



DEVELOPMENT OF A NATIONAL MUSIC SECTOR POLICY AND STRATEGY

Music Policy Final Draft

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TABLE OF CONTENTS

Glossary	3
Executive Summary.....	6
1. Introduction	11
1.1 Context for Development of the National Music Sector Policy and Strategy.....	12
1.2 Mandate Review.....	13
1.3 Strategic and Policy Linkages	15
1.4 Policy Process Followed	17
2. Evidence Based Problem Statement	20
2.1 Macro Analysis.....	20
2.2 Micro Analysis.....	21
2.2.1 Supply-side dynamics	21
2.2.2 Demand-side dynamics	24
2.2.3 Enabling environment dynamics	26
2.3 Problem Statement.....	27
3. Theory of Change	29
4. Policy Vision and Outcomes	31
4.1 Vision	32
4.2 Policy Outcomes	33
Outcome A: Cultural Conservation, Preservation and Promotion	33
Outcome B: Social Cohesion through a shared National Identity	34
Outcome C: Economic Development through Financial Sustainability.....	35
5. Policy Implementation.....	37
5.1 Policy Implementation Mechanisms	37
Policy Outcome A: Cultural Conservation, Preservation and Promotion	37
Policy Outcome B: Social Cohesion through a shared National Identity and Brand.....	41
Policy Outcome C: Economic Development through Financial Sustainability	47
5.2 Target Beneficiaries and Stakeholders.....	52
5.3 Resource Allocation and Prioritization.....	53
5.4 Roles and Responsibilities	56
5.5 Monitoring and Evaluation.....	58
6. Governance	59
6.1 Performance Reporting and Accountability.....	59
6.2 Transparency and Information dissemination	59

6.3	Risk Assessment and Mitigations	59
7.	Conclusion	61

TABLE OF FIGURES

Figure 1-1 Project Methodology.....	17
Figure 1-2 Situational Analysis Framework.....	18
Figure 1-3 Conceptual Framework Guiding Analysis.....	19
Figure 2-1 Music Sector Conceptual Framework	20
Figure 2-2 Recording Industry Structure	22
Figure 2-3 Physical versus Digital Music Consumption Platforms	23
Figure 2-4 Supply chain dynamics.....	24
Figure 2-5 Demand-side dynamics.....	26
Figure 2-6 Enabling Environment Dynamics.....	27
Figure 3-1 Theory of Change.....	30
Figure 4-1 Music Sector Policy Structure Framework.....	32
Figure 4-2 Policy Impact Statements.....	32
Figure 5-1 Implementation mechanisms within the Music Sector Policy Structure Framework	37
Figure 5-2 Waves of Impact	54
Figure 5-3 Monitoring and Evaluation Framework	58

GLOSSARY

Accreditation and Certification Frameworks

- **Definition:** Structures designed to formally recognize and certify qualifications and standards within the music sector, ensuring the presence of qualified music educators and fostering professionalism.

Cultural Conservation, Preservation and Promotion

- **Definition:** The process of maintaining and protecting cultural heritage, traditions, and expressions within the music industry to inspire creativity and ensure sustainability

Economic Development

- **Definition:** The process of enhancing financial stability and expanding revenue opportunities for artists and stakeholders within the music sector, contributing to the overall economy.

Effective Regulatory Frameworks

- **Definition:** Clear and enforceable regulations aimed at ensuring accountability, professionalism, and fairness within the music sector, protecting diverse/various cultural expressions and stakeholder operations.

Enabling Environment / Dimensions

- **Definition:** An "enabling environment" refers to a set of ecosystem conditions that facilitate and support the achievement of specific goals, activities, or developments by removing barriers and providing the necessary resources and support. It is an ecosystem in which individuals, organizations, or sectors can operate effectively and efficiently, promoting growth, innovation, and sustainability

Incubation and Capacity Development

- **Definition:** Initiatives focused on fostering professionalism, transferring business and indigenous, and general music knowledge, developing economically viable music businesses, and standardizing industry processes.

Industry Monitoring and Tracking

- **Definition:** A system that establishes feedback mechanisms to measure the impact of policies and prioritize actions based on the needs of the music industry.

Music Sector

- **Definition:** The South African "music sector" refers to the collective industry and ecosystem involved in the creation, production, distribution, and consumption of music within South Africa. This sector encompasses a wide range of activities, stakeholders, and sub-industries that contribute to the cultural, economic, and social landscape of the country. While this term also encompasses the commercial side of the music business, it can have a broader scope. The "music sector" might include not only the commercial entities but also non-profit organizations, educational institutions, government agencies, and other groups that contribute to the cultural, social, and economic aspects

of music. It might also encompass music education, music therapy, and other non-commercial aspects of music.

Music Industry

- **Definition:** This term typically refers to the commercial aspect of music production, distribution, and consumption. It encompasses record labels, music publishers, recording studios, streaming services, concert promoters, and other entities involved in creating and selling music for profit. Technical services, for instance, play an integral role within the various subsectors of the music industry. They encompass a wide range of specialised services such as sound, engineering, stage, lighting, mastering, equipment maintenance and technological innovation.

National Music Identity

- **Definition:** "National music identity" refers to the unique musical characteristics and expressions that are closely associated with a particular country or nation. It encompasses the musical traditions, styles, genres, instruments, rhythms, melodies, lyrics, and performance practices that are deeply rooted in the cultural heritage and history of a nation. National music identity often reflects the diverse cultural influences, historical events, social dynamics, and geographic landscapes of a country. It serves as a means of cultural expression, communication, and identity formation for its people, and it can play a significant role in shaping national pride, unity, and collective consciousness. Examples of musical expressions unique to SA are Amapiano, Maskandi, and our unique South African Jazz and Gospel.

Social Cohesion

- **Definition:** Social Cohesion refers to the degree of social integration and solidarity within a community or society. It talks to the strength of relationships, trust, and cooperation among individuals and groups, regardless of their backgrounds, identities, or differences. The development, documentation, preservation and promotion of a distinct South African cultural identity will engender social cohesion and nation-building through musical diversity, contributing to societal harmony and collective cultural expression.

Stakeholder Engagement

- **Definition:** The process of involving and collaborating with various stakeholders within the music sector in order to drive transformative programmes, elevate demand for local music, and foster economic growth.

Theory of Change

- **Definition:** The "Theory of Change" (ToC) is a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is a methodological approach used to plan, participate in, and evaluate the impact of social interventions.

Value Chain

- **Definition:** The South African music sector value chain encompasses all the activities and processes involved in the creation, production, distribution, marketing, and consumption of music within South Africa.

Venue and Infrastructure Revitalisation

- **Definition:** "Revitalisation" in the context of venues and infrastructure refers to the process of rejuvenating, upgrading, and modernising existing infrastructure systems to enhance their functionality, efficiency, safety, and sustainability. This can involve repairing, renovating, or replacing aging infrastructure components, incorporating new technologies, and improving the overall design to meet current and future demands. The goal is to extend the lifespan of infrastructure, improve service delivery, and support economic growth and community well-being by stimulating audience development, supporting music production and consumption, and enhancing the quality of music supply.

Vision

- **Definition:** A "vision" is a clear, aspirational statement that outlines the long-term goals and desired future state. The vision aims to inspire stakeholders and set a direction for growth. The ultimate goal of the policy, which is to create an inclusive, educated, transparent, fair, and proudly South African music sector that contributes to cultural preservation, promotion, social cohesion, financial sustainability, and economic development.

EXECUTIVE SUMMARY

Introduction

The South African National Music Sector Policy, within the custodianship of the Department of Sport, Arts and Culture (DSAC), serves as a comprehensive framework designed to guide the government's role in the growth, development, and sustainability of South Africa's music sector. The policy serves to outline an understanding of the sector dynamics at play, and provides a vision supported by a set of policy outcomes and implementation focus areas for the music sector.

The policy document has three main objectives:

- Provide a National policy direction for the South African music sector;
- Clearly define the state's role in creating an enabling environment that would ensure the growth, development and sustainability of the South African music sector;
- To act as a catalyst for transformation, broader economic development and growth across the country and increase the sectors contribution to the South African GDP.

The document, which is intended to be a living one, provides the direction and framework which all related strategic interventions will be guided by. This is supported by a separate strategy document with action-oriented interventions that detail specific steps, initiatives, and tactics to achieve the objectives set out in the policy. It provides the roadmap for implementing the policy ensuring that all related activities and strategies operate within a coherent and supportive substructure.

Situational Analysis and Problem Based Evidence Statement

The initial step involved a thorough situational analysis to identify and validate the existing challenges and opportunities across the entire music sector. It comprises three primary components: a sector profile analysis and market segmentation, a socio-economic analysis, and a comparative benchmarking study involving three countries outside the African continent and two within Africa. The goal is to gain valuable insights into sector imperatives, drivers, and the

nuances of South Africa's diverse music landscape. This analysis also provides context for understanding economic challenges and identifying opportunities, and areas for improvement. The findings directly influence the structure of the National Policy and Strategy for the Music Sector.

The analysis of South Africa's music sector suggests that the national policy needs to prioritise diversity, education, and intellectual property regulation, as well as access to resources. There is an imperative need to support music practitioners and various forms of artistic initiatives, as well as stimulate collaborations. Also of primary significance is the issue of safety at events, aligning education with industry needs, and preserving music history. Additionally, addressing labour laws and promoting interdepartmental collaboration will foster a thriving and inclusive music sector.

