised Local Economic Development Strategy and Implementation Plan: Bergrivier 2010/11*. [online]. [Accessed 18 September 2015]. Available from World Wide Web:

<<http://www.bergmun.org/za/media/files/2013/>>

Beukes, J 2013. *Namibia: RINA Wants to Unite the Music Industry*. [online]. [Accessed 6 August 2013]. Available from World Wide Web:

<<http://allafrica.com/stories/201306280980.html>>

Beyers, W B, Fowler, C & Andreoli, D 2008. *The Economic Impact of Music in Seattle and King County*. Washington: Department of Geography, University of Washington.

Bolivar, S 2012. *Simon Bolivar Music Foundation*. [online]. [Accessed 30 June 2012]. Available from World Wide Web: <<http://www.fesnojiv.gob.ve/en/el-sistema.html>>

Booth, E 2008. *El Sistema First Observations*. [online]. [Accessed 14 November 2013]. Available from World Wide Web: <<http://ericbooth.net/el-sistema-first-observations/>>

Botha, M. 2013. Kimberley.

Briggs, J 2005. *Entertainment Industry Strategic Development Plan: The Music Industry Northwest Alabama*. Northwest Alabama Council of Local Governments.

Briney, A 2013. *Central Place Theory*. [online]. [Accessed 17 January 2016].

Available from World Wide Web:

<<http://geography.about.com/od/urbaneconomicgeography/a/centralplace.htm>>

Bruwer, D. 2012. Uppington.

Burgess, S & Bothma, C H 2007. *International Marketing*. Cape Town: Oxford.

Byrnes, WJ 2003. *Management and the Arts*. 3rd ed. Burlington: Focal Press.

Canadian Government 2015. *Data Analysis and presentation*. [online]. [Accessed 20 Dec 2015]. Available from World Wide Web:

<<http://www.statcan.gc.ca/pub/12-539-x/2009001/analysis-analyse-eng.htm>>

CASSE 2014. *FAQ's*. [online]. [Accessed 14 July 2014]. Available from World Wide Web: <<http://steadystate.org/'discover/faqs/>>

Central University of Technology 2011. *Research Methodology I NMT10AB*. Bloemfontein: CUT.

Chilvers, A 2011. *Mozart Fights Crime*. [online]. [Accessed 9 June 2012].

Available from World Wide Web:

<<http://www.limelightmagazine.com.au/Article/243812,mozart-fights-crime.aspx>>

Chiumbu, S, Minnie, J & Bussiek, H 2009. *Public Broadcasting in Africa Series: Zimbabwe*. Johannesburg: Open Society Institute.

Chong, D 2005. *Arts Management*. London: Routledge.

CIA 2013. *The World Fact Book*. [online]. [Accessed 19 June 2013]. Available from World Wide Web: <<http://www.cia.gov/library/publications/the-world-fact-book/geos/ve.html>>

City of Portland 2015. *Home*. [online]. [Accessed 25 May 2015]. Available from World Wide Web: <<http://www.cityofportlandtn.gov/>>

CKU 2013. *Culture Programme Mozambique*. [online]. [Accessed 16 August 2013]. Available from World Wide Web: <<http://www.cku.dk/en/culture>>

College of the Arts 2011. *Home Page*. [online]. [Accessed 5 August 2013]. Available from World Wide Web: <<http://www.cota.na>>

Contreras, R 2013. *Competing Theories of Economic Development*. [online]. [Accessed 29 May 2013]. Available from World Wide Web: <<http://blogs.law.uiowa.edu/ebook/uicfd-ebook/part-1-III-competing-theories-of-economic-development>>

Cook, N 2000. *Music. A Very Short Introduction*. New York: Oxford.

CSI Solutions 2014. *CSI Toolkit*. [online]. [Accessed 10 November 2014]. Available from World Wide Web: <<http://www.csisolutions.co.za/csi-toolkit.php>>

Cuesta, J, Antola, L C, Castillo, G, Frigerio, G, Lamas, J, Soto, W & Ortega, A 2007. *Program to Support the Centro De Accion Social Por a Musica, Phase ii (VE-L1017) Loan Proposal*. Venezuela: Inter-American Development Bank.

Cummings, A 2015. *Home: Industry Details*. [online]. [Accessed 23 April 2015]. Available from World Wide Web: <<http://uitenhage.ec.za/uitenhage-industry.htm>>

Cutler, D 2010. *The Savvy Musician*. Pittsburgh: Helius Press.

Daly, H E 1999. *Globalization Versus Internationalization*. [online]. [Accessed 5 July 2014]. Available from World Wide Web: <<https://www.globalpolicy.org/component/content/article/162/27995.html>>

Daniel, J & Southall, R LJ 2005. *State of the Nation: South Africa 2004-2005*. Cape Town: Human and Social Research Council.

Dash, N K 2005. *Selection of the Research Paradigm and Methodology*. [online]. [Accessed 27 May 2013]. Available from World Wide Web: <http://www.celt.mmu.ac.uk/researchmethods/Modules/Selection_of_methodology/>

Dawkins, C J 2003. Regional Development Theory: Conceptual Foundations, Classic Works and Recent Developments. *Journal of Planning Literature*. **18**(2), pp.133-172.

Delport, A & Dhlomo, D 2010. Music Education in Zimbabwean Schools. *SA-eDUC JOURNAL*. **7**(1), pp.1-15.

