HOW TO MAKE A SUSTAINABLE CREATIVE CULTURAL INDUSTRY (CCI) SECTOR: EXPLORING A CLUSTERING FRAMEWORK, USING SPECIAL ECONOMIC ZONES AND INNOVATION AS VEHICLES FOR THE GROWTH AND COMPETITIVENESS OF THE SECTOR, IN GAUTENG, SOUTH AFRICA

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Declaration

I have read the definition of plagiarism. I am fully aware of what it means and I hereby certify that the dissertation is entirely my own work, except where indicated. I hereby declare that the work embodied in this dissertation is original work undertaken by myself, and that it has not been submitted, either in the same or different forms, to this or any other university. I also declare that this dissertation does not draw from any other work prepared under consultancy or other professional undertaking, by myself or jointly with other authors in any way other than duly and explicitly acknowledged herewith.

I agree to this dissertation being made available to other distance learning students via CeDEP's online learning environment.

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Acronyms

4IR	Fourth Industrial Revolution
AI	Artificial Intelligence
ASGISA	Accelerated and Shared Growth Initiative for South Africa
AU	African Union
CBD	Central Business District
CCI	Creative, Cultural Industry
CCIFSA	The Cultural and Creative Industries Federation of South Africa
CGT	Constructivist Grounded Theory
CIGS	Cultural Industries Growth Strategy
COVID	Coronavirus disease
the dtic	The Department of Trade, Industry and Competition
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GDSARC	The Gauteng Department of Sport, Arts, Culture and Recreation
GGDA	Gauteng Growth and Development Agency
GGT 2030	Growing Gauteng Together 2030
GP	Gauteng Province
GPG	Gauteng Provincial Government
GVA	Gross Value Added
ICT	Information and Communications Technology
IGR	Intergovernmental Relations
IKS	Indigenous Knowledge Systems
IP	Intellectual Property
NIPF	National Industrial Policy Framework

NGP	New Growth Path
NDP 2030	National Development Plan
NTIP	National Technologies Implementation Platform
ORTIA SEZ	OR Tambo International Airport Special Economic Zone
PC4IR	Presidential Commission on the 4th Industrial Revolution
R&D	Research & Development
SA	South Africa
SACO	South African Cultural Observatory
SEZ	Special Economic Zone
SGDs	Sustainable Development Goals
SSIs	Semi-structured interviews
STEM	Science, Technology, Engineering, Mathematics
STEAMIE	Science, Technology, Engineering, Art, Mathematics, Innovation, Entrepreneurship
SMMEs	Small, micro and medium enterprises
UN	The United Nations
UNCTAD	The United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organisation

Abstract

The Creative, Cultural Industry (CCI) in South Africa boasts great talent and potential for economic and social growth. Compared to other sectors, the sector employs more young people, it advances a strong cultural distinctiveness and diversity, common heritage, social cohesion and inclusion, as well as human development. This makes it key in the achievement of the African Union Agenda 2063 and the 2030 Sustainable Development Goals.

However, the sector is often misunderstood and incorrectly perceived, which results in inadequate support and protective legislation, policies and regulation. The support given to the sector is not only inadequate, but it is also not coordinated.

This dissertation seeks to explore a framework that fuses three economic development tools: Cluster Development, Special Economic Zones (SEZ) and Innovation[1]. The framework seeks to cluster CCI businesses using an SEZ tool and innovation as economic vehicles for the growth and competitiveness of the sector in Gauteng Province, South Africa. It is hoped that through the dissertation, key stakeholders will be able to offer it better support, and thus contribute to its sustainability.

The Constructivist Grounded Theory (CGT) was used for this study's research approach. This approach was chosen because the research sought to interpret the emerging data in order to develop this framework.

A literature review, as well as 13 semi- structured interviews were undertaken to gather the data and draft a synopsis of the sector. The interviews took place with two stakeholder groups: (1) Sector experts from academia and government, the SEZ space, innovation and strategy development, and (2) with CCI businesses that ultimately would be the beneficiaries of this dissertation.

The study's findings revealed that the sector is important economically and socially but is marred by a number of challenges that could be resolved through one intervention – that is intentionally clustering CCI businesses within a special economic zone (SEZ) and incorporating innovation.

Policy developers, implementers, evaluators, CCI businesses, organisations supporting the sector and funders can benefit from these findings. Sector researchers and practitioners of international management or business studies can also stand to benefit from this paper.

Key words: Creative Cultural Industry (CCI), Cluster development, Special Economic Zone (SEZ), Innovation, Gauteng Province

[1] and/or technology

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1. Introduction

The potential of the creative cultural industry (CCI) to contribute economically and socially has long been identified by South Africa. The evidence of this can be seen in the many economic policies[2] of government, (the dtic, 2022).

Globally, CCIs make a noteworthy contribution to the world's economy, accounting for 3.1% of global Gross Domestic Product (GDP), 3-21% of total exports and 6.2% of all employment in 2020 (UNCTAD, 2022: p.5). In South Africa (SA) in 2020, the sector accounted for 2.97% of GDP (making it surprisingly similar in size with the agricultural sector), 6% of all employment[3] and 0.37% of total exports (SACO, 2022: p.13, 24, 36). The sector is also known to grow at a faster rate than the rest of SA's economy (Snowball *et al.,* 2021).

Given its size, the importance of its inputs to other sectors, and its ability to provide much-needed jobs, the CCI has been flagged by the Gauteng Government as one of the priority sectors (GGT, 2020: p.23). The Gauteng Province is geographically the smallest province with a landmass of only 1.4%, it is however, the wealthiest. It is highly urbanised and densely inhabited. Because of this, it is the most socio-economically challenged province (Gauteng, n.d.: para.1).

This dissertation seeks to explore an economic development framework that has been used in other sectors, but as far as the researcher is concerned, has not been used explicitly for the CCIs[4] – a sector with great potential but so far still lacks adequate support. It seeks to explore a framework that will assist in making the sector sustainable by exploring a clustering framework, using a special economic zone (SEZ) and innovation as economic development vehicles for the growth and competitiveness of the sector and the Gauteng province.

The 2022 CCI Master Plan outlines a range of challenges experienced by the sector. These include:

a) Lack of access to markets for businesses
b) Lack of access to finance and low profits
c) Inability to access credit due

[2] Cultural Industries Growth Strategy (CIGS, 1998), Accelerated and Shared Growth Initiative for South Africa (ASGISA), National Industrial Policy Framework (NIPF), New Growth Path (NGP) and the National Development Plan 2030 (NDP)
[3] Including in non-cultural industries
[4] The only known example of a sub-sector forming part of an SEZ is in the case of ORTIA SEZ's Jewellery Manufacturing Precinct. However, the precinct is located in a multi-sectoral SEZ space that consists of eight other sectors, (GIDZ, 2023: para.1).

d) Burdensome legislative and regulatory processes
e) Limited access to economic infrastructure
f) Lack of R&D capacity among SMMEs due to lack of support.
g) Inadequate entrepreneurial skills by SMMEs (the dtic, 2022: p.29).

Therefore, the overall objective of this dissertation is to identify a framework that might assist the sector in addressing some of these challenges. It seeks to do this by:

a) Assessing the status quo of the sector, including assessing the challenges and opportunities that the sector faces
b) Exploring the concept of a cluster development model for the sector by assessing the extent to which it is taking place in Gauteng and exploring the shape it should take to benefit the sector
c) Exploring if clustering CCIs in an SEZ is a viable avenue to comprehensively address the sector's challenges, and assessing if businesses would be keen to form part of it
d) To explore how the sector can fuse innovation and/or technology to accelerate growth, and
e) Make practical recommendations to key stakeholders.

The study's findings present an overall synopsis of the sector which includes its challenges and strengths. It also indicates a possible intervention that seeks to resolve these challenges.

The findings and recommendations from the dissertation are aimed at affording key stakeholders, an opportunity to contribute to the growth of the sector in the medium to long-term. Making a concerted effort to empower and support the sector will not only have a direct positive impact on the sector, it will also have spillovers in the form of large multiplier effects across other sectors.

On a personal note, and as a creative myself, the dissertation allows me to merge my passion for the sector with my current profession in the economic development space in government. My career started in fashion design, where I used to own a fashion business, while studying economics. My proximity to and affinity with the creative space has exposed me to a myriad of challenges faced by the sector. My work within the economic development space includes strategy development, monitoring and evaluation in a new SEZ project that the Gauteng Government plans to establish. This provides me with the opportunity to explore and investigate pragmatic ways to make the CCI sector competitive and help it to grow.

2. Literature Review

2.1 Overview of the CCI

2.1.1 What are CCIs

Definition, composition and attributes

A number of different CCI definitions have been provided across countries and international organisations. The United Nations Educational, Scientific and Cultural Organization (UNESCO) defines CCIs according to culture and its related domains. The United Nations Conference on Trade and Development (UNCTAD) defines it as referring to the creation, production and dissemination of outputs using creativity and intellectual capital as inputs. The Inter-American Development Bank's (IDB) definition is similar to UNCTAD's, but adds that the value of CCI outputs is/should be protected by intellectual property (UNCTAD, 2022).

Within the South African context, the CCI Masterplan provides two definitions, which are similar to the above, but it includes the CCI's potential for wealth and job creation and secondly it considers the type of value that CCIs generate, which may not (only) be measured in monetary terms (the dtic, 2022). For SA, a country marred by the triple challenge of poverty, unemployment and inequality, CCIs can offer a great opportunity to overcome these challenges (UNCTAD, 2022).

With regard to the CCIs' composition, UNESCO compartmentalises them as:

a) Design and creative services
b) Audio-visual and interactive media
c) Visual arts and crafts
d) Books and press
e) Performance and celebration, and
f) Cultural and national heritage (UNESCO, n.d.: p.2).

UNCTAD compartmentalises them as:

a) Cultural sites
b) Traditional cultural expressions
c) Performing arts
d) Audio-visuals
e) New media
f) Creative services
g) Design

h) Publishing and printed media, and
i) Visual arts (Codesria, n.d.: p.7).

This dissertation will adhere to UNESCO's form, while acknowledging that SA needs to have its own way of organising the domains of the sector taking into account the country's context.

With regard to the CCI's attributes, many of the businesses tend to be micro-sized, and collaborate with others to work on projects, bringing in the different expertise/talent (Oyekunle, 2014). Other attributes are, according to a paper by SACO (2022), that they tend to rely on face-to-face interaction to produce and consume creative outputs. They generate income as per project; they often rely on tourism; and there are lots of freelancers in the sector. Creative work is generally informal in nature; and networking and events are important for career development (SACO, 2022). However, the face-to-face interaction nature of the sector does not apply to the whole sector as some sub-sectors, such as interactive media, conduct most of their business online.

It is also important to take into consideration SA's complex history of creativity, which is rich and diverse and at the same time, shaped by the country's tumultuous legacy of apartheid[5], the structural differences between the commercial and the non-commercial domains, and the cross sectoral nature of the sector (SACO, 2016).

[5] A system of institutionalised racial discrimination between 1948 and 1994 in South Africa.

2.1.2 Economic overview

The importance of the sector at a global and local level

CCIs contribute significantly to the world's economy. According to 2020 economic indicators, they account for 3.1% of global GDP, represent 3-21% of total exports, provide 6.2% of all employment (50 million jobs), and they employ more young people than other sectors (UNCTAD, 2022: p.5).

Domestically, a 2022 mapping study conducted in the CCI sector gives economic context and background to the size of the sector. It indicates that the sector is surprisingly similar in size to the agricultural sector – having contributed R161 billion (or 2.97%) to GDP in 2020 (SACO, 2022: p.13, 36). However, this is a decline from previous years' figures of between 4-11% in 2018 obtained from the World Economic Forum (the dtic, 2022: p.8).

The audio-visual, interactive media, and 'design and creative services' showed some growth between 2016 and 2020, while the 'visual arts and craft' and the 'books and press' domains experienced declines in Gross Value Added (GVA)[6] (see Figure 1).

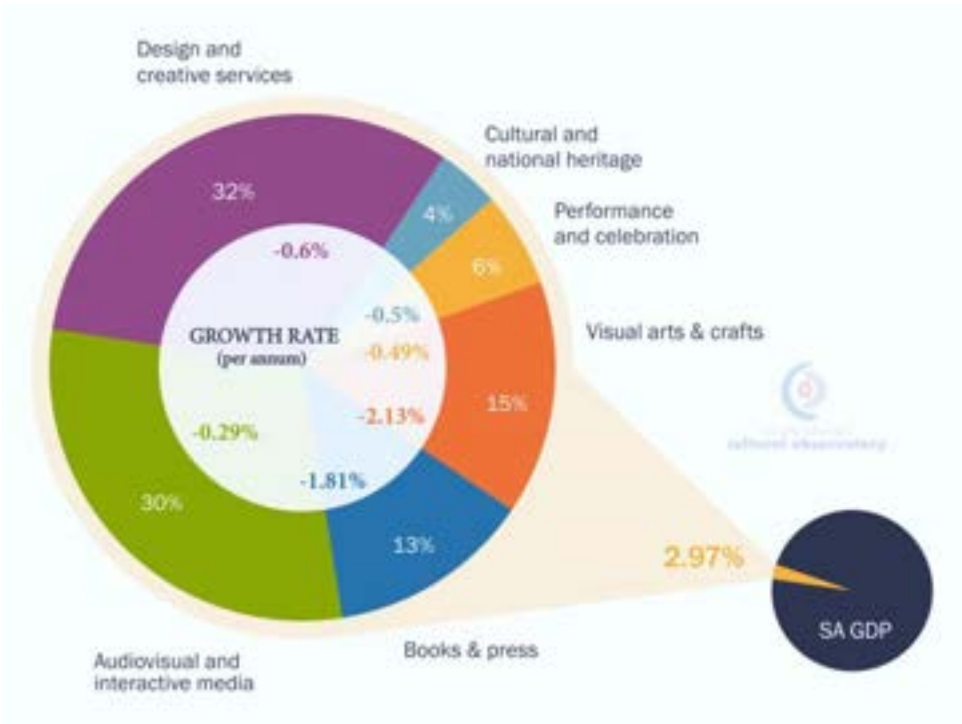

Figure 1: GVA contribution per CCI Domain (at current 2020 prices)
Source: SACO (2022)

[6] The contribution of the CCIs is measured using Gross Value Added (GVA). GVA is the value added to all goods and services produced in a country in a time period (excluding intermediate uses to avoid double counting) (SACO, 2022: p.18).

With regard to employment, the sector contributes to 6% or just under 1 million of all jobs in SA, a slight increase from 5.9% in 2017 (SACO, 2022: p.24).

With regard to exports, SA's CCI goods exports made up 0.37% (US$316.46 million) of the value of the country's commodity exports in 2020. SEZs have been identified as tools that can boost exports (among other benefits). Therefore, it may be a feasible tool for the Gauteng Province to use in promoting CCI exports and ensuring that the sector becomes competitive.

The COVID-19 pandemic adversely affected the sector, as it did many other sectors. There is evidence, however, that despite this setback, CCIs continue to contribute positively economically, with some parts of the sector having started to recover (SACO, 2022: p.50). The framework, which will be explored in this dissertation, should be able to assist in accelerating the recovery of the sector.

2.1.3 Challenges and strengths / opportunities of the sector

As previously mentioned, the sector faces a number of challenges as outlined in the 2022 CCI Master Plan. Key amongst these are: lack of market access, access to funding, burdensome legislative and regulatory processes, access to economic infrastructure, lack of R&D capacity and inadequate entrepreneurial skills among SMMEs (the dtic, 2022: p.29).

On a positive note, it also boasts some strengths. These include: SA's unique and diverse culture, arts and heritage, the CCI value chain has a strong industrial and enterprise base, a number of institutions and organisations representing most of the CCIs include well-established collecting societies, a forceful independent CCI sector and a growing number of SMMEs.

It is not certain if the third point is an outright strength, seeing that there is a lack of evidence to assess the performance of the work conducted by the organisation representing the entire sector – that is the Cultural and Creative Industries Federation of South Africa (CCIFSA)[7], which is tasked with "protecting, restoring and promoting the dignity of the CCIs, practitioners and entrepreneurs through strong partnerships" (CCIFSA, 2023: para.2). With regard to collecting societies (which are private businesses), the question is why with so much music being produced and exported from SA, there is still perpetual poverty in the music industry (Gilfillan, 2010: p.3). The same can be inferred about other CCI sub-sectors.

[7] CCIFSA is a non-profit organisation set up with the assistance of the Department of Sports, Arts and Culture. Efforts to retrieve its performance plans and reports where unsuccessful.

2.2 Cluster Development

The 2022 CCI Master Plan states that countries with a high level of competitiveness have a strong presence of creative clusters in their economy, as creative industries symbolise advanced knowledge, ideas and innovation. Evidently, the Masterplan includes clusters (as well as hubs) as part of the demand-side infrastructure required to assist with sector development and growth (the dtic, 2022), see Figure 3.

Silicon Valley in the United States is a famous example of a cluster that Newbigin (2014) gives in his article "Hubs, clusters & regions". It was developed by a small group of digital technology businesses; their labour force comprised graduates from the nearby Standford University. In turn, this attracted talent and other complementary businesses, until a formidable cluster of global significance was formed. Newbigin (2014: p.8) states that a successful business or a talented individual might form a hub from which a cluster of businesses would grow. However, in order for a cluster to emerge, these businesses must connect with each other; there must be collaborations, business partnerships, innovation sources elsewhere, as well as clients in the form of businesses from other sectors. All of these are underpinned by informal networking.

A paper by McGurk titled "Growing the creative economy of South Africa: How creative hubs in Johannesburg can develop, support and grow start-up creative businesses" states that even though creative hubs in Johannesburg have strengths in certain areas, they are not self-sustainable and more can be done in that area to ensure that they are more effective and impactful (2019: p.3). Clustering therefore offers an opportunity for the growth and sustainability of hubs.

The paper "Realising the Economy of the Imagination and the Creative and Cultural Industries" by SACO (2016), finds that there is a renewed global interest in industrial clusters[8]. The paper suggests that there should be an emphasis on CCI cluster development, which should be a central element of re-worked industrial and economic development strategies, especially at provincial government level. The 2022 CCI Masterplan has taken this into account as part of its national key strategic interventions (the dtic, 2022). However, at the time of writing this paper, CCI cluster development did not officially form part of Gauteng's provincial strategy – that is the Growing Gauteng Together (GGT)[9] 2030 Plan;

[8] Clusters (and hubs) have been present in most of the world economies for hundreds if not thousands of years (Newbigin, 2014).