Theory of Change

The "Theory of Change" section of the policy is included to clearly express the strategic narrative aimed at transforming South Africa's music sector in response to the challenges posed by the aspects identified in the situational analysis. This narrative shifts the government's role from direct market intervention to creating a supportive environment for grassroots development. Key components of this theory include:

1. **Empowerment and Capacity Building:** Focusing on empowering local music industry practitioners through continuous learning, development, and targeted interventions.
2. **Collaborative Efforts:** Engaging other government departments and stakeholders to drive activities that promote education, advocacy, stakeholder engagement, and effective regulation.
3. **Intended Impact:** Aiming for a resilient and financially sustainable local music sector that fosters cultural preservation, promotes social cohesion, and contributes to economic development.

This transformation is expected to enhance the quality of music productions, increase competitiveness, and solidify South Africa's position in the global music landscape.

Music Sector Policy Vision and Outcomes

The vision which this policy is ultimately striving towards is, **'An inclusive, transformed, educated, transparent, fair and proudly South African sector that contributes to cultural conservation and preservation, social cohesion, financial sustainability and economic development'**.

In striving towards this vision for the sector, the following three policy outcomes were developed to ensure that the state's role in the music industry is clearly directed towards key areas of enablement. These outcomes are interconnected, with each one enabling or enhancing the next. These outcomes will be collapsed further in the strategy document into specific interventions, actions and activities.

- **Cultural Conservation and Preservation:** Recognizing, valuing, and safeguarding our diverse cultural heritage ensures its continuity for future generations. Protecting our

musical legacy from exploitation involves promoting music ownership and documenting our unique journeys. This fosters respect for indigenous knowledge and practices that set South African music apart on the global stage.

- **Social Cohesion through a shared National Identity:** Music has the power to unite people across boundaries. Through music, we share stories, bridge divides, and foster understanding and solidarity within communities. Embracing our diversity through music strengthens our national unity.
- **Economic Development through Financial Sustainability:** A thriving music sector relies on economic viability. This means creating opportunities for musicians and professionals to earn fair wages, access funding, and develop sustainable business models that ensure growth and stability. Poverty alleviation, job creation, and inclusivity hinge on the sector's financial health and economic success.

Policy Implementation

To realize the policy vision and outcomes, three key strategic areas of intervention have been identified:

1. **Comprehensive Education and Training:** Enhancing music education, bridging digital divides, and fostering business incubation to increase skilled musicians and sustainable local businesses.
2. **Promotion, Advocacy, and Stakeholder Engagement:** Elevating South African music locally and globally by creating a national music identity, revitalizing venues and infrastructure, and fostering cross-functional collaboration.
3. **Effective Regulatory Frameworks and Enforcement:** Enhancing industry monitoring, formalizing music education, and enforcing licensing regulations to create a transparent and thriving industry environment.

These strategic areas are supported by a robust framework of roles and responsibilities, monitoring, and evaluation mechanisms to ensure cohesive progress and accountability in the policy's implementation. The collaboration between DSAC, other government departments, associated government institutions or agencies, industry stakeholders, and various sector representatives is essential to creating an enabling environment for the South African music sector to thrive and achieve its envisioned outcomes.

Governance

The governance section of the National Music Sector Policy outlines a comprehensive framework to ensure effective leadership and directive administration processes, emphasizing performance reporting, transparency, and risk mitigation.

1. **Performance Reporting and Accountability:**

- **Key Performance Indicators (KPIs):** Establish measurable indicators for each policy initiative to track progress, such as the number of -practitioners trained or audience engagement.
- **Regular Reporting:** Implement a system for ongoing reporting on policy performance, including data collection, analysis, and dissemination of reports to stakeholders.
- **Independent Evaluations:** Conduct periodic independent evaluations to assess the overall impact of the policy, providing an objective assessment and identifying areas for improvement.

2. Transparency and Information Dissemination:

- **Publicly Available Documents:** Ensure that the policy document and its implementation plan are accessible to the public online.
- **Stakeholder Engagement:** Establish regular communication channels with stakeholders through workshops, forums, and meetings to share information, solicit feedback, and address concerns.
- **Resource Allocation Reporting:** Publicly report on resource allocation across relevant government entities, various stakeholders and different policy initiatives to promote transparency and accountability.

3. Risk Assessment and Mitigation:

- **Risk Identification:** Recognize potential risks that could hinder policy implementation.
- **Mitigation Measures:** Propose strategies to address these risks, ensuring that the policy remains resilient and adaptable to challenges.

This governance framework is designed to provide the necessary oversight, accountability, and stakeholder involvement to achieve the policy's goals and support the sustainable development of South Africa's music sector.

Conclusion

The conclusion of the National Music Sector Policy emphasizes the potential of the South African music industry despite historical inequalities and the challenges posed by a dynamic global landscape. This policy serves as a strategic roadmap to address these challenges and leverage the transformative power of music.

Key focus areas include nurturing young talent, building a supportive infrastructure, and empowering industry professionals. The policy underscores the importance of investing in music education, capacity building, and infrastructure development at the grassroots level to create a thriving future generation of artists and music practitioners.

Additionally, the policy aims to establish a distinct "South African Music Brand" that celebrates the nation's rich cultural heritage and appeals to global audiences. By equipping artists and

practitioners with the necessary business skills, the policy seeks to enhance their competitive edge and economic success.

Ultimately, the policy envisions long-term economic and social transformation, contributing to national development through job creation and cultural exports. By promoting South African music, the policy aims to strengthen national identity and foster shared pride. Implementing this strategic approach will ensure that South African music continues to be a powerful force for social cohesion, cultural expression, and economic prosperity for future generations.

1. INTRODUCTION

The South African National Music Sector Policy, within the custodianship of the Department of Sport, Arts and Culture (DSAC), serves as a comprehensive framework designed to guide the government's role in the growth, development, and sustainability of South Africa's music sector. The policy serves to outline an understanding of the sector dynamics at play, and provides a vision supported by a set of policy outcomes and implementation focus areas for the music sector.

The policy document has three main objectives:

1. Provide a National policy direction for the South African music sector;
2. Clearly define the state's role in creating an enabling environment that would ensure the growth, development and sustainability of the South African music sector;
3. To act as a catalyst for broader economic growth across the country and increase the sectors contribution to the South African GDP.

Components of the Policy:

1. **Evidence Based Problem Statement:** An analysis of the as-is situation of the South African music sector which seeks to understand the key challenges of the sector, as well as an understanding of the root causes of these issues.
2. **Vision Statement:** A concise statement describing the desired future state of the music sector in South Africa.
3. **Theory of Change:** The "Theory of Change" (ToC) is a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is a methodological approach used to plan, participate in, and evaluate the impact of social interventions.
4. **Policy Vision and Outcomes:** Clear and specific goals and outcomes the policy aims to achieve.
5. **Policy Implementation:** This section translates the policy's goals and objectives into actionable steps and provides a roadmap for achieving the desired outcomes.
6. **Governance:** This final component of the policy outlines the framework and processes for overseeing and managing the implementation, monitoring, and evaluation of the policy. This section ensures that there is a clear structure for accountability, transparency, and effective decision-making.

The document, which is intended to be a living one, provides the direction and framework which all related strategic interventions will be guided by. This is supported by a separate strategy document with action-oriented interventions that detail specific steps, initiatives, and tactics to achieve the objectives set out in the policy. It provides the roadmap for implementing the policy ensuring that all related activities and strategies operate within a coherent and supportive substructure.

1.1 Context for Development of the National Music Sector Policy and Strategy

South African music embodies the country's profound heritage of diversity and resilience. Through innovative and creative storytelling, we capture and convey the essence of our predecessors, with each iteration enriching the narrative of who we are. Music imprints itself in the minds and hearts of those who consume it, resounding over the day-to-day lives of South Africans. As such, the power of music is one that resonates, regardless of socio-economic background, race, gender and tribe.

The distinctive culture, heritage and context of the South African people lends itself to creation of unique musical expressions. South Africa grapples with the triple challenges of poverty, inequality, and unemployment, compounded by the enduring legacies of apartheid and its colonialist history. This context is undeniably reflected in the ways in which South Africans express and engage with their cultures through music, as well as preferences on the types of sounds and music consumed. Music serves both as a mechanism for collective change and unity, and as a reflection of the broader process of national transformation.

However, the sector is at a turning point where the richness and diversity of the music are at risk of being lost unless it seizes the available opportunities. Digital innovation is rapidly transforming the music landscape, increasing competition, and unlocking new revenue generating opportunities through music. These developments have thrust local players in competition with multinational industry juggernauts who have identified and invested in South Africa as a key music market. As a result, international music has become widely accessible across the country, overtaking local music in consumption numbers and revenues generated.

These developments are tangibly shifting the needle, in terms of how consumers access, engage and consume music. The lingering effects of our colonial past have skewed music tastes and preferences, with readily accessible Western sounds saturating the market. While the exposure to global platforms brings forth several advantages to South African artists such as facilitating collaboration with international artists, and broadening an artist's global audience, the dominance of international music in the local market can pose significant challenges to the development of local music and culture. These challenges have an impact on artistic expression, infrastructure development and economic opportunities for local stakeholders.

Nonetheless, value creation and revenue generation have been biased in favour of international players, leaving local artists and industry practitioners struggling to economically benefit from their own culture and sounds.

It is therefore against this background that the development of a National Music Policy was undertaken. It is the prerogative of the South African government to intervene, rectifying past injustices and fostering an environment where South African culture and heritage can thrive and endure. Coupled with the growing global interest in and appreciation of African cultures and art, South Africa has demonstrated potential to play a key role as a source of profound creativity and innovation through cultural expression.