Department of Arts and Culture 2013. *Home*. [online]. [Accessed 4 October 2013]. Available from World Wide Web: <<http://www.dacst.gov.za/>>

Department of Arts and Culture 2014. *Department of Arts and Culture*. [online]. [Accessed 27 July 2014]. Available from World Wide Web: <<http://www.traesury.gov.za/>>

Department of Arts, Culture, Science and Technology 1998. *Cultural Industries Growth Strategy (CIGS): The South African Music Industry. Final Report*. Pretoria: National Government.

Department of Arts, Culture, Sport and Techonolgy 1996. *White Paper on Arts, Culture and Heritage: All our legacies, our common future*. Pretoria: Government Printer.

Department of Basic Education 2010a. *National Curriculum and Assesment Policy Statement (CAPS) for Creative Arts in the Foundation Phase*. Pretoria: Government Printer.

Department of Basic Education 2010b. *National Curriculum and Assesment Policy Statement (CAPS) for Creative Arts in the Senior Phase*. Pretoria: Government Printer.

Department of Basic Education 2012a. *Curriculum and Assessment Policy Statement (CAPS) for Intermediate Phase Life Skills*. Pretoria: Government Printers.

Department of Basic Education 2012b. *Curriculum and Assessment Policy Statement: Grades 10 - 12, Music*. Pretoria: Government printer.

Department of Basic Education 2012c. *National Curriculum and Assessment Police Statement (CAPS) for Creative Arts: Senior Phase*. Pretoria: Government Printer.

Department of Basic Education 2012d. *Curriculum and Assessment Policy Statement (CAPS) for Life Skills in the Foundation Phase*. Pretoria: Government Printer.

Department of Basic Education 2014.|"n.d." *Curriculum Assessment Policy Statements*. [online]. [Accessed 6 February 2014]. Available from World Wide Web: <www.education.gov.za/curriculum>

Department of Economic Development 2015. *The Second Economy*. [online]. [Accessed 10 August 2015]. Available from World Wide Web: <<http://www.economic.gov.za/about-s/programmes/economic-policy-development/second-economy>>

Department of Higher Education 2012. *Education Institutions FET Colleges*. [online]. [Accessed 12 April 2014]. Available from World Wide Web: <<http://www.dhet.gov.za/EducationInstitutions>>

Department of Information and Broadcasting 2013. *Radio Botswana*. [online]. [Accessed 16 August 2013]. Available from World Wide Web: <<http://www.dib.gov.bw/>>

Department of Provincial and Local Government 2006. *National Framework for Local Economic Development in South Africa (2006 - 2011)*. Pretoria: Government Printer.

Department of Sport, Arts, Culture and Technology 2002. *Poverty Alleviation Programme "Investing in Culture"*. [online]. [Accessed 20 March 2014]. Available from World Wide Web:

<<http://www.pmg.org.za/docs/2002/appendices/020507culture.htm>>

Development Bank of Southern Africa 2015. *Summary of the Northern Cape*. [online]. [Accessed 22 July 2015]. Available from World Wide Web:

<<http://www.dbsa.org.org/EN/DBSA-Operations>>

Deysel, F & Swart, J 2013. *SAEXPO*. [online]. [Accessed 2 August 2012]. Available from World Wide Web: <<http://saexpo.co/za/>>

Diamond Fields Advertiser 1903. *SASMT Local Branch Formed*.

Diamond Fields Advertiser 1912. *Progressive Kimberley*.

Diamond Fields Advertiser 1920. *Abanthu-Batho Musical Association*.

Diamond Fields Advertiser 1926. *Music Club for Kimberley*.

Diamond Fields Advertiser 1930. *Music in Kimberley*.

Diamond Fields Advertiser 1931. *Communal Singing*.

Diamond Fields Advertiser 1949. *In Town and Out*.

Diamond Fields Advertiser 1950. *Presentation of Afrikaans Play*.

Diamond Fields Advertiser 1961. *Untitled article*.

Diamond Fields Advertiser 1983. *Early Theatre Days Lively and Riotous*.

Diamond Fields Advertiser 1983. *Untitled article*.

Diamond Fields Advertiser 1988. *City firm making sound equipment*.

Diamond Fields Advertiser 2008. *Diamond Fields Advertiser*.

Du Preez, A. 2012. Upington.

Du Toit, A 2006. *Theatre. Something to Behold*.

Duignan, P 2009.|"n.d." *What is 'best practice'? Outcomes Theory Knowledge Base Article 237*. [online]. [Accessed 26 February 2014]. Available from World Wide Web: <<http://knol.google.com/k/paul-duignan-phd/wat-is-best-practice/2m7zd68aaz774/32>>

ECPACC 2013. *Council and staff*. [online]. [Accessed 14 October 2013]. Available from World Wide Web: <<http://ecpacc.co.za>>

Elphick, R & Davenport, TRH 1997. *Christianity in South Africa: A Political, Social and Cultural History*. California: University of California Press.

Encyclopaedia Britannica 2014. *Central-place Theory*. [online]. [Accessed 27 April 2015]. Available from World Wide Web: <<http://www.britannica.com/EBchecked/topic/102569/central-place-theory>>

Engelbrecht, J. 2012. Upington.