[9] GGT 2030 is Gauteng Province's standing policy document

hence, the need to explore this clustering framework specifically for the province, which hopefully can inform policy.

The paper, “The Role of Cultural and Creative Industries in Special Economic Zones” by Huang advocates that a shift from traditional industrial development to more sustainable industries starts with the development of CCI clusters and entrepreneurship (2021). The paper also states that to develop CCI clusters in Macao-Hengqin region in Hong Kong, there is a need to systematically link entrepreneurs, talent, and investors to evolve into a high-quality entrepreneurial ecosystem. The same is true for Gauteng, except that there is declining investor confidence evidenced by the declining FDI inflows over the last year[10] (GGDA MBI, 2023: p.7). The sector would need to devise creative ways to attract investment into the cluster. SEZs generally have a high appeal for investment due to their status and benefits.

A paper titled “Hubs, clusters and regions” by Newbigin found that in order to grow CCI clusters, the creatives – who are the heart and soul of clusters – need to have a good reason to stay. Clusters should ensure that universities and research organisations are part of the clusters and that the talented people would be keen to study there (2014: para.16).

A paper titled “Gauteng Cultural and Creative Industries Growth Strategy” by the GDSARC[11] states that The City of Johannesburg[12] has the largest cluster of creative companies (see Figure 2), and the highest turnover, compared to all other metros[13]. This fact starts pointing to the possible location of the proposed CCI SEZ. The strategy falls short on emphasising clusters, even though it claims to have taken cognisance of the 2022 CCI Master Plan, which puts an emphasis on such.

[10] This is largely due to the intensity of loadshedding in the country. Loadshedding is a process whereby the demand for electricity exceeds its supply, which is experienced by power cuts or blackouts (GGDA MBI, 2023: p.4)
[11] The Gauteng Department of Sport, Arts, Culture and Recreation
[12] Johannesburg is situated in the Gauteng Province
[13] The city has the highest concentration of all domains, except for Design and Creative Services, the largest cluster of which is in the City of Cape Town in the Western Cape Province

Figure 2: Spatial distribution of creative clusters in Johannesburg
Source: Gregory, J. and Rogerson, C. (2018)

2.3 Special Economic Zones (SEZs)

SEZs, as established and managed through the SEZ Act, 16 of 2014 of South Africa, are defined as "designated areas, established to promote targeted economic activities, supported through special arrangements and support systems including incentives, business support services, streamlined approval processes and infrastructure" (BVI, 2023: p.20). Their purpose is to "promote industrial agglomeration, build the required industrial infrastructure; promote coordinated planning among key government agencies and the private sector; and guide the deployment of other necessary development tools" (BVI, 2023: p.20).

A paper titled "Special Economic Zones" by the United Nations (UN) found that 75% of developing economies and almost 100% of transition economies use SEZs. Over 200 SEZs have been established on the African continent and there is a continued growing demand for them. There is also rising FDI[14] in SEZ development (UN-library, n.d.).

[14] Foreign Direct Investment

Regarding the Gauteng Province, the aim of the GGT 2030 Plan is to double the size of Gauteng's GDP, double employment, grow exports, reduce poverty and promote economic empowerment by 2030. The plan defines activities to be undertaken to speak to these aims, which include inter alia:

a) The implementation of activities in the ten high-growth sectors[15] – which CCIs form a part of
b) Aggressive support towards expanding and building sustainable businesses, and the creation of an efficient, competitive and responsive cluster of economic infrastructure. As such and specific to the latter, SEZs have been identified as tools to bolster manufacturing, exports and quality jobs in the province (GPG, 2020).

In terms of the regulatory and institutional frameworks for SEZs in SA, the UN paper outlines two of the SEZ Act's objectives:

a) To broaden economic participation by promoting medium-sized enterprises (UN-library, n.d.). This offers an opportunity to open economic participation up to a large part of a sector that is currently not fully included in the mainstream economy because of its informal nature (SACO, 2022).
b) The promotion of skills, which according to Nesta (2023) can be delivered by the creative economy

The "Draft SEZ Strategy" by the dtic lists the principles that must be taken into account in the expansion and establishment of SEZs. Two of these principles are:

a) SEZs should become multifunctional - human settlements and facilities, as well as other open systems, such as tourism, should be the norm for all SA SEZs (with few exceptions). The CCIs strong links with the tourism sector would give effect to this principle.
b) SEZs should be engineered for economic growth and development, and fully integrated with all relevant South African national, regional and sectoral master plans (the dtic, n.d.). From the available literature, it seems as if the OR Tambo International Airport (ORTIA) SEZ[16] is the only SEZ with a CCI sub-sector (jewellery), (the dtic, 2020).

The SEZ Implementation Plan 2020-2030 in the "Draft SEZ Strategy" (dtic, n.d.) suggests a few strategies as a new approach to SEZs in SA. Three of the strategies relevant to this dissertation are:

a) Governance and institutional arrangements in SEZs

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[15] The 10 high growth sectors are: Energy, with a focus on new technologies and a diverse energy mix; Transportation and logistics; ICT and digital services with a focus on the gig economy; Tourism and Hospitality; Food, Beverages, Agro processing and agribusiness; Construction and Infrastructure; Automotive, Aerospace and Defense; Financial services; Cultural and Creative services; Cannabis industry, (GGT 2030,2020:23).
[16]OR Tambo International Airport Special Economic Zone

b) Investment promotion and aftercare, which is critical for CCI businesses that have challenges of access to funding
c) Enterprise development and empowerment.

The above literature highlights that there is an interest to establish SEZs on the continent, there's rising investment geared towards them, there's a shift away from the typical industrial type SEZs, and an integration of sectoral master plans into SEZs is being advocated, which should ensure that the CCI sector is also accommodated. Therefore, a CCI clustering framework within an SEZ has to be explored.

2.4 CCIs and innovation

A paper titled "Innovation and diversity in the digital cultural and creative industries" by Snowball *et al.* (2021) reports that firms that combine digital technology and creative design in producing a final good/service have higher levels of innovation and are likely to grow.

In the paper titled "The state of Creativity Policy Research Industry" by Nesta, a survey was conducted which found that CCI firms that engaged in R&D had a better potential for growth. The paper also encourages decision-makers to look at other key innovation activities, such as new technology (for example, Createch[17]) and AI[18] use in CCIs. The paper stated that using innovation to build sector resilience and adapt during turbulent periods is key (Nesta, 2023).

A report by the Presidential Commission on the 4th Industrial Revolution recommends that the country should foster a conducive environment for creativity, innovation and competitiveness (while protecting the rights and interests of creatives and entrepreneurs) in the creative economy. For this, the following should happen:

a) The education curriculum should teach skills aligned to the 4IR
b) Government should expand the NTIP[19] initiative's model to include other sectors, such as CCIs and focus on innovation and technology
c) Have an in-depth look at what the Copyright & Performance Rights Bill[20] means in the context of 4IR and the creative economy as IP protection and ownership is the foundation of the creative economy (PC4IR, 2020).

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[17] Createch - "the special combination of creativity and technology in creative industry sectors" (Nesta, 2023: p.5)
[18] Artificial Intelligence
[19] NTIP refers to the National Tooling Initiative Program and is now called the National Technologies Implementation Platform (NTIP). It is a fully-fledged 4th Industrial Revolution program, which includes training in robotics, mechatronics, and industrial maintenance (the dtic, 2018: para.4).
[20] The 2017 Copyright Amendment Bill (CAB), which seeks to amend the Copyright Act 1978, was returned by the President of South Africa to, among other, critical provisions:

a. Provide for prohibited conduct in respect of technological protection measures, and

In the GDSARC (2022) paper, the majority of the interventions required to build a future for the sector in Gauteng CCI are underscored by innovation. These include:

a) Big investment in infrastructure to enable creation, innovation and business development
b) Driving innovation, investing in digital human capital, combined with access to spaces that will allow the use of technology
c) Centralising indigenous knowledge systems (IKS), epistemology, art, culture and heritage in policies, programmes and institutions (2022: p.27).

Kompatsiaris *et al.* (2020: p.2) in the paper titled "The Industrialization of Creativity and Its Limits" reports that innovation in the media has disrupted the old models of media production and does not necessarily produce high quality content, thus challenging the narrative that technological innovation always leads to creative enhancement. Digitisation has enabled creative content to be standardised and mass produced, thus contributing towards the financialisation of the sector where revenue generation becomes the driving force.

Most of the literature tends to support innovation and technology, especially in the South African context. It emphasises the need to fuse innovation into CCI businesses for growth, investing in digital human capital and innovation enabling infrastructure, investing in R&D, new technology and AI.

The opposing literature states that innovation does not necessarily always result in quality work, revenue generation becomes the driving force of creative content production as opposed to creativity itself. This literature, however, does not object to the fact that fusing innovation leads to business growth. For a province like Gauteng that has its fair share of socio-economic and structural challenges[21], the country cannot afford to miss an opportunity to invest in or fuse innovation into the CCIs - a sector that shows that with the right innovative and/or technological support, it can thrive. Caution must though be exercised to ensure that creative outputs remain of high quality and that a balance is reached between revenue generation and preserving creativity.

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b. Provide for management of digital rights.

[21] Gauteng's socio-economic challenges include: Unemployment, Poverty and hunger, Crime and Substance abuse, Climate change, Unsustainable growth and economic crises, Migration, Flight and displacement, Health, Inequality, Social exclusion, Lack of decent work and social protection and Political instability, insecurity and violent conflicts, (GGT 2030, 2020:7). This is largely due to the structural difficulties facing the economy, which was made worse by the COVID-19 crisis. Some of the structural impediments to economic growth include widespread corruption, failing state-owned entities, low investment rates relative to consumption, energy insecurity, a high cost of interconnectedness, and economic policy uncertainty (Engineering News, 2023). It would be remiss to leave out neo-liberal policies, which, according to South Africa's Treasury, encourages disinvestment in social programmes, and thus adds further to these challenges.

The motivation behind the chosen dissertation title came from the need to merge SACO's fifth and sixth thematic themes, which seek to:

> *"Track the economic impact of the CCIs on SA economy by developing a value-chain analysis of the cultural and creative industries to assist in policy development, which would inform the* ***development of a clustering model that would increase the competitiveness of the industry using SEZ as a vehicle****, and determine the* ***role, nature and impact of innovation and disruptive technologies in advancing the development of the South African creative and cultural industry****"* (SACO, 2023: para.10)

The dissertation sought to draw on existing data on the concepts of cluster development, SEZ and innovation and then merge them together to explore the said framework, which as far as the literature has revealed, has not been developed yet for CCIs, especially in Gauteng.

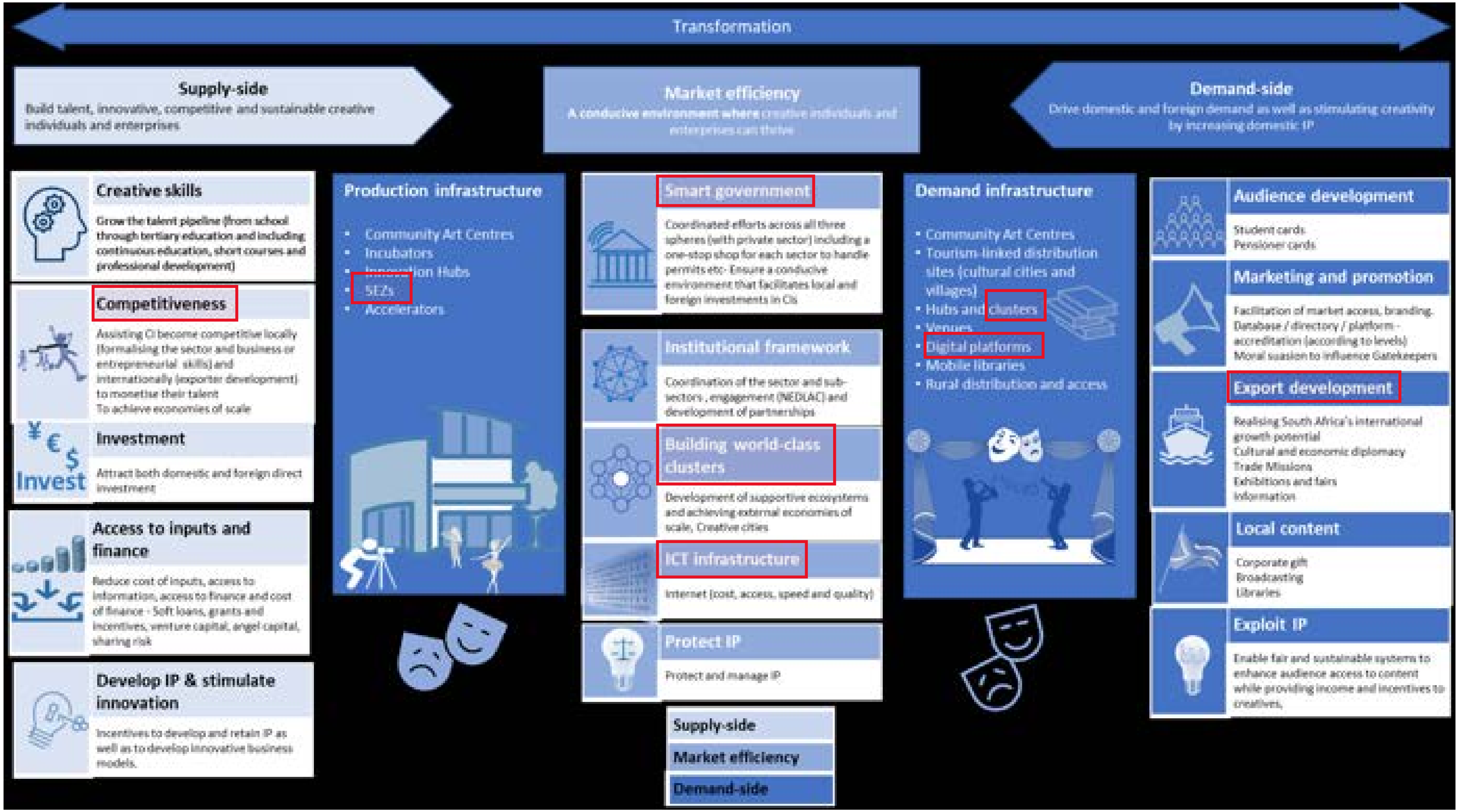

Figure 3: The creative industry strategic interventions from the dtic (the red boxes indicate the concepts explored in this research paper)

Source: (the dtic, 2022, http://www.thedtic.gov.za/wp-content/uploads/Cultural-and-Creative-Industries-Masterplan.pdf)

Table 1: Summarised Literature Review (See Appendix A for the comprehensive table)

Name of paper/book/article	Study, Setting and Sample size	Study Design	Summary of Intervention	Building Blocks Included	Summary of Findings	Risk of Bias Assessment
1. Innovation and diversity in the digital cultural and creative industries	Snowball et al., 2021 [1], Cape Town, South Africa (SA), Brighton, UK *n* = 349	Mixed Methods (Case Study, Survey)	The paper assesses the way in which CCI businesses in Cape Town – South Africa innovate by fusing digital technology, creativity, and diversity on the workforce	• Creative industries • Innovation • IP • Diversity	Fused firms have higher levels of innovation in business processes, goods and services. Fused firms were also more likely to employ demographically diverse people, adding insights from the South African mix to the UK studies on disciplinary diversity.	Selection bias
2. The Economic Mapping of the Cultural and Creative Industries in South Africa 2022	SACO. 2022 [13,36], SA, n = N/A	N/A	The purpose of a mapping study is to provide reliable data about the economic value of CCIs in South Africa, using indicators like GDP and growth, impact, provincial GVA, etc. This data can then be used to inform the	• Impact of CCIs • Cultural Employment and Transformation • International Trade • Provincial Profiles • Historical Context	2020 indicators: • Sector directly contributed 2.97% of SA's GDP • Largest domain is Design and Creative Services • Sector accounts for 6% of all employment in SA • Exports made up 0.37% of the value of all South Africa's commodity exports - affected by Covid	Publication bias

Name of paper/book/article	Study, Setting and Sample size	Study Design	Summary of Intervention	Building Blocks Included	Summary of Findings	Risk of Bias Assessment
			development of the sector as well as policy.			
3. Cultural and Creative Industries (CCI) Masterplan	The dtic. 2022 [47], SA, *n* = N/A	N/A	The strategy's key focus is in growing an innovative & sustainable CCI with the purpose being to outline key interventions that cut across all relevant stakeholders (public and private sector) – with the ultimate aim being decent job creation in SA.	• Plan • CCI • Creative economy • Sustainability • Inclusive • Key interventions • Job creation	Strategic sector interventions: • Supply-side: build the talent • Market efficiency: create a conducive environment including building SEZs • Demand-side: push local and foreign demand and stimulate creativity All these interventions are underscored by transformation across the sector	N/A
4. Growing the creative economy of South Africa: How creative hubs in Johannesburg	McGurk, 2019 [3], Johannesburg, SA, *n* = 12	Constructivist Grounded Theory method	The paper suggests a focus on cultivating and supporting start-up creative businesses, thereby	• The creative economy • Youth • Hubs • South Africa	• An innovation audit showed that the strategy and processes of creative hubs' own growth, sustainability and	Researcher and Selection bias

Name of paper/book/article	Study, Setting and Sample size	Study Design	Summary of Intervention	Building Blocks Included	Summary of Findings	Risk of Bias Assessment
can develop, support and grow start-up creative businesses			growing the creative economy in SA – specifically in Johannesburg through creative hubs	• Johannesburg • Creatives • Start-up businesses	communication of their value was limited.	
5. Realising the Economy of the Imagination and the Creative and Cultural Industries: Options for South Africa	SACO. (2016) [i-ii], SA, n = N/A	N/A	The article discusses the potential the sector has in spite of the challenges it faces	• CCIs • Economy • Policy support and incentives • Industrial clusters • CCI Cluster development • Innovation	• The findings emphasise how important it is to recognise the unique attributes of SA's CCIs, incorporating cluster development into policy and nourishing cooperation across government in order to allow the sector to reach its full potential. • The findings also stress the need for a strategic approach that leverages creativity and innovation in economic and industrial policy	

Name of paper/book/article	Study, Setting and Sample size	Study Design	Summary of Intervention	Building Blocks Included	Summary of Findings	Risk of Bias Assessment
8. Special Economic Zones	UN- iLibrary, 2019 [12, 23, 36], Worldwide, n=N/A	Desktop study	• The universe of SEZs • The regulatory and institutional frameworks for SEZs • Performance and impact of SEZs • Towards a new generation of SEZs	• SEZs	**The SEZ universe** • 75% of developing economies and almost 100% of transition economies use SEZs • Over 200 established SEZs on the African continent, with a growing appeal **SEZ regulation & institutional frameworks** • SEZ Acts are key for SEZ regulation • The regulatory framework deals with varied policy • Government, SEZ authority, Zone developer, Zone operator, Zone user are main stakeholders in SEZ regimes	Researcher & Publication bias

The paper by McGurk (2019) influenced the choice of this paper's Research Design. The paper used the Constructivist Grounded Theory (CGT) research design, explained in the next section.