The state recognises the paramount need to harness the transformative power of music as a driver of social and economic change. It is a government priority to facilitate local economic empowerment within the South African music industry and its markets, aligning with the

National Development Plan (NDP) goals of fostering job creation, alleviating poverty, and promoting greater equality. Beyond this, the state should extend beyond simply harnessing job creation to actively promoting and advancing real participation of Africans in the music economy.

This can be done through the prioritization of policies and initiatives that encourage entrepreneurship and ownership within the music industry including providing support for aspiring music entrepreneurs to start their own businesses, access financing, and navigate regulatory requirements. Additionally, efforts should be made to promote the ownership and control of music-related assets such as record labels, publishing companies, and performance venues by African individuals and communities. This not only contributes to economic empowerment and social inclusion but also fosters cultural pride, creativity, and innovation within the continent's music industry.

Furthermore, it is a government priority to encourage the consumption and championing of South African music, aligning with its goals of fostering a cohesive society unified by a common national identity.

In essence, the development of this music sector policy represents a pivotal step towards realizing the economic and social dividends of South Africa's rich musical heritage. By harnessing the power of music as a strategic asset, the country can chart a course towards sustainable development, cultural preservation, and meaningful social impact.

1.2 Mandate Review

The Department of Sports, Arts and Culture (DSAC) derives its mandate from the constitution, more specifically in the following sections:

‘16(1) Freedom of expression - Everyone has the right to freedom of expression, which includes.

- (a) freedom of the press and other media;
- (b) freedom to receive or impart information or ideas;
- (c) freedom of artistic creativity; and
- (d) academic freedom and freedom of scientific research.

‘30. Language and culture - Everyone has the right to use the language and to participate in the cultural life of their choice, but no one exercising these rights may do so in a manner inconsistent with any provision of the Bill of Rights,’ and

‘32. Access to information - (1) Everyone has the right of access to –

- (a) any information held by the state; and
- (b) any information that is held by another person and that is required for the exercise or protection of any rights.

The functionality of the Department is also premised on the constitutional right to social security in Schedule 27. In addition to this, the department derives its mandate over the cultural

and creative industries from legislation such as the Culture Promotion Act, which makes the following provisions:

- **Cultural Preservation and Growth:** DSAC actively protects and promotes South Africa's cultural heritage by providing resources and opportunities for people to explore and appreciate their culture.
- **Building Global Bridges:** The department fosters cultural exchange with other nations, promoting international understanding and collaboration.
- **Ministerial Leadership:** The Act empowers the Minister with specific tools to achieve these goals, including funding cultural initiatives, establishing programs, and recognizing artistic excellence.

Amendments to the Act further strengthen the Minister's ability to pilot new ideas for cultural development, support nationwide cultural organizations, bestow honours for artistic contributions, empower communities through grassroots arts education programs, and expand cultural exchange programs globally. In essence, DSAC serves as a champion for South African culture, ensuring its legacy endures while fostering vibrant connections on a global scale.

In line with constitutional imperatives on democratic values of human dignity, equality, and freedom, the Department has also been assigned the powers and functions to develop and implement national legislation, policies, and programs regarding arts and culture in the country. It delivers on its mandate through legislation such as the National Arts Council Act, which makes provisions for the establishment of a dedicated body – the National Arts Council (NAC) – to nurture and champion South Africa's artistic expression. By establishing a strong foundation for the NAC, this Act serves as a catalyst for a vibrant and inclusive South African arts scene. This Act serves as a cornerstone for the nation's cultural development by:

- **Empowering the NAC:** It equips the NAC with the resources and authority to actively promote and develop the arts across the country.
- **Fostering a Thriving Arts Landscape:** The Act facilitates a flourishing environment for artists, fostering creativity and artistic exploration.
- **Celebrating Artistic Achievement:** It allows the NAC to recognize and celebrate the contributions of exceptional South African artists.
- **Promoting Cultural Accessibility**:** The Act empowers the NAC to support community-based arts education, ensuring broader access to artistic experiences.

Additional legislature, policies and programs include:

- **National Film and Video Foundation Act:** Promotes and develops the film and video industry, promotes the export of South African films and videos, and supports research and documentation of the film and video industry.
- **National Heritage Council Act:** Advises the government on matters relating to South African heritage, including music, and recommends measures to protect and preserve SA heritage and promote public awareness.
- **Mzansi Golden Economy Strategy:** Promotes the export of South African creative goods and services and enhances the contribution of the creative sector to economic growth and job creation.

Within these parameters, DSAC strives to create an enabling environment that fosters an active, creative, winning, and socially cohesive nation through sports, arts, and culture.

1.3 Strategic and Policy Linkages

This policy exists within the broader ecosystem of legislature which governs and influences all activities within the music sector. It promotes and enhances the envisaged impact outlined in these documents.

National Development Plan – Vision 2030: Offers a long-term perspective for South Africa's development. South Africa's music industry is experiencing significant growth, driven by streaming services. The National Development Plan (NDP) prioritizes addressing inequality, poverty, and unemployment through education and skills development. This aligns with the national plan for music education, aiming for all children to learn music by 2030. While the NDP doesn't directly mention music, it recognizes the importance of arts and culture for national development. The National Arts Council supports various artistic disciplines, including music, to contribute to economic growth and social cohesion. There's a need for improved policies and collaboration to ensure musicians benefit from performance rights and revenue generation opportunities. Overall, the NDP and the music industry can work together to achieve economic prosperity and cultural enrichment for South Africa.

Revised White Paper on Arts, Culture and Heritage : Aims to align the arts, culture and heritage section with the core mandate of DSAC, which is to provide arts, culture and heritage services, facilities, funds and resources, contribute to addressing poverty and job creation, and promote social cohesion and nation building by providing access, resources and facilities to all who live in South Africa with special attention to injustices and imbalances of the past.

National Youth Policy (2020 – 2030): Aims to strengthen youth development, both during and post the COVID-19 era. It provides a framework for addressing the needs, challenges and aspirations of young people in South Africa. It also outlines the roles and responsibilities of various stakeholders in advancing youth empowerment and participation.

Cultural and Creative Industries Masterplan (May 2022): This is a strategic document that outlines how the government and industry should work together to unlock the growth potential of the cultural and creative industries (CCI). By providing more investment and building the creative businesses and jobs of the future. The masterplan also identifies key challenges and opportunities for its development

Music Industries Task Team Report: This report highlights the immense potential of the South African music industry for economic growth, cultural identity, and social cohesion. However, the legacy of apartheid hinders local music development, with international music dominating the market. The Music Industry Task Team (MITT) aims to bridge this gap by recommending strategies that unlock the cultural and economic potential of South African music. This focus aligns with the Cultural Industries Growth Strategy (CIGS) that recognizes the importance of cultural sectors in the information economy. By fostering the "value-added" potential of the music industry, the MITT seeks to harness South Africa's rich musical talent and contribute to the nation's overall development.

Music Industry Strategy and Action Plan (September 2013): This report, by thedtic, DSAC and the IDC underscores the government's recognition of the creative industries as integral to national growth and development, echoing initiatives outlined in the National Industrial Policy and the Industrial Policy Action Plan. Drawing on extensive research and analysis of the South African music industry, the report identifies concrete actions to leverage its untapped potential,

emphasizing its interconnectedness with other sectors of the economy and its capacity to promote economic growth, employment, cultural diversity, and social cohesion.

Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan (September 2021):

The report delves into the South African music industry's challenges despite its perceived stability, notably the dominance of imported products and declining earnings for artists. It also highlights the precarious social security of artists and the limited access to finance for investment. However, amidst these challenges, opportunities emerge, such as the shift to digital broadcast and the existence of niche markets. The report sets sector goals aiming to increase local music content share, improve royalties' collection, promote industrialization, and support industry organizations. Through these initiatives, the report seeks to address industry challenges, foster economic growth, and enhance cultural inclusion over the next five years.

1.4 Policy Process Followed

A structured policy development process was followed aligned to the National Policy Development Framework of 2020. The methodology captured in the figure below, provides a high-level view of the approach followed in executing the stage 1: Problem diagnosis and option analysis and Stage 2: Policy Design in the policy-development stages outlined in the framework. The project was broken into four phases, each yielding discrete outputs produced through stakeholder engagement and consultation.