Essex County Council 2012. *Essex Economic Growth Strategy*. [online]. [Accessed 6 March 2014]. Available from World Wide Web: <<http://www.essex.gov.uk/Your-Council/Startegies-Policies/Documents/>>

Esterhuizen, H. 2013. Kimberley.

Etzkowitz, H 2007. *University-Industry-Governbment: The Triple Helix Model of Innovation*. [online]. [Accessed 6 July 2014]. Available from World Wide Web:



<http://www.eoq.org/fileadmin/user_upload/Documents/Congress_proceedings/Praque_2007>

Etzkowitz, H & Ranga, M 2002. *A Triple Helix System for Knowledge-based Regional Development: From "Spheres" to "Spaces"*. [online]. [Accessed 11 November 2015]. Available from World Wide Web: <<http://www.triplehelixconference.org/th/8/downloads/Theme-Paper.pdf>>

Finkelman, J 2013. *Director's Note*. [online]. [Accessed 28 November 2013]. Available from World Wide Web: <<http://cwm.illinois.edu/node/17>>

Florida, R 2002. *The Rise of the Creative Class*. [online]. [Accessed 5 June 2012]. Available from World Wide Web: <<http://www.washingtonmonthly.com>>

Frey, B 2003. *Arts & Economics: Analysis and Cultural Policy. Second Edition*. Berlin: Springer-Verlag.

Frith, A 2011. *Northern Cape*. [online]. [Accessed 18 January 2014]. Available from World Wide Web: <<http://census2011.adrianfrith.com/place/3>>

Frontier Market Intelligence 2008. *Northern Cape Chamber of Commerce and Industry*. [online]. [Accessed 10 April 2014]. Available from World Wide Web: <<http://www.tradeinvestafrica.com/>>

Green, J. 2013. Kimberley.

Groenewald, T 2004. *A Phenomenological Research Design Illustrated*. [online]. [Accessed 21 May 2013]. Available from World Wide Web: <http://www.ualberta.ca/~iiqm/backissues/3_1/pdf/groenewald.pdf>

Guchu, W 2013. *Rina rises, brews storm*. [online]. [Accessed 12 June 2014]. Available from World Wide Web: <<http://www.thevillager.com.na/articles/4344/Rina-rises--brews-storm-----new-artists--body-questioned/>>



Gwabanayi, K 2012. *Grammar to Introduce MP3s*. [online]. [Accessed 21 July 2013]. Available from World Wide Web: <http://www/herald.co.zw/index.php?option=com_content&view=article&id=41695:grammar-to-introduce-mprs>

Hagg, G 2010. The State and Community Arts Centres in a Society in Transformation. *International Journal of Cultural Studies*. **13(2)**, pp.163-184.

Heatherington, M J 2013. *Facilities*. [online]. [Accessed 16 August 2013]. Available from World Wide Web: <<http://www.aism-moz.com/>>

Henderson, M 1900. *The Kimberley Year Book, Directory and Diary*. 1900 ed. Kimberley: Diamond Market Printing Works.

Henkins, F. 2013. Bloemfontein.

Hidber, L 2013. *Tagebuch von Lis Hidber*. [online]. [Accessed 5 August 2013]. Available from World Wide Web: <<http://www/apcnamibia-lis.ch/index.php>>

Hirsch, E D, Kett, J F & Refil, J S 2005. *Multiplier effect*. [online]. [Accessed 26 January 2014]. Available from World Wide Web: <http://dictionary.reference.com/browse/multiplier_effect>

Historical and Commercial Review 1902. *Historical and Commercial Review*. Cape Town: The South African Publishing Company.

Hornby, AS 2005. *Oxford Advanced Learner's Dictionary*. 7th ed. New York: Oxford University Press.

Howell, D 2014. *Deductible Donations*. [online]. [Accessed 18 January 2016]. Available from World Wide Web: <<http://www.sataxguide.co.za/deductible-donations/>>

Hracs, B J 2009. *Building Ontario's Music Economies*. Toronto: University of Toronto.

HSRC 2014. *State of poverty in South Africa*. [online]. [Accessed 3 August 2015]. Available from World Wide Web:
<<http://www.nda.org.za/docs/research%20Report>>

IFCD 2013. *Measuring the economic contribution of Zimbabwe's cultural industries*. [online]. [Accessed 21 July 2013]. Available from World Wide Web:
<<http://www.unesco.org/new/en/culture/>>

IFPI 2005. *IFPI Commercial Piracy Report 2005*. [online]. [Accessed 23 September 2013]. Available from World Wide Web:
<http://www.ifpi.org/content/section_news/20050623.html>

Independent Communications Authority of South Africa (ICASA) 2006. *Community Sound Broadcasting Licence: PROV/COM/05/OCT/05*. Sandton: ICASA.