3. Methodology

The overall research approach to the dissertation was the Constructivist Grounded Theory (CGT). This approach focuses on merging pre-existing literature and qualitative data coding to develop new theories rather than from pre-existing theoretical frameworks. The aim with this approach is to understand a socio-economic phenomenon and then develop an appropriate solution in the form of a framework, after interpreting the data (McGurk, 2019).

The section below borrows from Denscombe (2021) in seeking to describe the research methods undertaken to collect the data. The following three items are covered:

a) A description of how the research was conducted
b) A justification of these procedures
c) Research Ethics

3.1 How the research was conducted

First, a literature review was undertaken to collect and synthesise secondary data on the sector. A review of documents including sector policies compiled by local and international authors, economists, researchers, research institutions, national and provincial government departments, consultancy groups/committees and other relevant documents was undertaken to determine areas of alignment or misalignment.

Second, semi-structured interviews were conducted to garner primary data that would either differ with or reinforce the findings from the literature review.

3.1.1 Sampling Strategy

With regard to the sampling, the aim was to achieve an exploratory sample to probe the topic under investigation, which has been relatively unexplored, and to garner insights and information with the aim of discovering new ideas (Denscombe, 2021: p.86). A non-probability sampling technique was used as there was an element of discretion or choice sought on the researcher’s part because the questions posed in the study needed a specific group of key informants/experts with the right experience to provide the insights. Non-probability sampling can be used where the aim of the research is to produce an exploratory sample rather than a representative cross-section of the population (Denscombe, 2021: p.88).

Two stakeholder groups, consisting of 23 people were initially contacted, who included 16 sector experts, as well as seven CCI businesses from different sub-sectors of the CCI. The final sample consisted of 13 participants, seven of whom were sector experts and six were CCI businesses. The other potential participants either responded late or not at all.

3.1.2 Data collection

With regard to data collection, an interview schedule was designed as the data collection instrument, asking specific questions that aimed to identify in-depth information from the selected participants. These questions probed the participant's understanding of the sector from an economic point of view, the challenges and strengths of the sector, and their understanding of cluster development. The questions also probed if an SEZ was a feasible concept for CCI clusters, and the ways in which innovation and/or technology could be fused in CCI clusters/businesses (see Appendix K). A question around industrialisation of the sector was asked, but although an important question, it was left out of the study as it was not going to serve the research objectives. The questionnaire was designed to answer the research question/s, meet the set objectives and provide rich data on the research topic.

3.1.3 Interviews

A total of 13 in-depth semi-structured interviews were thus conducted in July 2023 over a three-week period. As the research team had a list of issues to be addressed and questions to ask and probe in-depth, the team was prepared to be flexible. Interviews were conducted online in English, using either the Zoom or Google Meet platform. One of the interviews was conducted via WhatsApp voice notes as the participant had time constraints. Most of the participants are based in Gauteng, with only one individual based in the Eastern Cape Province.

Most of the participants showed an interest in the interviews, although most of the interviews took longer than anticipated due to the additional probing. The data collection process was enlightening, with most of the participants being excited about the research as well as the emerging concepts. All individuals were informed about the purpose of the study and were asked about their voluntary participation. They were also assured that their personal details would be kept confidential, and the data would be aggregated and anonymised. Codes where assigned to the participants as follows: Sector experts where coded Exp 1-7 and businesses where coded Bus 1-6, see Appendix J.

3.1.4 Choice and design of a coding approach to data analysis

Step 1: Determining an appropriate coding strategy

The chosen coding strategy was the Descriptive-Focused Coding Strategy because the research sought to describe and make sense of the emerging data. Below is a guide on how the researcher derived at this coding strategy.

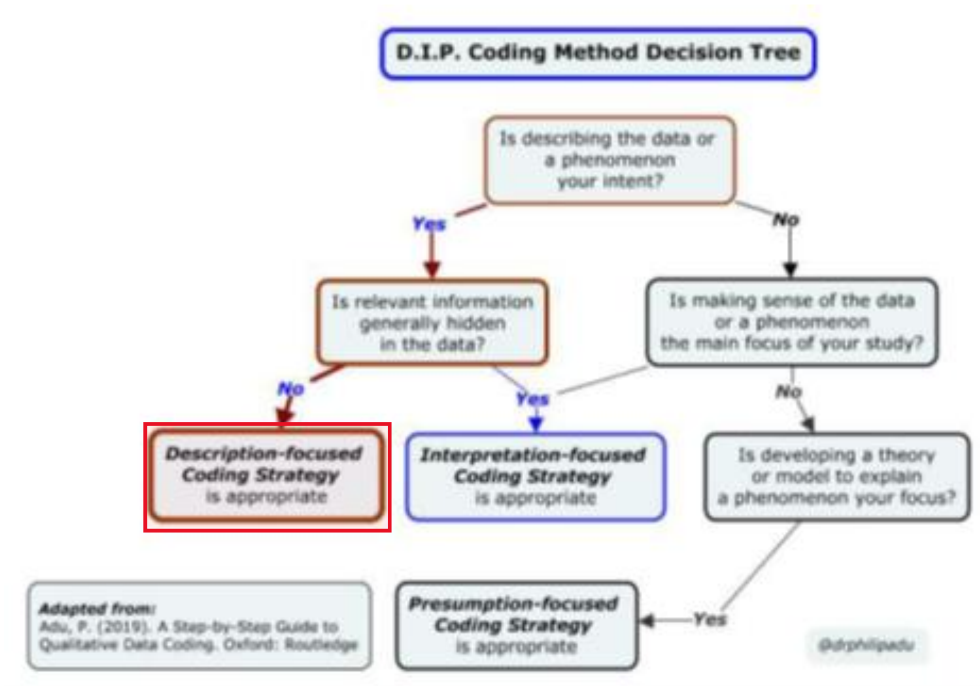

Figure 4: D.I.P (Descriptive, Interpretive, Presumption) coding method decision Tree

Source: (Research Gate, 2021 – Phillip Adu)

Step 2: Creating an anchor code for each research question

Qualitative data coding analysis resulted in anchor codes being created. These related to the draft research objectives and questions. Each anchor code was aligned to the overall research questions (see Appendix M).

Step 3: Identifying the relevant excerpts, assigning a code or connect to existing code (see Appendix B - "Coded transcripts")

Step 4: Categorising the codes.

This entailed the below steps:

a) Compiling the codes (see Appendix C – "Compiled Codes")
b) Arranging codes alphabetically for the two stakeholder groups (see Appendix D – "Coding")
c) Consolidating codes according to a colour (counting them in parenthesis)- (see Appendix D – "Coding")
d) Sorting codes (see Appendix E - "Sorted codes")
e) Labelling codes (see Appendix F - "Labelled codes")
f) Presenting findings (see section 4 and Appendix G – "Key findings presented")

To summarise the above, the data emerging from interviews was transcribed, coded and analysed using Qualitative Data Coding Analysis to derive at key themes emerging from each of the questions. In cases where further clarity was sought from the participants, follow-up interviews were conducted between July and September 2023 in the form of emails and WhatsApp communication. The themes emerging from the coded data were then clustered according to their similarity and presented (see Appendix G). The results of the two stakeholder groups were then compared with each other to identify similarities and differences, and this was followed by a comparison with the literature review findings.

3.2 Justifying the procedures

In terms of the time allocated to the research (i.e., eight months,) as well as the limited length of the words required for the research (i.e., 10 000), it was felt that the procedures used were reasonable.

The data collection methods in the form of document review as well as interviews used were reliable and appropriate for collecting the type of data collected. The researcher had access to internal organisational documents as well as people that other researchers might not have had access to.

It is felt that the document review and interview schedule developed, which sought to address the questions underpinning the research, are likely to produce valid data. The literature review was meant to help in triangulating the data from the in-depth interviews to ensure validity and reliability of the data.

3.3 Research Ethics

According to Tobin (2019), ethics allude to the rules that must be followed by the researcher in relation to the participants.

The methods used to collect the data conformed with all ethical standards set by the University, and the researcher was committed to upholding all ethical guidelines. Therefore, the researcher needed to obtain informed consent from all participants in the study – this was detailed as follows:

a) Voluntary participation: Their participation in the research was voluntary, and they were free to withdraw from this study at any time without any consequences
b) Confidentiality and anonymity: All information supplied during the research was and will be held in confidence. Names do not appear in any report or publication of the research and only the research team and the supervisor have access to this information. All responses were aggregated or anonymised for use in the report. Full responsibility was taken for the data provided as well as who will be allowed to have access to the data.
c) The participants agreed to the interview being audio-recorded and were allowed to have the transcription shared with them should they wish to
d) The participants had the right to ask questions at any time during the study. These may be directed to the researcher whose contact details were provided (see Appendices H & I – Signed consent forms).

Before the interviews started, the participants were informed that they were not obligated to answer any questions they were not comfortable answering.

4. Key findings[22]

Also see Figure 29

4.1 Summary of key findings for Stakeholder 1 Group (Sector experts)[23]

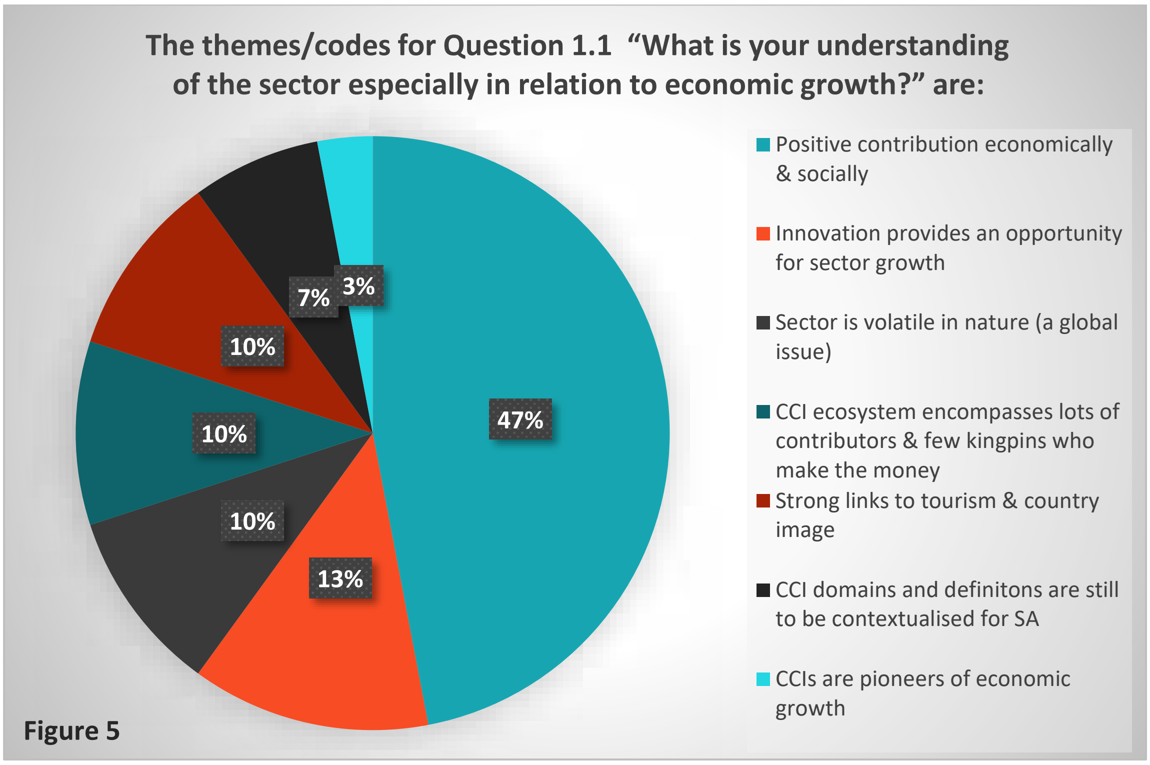

Figure 5

[22]The questions are numbered to align with categorisation of questions between the different stakeholder groups in Appendix G - "Key findings presented". Where numbering does not seem to be chronological - it is intended that way to align to Appendix G

[23] Due to the frequency of responses received, percentages where used instead of number of respondents. For example a respondent would respond or expand on question 1.1 when responding to question 1.2 and then both responses would be captured.