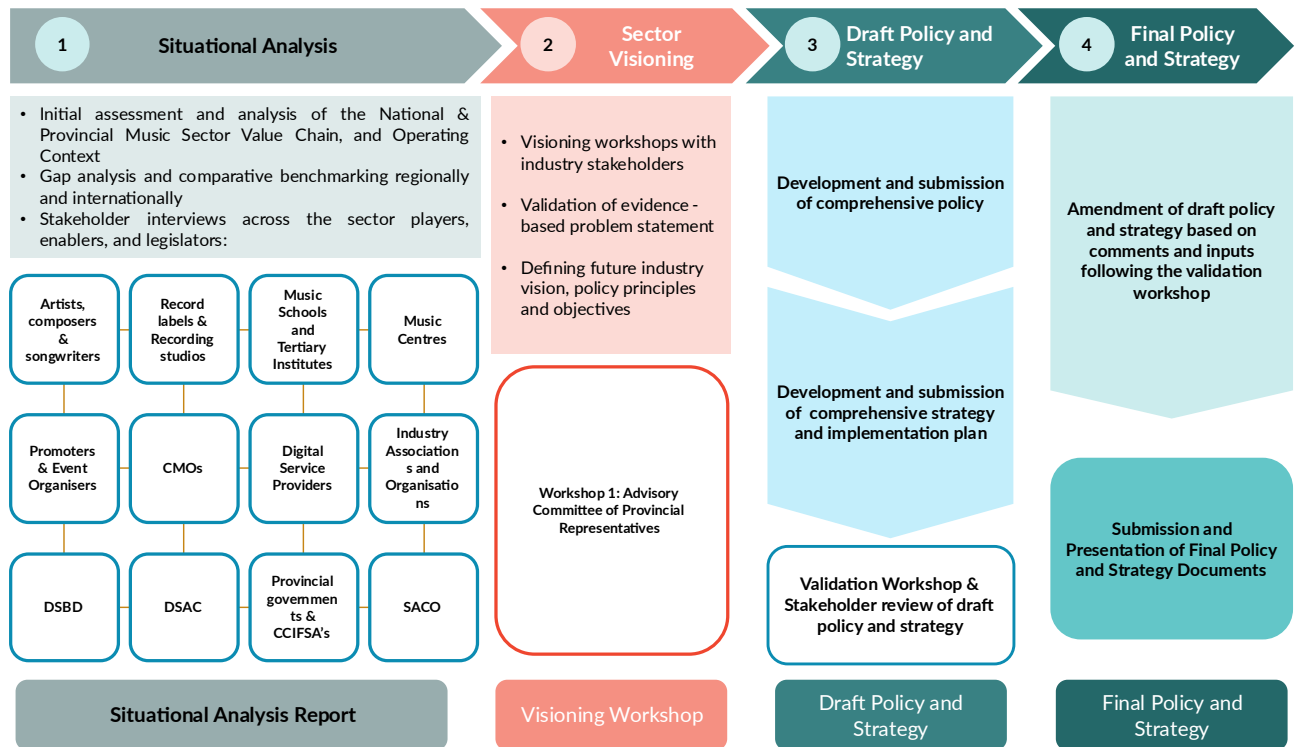


Figure 1-1 Project Methodology

Phase 1 of the project, titled 'Situational Analysis', was dedicated to defining the status quo in the music sector. Through extensive desktop research and one-on-one interviews with industry practitioners across the value chain, insights were derived which were consolidated into a situational analysis report. The objective here was to collect data and insights from the sector through conducting a series of interviews, review relevant research reports produced and conducting further desktop research where needed.

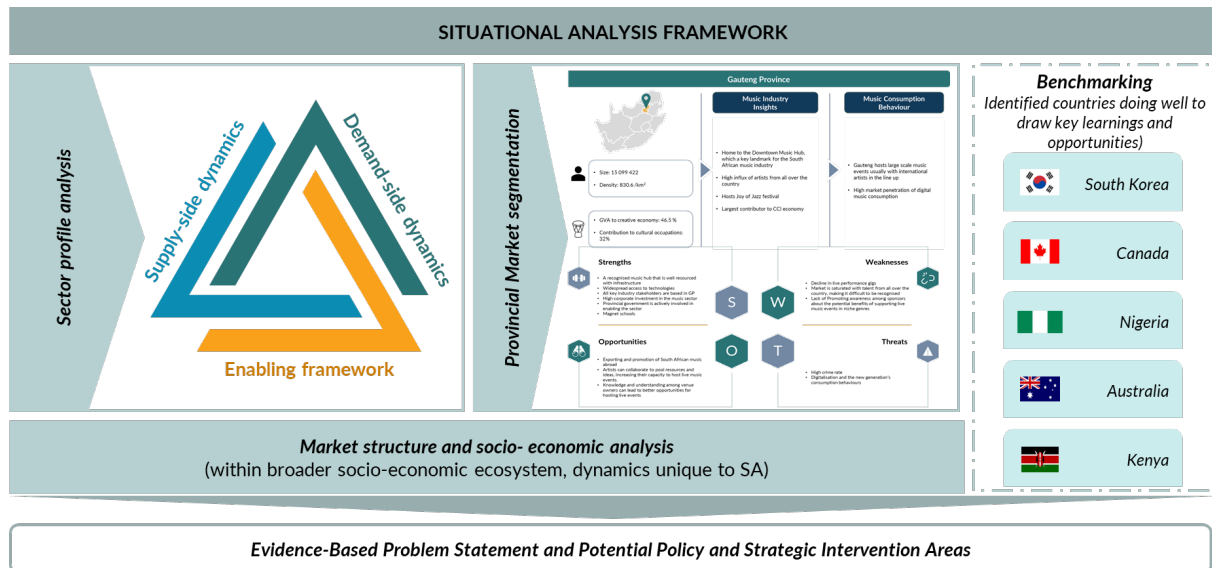


Figure 1-2 Situational Analysis Framework

The situational analysis report was structured into four parts. The Sector Profile Analysis focused on developing a comprehensive sector overview, considering supply-side dynamics, demand-side dynamics, and the enabling framework. This was followed by a provincial market segmentation analysis, where the unique successes and pain points of each province were analysed across the value chain. Furthermore, a market structure and socio-economic analysis, which analysed the social and economic issues pertaining to the data collected thereby laying the foundation for the comparative benchmarking analysis. In this analysis, successful music sectors around the world were identified and analysed for potential learnings and opportunities which South Africa could leapfrog from, while maintaining an appreciation for the differences in socio-economic dynamics in each.

The situational analysis report yielded a comprehensive picture of the strengths, weaknesses, opportunities, and threats faced by the South African music sector, aligned to the high-level conceptual framework, depicted in the figure below.

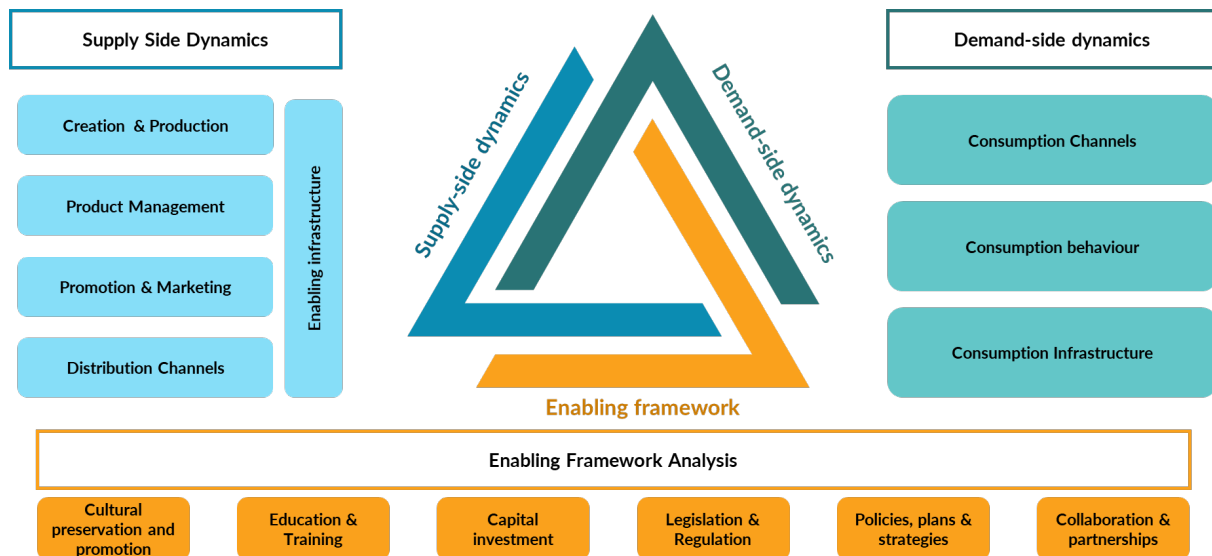


Figure 1-3 Conceptual Framework Guiding Analysis

The second phase of the project, was about establishing a vision for the sector, considering the insights derived in the Situational Analysis Report. The Music Sector Advisory Committee, a committee -appointed by the Minister of Sport, Arts, & Culture in consultation with provincial MECs which constitutes industry practitioners, was consulted at this stage of the project. Through a workshop format, the committee members reviewed and provided feedback and insights in response to the situational analysis report submitted. The policy problem statement was subsequently derived from the situational analysis report and the visioning workshop. This then led to the articulation of the policy vision, and outcomes, as well as the discrete outputs that make up the policy focus areas. Thereby, producing a first iteration of the policy direction and principles.

The third phase of the project is where the first draft of the policy and strategy document were developed. Based on the problem diagnosis and policy direction set in phase 2, policy options were drafted. These were articulated as policy focus areas which defined the strategic outputs that will yield the envisaged outcomes and impact. The strategy document, which clearly defines how the policy will be implemented and enforced. This strategy document outlined strategic programmes aligned to the policy focus areas, key results, roles and responsibilities, and implementation and governance recommendations on a strategic level. The first drafts of the policy and strategy were presented in validation workshops, wherein the problem diagnosis was validated, and the policy and strategic direction were presented for review and feedback. A validation workshop was held, which was attended by various government representatives at national, provincial, and municipal levels, as well as the sector representative bodies. . This workshop concluded phase three of the project.

The final phase of the project was dedicated to developing the final draft of the policy and strategy. In this phase, the draft documents were distributed to the attendants of the validation workshops, providing stakeholders with the opportunity to conduct an in-depth review of what has been developed. Additional inputs, considerations and adjustments were consolidated to produce a final draft of the policy and strategy documents. In doing so, the policy design process was concluded. Following from this, this policy will be taken forward into the

subsequent steps in the policy process, beginning with policy adoption during which the policy will be tabled with the relevant policy authorisation structures.

2. EVIDENCE BASED PROBLEM STATEMENT

In this section, we seek to derive an understanding of the key challenges that have resulted in the current status of the sector, as well as an understanding of the root causes of these issues. To do this, we have defined the value chain, as captured in the framework below.