Info is info 2010. *Sound Recorder in South Africa*. [online]. [Accessed 19 August 2015]. Available from World Wide Web:
<<http://www.infoisinfo.co.za/search/sound-recorder/2>>

Infoplease.com 2008. *Mozambique*. [online]. [Accessed 12 August 2013]. Available from World Wide Web:
<<http://www.infoplease.com/country/mozambique.html>>

International Economic Development Council 2016. *IEDC at a glance*. [online]. [Accessed 3 March 2016]. Available from World Wide Web:
<<http://www.iedconline.org/web-pages/inside-iedc/iedc-at-a-glance/>>

Ishada, A 2006. *Potential of Social Capital for Community Development Report*. [online]. [Accessed 22 August 2015]. Available from World Wide Web:
<http://www.apo-tokyo.org/00e-books/AG-17_Potential/Social/Capital.pdf>

Judson, A 2013. *The Importance of Music*. [online]. [Accessed 8 March 2013]. Available from World Wide Web: <<http://www.musicempowersfoundation.org>>

Kamwanyah, N J 2013. *Music as a Public Policy Issue*. [online]. [Accessed 5 August 2013]. Available from World Wide Web:

<<http://www.allafrica.com/stories/201306130789.html>>

Kau, M. 2013. Kimberley.

Keoreng, E 2008. *Arts and Culture: Botswana Music Industry under Threat*.

[online]. [Accessed 16 August 2013]. Available from World Wide Web:

<<http://www.mmegi.bw/>>

Kierman, S 2008. *A Feasibility Study for the establishment of a Music Academy to be based at the Mayibuye Centre and a Symphony Orchestra in Kimberley*.

Kimberley: NCDSAC.

Kimberley: Department of Sport, Arts and Culture. Northern Cape Province.

Kierman, S. 2013. Cape Town.

Kilmer, B 2010. *Evolution of the Music Industry*. [online]. [Accessed 1 July 2014]. Available from World Wide Web:

<<http://www.slideshare.net/BenKilmer/>>

Klemp, L. 2013. Kimberley.

Knowles, H 2014. *Why Management and Business Studies Need History*. [online].

[Accessed 25 April 2014]. Available from World Wide Web:

<http://worksite.econ.usyd.edu.au/knowles_history.html>

Kopanong Local Municipality 2015. *Free State*. [online]. [Accessed 12 August 2015]. Available from World Wide Web:

<<http://www.localgovernment.co.za/locals/view/55/Kopanong-Local-Municipality#map>>

Kopanong Municipality 2013. *Kopanong Local Municipality LED Strategy 2013-2018*. [online]. [Accessed 11 October 2015]. Available from World Wide Web: <<http://www.kopanong.gov.za/.t./337-kopanong-led-strategy-2013-to-2018>>

Kotler, P 2001. *Kotler on Marketing. How to Create, Win and Dominate Markets*. London: Simon and Schuster UK Ltd.

Kotler, P & Armstrong, G 2001. *Principles of marketing*. [online]. [Accessed 19 August 2015]. Available from World Wide Web: <<https://202.74.245.22.8080/xmlui/bitstream/handle/>>

Kozma, R 2008. *ICT, Education Reform, and Economic Growth: A Conceptual Framework (White Paper)*. [online]. [Accessed 7 March 2013]. Available from World Wide Web: <http://download.intel.com/education/EvidenceOfImpact/Kozma_ICT_Framework_k.pdf>

Krippendorff, K 2013. *How To Beat Your Competition by Innovating Ways They Can't Copy*. [online]. [Accessed 14 July 2014]. Available from World Wide Web: <<http://www.forbes.com/sites/forbesleadershipforum/>>

Lathrop, T 2003. *This business of music marketing and promotion*. New York: Billboard Books.

Le Roux-Allen, V 1990. *The Social Life and Cultural Life of the White Community of Kimberley. 1888-1899*. Bloemfontein: University of the Free State.

Lebethe, A 2003. *Promoting the Culture Sector Through Job Creation and Small Enterprise Development in SADC Countries: The Performing Arts and Dance*. [online]. [Accessed 16 August 2013]. Available from World Wide Web: <<http://www.ilo.org/>>

Leurdijk, A & Nieuwenhuis, O 2012. *Statistical, Ecosystems and Competitiveness Analysis of the Media and Content Industries: The Music Industry*. [online].

[Accessed 19 January 2013]. Available from World Wide Web:
<<http://ipts.jrc.ec.europa.eu>>

Lochner, E 2012. *The Community Arts Project (CAP): The Role of the Arts in Building Community and Artistic Development*. Grahamstown: Rhodes University.

Long, C 2013. *Why music education shouldn't play second fiddle*. [online].
[Accessed 25 September 2013]. Available from World Wide Web:
<<http://neatoday.org/2013/02/12/>>

Louisiana Entertainment 2010. *Building a Permanent Entertainment Industry*.

Louisiana: Louisiana Economic Development. Office of Entertainment Industry Development.

Lubow, A 2007. *New York Times*. [online]. [Accessed 23 August 2012]. Available from World Wide Web:
<<http://www.nytimes.com/2007/10/28/magazine/28dudamel-t.html>>

Luphahla, Z 2013. *DA Party slams Diamonds and Dorings Festival*. [online].
[Accessed 17 February 2013]. Available from World Wide Web:
<<http://www.thenewage.co.za/82094-1015-53->>

Makakane, M 2014. *Do SMME's play a role in the South African Economy?* [online]. [Accessed 19 November 2014]. Available from World Wide Web:
<<http://morongwamakakane.co.za/>>

Malan, J P 2009. *Mayibuye Academy of Music Annual Report: 2009*. Kimberley: Mayibuye Academy of Music.