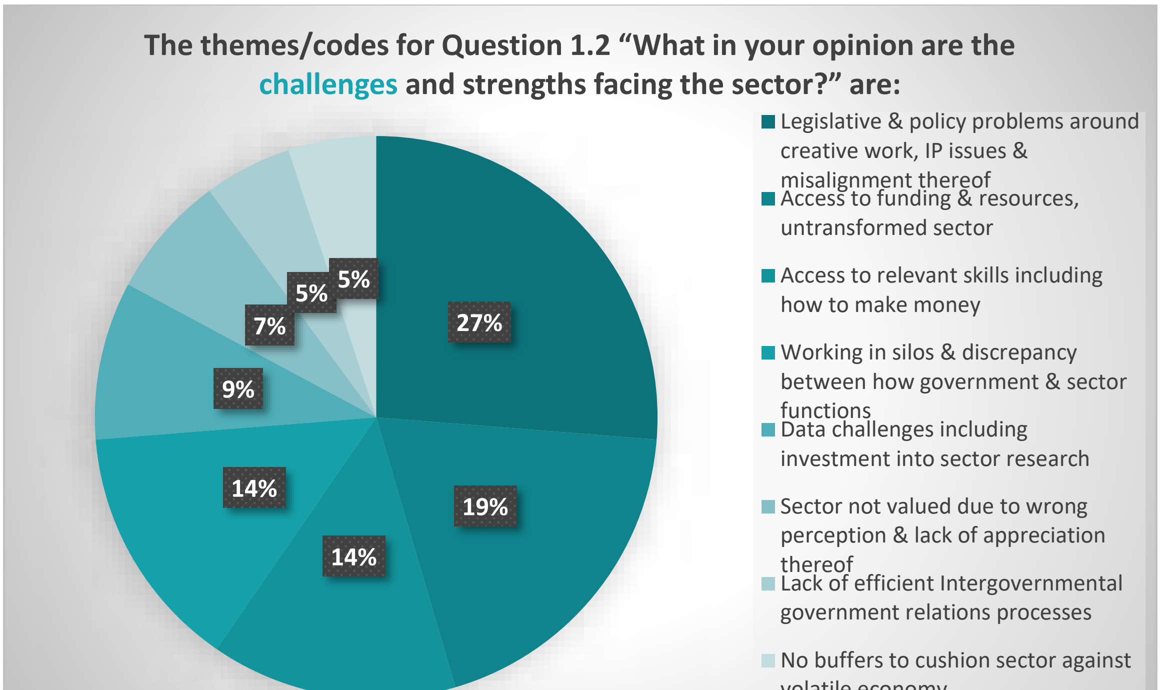

Figure 6

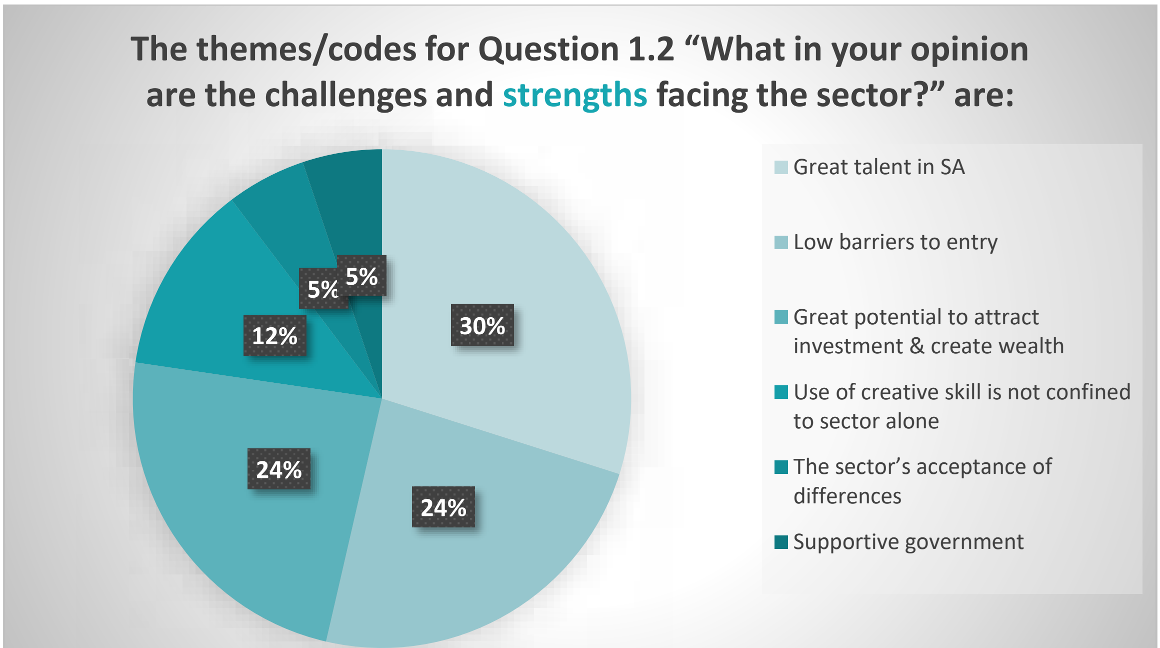

Figure 7

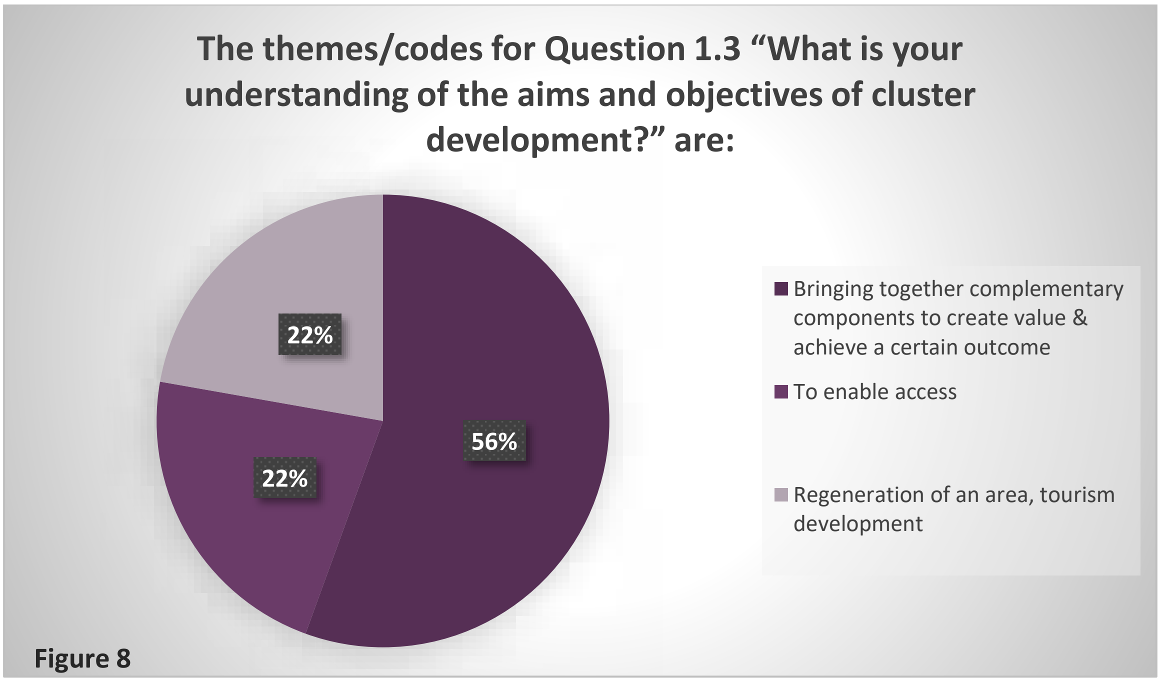

Figure 8

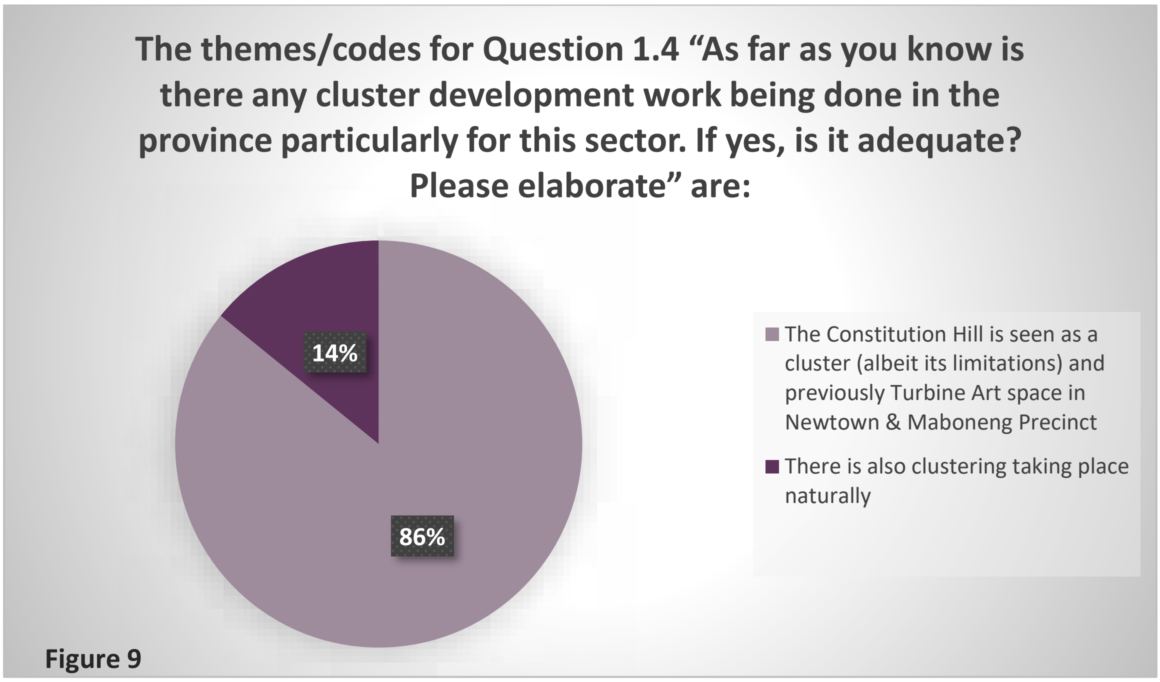

Figure 9

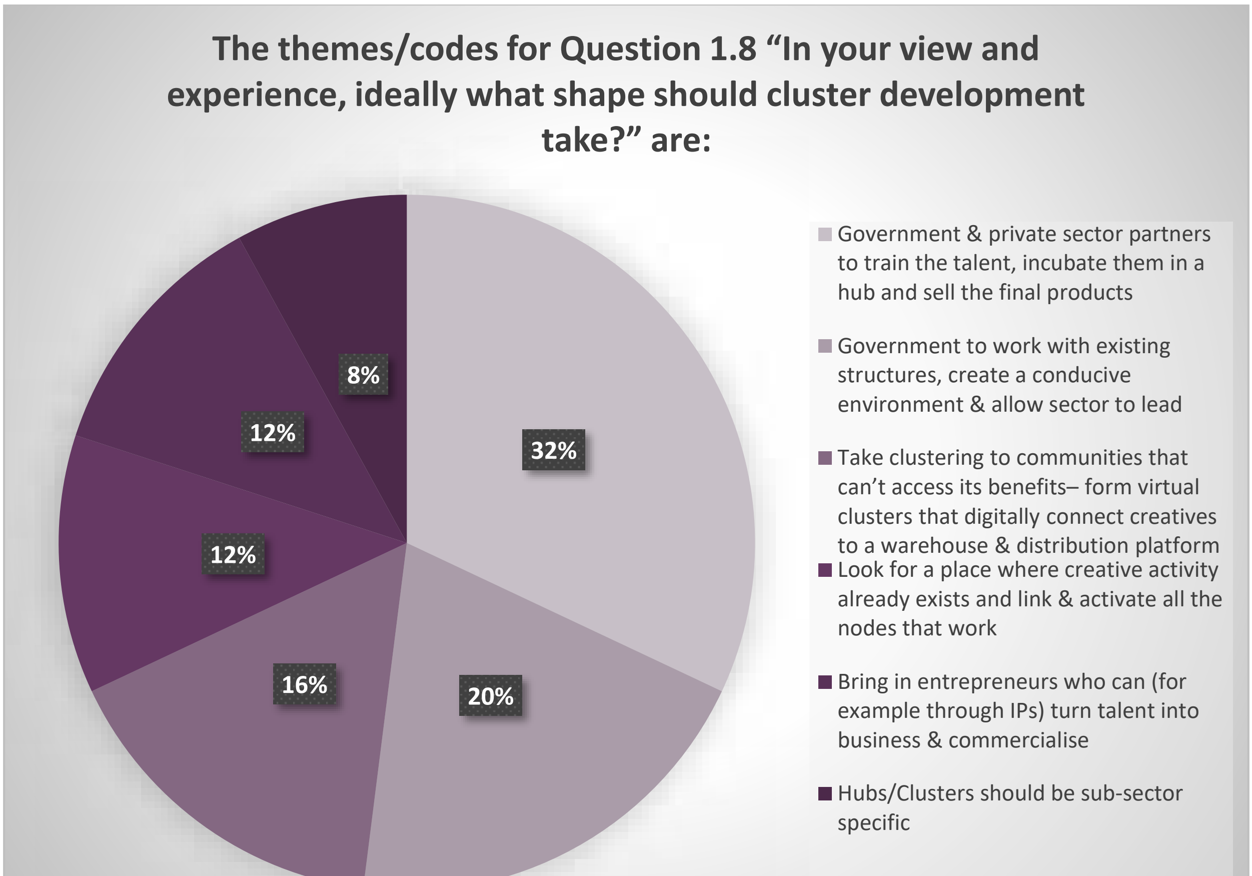
The themes/codes for Question 1.8 “In your view and experience, ideally what shape should cluster development take?” are:
32%
20%
16%
12%
12%
8%
Government & private sector partners to train the talent, incubate them in a hub and sell the final products
Government to work with existing structures, create a conducive environment & allow sector to lead
Take clustering to communities that can’t access its benefits– form virtual clusters that digitally connect creatives to a warehouse & distribution platform
Look for a place where creative activity already exists and link & activate all the nodes that work
Bring in entrepreneurs who can (for example through IPs) turn talent into business & commercialise
Hubs/Clusters should be sub-sector specific

Figure 10

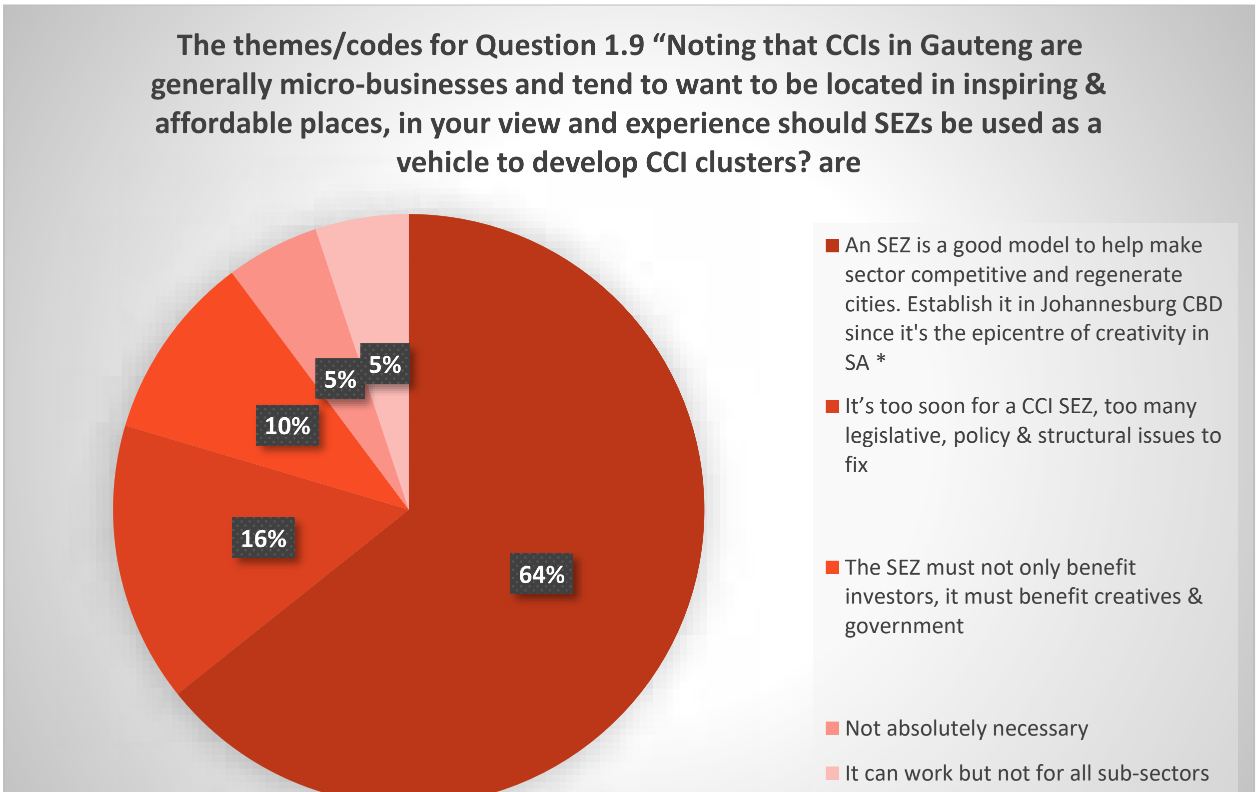

Figure 11

*Exp 5's company is trying to set up an innovation hub city that is anchored around education and creative industries for one of the mining companies with the assets they have in the Joburg CBD, using global models of developing cities. It will partner with other universities and the creative industry. The company is also trying to advocate for the CBD to be declared an SEZ.

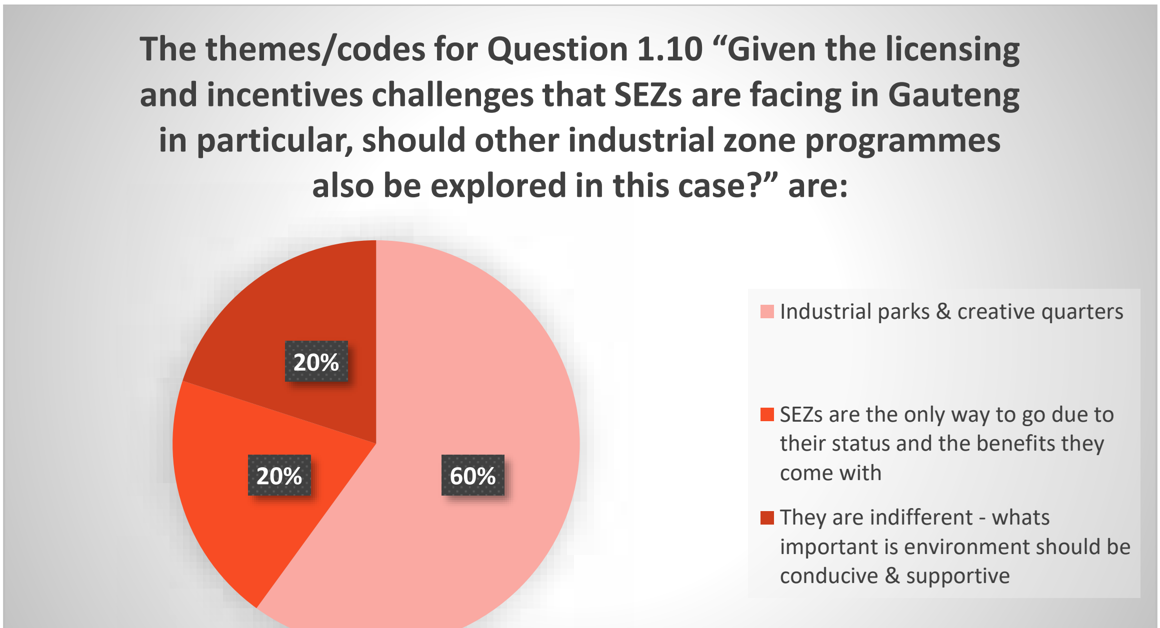

Figure 12

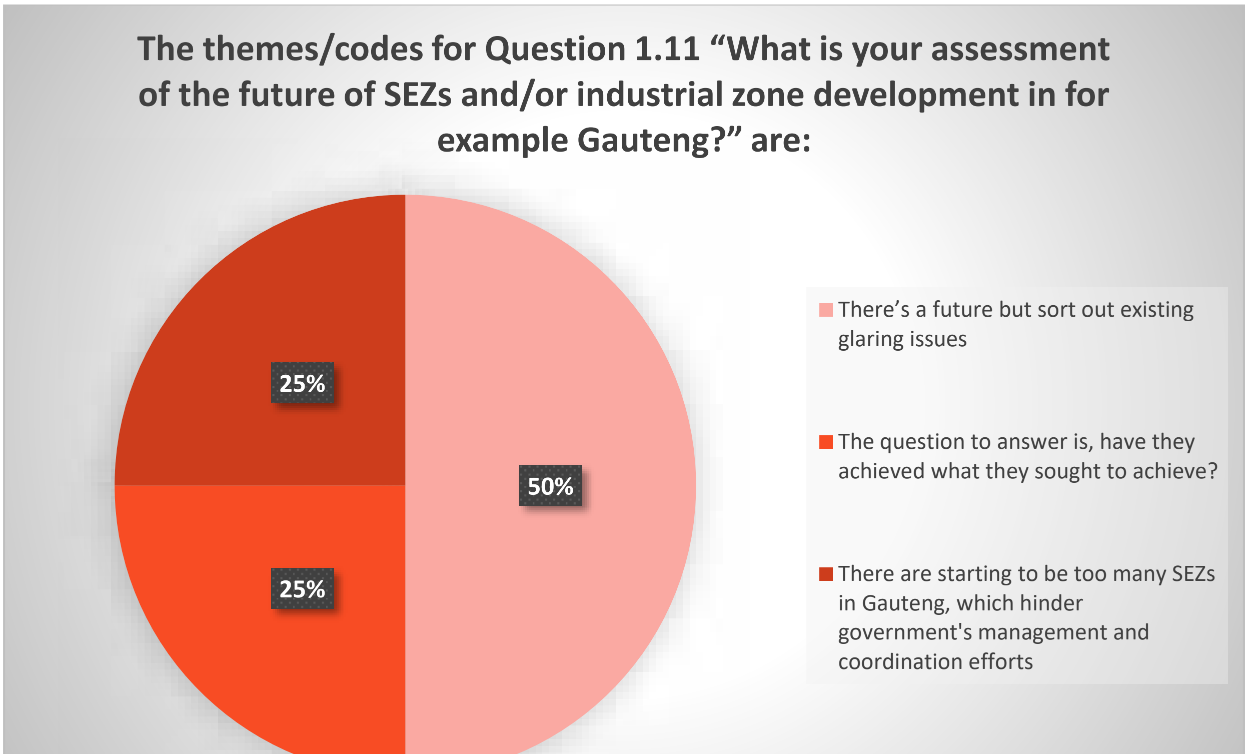
The themes/codes for Question 1.11 “What is your assessment of the future of SEZs and/or industrial zone development in for example Gauteng?” are:
25%
50%
25%
There’s a future but sort out existing glaring issues
The question to answer is, have they achieved what they sought to achieve?
There are starting to be too many SEZs in Gauteng, which hinder government's management and coordination efforts