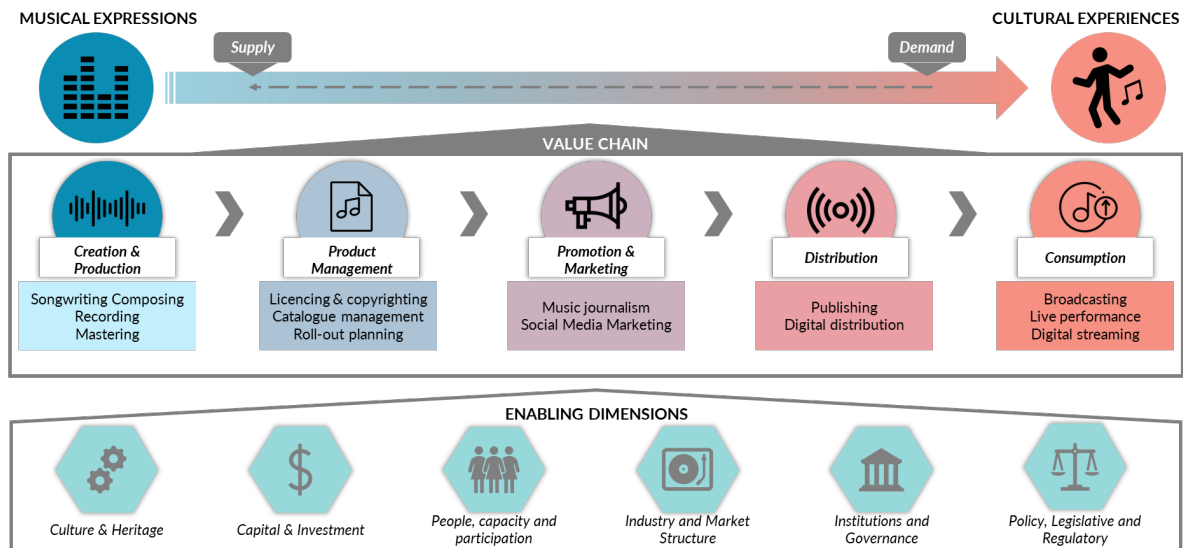


Figure 2-1 Music Sector Conceptual Framework

2.1 Macro Analysis

The South African music sector has experienced remarkable growth, attracting increasing international interest as a gateway to the African market. The country has witnessed numerous musicians breaking through to become global phenomena and ambassadors of South African culture on the world stage. Icons such as Hugh Masekela, Miriam Makeba (Grammy award winner), Vusi Mahlasela, Abdullah Ibrahim, Sipho 'Hotstix' Mabuse, Letta Mbulu, Ray Phiri and Caphaius Semanya have played pivotal roles in propelling South African music onto global platforms. Their distinctive fusion of traditional African rhythms with contemporary genres has not only showcased the richness and diversity of South African music but also illuminated the socio-political struggles confronting their nation. Groups like Ladysmith Black Mambazo (Grammy award winners) and Soweto Gospel Choir (Grammy award winners) have further demonstrated the choral strengths of South Africa's music scene. In theatre and film, South African sound can be heard as the backdrop of iconic shows such as Solomon Linda's *Mbube* in the Lion King production. The diverse legacy of globally recognized musical excellence has been further carried forward by artists like Brenda Fassie, Thandiswa Mazwai, Johnny Clegg, (Grammy award winner), Wouter Kellerman (Grammy award winner), Black Coffee (Grammy award winner), Steve Hofmeyr, and Die Antwoord. Equally important and worth noting are the indigenous music icons like Mahlatini and the Mahotella Queens, Papa Penny, and Ringo Madlingozi.

These luminaries, alongside countless others, have elevated South African music to global prominence, leaving an indelible mark on the world's cultural landscape. Their success stories highlight South Africa's significant role in the global music scene and its potential to become a

key musical hub both regionally and internationally. This is further evidenced by South Africa's strong demand and consumption of music, with digital streaming revenues growing by over 20% in the past two years¹. These figures are expected to continue rising alongside projected consumer expenditure on music, radio, and podcasts².

A key driver of this growth is the digital music economy. Although the transition to digital music consumption in South Africa may have been staggered compared to the rest of the world, increased internet connectivity and access to smart devices have significantly boosted music consumption locally and across the continent. In response, many global players have invested in South Africa, recognizing the existing demand for music. This growth has been supported by the robust development of mature institutions and enabling structures, such as collective management organizations (CMOs), which have unlocked revenue streams for international competitors, providing them with a tangible return on investment.

However, challenges persist. The influx of global content and Western influences presents a complex dynamic for South African musicians seeking to preserve and promote their heritage. The ownership of South African music makes it difficult for the economic beneficiation from the music to be realised, with many artists dying in poverty and struggle. This culture of exploitation and lack of accountability, significantly limits the envisaged growth of the sector.

Furthermore, digital innovation remains a critical disruptor in the music sector, altering how music is produced and consumed, and introducing a new competitive landscape with novel revenue-generating opportunities that demand new skill sets and competencies. Within this context, the South African music sector may fall short, making it increasingly difficult for artists to break through onto international stages. This underscores the need for strategic capacity development across the sector to create a conducive environment for South African musicians to compete sustainably on the global stage. Such an environment should not only be financially viable and provide economic security but also ensure the protection of intellectual property (IP) rights, thereby preserving cultural heritage for posterity.

As such, it is evident that while South Africa has emerged as a key territory for music consumption and creation, demonstrating promising growth potential enabled by the digital music economy, local economic beneficiation and cultural preservation have been neglected. This neglect perpetuates the false narrative that there is no money to be made in the sector, leaving local musicians vulnerable to exploitation, and hindering their opportunities to break through.

2.2 Micro Analysis

2.2.1 Supply-side dynamics

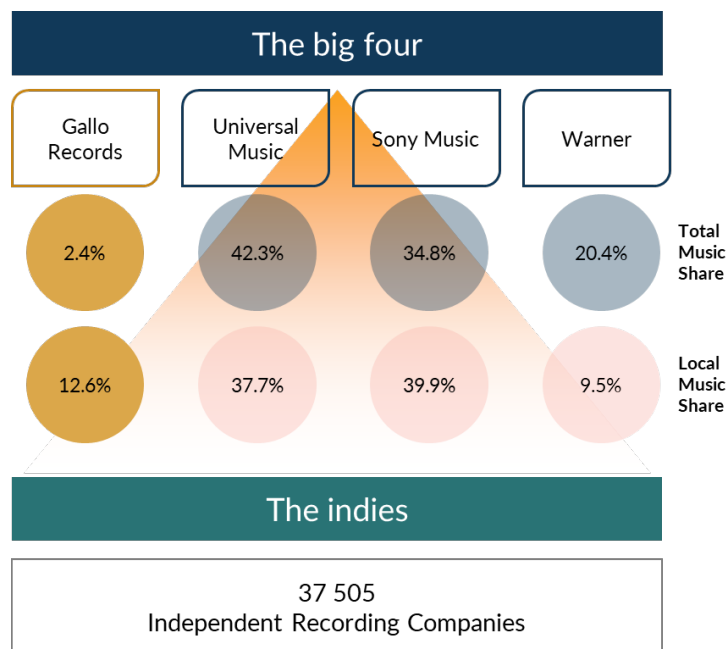
South Africa has a broad music supply chain that is fairly developed, with high competition from creation & production right through to consumption. Technological advancements within the music industry have resulted in key market shifts, which are fundamentally changing the ways in which music is produced, managed, distributed, and consumed. Digital innovation has

¹ IFPI Global Music Report 2023

² pWc Africa Entertainment and Media Outlook 2022-2026

made key industry capabilities and services more accessible. The barriers to entry for music creation and production have been lowered, with an increasing number of artists establishing themselves independently, outside of traditional record labels.

The recording industry is dominated by four record labels, three of which are multinational players with a dominant presence across the globe. Within this space, there are over thirty-seven thousand locally owned independent recording companies³- as captured in the figure below.



Revenues generated from the industry are largely earned by the four major labels, leaving less than 1% of the total music share going to the local independent players⁴. These smaller businesses face challenges competing amid the more established powerhouses in the sector such as securing funding for crucial equipment upgrades or marketing initiatives, making them more susceptible to exploitation by larger corporations with superior resources. This results in unfair contracts and squeezed profit margins.

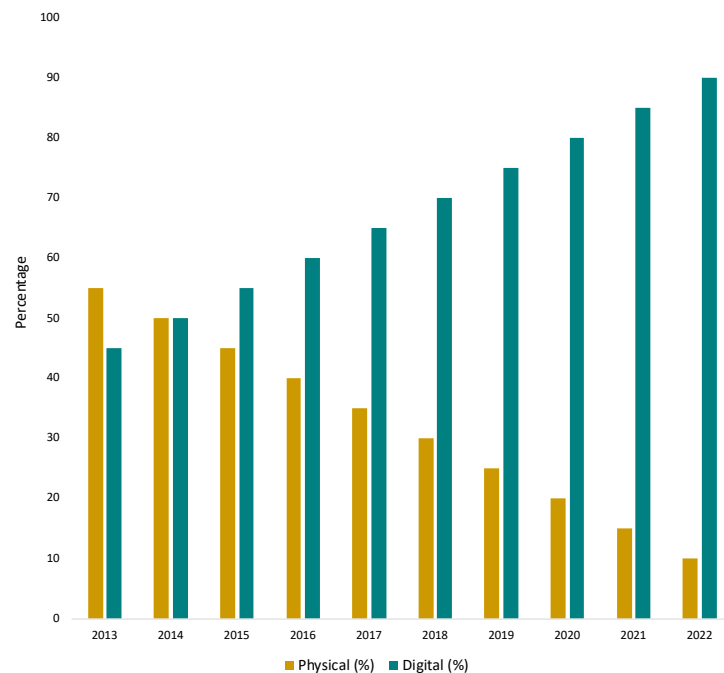
From a music consumption point of view, music has become more

accessible on various digital streaming platforms. The market has steadily shifted away from physical consumption platforms to digital platforms, with has been demonstrated by revenues generated from the respective platforms, shifting the music consumption market to globally accessible platforms – as captured in the figure below.