MapXL, Inc 2015. *Botswana*. [online]. [Accessed 25 January 2016]. Available from World Wide Web: <<http://www.mapsofworld.com/botswana/culture-and-society.html>>

Marciano, Y 2011.|"n.d." *The impact of classical music education in development*. [online]. [Accessed 1 June 2013]. Available from World Wide Web: <http://www/hks/harvard.edu/cchrp/initiatives/latin_american/pdf/EISistemaPresentation_02_08_12.pdf>

Margiotta, T 2012. *How Can Your Child Compete in the Global Economy?* [online]. [Accessed 7 June 2012]. Available from World Wide Web: <www.themusiconomy.com/>

Market Street Services 2012. *Metro Atlanta Regional Economic Competitiveness Strategy and Implementation Plan*. Atlanta: Market Street Services Inc.

Marwizi, T 2013. *Entertainment, Life & Style*. [online]. [Accessed 21 July 2013]. Available from World Wide Web: <<http://www.thestandard.co.zw/2013/05/05/diana-opens-recording-studio/>>

Maswanganyi, N 2013. *Budget deficit widens to 5,2%*. [online]. [Accessed 20 November 2014]. Available from World Wide Web: <<http://www.bdlive.co.za/economy>>

Mazansky, E & Rood, L 2013. *South Arica: 2013/2014 Budget Proposals*. [online]. [Accessed 21 September 2013]. Available from World Wide Web: <<http://www.mondaq.com/x/224970/tax+authorities/so132014+Budget+Proposals+Tax+Overview>>

McDonagh, L 2012. *Rearranging the Roles of the Performer and the Composer in the Music Industry*. [online]. [Accessed 2 October 2014]. Available from World Wide Web: <http://papers.ssrn.com/sol3/papers.cfm?abstract_id=2034899>

McGahey, R M 2008.|"n.d." *Regional Economic Development*. [online]. [Accessed 20 April 2015]. Available from World Wide Web: <<http://community-wealth.org/content/regional-economic-development-theory>>

Media Club South Africa 2015. *Community Radio Stations*. [online]. [Accessed 1 Nov 2015]. Available from World Wide Web:



<<http://www.medioclubsouthafrica.com/component/content/article?id=121.&start=9>>

Melody Maker 1981. *The Man Who Would be Queen*. [online]. [Accessed 12 February 2013]. Available from World Wide Web: <http://mr-mercury.co.uk/freddie_1981_interview.htm>

Miles, MB & Huberman, MA 1994. *Qualitative Data Analysis: An Expanded Sourcebook*. 2nd ed. Beverley Hills: Sage.

Miller, E L 2011. *Rethinking Economy for Regional Development: Ontology, Performativity and Enabling Frameworks for Participatory Vision and Action*. Massachusetts: University of Massachusetts.

Motsoare, P. 2013. Kimberley.

Mpofu, F 2009. *Arts and Culture*. [online]. [Accessed 12 August 2013]. Available from World Wide Web: <<http://www.mmegi.bw/index.php?sid=7&dir=2009/January/Thursday29>>

Mpumalanga 2013. *About Mpumalanga*. [online]. [Accessed 16 August 2015]. Available from World Wide Web: <<http://www.mpumalanga.gov.za/about/province.htm>>

Mpumalanga Department of Economic Development 2011. *Mpumalanga Economic Growth and Development Path*. Mpumalanga Department of Economic Development.

Muller, K 2014. Koorsang bly haar lewe. *Volksblad*.

Music Crossroads International 2013. *Music Academies*. [online]. [Accessed 16 August 2013]. Available from World Wide Web: <<http://www.music-crossroads.net/en/academies>>

Music in Africa 2015. *The history of the Zimbabwean recording industry*. [online]. [Accessed 5 August 2015]. Available from World Wide Web: <<http://www.musicinafrica.net/>>

Musicradar.com 2011. *How the music industry works*. [online]. [Accessed 19 April 2014]. Available from World Wide Web: <<http://www.musicradar.com/how-the-music-industry-works>>

NAC 2013. *Home*. [online]. [Accessed 4 October 2013]. Available from World Wide Web: <<http://www.nac.org.za>>

Naim, M 2013. *Hugo Chavez, R.I.P.* [online]. [Accessed 14 November 2013]. Available from World Wide Web: <<http://www.businessweek.com/articles/2013-03-05/hugo-chavez-rip>>

Namibian 2013. *Spar now stocks Namibian music*. [online]. [Accessed 7 August 2013]. Available from World Wide Web: <<http://www.fastmoving.co.za/news/supplier-news-17/namibia-spar-now-stocks-namibian-music-3782X>>

National Arts Council of Namibia 2013. *About Us*. [online]. [Accessed 8 August 2013]. Available from World Wide Web: <<http://www.astscouncilnam.org/2/About-Us/>>

National Arts Council of Zimbabwe 2013. *About Us*. [online]. [Accessed 8 August 2013]. Available from World Wide Web: <<http://www.natartszim.org>>

National Geographic 2013. *Namibia Facts*. [online]. [Accessed 2 August 2013]. Available from World Wide Web: <<http://travel.nationalgeographic.com/travel/countries/namibia-guide/>>

NCRF *Northern Cape*. [online]. [Accessed 20 February 2013]. Available from World Wide Web: <<http://www.ncrf.org.za/provinces/northern-cape>>

Newbanks, M 2013. *About: Biography*. [online]. [Accessed 5 August 2013].

Available from World Wide Web:

<<http://www.gustavodudamel.com/content/biography>>

Nkosi, P. 2013. Kimberley.