Figure 13

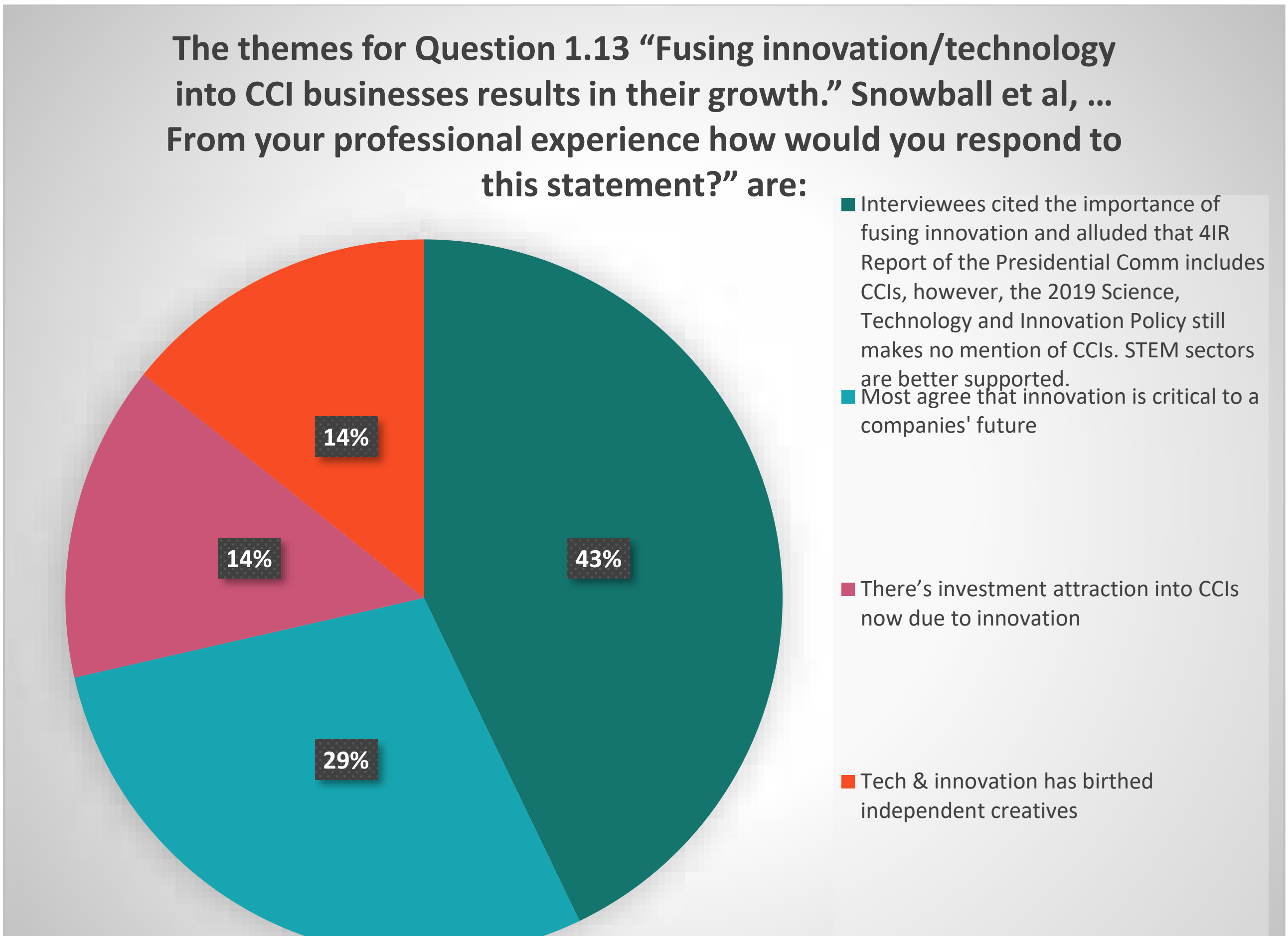

Figure 14

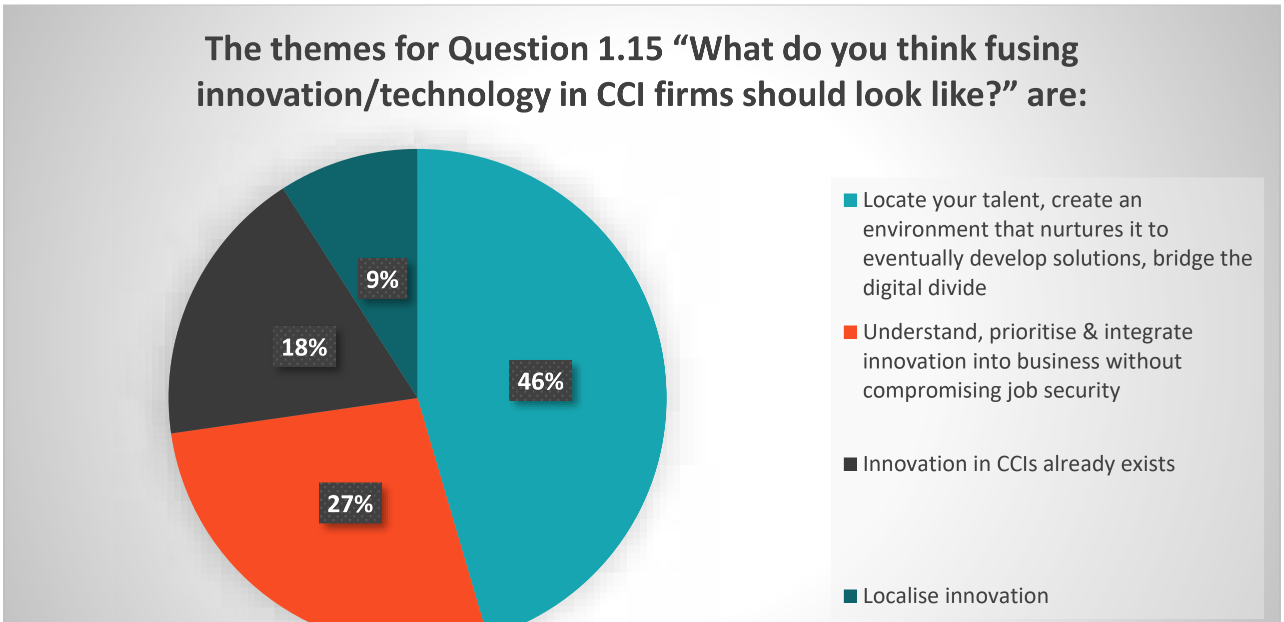

Figure 15

4.2 Summary of key findings for Stakeholder 2 Group (CCI businesses)[24]

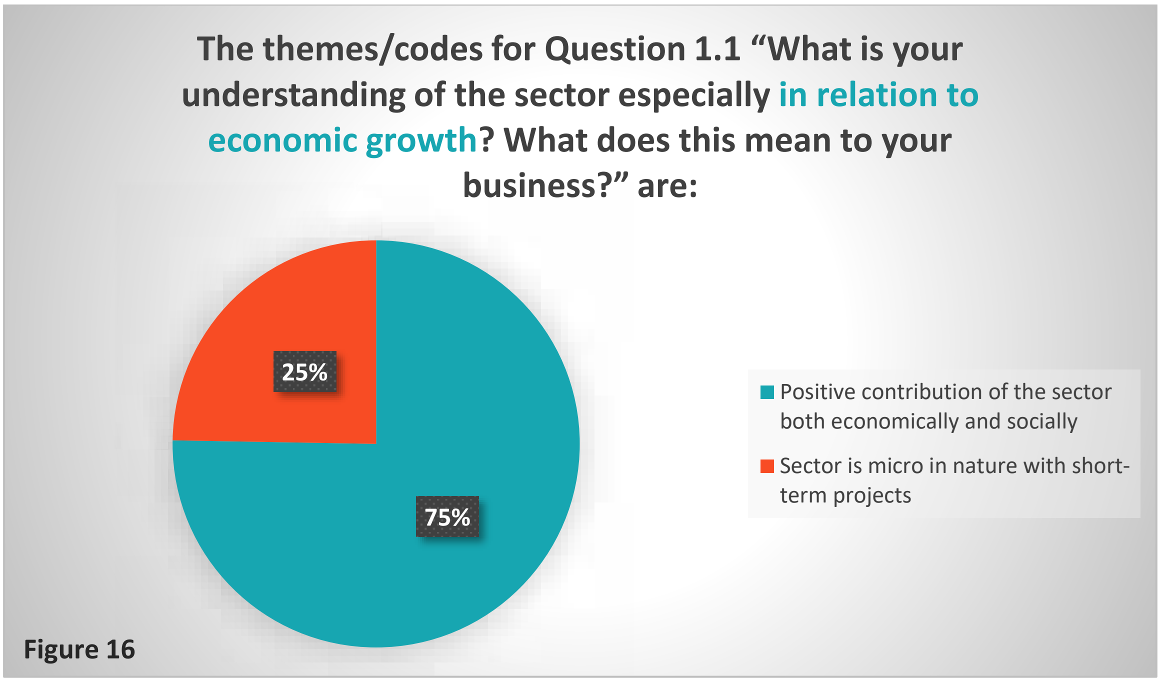

Figure 16

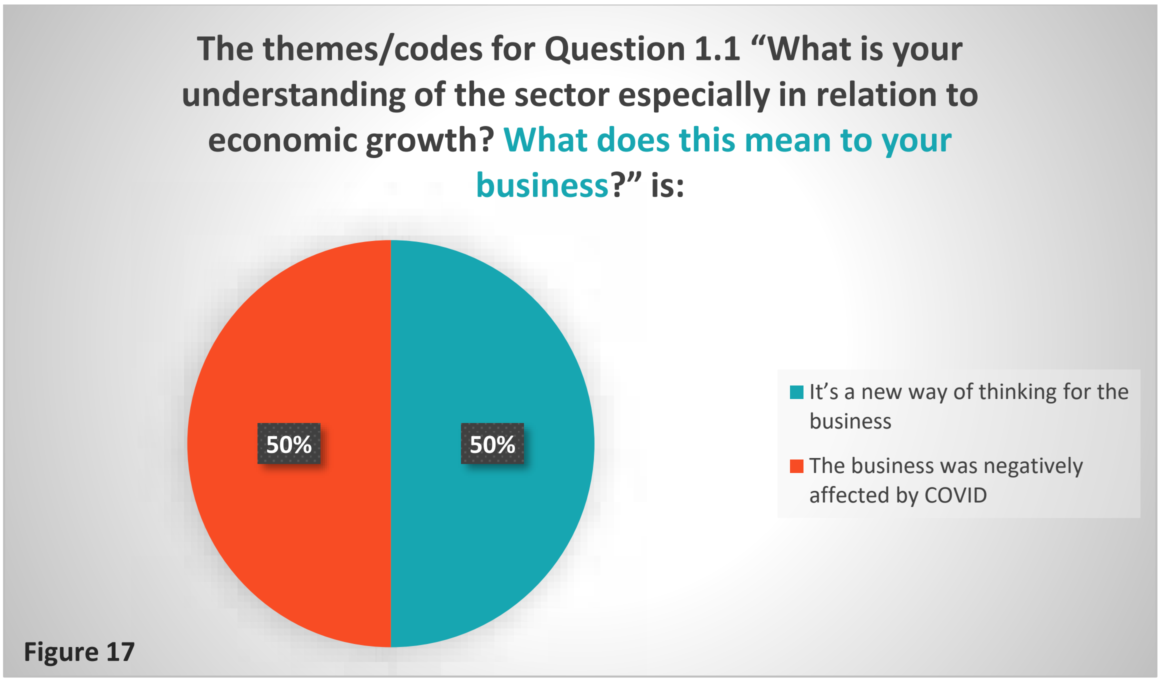

Figure 17

[24] Ibid 23

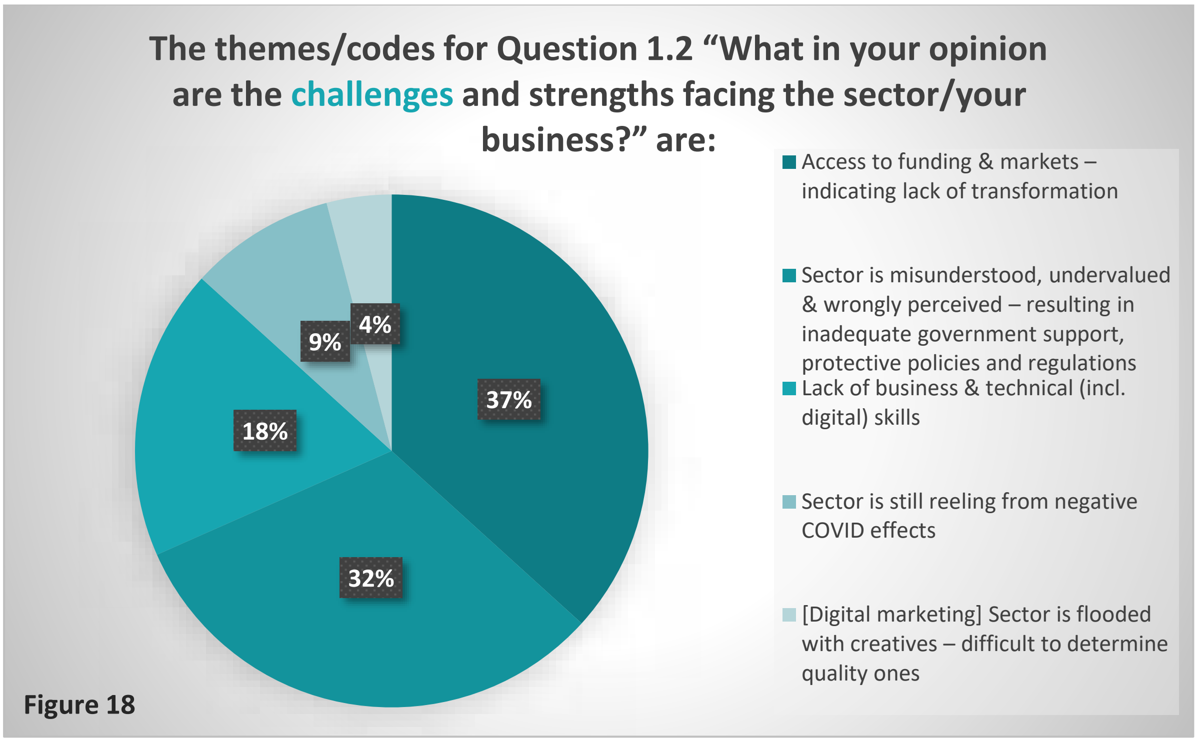

Figure 18

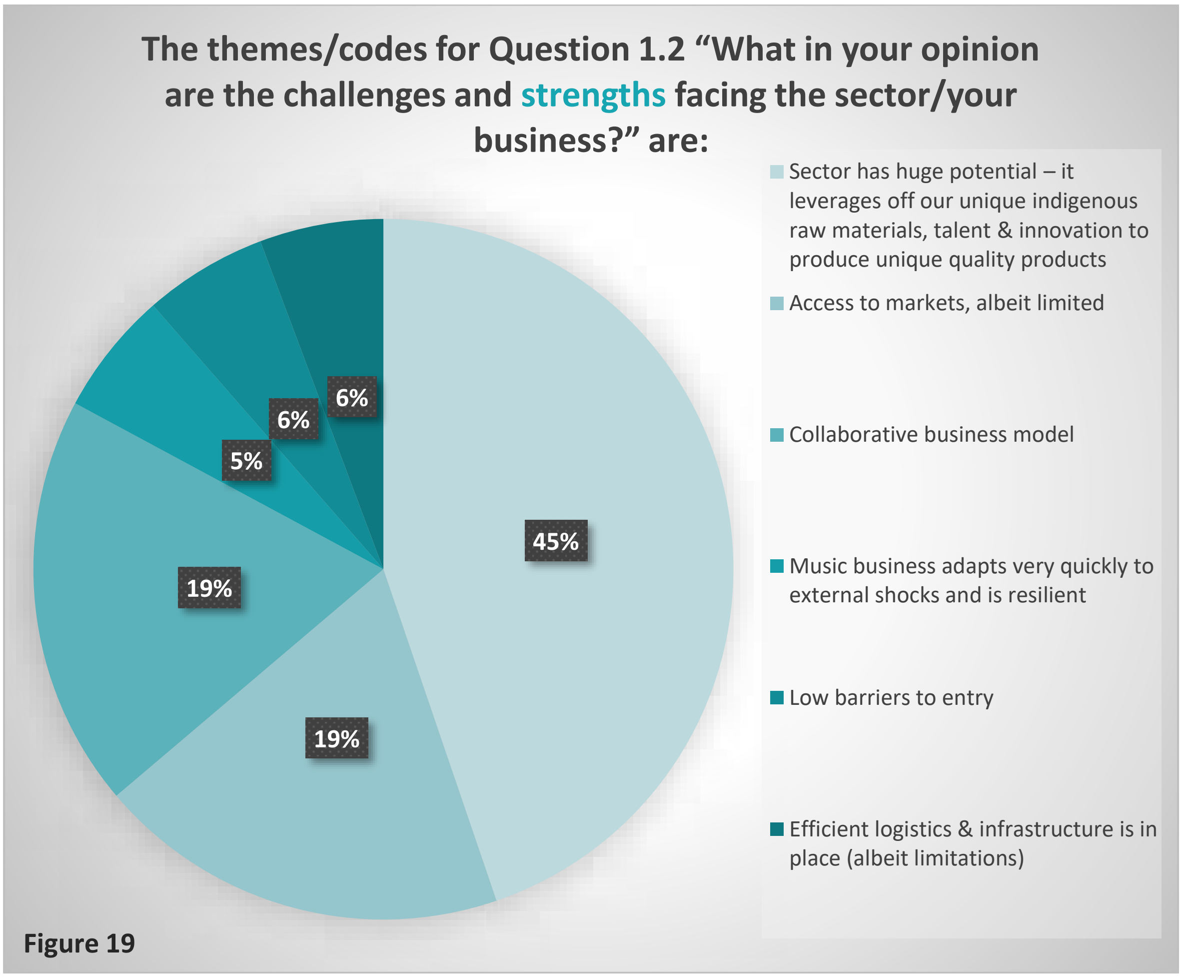

Figure 19

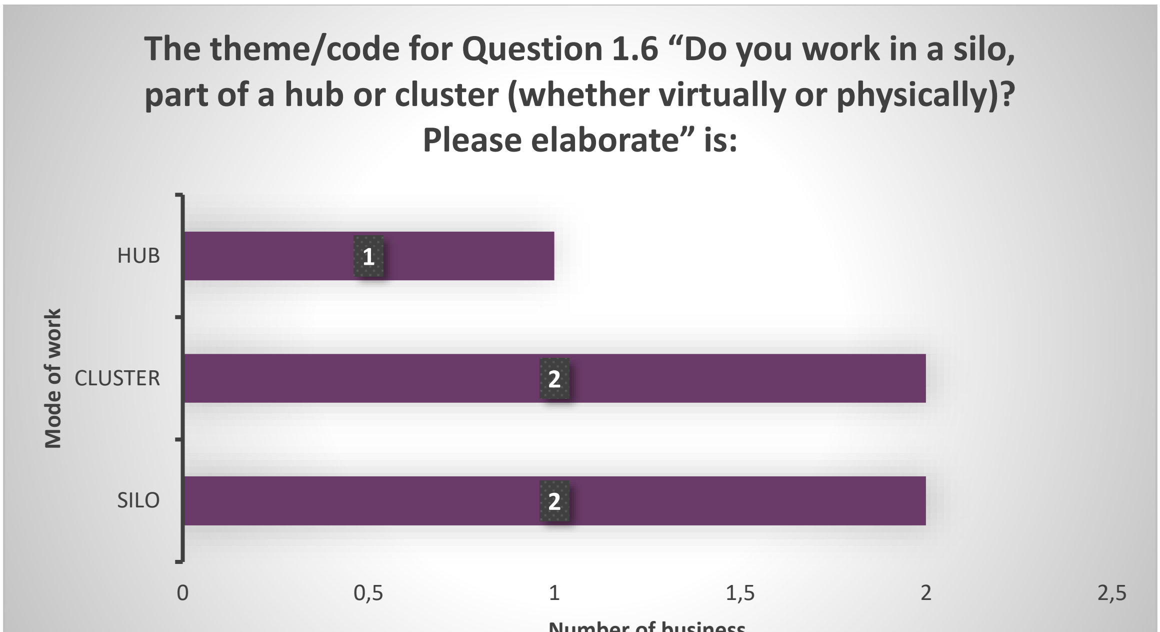

Figure 20

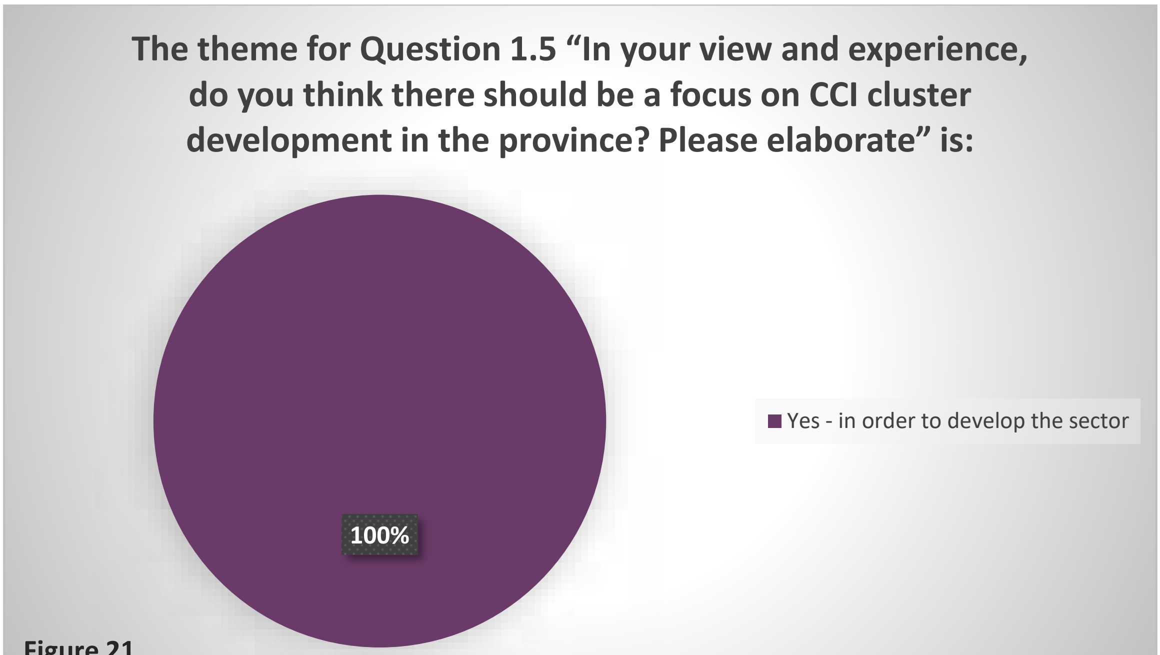

Figure 21

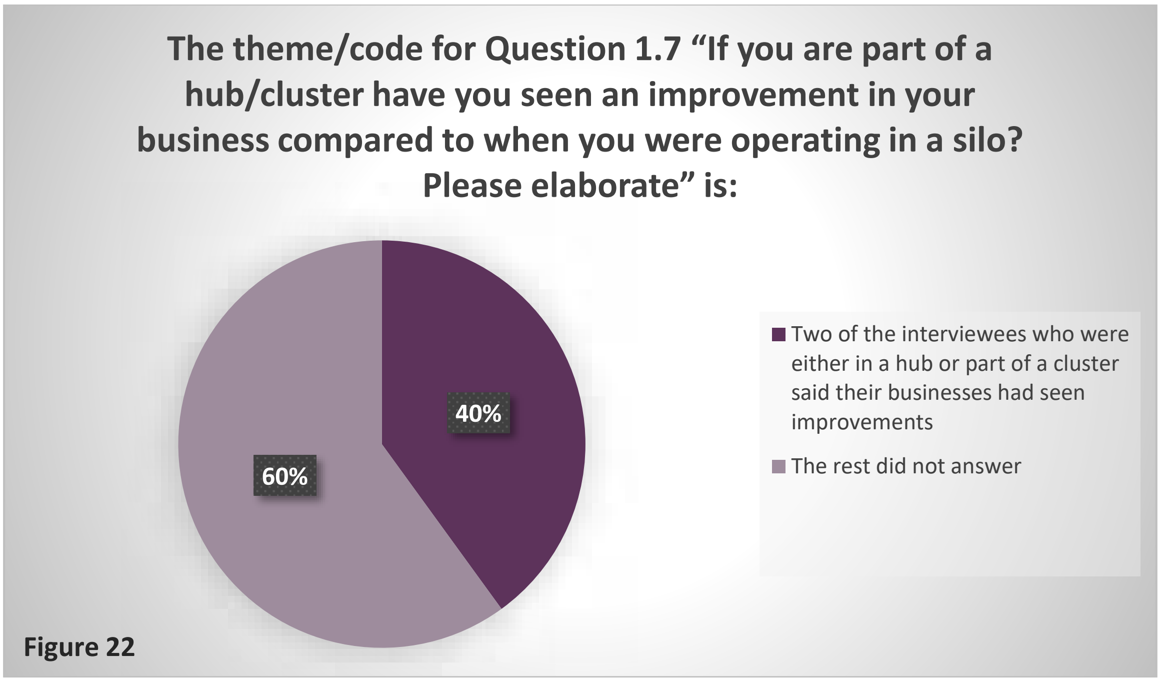

Figure 22

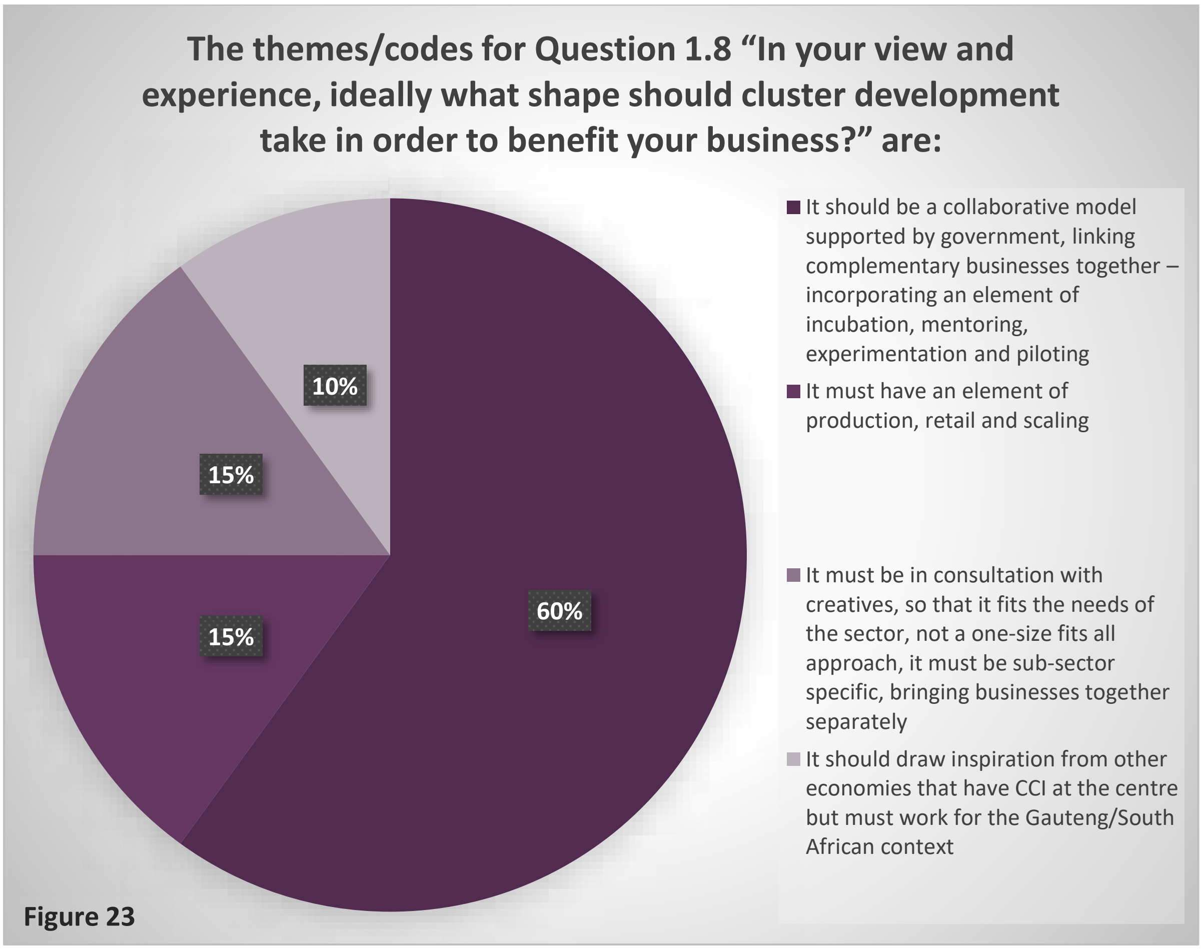

Figure 23

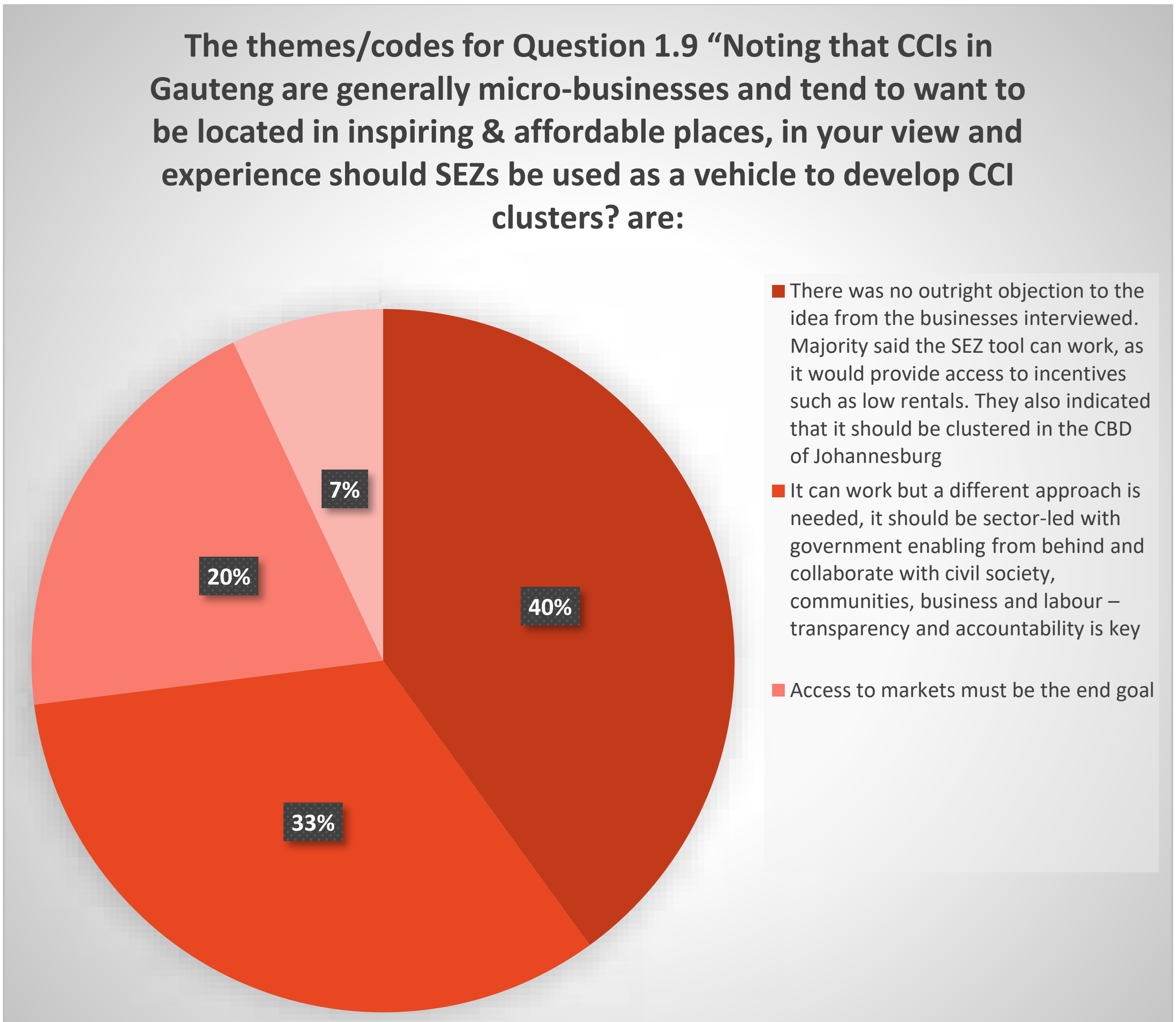
The themes/codes for Question 1.9 “Noting that CCIs in Gauteng are generally micro-businesses and tend to want to be located in inspiring & affordable places, in your view and experience should SEZs be used as a vehicle to develop CCI clusters? are:
40%
33%
20%
7%
There was no outright objection to the idea from the businesses interviewed. Majority said the SEZ tool can work, as it would provide access to incentives such as low rentals. They also indicated that it should be clustered in the CBD of Johannesburg
It can work but a different approach is needed, it should be sector-led with government enabling from behind and collaborate with civil society, communities, business and labour – transparency and accountability is key
Access to markets must be the end goal