³ The Mail & Guardian. How the digital age has changed the existence of big record labels .

⁴ RISA. Industry Statistics Jan - Dec 2022.

Revenue % Split between Physical and Digital Platforms in SA



Digital Platforms

SPOTIFY

Spotify has the majority of the market share of subscribers to digital platforms. It has over half of the streaming share

APPLE

Apple Music has the second-biggest market share at just over 30%

DEEZER

Deezer holds a share of less than 10%, with the remainder being distributed among various smaller digital platforms.

Revenue Split: 90%



Physical Platforms

CDS

CDs are still being sold in SA but revenues have declined over the years. They make up less than 10% of music revenues

VINYLS

Vinyl sales have increased over the years, especially in other global regions. They account for less than 1% of music revenues

USBs

USB sales are also popular in SA, especially in rural areas where internet access is limited. USB sales accounted for 2% of music revenue

Revenue Split: 10%

Figure 2-3 Physical versus Digital Music Consumption Platforms

Within this competitive landscape, we have seen that although the recording industry revenues have demonstrated considerable growth, this revenue is mostly generated off international music, owned by the multinational players. Furthermore, more than 85% of the revenues generated from local music is owned by the multinational players. As a result, most royalties collected end up leaving the country, with less than 13% of revenues generated contributing to local economic growth⁵. This dynamic has resulted in the marginalisation of a large proportion of local musical artists, who have not been able to unlock sustainable revenue streams within the industry.

With the increased competitiveness that has come with the globalisation of the sector, because of the digital transformation of the value chain, it has become increasingly challenging to access to unlock sustainable career opportunities within the professional music space. Key skills and capacity gaps exist, regarding entrepreneurship and the business of music. Locally owned businesses within the value chain do not have the necessary financial muscle and capital to sustainably compete with the majors. Business venture funding is not easily accessible for the

⁵ RISA. Industry Statistics Jan - Dec 2022.

music industry due to its reputation as being a high-risk sector. As a result, established entities within the industry are personally funded, or subject to annual funding from government.

Additionally, artists are faced with a precarious situation with regard to social security. Due to the fact that they are classified as independent contractors, they are excluded from accessing the rights and benefits afforded by the South African Labour Relation Laws. A significant portion of artists find themselves operating under a web of informal employment. This translates to a lack of basic protections such as an absence of minimum wage and unemployment insurance. Even those who do have contracts experience the effects of unclear agreements or misclassification as independent contractors leave many musicians, especially those starting out, vulnerable. These contracts often fail to guarantee the rights and benefits afforded to employees under the Basic Conditions of Employment Act.

From an educational standpoint, comprehensive music education from early childhood to higher education and training is not widely accessible. This is due to the resource disparities within the public schooling system, which is not adequately capacitated with qualified music instructors and infrastructure to administer music education. As a result, prospective music scholars coming out of the public school system struggle to meet the qualifying criteria for university education and training. Consequently, professional development opportunities have only accessible through private schooling or informal schooling systems.

Over and above this, industry practitioners also lack adequate education and training on the business fundamentals of the sector. Musicians within the industry tend to be skilled in the art of music creation and production, but they have not been empowered with the necessary tools and education to compete as entrepreneurs, brand owners and businesses within the sector.

Ultimately, the following key challenges are evident within the music supply chain:

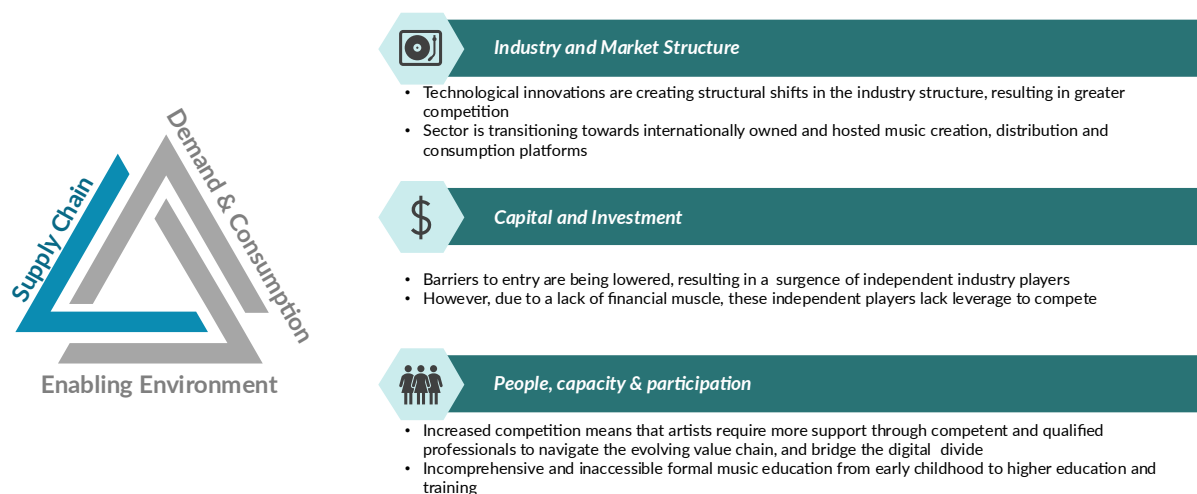


Figure 2-4 Supply chain dynamics

2.2.2 Demand-side dynamics

Culture and heritage are key drivers of music consumer behaviour. The digital music market has transformed music consumption behaviour. However, the limitations faced by underserved genres threaten the sustainability of these unique sounds.

The music distribution and consumption ecosystem has changed from pre-digital to post-digital eras. Digital innovation has unlocked new avenues for understanding and influencing music consumer preferences, with features like algorithmic suggestions making it easier for consumers to discover music they would enjoy, ultimately becoming a tool for influencing the market and directly targeting prospective listeners. Digital streaming platforms have optimized audience development, offering new opportunities for artists to expand their reach and build substantial digital footprints.

With increased access to digital streaming platforms, the country's music consumption market is being flooded with international music and content, largely driven by the multinational players whose objective it is drive listenership and grow audiences for their artists. These players have been successful in establishing a strong audience base, with the split between international to local music consumed remaining at an average 80:20, respectively⁶.

Revenue generated from local listenership and support for local music has not grown to meaningfully compete with the international sounds that flood the market. The barriers that exist in achieving a greater proportion of music consumption in the country are two-fold, namely accessibility and discoverability; and cultural relevance and taste. The digital transformation of the sector has resulted in the marginalisation of indigenous genres, which are not as easily accessible and discoverable as their international counterparts. This can be attributed to the lack of market access, with many traditional artists in the country still distributing physical copies of their music for consumption. As a result, this music is mostly consumed informally, with no royalties being collected for their consumption – thus highlighting the gaps in the protection of uniquely South African sounds.

Additionally, the ways in which South Africans engage with their heritage and express their culture are evolving, influenced increasingly by Western trends shaping consumer preferences. Consequently, local music is often not the first choice in settings such as restaurants, gyms, and stores, where music is integral to marketing and business operations. This shift is concerning, especially considering the crucial role of public broadcasting platforms in promoting music discoverability and fostering audience development.

This business-consumer dynamic highlights the reality that local, indigenous music is not fully promoted and embraced. This issue is further exacerbated by the decline in live music performances. Across the country, there is a growing concern that performance infrastructure and well-maintained venues are becoming increasingly scarce. Consequently, the once vibrant live music scene has diminished, with many artists struggling to organize live music circuits nationwide.

Ultimately, the following key challenges are evident in relation to the demand-side dynamics:

⁶ **ResearchandMarkets.** *The South African Music Industry in South Africa 2020 Report.*



Culture & Heritage

- Technological innovations are transforming how consumers discover and engage with music
- Limited support and consumption of local music due to its limited digital discoverability and cultural relevance
- Indigenous genres are being marginalized, proving to be unsustainable with the decline in live music and lack of music promotion
- Participation in the digital music market is necessary to preserve and promote cultural heritage as captured in music

Figure 2-5 Demand-side dynamics

2.2.3 Enabling environment dynamics

The music sector is largely self-regulated, with various entities either enabling or competing in it. DSAC is a key industry enabler, providing funding for the sector, investing in education and training, infrastructure, and cultural promotion events and festivals. Regulation of the sector is executed through the DTIC and CIPC which is the regulatory body of the copyrights dealing with legislation, compliance and enforcement.

The current legislative framework governing the cultural and creative industries (CCI) in South Africa exhibits an asymmetry in its support for various sectors. While dedicated legislative efforts have demonstrably spurred growth and heritage preservation initiatives in sectors such as film and heritage, the music industry lacks a comparable level of legislative focus.

This disparity is evident in the establishment of specialized agencies like the National Heritage Council and the National Film and Video Foundation. These entities provide crucial support for heritage protection, knowledge sharing, film production, audience access, and industry training within their respective domains. The existing framework fails to fully exploit the potential of the music industry to contribute to the broader objectives envisioned by the CCI legislation. Music videos, for instance, represent a powerful convergence of audio and visual storytelling, potentially falling within the purview of the National Film and Video Foundation's mandate.