Noordkaap 1984. *Musiekwinkel open in Kimberley*.

Northern Cape 2012. *Subject Enrolment List for Public Schools*. Kimberley:

Northern Cape Department of Education.

Northern Cape Department of Economic Development and Tourism 2012.

Northern Cape Province Economic Potential and Investment Profile. [online].

[Accessed 14 January 2016]. Available from World Wide Web:

<ed.co.za/sites/default/files/nc_profile.pdf>

Northern Cape Province 2002. *The establishment of a National Institute for*

Higher Education in the Northern Cape. Kimberley: Provincial Government.

Northern Cape Province 2012. *What is the PSDF?* [online]. [Accessed 14 January

2016]. Available from World Wide Web: <<http://northerncapepsdf.co.za/>>

Northern Cape Province 2012/13. *Regional Overview of the Northern Cape*.

[online]. [Accessed 11 January 2013]. Available from World Wide Web:

<<http://www.northerncapebusiness.co.za/>>

Northern Cape Province 2012b. *Arts and Culture*. [online]. [Accessed 15 October

2013]. Available from World Wide Web: <<http://www.ncsac.gov.za>>

Northern Cape Province 2015. *The Local Government Handbook*. [online].

[Accessed 3 August 2015]. Available from World Wide Web:

<[http://www.localgovernment.co.za/provinces/view/7/northern cape](http://www.localgovernment.co.za/provinces/view/7/northern%20cape)>

O'Luanaigh, C 2013. *Hitting the Right Notes: Music as a Tool in Community*

Development in Uganda. Oxford: Oxford Brooks University.

Open Society Foundation 2010. *Public Broadcasting in Africa: Mozambique*. Johannesburg: Open Society Foundation.

Organisation of American States 2004. *Unit for Social Development, Education and Culture*. [online]. [Accessed 19 June 2013]. Available from World Wide Web: <<http://www.oas.org/oipc/english/documentos/VenezuelaNationalMusicSystem.doc>>

PACOFS 2013. *Home*. [online]. [Accessed 22 August 2013]. Available from World Wide Web: <<http://www.pacofs.co.za/pages/web/20/sand-du-plessis-theatre>>

Passman, D S 2004. *All you need to know about the music business*. London: Penguin Books.

Phillips, R & Pittman, R 2008. *Community and Economic Development*. [online]. Available from World Wide Web: <<http://tandfbis.s3.amazonaws.com/rt-media/pdf/9780415773843/chapter1.pdf>>

Phillips, R & Pittman, R 2011.|"n.d." *A Framework for Community and Economic Development*. [online]. [Accessed 15 June 2014]. Available from World Wide Web: <<http://media.routledgeweb.com/pdf/9780415773850/chapter1.pdf>>

Pitt, L F 2000. *Marketing for Managers. A Practical Approach*. Cape Town: Juta.

Porter, M 2007. *Cluster-Based Strategies for Growing State Economies*. Washington DC: National Governors Association.

Portland Development Team 2012. *Portland Economic Development Strategy*. [online]. [Accessed 25 May 2015]. Available from World Wide Web: <<http://pdxeconomicdevelopment.com/implementation.html>>

Powell, W W & Snellman, K 2004. *The Knowledge Economy*. California: School of Education and Department of Sociology, Stanford University.

Pratt, A C 2004. *The Music Industry in Senegal: The Potential for Economic Development. Draft 11*. London: UNCTAD.

Princeton 2014. *The Nature and Importance of Innovation*. [online]. [Accessed 5 July 2014]. Available from World Wide Web:
<<http://www.press.princeton.edu/chapters/s9221.pdf>>

Rabinowitz, P 2013. *Promoting the Adoption and Use of Best Practices*. [online]. [Accessed 22 June 2014]. Available from World Wide Web: <<http://ctb.ku.edu/>>

Radio Riverside 2013. *Home Page*. [online]. [Accessed 20 February 2103]. Available from World Wide Web: <<http://www.radio-riverside.co.za/inex.php>>

Rainbow Nation 2015. *Tourist Map of South Africa*. [online]. [Accessed 3 Dec 2015]. Available from World Wide Web:
<<http://www.rainbownation.com/travel/maps/index.asp?loc=15>>

Random House 2007. *World Atlas and Encyclopedia*. New York: Random House Reference.

Rapoo, S. 2013. Kimberley.

Reiss, AH 2000. *Cash In! Funding and Promoting the Arts*. Lincoln USA: iUniverse.com, Inc.

Reiss, AH 2000. *Don't Just Applaud - Send Money!* New York: Theatre Communications Group.

Republic of Namibia 2009. *National Institute for Educational Development*. [online]. [Accessed 5 August 2013]. Available from World Wide Web:
<<http://www.nied.edu.na>>

Rowe, J E 2009. *Theories of Local Economic Development*. Auckland: Ashgate.

RSA 1998. *Skills development act no. 97*. [online]. [Accessed 16 September 2015]. Available from World Wide Web:

<<http://www.saqa.org.za/docs/legislation/2010/act98.pdf>>

Rucker, A & Trah, G 2007. *Local and Regional Economic Development. Towards a common framework for GTZ's LRED interventions in South Africa*. [online]. [Accessed 14 March 2013]. Available from World Wide Web:

<<http://led.co.za/sites/led.co.za/files/documents/304.pdf>>

SA San Institute 2013. *Home*. [online]. [Accessed 16 May 2014]. Available from World Wide Web: <<http://www.kalaharidesertfestival.org/>>

SADC 2012.|"n.d." *SADC Overview*. [online]. [Accessed 8 July 2013]. Available from World Wide Web: <<http://www.sadc.int/about-sadc/overview/>>

SANYO 2007. *Participants List 2007*. Kimberley: SANYO.