Figure 24

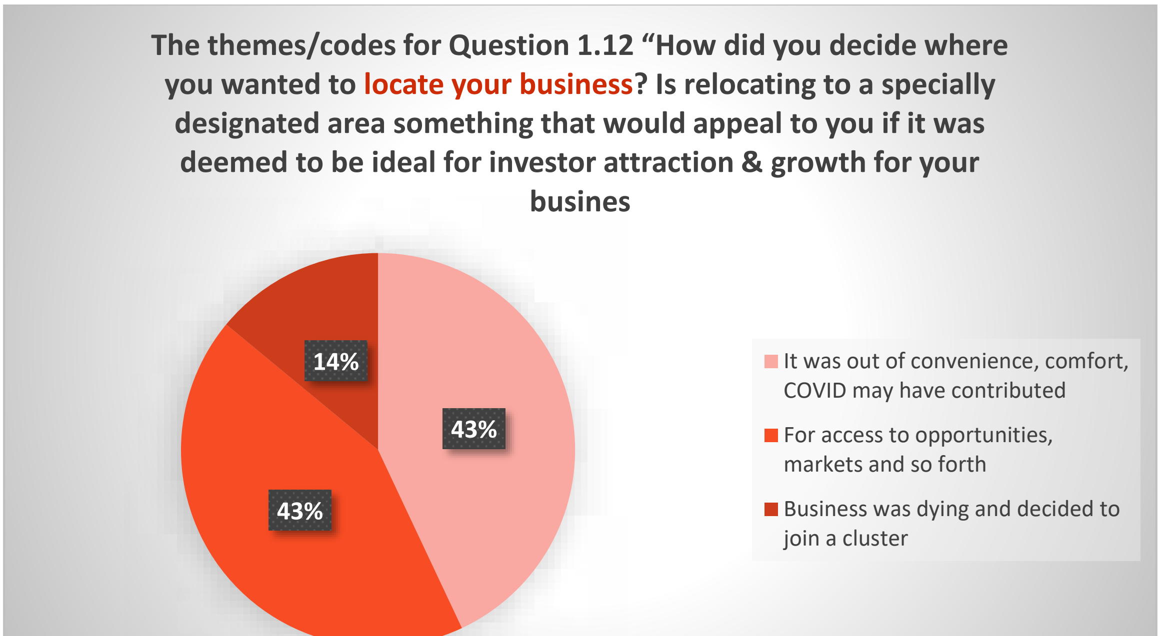

Figure 25

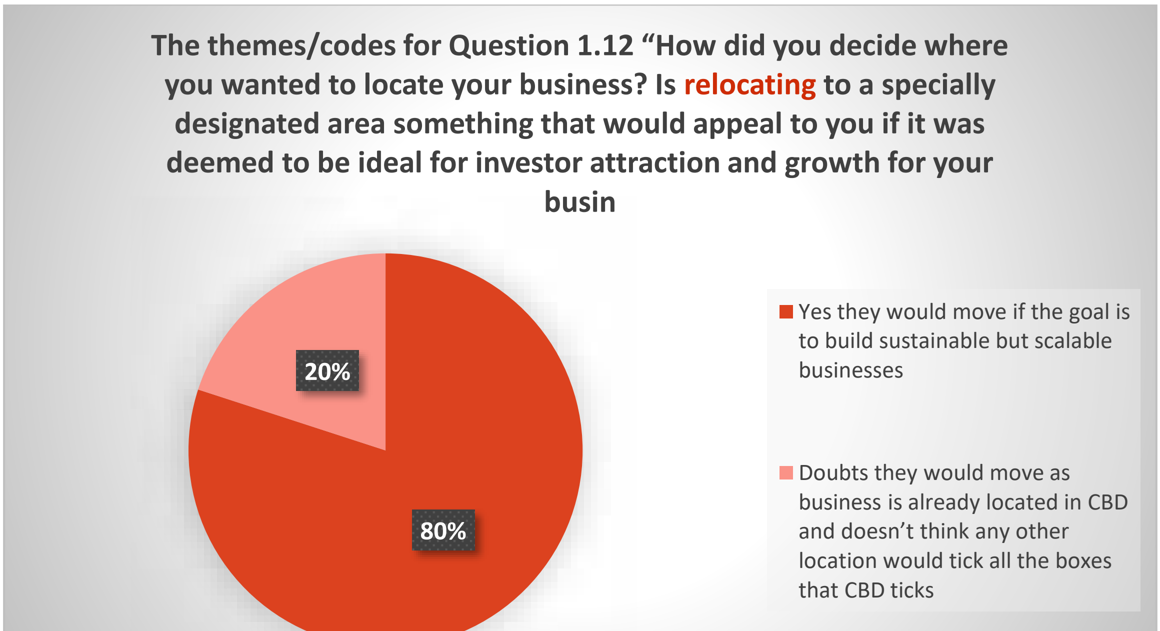

Figure 26

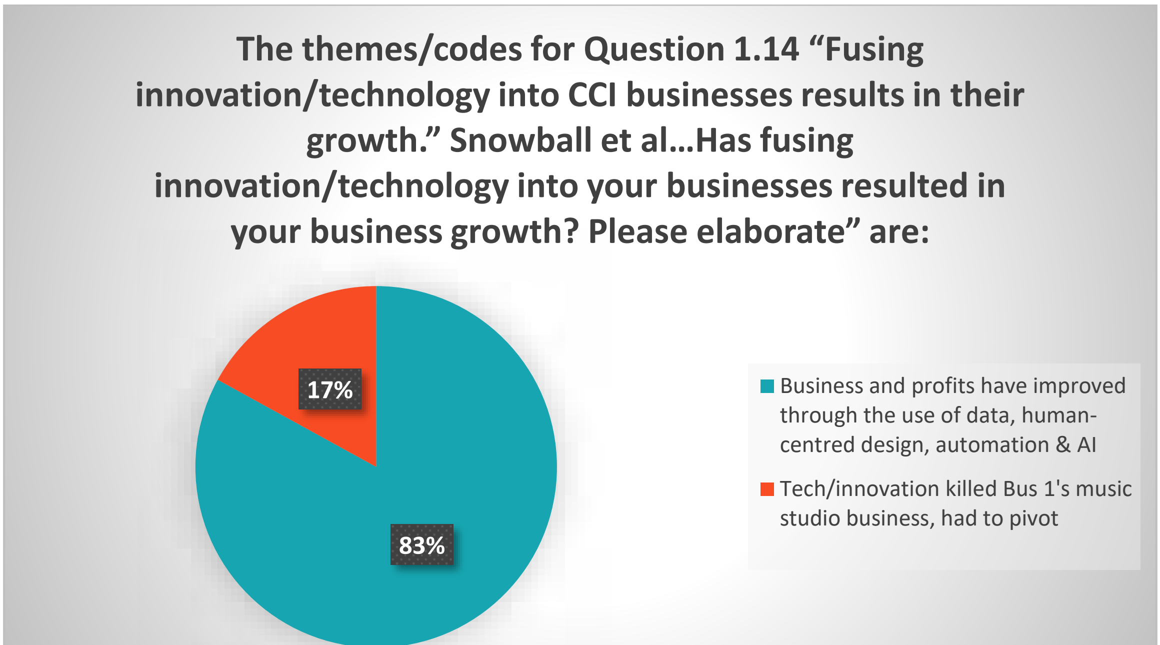

Figure 27

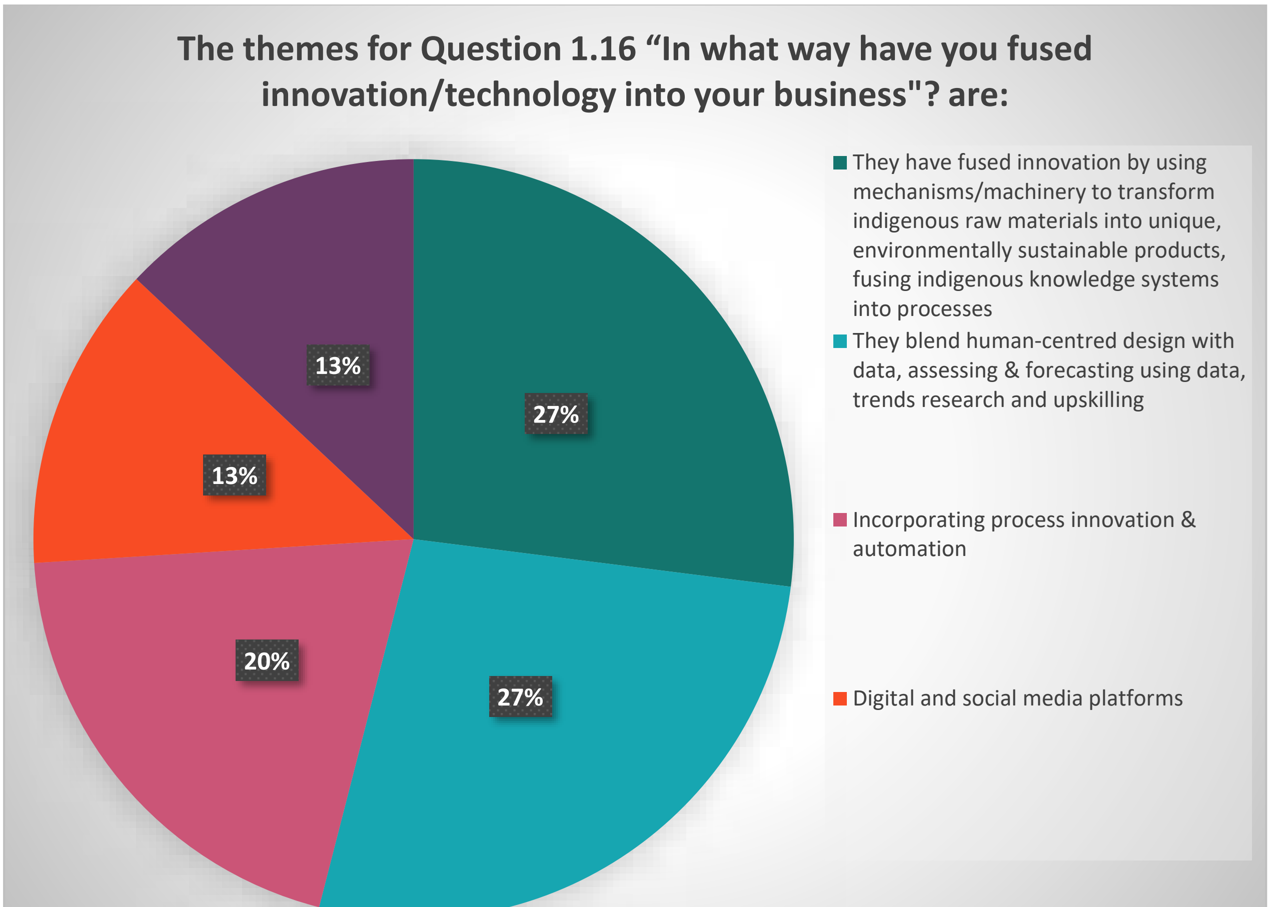

Figure 28

4.3 An aerial presentation of key findings

The below figure is a summary of the key findings from the interviews undertaken with the two stakeholder groups. A comparison of similarities and differences in the data was also done.

Figure 29: Key findings – Question 1.1-1.8 (Also see Appendix G)

KEY FINDINGS THEMES - Appendix G - (Questions in red are specific to CCI Businesses)									
Stakeholder Group	1.1 What is your understanding of the sector especially in relation to economic growth (what does this mean to your business)	1.2 What in your opinion are the challenges and strengths facing the sector/your business?		1.3 What is your understanding of the aims and objectives of cluster development?	1.4 As far as you know is there any cluster development work being done in the province particularly for this sector. If yes, is it adequate? Please elaborate	1.5 In your view and experience, do you think there should be a focus on CCI cluster development in the province. Please elaborate	1.6 Do you work in a silo, part of a hub or cluster (whether virtually or physically)? Please elaborate	1.7 If you are part of a hub/cluster have you seen an improvement in your business compared to when you were operating in a silo? Please elaborate	1.8 In your view and experience, ideally what shape should cluster development take (in order to benefit your business)?
		Challenges	Strengths						
Experts	Positive contribution of the sector both economically and socially Innovation has contributed to the growth of the sector Its volatile in nature (global issue) CCI Ecosystem consists of lots of micro businesses (contributors) on short-term contracts (gig jobs) & few kingpins who make & control the money in the sector Strong linkages to tourism & country image Sector uses UNESCO's categorisation & definition, sector is still in the process of defining it to suit the country's context	The legislative and policy issues around creative workers, copyright (intellectual property - IP) & performers rights & the misalignment thereof Access to funding & resources, untransformed sector Working in silos & discrepancy between how government & sector functions Data challenges incl. investment into sector research Sector undervalued due to wrong perception & lack of appreciation thereof Lack of efficient IGR (Intergovernmental Relations) processes No buffers to cusion sector against shocks such as during Covid	The country has great talent Low barriers to entry A great potential to attract investment & create wealth Use of creative skills is not confined to the sector alone Sector's acceptance of difference of opinions, worldviews etc **(1)** **(1 means single response)**	Bringing together different (but complementary) components to create value and achieve a certain outcome Enables access for both business & government Regeneration of an area, tourism development	The Constitution Hill currently seen as a cluster (albeit its limitations) and previously Turbine Art space in Newtown & Maboneng Precinct Natural clustering taking place **(1)**	N/A	N/A	N/A	Government & private sector partners together, trains the talent, incubates them with retail as the end goal Government to work with existing structures, create a conducive environment & allow the sector to lead Take clustering to communities that cannot acces its benefits - form virtual clusters that digitally connects creatives to a warehouse & distribution platform Look for a place where creative activity already exists & link and activate all the nodes that work Bring in entrepreneurs who can (for example through IP) turn talent into business & commercialise Clusters should be sub-sector specific

KEY FINDINGS THEMES - Appendix G - (Questions in red are specific to CCI Businesses)

Stakeholder Group	1.1 What is your understanding of the sector especially in relation to economic growth (what does this mean to your business)	1.2 What in your opinion are the challenges and strengths facing the sector/your business?		1.3 What is your understanding of the aims and objectives of cluster development?	1.4 As far as you know is there any cluster development work being done in the province particularly for this sector. If yes, is it adequate? Please elaborate	1.5 In your view and experience, do you think there should be a focus on CCI cluster development in the province. Please elaborate	1.6 Do you work in a silo, part of a hub or cluster (whether virtually or physically)? Please elaborate	1.7 If you are part of a hub/cluster have you seen an improvement in your business compared to when you were operating in a silo? Please elaborate	1.8 In your view and experience, ideally what shape should cluster development take (in order to benefit your business)?
		Challenges	Strengths						
Businesses	Positive contribution of the sector both economically and socially Sector is micro in nature with short-term projects For their business its a new way of thinking Bus 3's business was negatively affected by COVID	Access to funding & markets - indicating lack of transformation Sector is misunderstood, undervalued & wrongly perceived - resulting in a lack of gov support, protective policies & regulation Lack of business, technical (including digital) skills Business negatively affected by COVID [Digital marketing] Sector is flooded with creatives - difficult to determine quality ones	Sector has huge potential – can leverage off the unique indigenous raw materials,talent & innovation to produce unique quality products Access to markets, albeit limited Collaborative business model Music business in particular is resilient to external shocks such as COVID and can adapt quickly (1) Low barriers to entry (1) Efficient logistics & infrastructure (1)	N/A	N/A	Yes – for the development of young creatives (mainly), to bridge the gap between art & business	2 work in silo 2 in a cluster 1 in a hub	Yes business has improved since being part of hub/cluster	A collaborative model supported by government, linking complementary businesses together, incorporating an element of incubation, mentoring, experimentation & piloting Must have an element of production, retail and scaling consult creatives sothat it fits the sector's needs, not a one-size-fits all approach, must be sector specific and bring businesses together separately Must draw inspiration from other countries that prioritise CCIs & create a model that works for Gauteng/South African context
Similarities OR Differences	Both stakeholders agree that the sector contributes positively to the economy and society. They also agree on the micro-nature of the sector	Both stakeholders agree on some of the challenges facing the sector - these being the legislative & regulation issues around nature of creative work, copyright protection, access to funding, markets, lack of transformation & wrong perception of sector resulting in sector being undervalued Both groups also agree that businesses where affected by Covid 19.	Wrt strengths, both stakeholders agree that the sector has great potential as well as talent - one stakeholder group alludes to potential for wealth creation and investor attraction whilst the other alludes to the potential to leverage off its unique raw materials using innovation. Both groups also agree that there are low barriers to entry		Wrt to cluster development work being done/ to be done in the province - the sector experts seem to see Constitution Hill as a cluster (albeit the limitations). The business say it will be good especially for the development of young creatives and to bridge the gap between creativity & business.				Wrt the shape that the cluster should take, both stakeholders agree that government must collaborate and partner with private sector to provide a conducive environment that will nurture the sector, allowing for experimentation, piloting & scaling and to bring in entrepreneurs who can (e.g. through selling IPs) commercialise businesses. Both stakeholders agree that government should look for a space where creative activities are already taking place and let the sector lead the initiative. They also think it should be sub-sector specific especially in the beginning. 2 of the interviewees thought it need not be subsector specific - Bus 1 & Bus 3 Whereas most of the interviewees agreed to physical clusters - 2 of them (Exp 1 & 4) advocated for virtual clusters - saying clustering should go to the communities that dont have access to it

Figure 30: Key findings – Question 1.9-1.16 (Also see Appendix G)

KEY FINDINGS THEMES - Appendix G - (Questions in red are specific to CCI Businesses)								
Stakeholder Group	1.9 Noting that CCIs in Gauteng are generally micro-businesses and tend to want to be located in inspiring & affordable places, in your view and experience should SEZs be used as a vehicle to develop CCI clusters in order to increase the competitiveness of the CCI? Please provide a reason for your answer. Do you have an example to give where this model has worked?	1.10 Given the licensing and incentives challenges that SEZs are facing in Gauteng in particular, should other industrial zone programmes also be explored in this case?	1.11 What is your assessment of the future of SEZs and/or industrial zone development in for example Gauteng		"Fusing innovation/technology into CCI businesses results in their growth." Snowball *et al*		1.15 What do you think fusing innovation/technology in CCI firms should look like?	1.16 In what way have you fused innovation/ technology into your business
Experts	SEZ is a good model to help make sector competitive and to regenerate cities. Establish it in JHB CBD since it's the epicentre of creativity in SA Its too soon for a CCI SEZ , too many legislative & structural issues to fix SEZs must not only benefit investors, also creatives & government Not absolutely necessary **(1)** It can work but not for all sub-sectors and also as a pre- cursor issues of legislation and policy should be addressed **(1)**	Industrial parks & creative quarters SEZs are the only way to go due to their status **(1)**	There's a future but sort out existing glaring issues Have they achieved what they sought to achieve? There are starting to be too many SEZs in Gauteng, which hinder government's management and coordination efforts	N/A	4IR Report of the Presidential Comm includes CCIs, however, the 2019 adopted white paper on Science, Technology and Innovation policy still makes no mention of CCIs – STEM vs STEAMIE Innovation is critical to a company's growth Distinguish between innovation & tech There's investment attraction into CCIs now due to innovation Tech & innovation has birthed new independent creatives		Locate your talent, create an environment that nurtures it to eventually develop solutions, bridge the digital divide Understand, prioritise & intergrate innovation into business without comrpomising job security Innnovation already existst in CCIs **(1)** Localise innovation **(1)**	N/A

KEY FINDINGS THEMES - Appendix G - (Questions in red are specific to CCI Businesses)

Stakeholder Group	1.9 Noting that CCIs in Gauteng are generally micro-businesses and tend to want to be located in inspiring & affordable places, in your view and experience should SEZs be used as a vehicle to develop CCI clusters in order to increase the competitiveness of the CCI? Please provide a reason for your answer. Do you have an example to give where this model has worked?	1.10 Given the licensing and incentives challenges that SEZs are facing in Gauteng in particular, should other industrial zone programmes also be explored in this case?	1.11 What is your assessment of the future of SEZs and/or industrial zone development in for example Gauteng		"Fusing innovation/technology into CCI businesses results in their growth." Snowball *et al*		1.15 What do you think fusing innovation/technology in CCI firms should look like?	1.16 In what way have you fused innovation/ technology into your business
Businesses	Yes they can work, as they would provide access to incentives such as low rentals, should be clustered in the CBD of Johannesburg Yes but a different approach is needed, should be sector led with gov enabling from behind and collaborate with civil society, communities, business & labour - transparency & accountability is key Yes but access to markets must be the end goal for businesses (1) Not sure - think carefully about its design & support needed given the uniqueness of the sector (1)	N/A		Convenience, comfort, COVID may have contributed For access to opportunities, markets etc Business was dying WRT relocating: Yes would move if goal is to build sustainable but scalable businesses Doubts business would move as business is already located in CBD, doesnt think any other location would tick all the boxes that CBD ticks	N/A	Yes business and profits have improved, through the use of data, human-centred design, automation & AI For Bus 1 - technology killed their music business, had to pivot (1)	N/A	Using mechanisms/machinery to transform indigenous raw materials into unique, environmentally sustainable products, fuse IKS into processes Blending human-centred design with data, assessing & forecasting trends using data, research trends & upskilling Incorporating process innovation & automation Digital & social media platforms for marketing & connecting with clients Business has completely fused innovation in every way
Similarities OR Differences	Wrt to an CCI SEZ, both stakeholders agree with the idea. Both groups say the Johannesburg CBD is best placed to be an SEZ since its the epicentre of creativity in province & country. Creatives do not want to be confined to a small area - freedom is important. Both groups agree that SEZs must not only benefit investors but also the creatives in the form of low rentals and access to markets Exp 4 had very strong views against CCI SEZ sighting that issues of legislation and policy governing the sector around issues of creative workers and IP should be resolved first before an SEZ can be considered Issues of CBD safety have been raised, however one of the interviewees says that safety is a perception. There are parts of the CBD that are safe. Bringing government administration back into the city may help with the safety issue. There were also some views that careful thought that considers the uniqueness of the sector & country context must be taken into account WRT to relocating to an SEZ - most of the businesses said they would move especially if the goal is to build sustainable & scalable businesses. Bus 5 is already located in the CBD and doesnt think any other location would tick all the boxes that the CBD ticks			**Refer to Column 2**	Both groups seem to agree that fusing innovation/technology into CCI business results in growth and has indeed resulted in growth for some of the businesses interviewed. Although one business said technology killed his music studio & business had to pivot. Issue of policy misalignment was raised by Exp 3, the Presidential Report on 4IR acknowledges CCIs but the adopted White Paper on Science, Technology and Innovation Policy still makes no mention of the CCI, it is still STEM focused as opposed to STEAMIE		Most of the interviewees gave many examples of how innovation can be fused into the CCIs, however 3 of them Exp 1, Bus 1&2 say innovation is already fused into the sector & their businesses	

5. Discussion

This chapter presents (1) a summary of the similarities and differences found in the findings and the literature; (2) it combines the key findings and literature to draft a synopsis of the sector and (3) it presents solutions emerging from the interview data as well as the literature. These solutions, combined with the opportunities the sector has, are expected to resolve the multiple challenges posed, and put the sector on a road towards accelerated growth and competitiveness.