Section 3 of the South African National Film and Video Foundation (NFVF) Act (Act No. 73 of 1997) outlines the objectives and functions of the NFVF. The Act establishes the NFVF to support the development of the South African film and video industry, including funding, training, and promoting local content. While the Act does not specifically mention music videos, it encompasses all forms of film and video, which should include music videos as part of its broader mandate to develop and promote the industry. However, current legislation does not facilitate streamlined access to funding for music-related projects, including music videos. This not only hinders artistic expression but also neglects an opportunity to cultivate a vibrant music industry that can significantly enrich the nation's cultural identity.

Moreover, music itself serves as a rich repository of our heritage, capturing the essence of traditions, social movements, and historical events. Without dedicated focus on music preservation, this invaluable tapestry of South African history risks deterioration and eventual loss. The current CCI legislative framework exhibits several gaps in its support for the music sector. These gaps manifest in the lack of a dedicated support structure, limited access to funding opportunities, and the absence of a clear focus on music preservation. These

shortcomings hinder the music industry's ability to thrive and fully contribute to the nation's cultural and economic development. The industry association and unions have played a key role in raising awareness of these challenges faced by artists. Addressing these gaps through legislative reform is crucial to fostering a vibrant and sustainable music sector in South Africa.

In conclusion, while the sector has achieved considerable growth through organic participation and collaboration, the next wave of growth will require strategic enablement. To address the complex challenges facing the South African music industry, a robust framework for interdepartmental collaboration and institutional support is essential. This transcends purely music-related issues and extends to critical ancillary matters such as labour regulations, financing options, broadcasting regulations, and work permit procedures. To achieve this, active participation from various departments such as the Department of Labour, Department of Home Affairs, Department of Communication and Digital Technologies, and the National Treasury, along with their associated entities, is imperative. This is especially crucial as the sector navigates an increasingly challenging macro-context and competitive global landscape.

Overall, the following are the key challenges within the enabling environment of the sector:



Figure 2-6 Enabling Environment Dynamics

2.3 Problem Statement

The sector has achieved considerable growth through organic participation and collaboration. However, it exhibits the following key characteristics that are problematic and inconducive to the growth and development of its stakeholders:

- **Marginalised:** The sector is not accessible at a grassroots level, due to a lack of information, performance infrastructure and adequate resources to compete – which is exacerbated by the transition to the digital music market.
- **Underserved:** There are no dedicated resources to enable and capacitate the music sector. Even though it is a part of the cultural and creative industries (CCIs), blanket interventions are not sufficient to resolve prevalent issues that are unique to the sector.
- **Unregulated:** Exploitation of music and creators prevails due to a lack of education, but also due to a lack of accountability among industry practitioners across the value chain. This is evident in unlicensed music consumption; unregulated CMOs; exploitative contractual agreements / disregard for equitable remuneration for artists; monopolization of radio airplay, performance opportunities, etc.

- **Misaligned:** The sector is fragmented, with a lack of coordination and synchronisation of efforts within governance structures, and amongst industry associations and organisations. There are also misaligned expectations on the role of various industry enablers (national and provincial government, industry associations and advocating groups, etc.)
- **Undervalued:** The cultural significance of our indigenous music is not valued or appreciated. As a result, the sector faces an identity crisis because we are not conserving and preserving our history and the wisdom of those who came before us.
- **Lack of policy coordination by government departments:** Without proper and aligned coordination, government services and interventions may be fragmented and disjointed, making it difficult for citizens to access the support they need. This can result in gaps in service provision, particularly for vulnerable or marginalised populations who may fall through the cracks between different agencies or programs. In addition, when government departments operate in silos, they may miss opportunities to leverage synergies and collaborate on shared objectives.

Therefore, it is incumbent upon us, as industry enablers to collaboratively address these issues through targeted change and intervention. As the sector is thrust into an increasingly challenging macro-context and competitive global landscape, the growth and sustainability of the sector will require strategic enablement, grounded in the propositions and guidelines of this policy.

3. THEORY OF CHANGE

The theory of change guiding the policy and strategy for the music sector acknowledges the critical pain points along the value chain and the socio-economic context in which the sector operates. However, addressing these challenges necessitates considering the significant impact of globalization on industry dynamics. The digital transformation of the sector is leading to a convergence of market forces, increasing reliance on and sensitivity to global industry dynamics. As such, in forging a path towards the envisioned music sector, it is important to recognize that the challenges faced by the sector are structural, arising from its interconnectedness with the global industry. With limited leverage to influence the sector independently, the survival and growth of the South African music sector within this converging and increasingly competitive landscape will depend on its agility and responsiveness to both external and internal dynamics.

This policy serves as a guiding document for strategic adaptation of the sector that seeks to address current challenges and eminent threats, with the objective of ultimately fostering a vibrant and thriving proudly South African music sector. The government's role as an enabler of sustainable development and local economic beneficiation of the sector from a grassroots level becomes more critical than ever in this regard.

The policy aims to empower and equip local industry practitioners from a grassroots level. Through education, promotion, advocacy, stakeholder engagement and regulation, the objective is to nurture a thriving grassroots industry. The envisaged impact of this is one that is transformative, driving the realization of a diverse pool of talented artists and enriched musical expressions that are locally owned and celebrated. Furthermore, this policy will drive economic beneficiation and development through financial sustainability across the value chain, enabling local music entrepreneurs to meaningfully compete and participate at provincial, national, regional, and international levels. Moreover, this policy will foster social cohesion through the development of a shared national identity that is embraced by South Africans and the world at large – further enhancing the brand of South African music in the global music arena. The figure below captures the theory of change.

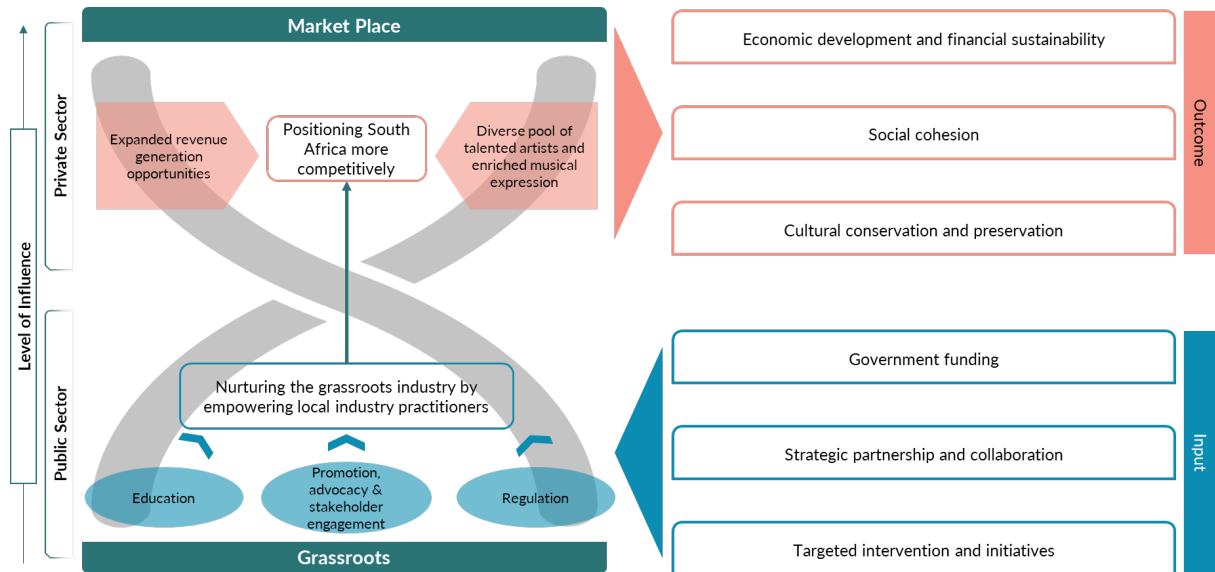


Figure 3-1 Theory of Change

By empowering the grassroots industry and promoting local talent, we aim to create a vibrant music ecosystem that thrives domestically and competes successfully on the global stage, embodying our collective aspirations and values. Through these concerted efforts, we seek to build a resilient and impactful music sector that contributes significantly to our broader societal and economic objectives.

4. POLICY VISION AND OUTCOMES

This section of the National Music Sector Policy lays the foundation for the transformation and advancement of South Africa's music industry by providing focussed direction to where government and sector stakeholders can focus strategic efforts. The comprehensive vision encapsulates the aspirations for a music sector that not only flourishes economically but also plays a pivotal role in the preservation of cultural heritage, the promotion of social unity, and the development of a sustainable and innovative industry framework.

The core outcomes that the policy aims to achieve set the stage for the strategic initiatives detailed later in the document. The outcomes are designed to address the critical areas of cultural conservation, social cohesion, and economic development. Each outcome is interconnected, reinforcing the policy's holistic approach to nurturing a vibrant and resilient music sector. These outcomes are introduced as follows, and expanded on in further detail in section 4.2;

- A. **Cultural Conservation and Preservation:** This outcome emphasizes the importance of recognizing, valuing, and safeguarding South Africa's diverse cultural heritage. It aims to protect the musical legacy from exploitation and marginalization, fostering respect for indigenous knowledge and practices that distinguish South African music on the global stage.
- B. **Social Cohesion through a Shared National Identity:** Music is portrayed as a powerful unifying force that bridges divides and fosters understanding within communities. By embracing the country's diversity through music, this outcome seeks to strengthen national unity and create a shared identity that is celebrated both locally and internationally.
- C. **Economic Development through Financial Sustainability:** The policy underscores the need for a thriving music sector that supports economic viability. This involves creating opportunities for musicians and industry professionals to earn fair wages, access funding, and develop sustainable business models. Achieving financial health and economic success is seen as crucial for poverty alleviation, job creation, and overall sector growth.