Scheffler, H M 1976. *Die kultuurlewe van die diamantdelwers te Kimberley van 1870 tot 1890*. Pretoria: University of Pretoria.

Segomotso, A B 2011. *Music Education in Junior Schools in Botswana: The way forward*. Pretoria: University of Pretoria.

Shaw, J 2010. *The South African Music Business*. 2nd ed. Johannesburg: Ada Emap.

Shaw, J & Rodell, R 2012. *Gauteng Music Strategic Framework Final Report*. Pretoria: Gauteng Provincial Government.

Sibanda, M 2011. *Articles*. [online]. [Accessed 19 July 2013]. Available from World Wide Web: <<http://freemuse.org/archives/562>>

Sibanda, T 2013. *Music Crossroads Opens in Harare*. [online]. [Accessed 19 July 2013]. Available from World Wide Web:



<<http://www.newsday.co.zw/2013/04/18/music-crossroads-academy-opens-in-harare/>>

Simon Bolivar Music Foundation 2013. *Home*. [online]. [Accessed 21 June 2013]. Available from World Wide Web: <<http://www.fesnojiv.gob.ve/en/home.html>>

Simpson (WO2), J. 2014. Cape Town.

Siyabona Africa 2015. *Cultural events in Mozambique*. [online]. [Accessed 17 January 2016]. Available from World Wide Web: <http://www.mozambique.co.za/Mozambique_Holiday_Activities-travel/cultural-events-mozambique.html>

Skyways 2014. Business Smarts. *Skyways Inflight Magazine for SA Airlink, November*, p.38.

Sol Plaatje Municipality 2010. *Invitation for Expression of Interest for Managing and Hosting of Diamond and Dorings Festival during 2010. Q008/2010*. [online]. [Accessed 17 February 2013]. Available from World Wide Web: <<http://www.solplaatje.org.za/downloads/SCM/Quotes/2010/2/Q008>>

Sol Plaatje Municipality 2015. *Big Hole Kimberley*. [online]. [Accessed 5 August 2015]. Available from World Wide Web: <<http://www.solplaatje.org.za/explore/history.php>>

South African Government 2014. *About Government*. [online]. [Accessed 10 April 2014]. Available from World Wide Web: <<http://www.gov.za/aboutgovt/dept.htm>>

Statistics Portal 2015. *Global revenue of the music industry*. [online]. [Accessed 15 July 2015]. Available from World Wide Web: <<http://www.statista.com/statistics/272305/>>

Statistics SA 2004. *Provincial Profile 2004*. [online]. [Accessed 22 July 2015]. Available from World Wide Web:

<<http://www.statssa.gov.za/publications/Report-00-91-03/Report-00-91-032004.pdf>>

Steenkamp, G AP 1983. *'n Historiese oorsig van die totstandkoming en ontwikkeling van die orkesprogram in die Oranje Vrystaat*. Bloemfontein: University of the Free State.

Stroebe, G 2013. *About Us*. [online]. [Accessed 18 February 2013]. Available from World Wide Web:

<<http://www.bizcommunity.com/PressOffice/AboutUs.aspx?i=126698>>

Sutton, B. 2013. Kimberley.

Swakopmund Musikwoche 2013. *About us*. [online]. [Accessed 5 August 2013]. Available from World Wide Web: <<http://www.musikwoche.com/about-us>>

Szajnowska-Wysocka, A 2009. *Theories of Regional and Local Development - Abridged Review*. [online]. [Accessed 17 October 2015]. Available from World Wide Web:

<http://www.bulletinfogeography.umk.pl/12_2009/05_szajnowska.pdf>

Taylor, S 2011. *Public broadcasting in Africa: Namibia*. Johannesburg: Africa Governance and Advocacy Project.

Tembo, L 2013. *Zimbabwe: Willom Tight to build studio*. [online]. [Accessed 21 July 2013]. Available from World Wide Web:

<<http://allafrica.com/stories/201301070712.html>>

Temmingh, H 1994. Speech delivered at the SASMT Congress 1994. Grahamstown.

Terluin, I J 2003. Differences in economic development in rural regions of advanced countries: An overview and critical analysis of theories. *Journal of Rural Studies*. **19**, pp.330-331.

The City of Kimberley 1952. *The City of Kimberley. Official Guide*. Cape Town: R. Beerman Publishers.

The Presidency: RSA 2004. *Accelerated Shared Growth Initiative for South Africa (ASGISA)*.