5.1 Summary of similarities and differences in the findings from the two stakeholder groups – juxtaposed with the literature review

With regard to economic growth, both stakeholder groups agree that the sector contributes positively to the economy and society. This is also cited in the literature, indicating similar numbers of 3.1% and 2.97% GDP, as well as 6.2% and 6% of employment globally and locally, respectively (UNCTAD, 2022: p.5; SACO, 2022: p.13, 36).

Both groups also agree on the micro-nature of the sector which consists of a large number of creatives who are on short-term contracts (i.e., freelancing), and very few "kingpins" who make and control "the money". (Oyekunle (2014: p.22) and SACO (2022: p.23) also state that the micro-nature leads to businesses collaborating to work on projects, thus generating income as per project.

Regarding challenges facing the sector, both stakeholder groups agree on some of the challenges being the legislative and regulatory issues around the nature of creative work, copyright protection, access to funding, markets, the lack of transformation and the incorrect perception of the sector resulting in the sector being undervalued and not well supported.

Many of the challenges cited in this study are also raised by Akhona (2021) and the dtic (2022), stating that policies should consider the challenges that affect the growth of the sector. These include (among others) the funding constraints, IP protection, access to markets, and skills development and burdensome legislative and regulatory processes. SACO (2016: p.7) states that the sector has unique characteristics and diversity requiring customised policy support and incentives. The findings also stress the need for a strategic approach that leverages creativity and innovation in economic and industrial policy.

With regard to sector strengths/opportunities, both stakeholder groups agree that the sector has great potential as well as talent. The need to build the talent is cited by the dtic (2022) as a strategic intervention that will assist to grow the sector.

One stakeholder group alludes to the sector's potential for wealth creation and investor attraction, while the other group alludes to the sector's potential to leverage off its unique raw materials by using innovation. Both groups agree that there are low barriers to entry (which is the opposite when it comes to market access).

Concerning cluster development work being done or to be done in the province, the sector experts seem to see Constitution Hill as a cluster (albeit its limitations)[25]. The businesses say cluster development will be good for the development of young creatives and for their business growth. Both SACO (2016) and the dtic (2022) are in full support of.

Concerning the shape the cluster should take, both stakeholder groups agree that government must collaborate and partner with the private sector to provide a conducive environment that will nurture the sector, allowing for experimentation, piloting and scaling. In order to scale, entrepreneurs who can commercialise businesses (for example through selling repeatable IPs) must be included in the cluster. A paper by Huang (2021) states that in order to develop CCI clusters in Macao-Hengqin, there was a need for government to systematically link entrepreneurs, talent and investors to evolve into a high-quality entrepreneurial ecosystem.

Both stakeholder groups agree that government should look for a space where creative activities are already taking place and let the sector lead the initiative. A good example was Silicon Valley in the United States, cited by Newbigin (2014) as it already had digital technology activities taking place in the area.

They also believe that cluster development should be sub-sector specific, especially in the beginning. However, Bus 1 & Bus 3 do not think so.

Whereas most of the participants agree to physical clusters, two of them (Exp 1 & 4) advocate for virtual, saying that clustering should go to the communities that do not have access to it.

[25] Limited variety of complementary businesses and organisations to support and/or service each other at ConHill

Both stakeholder groups agree with the concept of clustering CCIs in an SEZ and agree that the Johannesburg CBD is best placed to be an SEZ since it is the epicentre and has the most CCI clusters in the country (GDSARC, 2022). Figure 2 shows the spatial distribution of clusters in Johannesburg, with the largest ones being around Sandton and Randburg[26], however the focus for the proposed framework should be around the CBD which is a best practice global model used for developing cities. Florida (2016) argues that cities with a vibrant cultural scene, multi-cultural communities and an unbiased environment will most likely attract creatives and foster innovation.

Both groups agree that SEZs must not only benefit big investors, but also the creative businesses in the form of low rentals and access to markets, among many other benefits that come with being in an SEZ.

Exp 4 holds very strong views against a CCI SEZ, stating that issues of legislation and policy governing the sector around issues of creative workers and IP should be resolved first before an SEZ can be considered.

Issues of CBD safety were also raised; however, one participant says that safety is a perception, there are parts of the CBD that are safe. Bringing government administration back into the city may help with the safety issue as it will ensure more policing.

Some views are that careful thought should consider the uniqueness of the sector and the country's context. Most of the businesses say they would consider relocating to an SEZ, especially if the goal is to build sustainable and scalable businesses. Bus 5 is already located in the CBD and does not think any other location would "tick all the boxes that the CBD ticks".

Concerning fusing innovation, both groups agree that fusing innovation and/or technology into CCIs results in growth and has indeed resulted in growth for some of the businesses interviewed. The literature by Nesta (2023) and Snowball et all (2021) agrees fully with this finding.

The issue of policy misalignment is raised by Exp 3. While the Presidential Report on 4IR acknowledges CCIs, the adopted White Paper on Science, Technology and Innovation Policy still makes no mention of the CCI, it is still STEM focused as opposed to STEAMIE.

[26] This is due to the decentralization of the City

Regarding what fusing innovation/technology or how both have been fused into businesses, most of the interviewees give many conventional and non-conventional examples of how innovation/technology can be fused into the CCIs. These included: building and nurturing the creative talent; use mechanisms/machinery to transform indigenous raw materials into unique, environmentally sustainable products; fuse IKS into processes; blend human-centred design with data; incorporate process innovation and automation, digital and social media platforms for marketing and connecting with clients. However, Exp 1 argues that innovation is already fused into the sector and Bus 1 & 2 say it is already fused into their businesses.

Most of the interventions in the GDSARC paper required to build a future for the sector in Gauteng CCI are underscored by innovation.

5.2 A synopsis of the sector

Overall, the key findings, as well as the literature indicates that the CCI has good potential, and it can contribute significantly to Gauteng's economy and that of SA. It also contributes to the well-being of society, which cannot be measured through profits, making the sector very unique. Like many sectors in SA that are still rooted in apartheid legacy, legislation and policies, the sector's diverse history is complex and shows that it is largely untransformed. A significant portion of the sector is also informal – making it difficult to truly measure the size of the sector and its impact. The ecosystem is mainly made up of creatives and the "kingpins".

The challenges and strengths have also been widely highlighted throughout the dissertation.

5.3 An outline of the challenges and proposed tools to address them

The paper has outlined the sector's significance in terms of economic and social impact. It has also attempted to provide an understanding and appreciation of the challenges and opportunities of the sector.

The paper will now seek to develop a framework by exploring economic development tools that attempt to address most of the challenges, while using the strengths of the sector to accelerate sustainable development, growth and competitiveness. This framework takes into consideration the wide benefits of clustering businesses in an SEZ and fusing with innovation and/or technology.

Table 2: An outline of the challenges, solutions and economic development tools addressing the challenges

Key challenges	Solution	Is a cluster mandated to solve the challenge?	Is an SEZ mandated to solve the challenge?	Is an industrial park mandated to solve the challenge?
1. Access to funding	Investment promotion	No	Yes	Yes albeit limited
	Accessing development funding		Yes, in the form of grants, development credits and workforce training funds, (Camphall,2022; para. 8)	
2. Access to markets	Inclusion of CCIs into existing value chains including export opportunities	Yes	Yes – including getting duty-free exports	Yes, albeit limited
3. Legislative and regulation issues	Government lobbying and influencing policy through one body	No	No, but its close connection with other government entities and bodies such as Department of Labour, CCIFSA and Copyright Coalition of South Africa (CCSA) should give it an advantage	No
4. Lack of skills development	Identify skills required	No	Yes – transfer of skills is a requirement for SEZs	Yes
	Implement a human development programme			
	Incubate businesses/creatives with potential			
5. Inadequate government support	Coordinated government support in the form of funding, capacity building, access to markets, and so forth	No	Yes	Yes, albeit limited
6. Inadequate data and R&D	Lobbying public and private sector to invest in data and R&D	Yes	No, but a government partnership with a university could resolve the challenge	No
7. Ineffective IGR	Bringing all three tiers of government under one roof to accelerate and resolve any issues which arise, for example, fast visa approvals for a potential anchor investor from overseas	No	Yes	No

<table>
<tr><td rowspan="11">8. Lack of buffers</td><td>Create customised incentives and investment packages for CCI SMMEs and organisations that will encourage resilient and businesses that are future-ready, GDSARC (2022)</td><td rowspan="2">No</td><td>Yes</td><td rowspan="2">No</td></tr>
<tr><td>UNESCO (2020,p.17,27,41) highlights the following solutions:

Provide social benefits to creatives</td><td>No</td></tr>
<tr><td>Skills development</td><td>Not mandated but can</td><td>Yes</td><td>Not mandated but can</td></tr>
<tr><td>Provide subsidies/incentives</td><td>No</td><td>Yes – in the form of low rentals, labour subsidies, low property tax, tax incentives,</td><td></td></tr>
<tr><td>Intentionally stimulate demand</td><td>Yes especially through the cluster network</td><td>Yes – since SEZs are export oriented</td><td>Yes</td></tr>
<tr><td>Provide preferential loans</td><td rowspan="3" colspan="3">No but these can be pursued</td></tr>
<tr><td>Strengthen infrastructure and facilities</td></tr>
<tr><td>Adapting business models</td></tr>
<tr><td>Promoting local content</td><td>Not mandated but can</td><td>Yes</td><td>No</td></tr>
<tr><td>Tax incentives for foreign investment</td><td>No</td><td>Yes</td><td>No</td></tr>
<tr><td>Total “YES”</td><td></td><td>3</td><td>12</td><td>6</td></tr>
</table>

5.5 Proposed solutions for the sector

From Table 2 above it is clear that an SEZ tool can resolve most of the challenges of the sector. The dissertation now seeks to bring in the opportunities/strengths of the sector and innovation to develop a proposed framework. Key stakeholders who should form part of the framework and the form it should take will also be outlined.

5.5.1 Leverage from the sector's collaborative strength to form clusters

The sector's tendency to consist of micro and small businesses leads to a collaborative approach, putting it in a good position to form a cluster. The CCI businesses that were not already part of a cluster expressed an interest in forming part of one.

5.5.2 Explore a cluster model in an SEZ incorporating innovation

Clustering CCIs businesses within an SEZ is the most feasible option as it combines the two powerful economic development tools. It is also worth noting that the SEZ tool is an innovative way of growing an economy, therefore clustering businesses within such an area is in itself innovation.

Since an SEZ is controlled and operated by government, it will need to partner with the sector, as well as with other key stakeholders to make this framework work. The SEZ should provide a conducive environment that will nurture and support talent, allowing for experimentation, piloting and scaling. It should do this through an Enterprise and Supplier Development Programme as follows:

1. Develop start-up enterprises through an incubation. This should include:

a) Offering infrastructure that will enable creation, experimentation, such as fusing/centralising IKS into creative processes and production; innovation, proto-typing and business development; giving creatives access to a space that will allow the use of technology to transform indigenous raw materials into unique, environmentally sustainable products (createch[27] concept)
b) Providing technical, digital and entrepreneurship skills
c) Offering support services, such as administration, accounting, human resource, IT, and so forth
d) Piloting creative outputs.

2. Develop micro and medium-sized companies into suppliers. This according to SME South Africa (2022) should include:

a) Mentorship support and networking
b) Access to funding

[27] Ibid 22

c) Scaling the business
d) Procurement of goods or services by investors established in the SEZ from participating SMEs that provides sustainable revenue streams.
e) Export opportunities
f) Business to business servicing, meaning that the CCIs themselves should be able to supply/service each other.

In both sub-programmes, entrepreneurs must be brought in to commercialise businesses through, for example, the selling of repeatable IP[28].

5.5.3 Key stakeholders[29] that should be included:

a) Creatives and CCI business (as a start concentrate on one sub-sector, for example, film and television or two sub-sectors that complement each other, such as music and fashion design)
b) Anchor tenants/investors
c) The entire value chain that will support the CCI businesses, for example, in the case of fashion – bring in designers, pattern makers, cutters, fabric suppliers, accessories suppliers, and so forth
d) The three tiers of government to support the SEZ through special arrangements and support systems, including incentives (such as building allowances, tax incentives, employment incentive, low rentals, and so forth), business support services, streamlined approval processes and infrastructure" (BVI, 2023: p.20)
e) A partnership between government and the Copyright Association of South Africa, which must be solely dedicated to protecting copyright and performance rights of CCIs and ensuring that the creatives get their true value returns from their intellectual property
f) Universities and research organisations to be involved.
g) Satellite virtual clusters connected to the CCI SEZ – giving an opportunity to those businesses that are spatially disadvantaged and do not have access
h) Tourism sector – due to its strong links
i) Entrepreneurs

To quote from Bus 4

"To be very poetic about it, we [creatives] are the soul of the heartbeats of everybody, of every other business. Your corporate environment cannot survive without us."

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[28] This is to grow revenues and profitability for creative businesses and later sell the business for a profit. Also, the gross margin contribution from IP is high (MSDW, 2019: para.1 & 8)
[29] The list is not exhaustive – a proper stakeholder list would have to be developed going forward

5.5.4 The form it should take:

The proposed CCI SEZ should become multifunctional - human settlements and facilities, with an element of tourism (the dtic, n.d.).

6. Conclusion and Recommendations

The overall objective of this dissertation was to explore a clustering framework, using an SEZ and innovation as vehicles for the accelerated growth and competitiveness of the sector and the province. It did this by:

a) Assessing the status quo of the sector, including assessing the challenges and opportunities that the sector faces
b) Exploring the concept of a cluster development model for the sector by assessing the extent to which it is taking place in Gauteng and exploring the shape it should take to benefit the sector
c) Exploring if clustering CCIs in an SEZ is a viable avenue to comprehensively address the sector's challenges, and assessing if businesses would be keen to form part of it
d) To explore how the sector can fuse innovation and/or technology to accelerate growth

The data revealed that the such a framework can indeed work and as an intervention will comprehensively resolve the challenges of the sector, and ensure its growth and competitiveness.

This last section will attend to the last objective of e) Making practical recommendations to policymakers and implementers.

The interview data and gaps in the literature revealed that the framework has the potential to significantly assist the sector, albeit there are a few issues to consider and resolve, which must be done in tandem.

6.1 Limitations of the study

With regard to the methodology, the researcher acknowledges that it was not possible to use another data collection instrument in the form of focus groups as initially planned, because of time constraints. The researcher had wanted to bring in a group of people to explore their attitudes, perceptions, feelings and ideas about the research topic, especially because it is a topic that has not been fully exploited as yet and some questions resulted in widely varying views, (Denscombe, 2021: p.235).

The study mainly sought to explore a clustering framework within an SEZ, however, other very important issues were raised during the interviews, some of these were issues around intellectual property, the lack of protective policies for workers as well as regulation of creative work, which was not a planned part of the study.

Another research approach could have been a Case Study Approach, using ORTIA SEZ's Jewellery Manufacturing Precinct as a case study to see how this CCI sub-sector being placed in an SEZ is progressing and what needs to be done to advance its progress.

6.2 Justification for recommendations for future research

Table 3: Recommendations

Recommendations	Action points
For Researchers and Policy Evaluators	
1. Assess how the ORTIA SEZ Jewellery Manufacturing Precinct programme is progressing	1.1 Commission an Implementation Evaluation Study of same
2. Fully explore the suggested CCI cluster within an SEZ – fusing innovation - as a possible tool for economic growth.	2.1 Undertake a further research study with a larger sample across the province to fully explore the suggested framework and how ideally it should be put together, the study should inform the economic and social impact of the project and link the CCI SEZ to the tourism sector 2.2 Undertake a cost-benefit analysis to assess the cost of setting up an SEZ vs industrial park/creative precinct or cluster model outside of an SEZ
For Policy Makers	
3. Examine industrial policies that could enable the scaling up of the relevant CCI sub-sectors in the same way it is done for other sectors. Fully explore the suggested framework as possible tool for economic growth.	3.1 Consider the findings of this research and conduct a feasibility study and masterplan for an CCI SEZ taking into account the existing spatial clustering 3.2 Should the feasibility and business case be favourable – prioritise funding to the develop such 3.3 Consider future findings as mentioned above and incorporate into policies
4. Undertake a skills audit of the sector in Gauteng (as a start) and start aggressively developing the human capital	4.1 Commission a skills audit of the creative skills and develop an impactful training programmes that will provide the relevant future creative skills needed to grow the sector

5. Urgently address the Copyright and Performance Bills issue, which now includes the concept of "fair use"	5.1 Strong government lobbying, an in-depth look at what the bills mean in the context of 4IR and the creative economy
For Policy Implementers	
6. Look at alternative funding solutions to establish the CCI SEZ	6.1 Explore Afreximbank's fund that is dedicated to the sector 6.2 Explore the SEZ infrastructure fund
7. Together with the sector, support the efforts that Exp 5's company is doing of establishing an innovation hub city	7.1 Hold frequent round table discussions with the sector, the company, the municipality and the community – include all parties in the planning processes and let the sector lead the initiative, otherwise there is a risk of a white elephant 7.2 Advocate for the CBD to be designated a CCI SEZ – as a start
8. Create a safe environment for creatives in the CBD	8.1 Government administration that has moved out of the JHB CBD should be encouraged to move back for the area to have better policing
For Investors/ Development Funders	
9. Consider the findings of this dissertation and invest in a CCI SEZ	9.1 Invest in the CCI SEZ 9.2 Offer grant funding, development credits and workforce training funds for the CCI SMMEs that will form part of the SEZ
For others	
10. Urgently address the legislative issues around creative workers	10.1 The Creative Worker's Union of South Africa and CCIFSA to aggressively lobby government

Appendices:

Appendix A – Comprehensive Literature Review table

Appendix B – Coded transcripts

Appendix C – Compiled codes

Appendix D – Coding

Appendix E – Sorted codes

Appendix F – Labelled codes

Appendix G – Key findings themes presented

Appendix H – Consent forms – Sector Experts

Appendix I – Consent forms – CCI Businesses

Appendix J – Interview Schedule & Matrix

Appendix K – Research Questions

Appendix M – Anchor codes created

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