The Telegraph 2013. *News*. [online]. [Accessed 17 July 2013]. Available from World Wide Web:

<<http://www.telegraph.co.uk/news/worldews/africaandindianocean/zimbabwe/>>

The Whole Brain Group 2012. *Five Simple Steps to Creating an Ideal Customer Profile*. [online]. [Accessed 16 July 2014]. Available from World Wide Web:

<<http://www.blog.thewholebraingroup.com/>>

The World Bank 2004. *Organising a Local Economic Development Strategy*. [online]. [Accessed 19 May 2015]. Available from World Wide Web:

<<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTURBANDEVELOPMENT/EXTLED/0,contentMDK:20>>

The World Bank 2013. *Zimbabwe - Data & Statistics*. [online]. [Accessed 16 July 2013]. Available from World Wide Web:

<<http://www.worldbank.org/en/country/zimbabwe>>

The World Bank 2015. *Overview*. [online]. [Accessed 5 August 2015]. Available from World Wide Web:

<<http://www.worldbank.org/en/country/venezuela/overview>>

Thompson, N 2010. *Community Development Creates Great Neighbourhoods*. [online]. [Accessed 1 February 2013]. Available from World Wide Web:

<<http://www.useful-community-development.org>>

Thornton, G 2011. *Music Industry Strategy for Northern Ireland*. Glasgow: Department of Culture, Arts and Leisure.

Throsby, D 2002. *The Music Industry in the New Millenium*. Paris: The Global Alliance for Cultural Diversity.

Tiltman, J. 2014. Cape Town.

Todaro, M 2014. *Economic Development vs. Economic Growth*. [online]. [Accessed 25 June 2104]. Available from World Wide Web: <www.diffen.com/Economic_Development_vs_Economic_Growth>

Uiras, M. 2014. Cape Town.

UNCTAD/WIPO 2001. *Cuban Music Industry Development and Marketing Plan*. Havana: UNCTAD/WIPO.

UNISA 2005. *Handboek vir Musiekeksamens*. Pretoria: UNISA.

University of Namibia 2013. *University of Namibia*. [online]. [Accessed 4 August 2013]. Available from World Wide Web: <www.unam.na/faculties/Humanities2013.pdf>

Van der Linde, C. 2013. Kimberley.

Van der Merwe, E. 2013. Kimberley.

Van Rooyen, R 2010. *Customs duty in South Africa*. [online]. [Accessed 22 September 2013]. Available from World Wide Web: <<http://www.accountancesa.org.za/resources/ShowItemArticle.asp?ArticleId=1882&Issue=1090>>

Van Rooyen, D. 2013. Kimberley.

Van Schalkwyk, A. 2013. Kimberley.

Vercueil, F. 2013. Kimberley.

Viale, R & Ghiglione, B 2005. *The Triple Helix Model: A Tool for the Study of European Regional Socio Economic Systems*. Milan: University of Milan.

Viljoen, N. 2013. Bloemfontein.

Viljoen, M. 2014. Bloemfontein.

Von Willigh, M. 2013. Cape Town.

Wakin, D J 2012.|"n.d." *Fighting Poverty, Armed With Violins*. [online]. [Accessed 21 June 2013]. Available from World Wide Web:

<<http://www.nytimes.com/2012/02/16/arts/music/el-sistema-venezuelas-plan-to-help-children-through-music.html>>

Weekly Free Press and Mining Journal 1902. *The Kimberley School of Music*.

Weekly Free Press and Mining Journal 1903. *About Town*.

West Coast District Municipality 2007. *Regional Economic Development Strategy*. [online]. [Accessed 12 August 2015]. Available from World Wide Web:

<<http://westcoastdm.co.za/wp-content/uploads/2012/01/>>

West Coast District Municipality 2015. *Western Cape*. [online]. [Accessed 12 August 2015]. Available from World Wide Web:

<<http://www.localgovernment.co.za/districts/view/47/>>

Western Cape Province 2013. *Your government*. [online]. [Accessed 12 August 2015]. Available from World Wide Web: <<https://www.westerncape.gov.za/yourgov/29>>

Wilder, M 2014. *Telling the story: Music impacts learning and way of life*. [online]. [Accessed 15 July 2014]. Available from World Wide Web:

<<https://www.nammfoundation.org/educator-tips>>

Williams, P J 2012. *Budget Vote 7 for 2012/13 Financial Year*. [online]. [Accessed 16 April 2014]. Available from World Wide Web:
<<http://www.gov.za/speeches/view.php?sid=27735>>

Williams, F 2014. *SA loop in spoor van Argentinië*.

Willis, K 2007. *Theories and Practices of Development*. London: Routledge.

Wittenberg, M 2005. *The School Day in South Africa*. [online]. [Accessed 2 March 2015]. Available from World Wide Web:
<<http://www.researchgate.net/publication/46460414>>

World Atlas 2015. *Web Image*. [online]. [Accessed 7 July 2016]. Available from World Wide Web:
<<http://www.worldatlas.com/webimage/countrys/africa/sn.htm>>

World Music Network 2011. *Guide to World Music: The Music of Mozambique*. [online]. [Accessed 13 August 2013]. Available from World Wide Web:
<<http://www.worldmusic.net/guide/music-of-mozambique/>>

Zimbabwe Academy of Music 2012. *The Academy*. [online]. [Accessed 19 July 2013]. Available from World Wide Web:
<<http://www.zimbabwemusicacademy.org/the-academy/>>

Zimbabwe College of Music 2015. *Programmes*. [online]. [Accessed 5 August 2015]. Available from World Wide Web:
<<http://www.zcm.co.zw/index.php/programmes>>

Zimbabwean music festival 2012. *Home*. [online]. [Accessed 5 August 2015]. Available from World Wide Web: <<http://2011.zimfest.org/>>

End