The policy outcomes are then cascaded into **policy outputs and implementation mechanisms** as illustrated in Figure 4-1 below. Outputs and mechanisms have been developed in order to actualize the envisioned outcomes. By aligning these strategic areas of intervention with the desired policy outcomes, the document ensures a coherent and actionable roadmap for the music sector's development clarifying expectations of and important actions to be taken by each stakeholder. The collaboration between various government departments, industry stakeholders, and community representatives is emphasized as essential for the successful realization of the policy's intention.

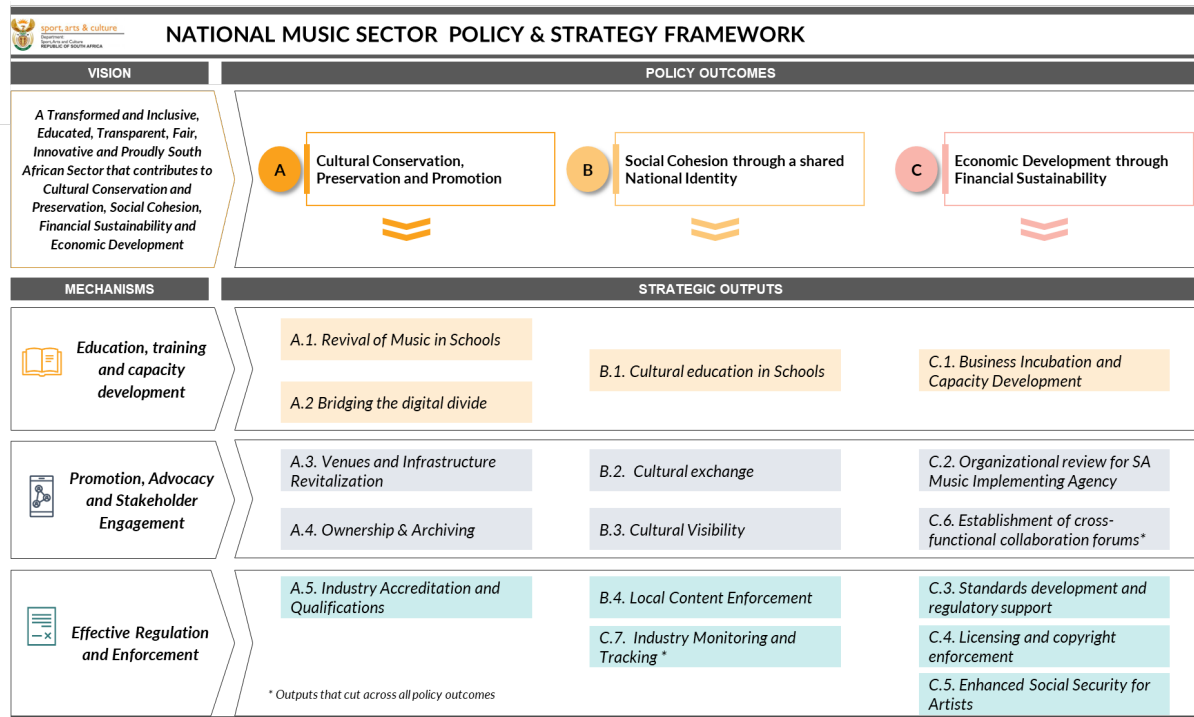


Figure 4-1 Music Sector Policy Structure Framework

4.1 Vision

The vision which this policy is ultimately striving towards is,

‘A transformed and inclusive, educated, transparent, fair, innovative and proudly South African sector that contributes to cultural conservation and preservation, social cohesion, financial sustainability and economic development.’

It is important to unpack the meaning and intention behind the use of each significant word. The following figure provides a breakdown of certain words chosen for the vision, and introduces, for the first time in the document, the values that underpin it. These characteristics of the future music sector are directly linked to the policy objectives (outputs) and targeted interventions unpacked in the strategy document.

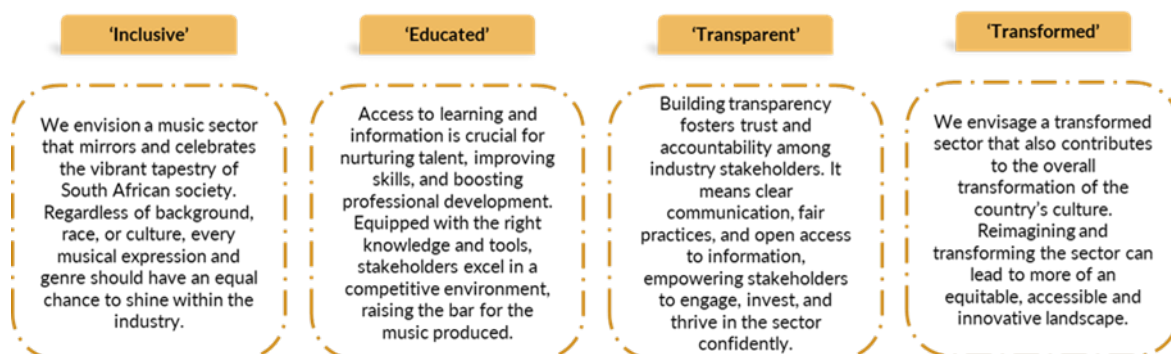


Figure 4-2 Policy Impact Statements

4.2 Policy Outcomes

The *Policy Outcomes* establish the aspirational goals for the South African music sector, while the *Policy Outputs* in the section that follows provides the practical steps to achieve these goals. Together, they form a comprehensive strategy aimed at fostering a dynamic, inclusive, and sustainable music industry that contributes significantly to the country's cultural, social, and economic fabric.

Outcome A: Cultural Conservation, Preservation and Promotion

Context

Culture serves as the foundation of inspiration and creativity, essential for producing meaningful music. However, the current context of the South African music sector presents significant threats to indigenous and traditional music, primarily through marginalization and exploitation.

The marginalisation of uniquely South African musical sounds can be traced back to the nation's oppressive history, where cultural expressions were deliberately suppressed. This painful legacy has left generations of South Africans growing up in environments that sought to erase their cultural heritage.

Additionally, the transition to the digital music economy has further marginalized these sounds. Competing in the digital landscape requires distinct competencies and access to infrastructure, creating a digital divide. This divide means that the necessary resources are concentrated in a few music hubs across the country, forcing most artists to relocate to these hubs in an effort to unlock opportunities. As a result, the heightened competition in these spaces often sidelines indigenous and traditional music in favour of more commercially viable Western sounds.

Exploitation compounds these issues, with many artists unable to generate income from their musical works. This economic disenfranchisement further weakens the support for and consumption of uniquely South African music, diluting the country's rich culture and heritage. The combined effects of historical oppression and the digital divide jeopardize the sustainability of South African music's deep-rooted sounds, placing us at risk of losing what makes this music truly unique in its essence.

Culture serves as the foundation of inspiration and creativity, essential for producing meaningful music. The current context of the South African music sector is one where indigenous and uniquely South African musical sounds are either marginalized or exploited, leaving many artists unable to generate income from their musical works. This issue is partly due to the transition to the digital music economy, which requires distinct competencies to compete effectively. A digital divide exists, with the necessary infrastructure and capabilities concentrated in a few music hubs across the country.

Objectives of Policy Outcome

Therefore, cultural preservation and conservation are fundamental pillars for the growth and sustainability of the music sector. This policy aims to conserve and preserve South Africa's multifaceted culture and heritage by prioritizing education and training in traditional and indigenous musical genres. It recognizes that the academization of culture is a powerful way to ensure it is not lost.

Additionally, prioritizing music industry research and documenting the South African story are essential mechanisms for preserving and conserving this culture. Effective regulatory frameworks and their enforcement aim to protect the culture from exploitation. Programs and strategies that promote the ownership of South African music by South Africans, along with equitable remuneration for these musical works, will further achieve this goal.

Outcome B: Social Cohesion through a shared National Identity

Context

Equally crucial to conserving South African culture is encouraging South African music consumers to engage with and embrace their culture. This serves a fundamental purpose in propagating the story of who we are and who we are becoming, ensuring our legacy resonates well into future generations. Without a vibrant cultural identity that binds us, we risk losing the tapestry of shared experiences that forge a strong sense of community. This raises critical questions about our collective spirit and values, especially when considering the weight of the nation's oppressive history.

As South Africa charts a course towards a brighter future, the lingering scars of the past continue to cast a shadow. The full, unapologetic expression and appreciation of our rich cultural heritage remains elusive. This is evident in the dangerous rise of xenophobic rhetoric, which fuels violence and mistreatment. Furthermore, deep economic divides create chasms between the privileged and the underprivileged, further fracturing the nation. South Africa thus finds itself at a crossroads, a land of diverse groups with vastly different realities and perspectives, struggling to find common ground. This, in turn, leaves younger generations searching for self-expression in the homogenizing currents of Western popular culture. Consequently, with the ever-expanding influence of Western culture, one can argue that South Africa's unique African voice has yet to fully resonate within its own popular culture.

Objectives of Policy Outcome

It is therefore a matter of national significance to prioritize and enhance the cohesiveness of South African society. This policy aims to address the injustices and lingering effects of the nation's culturally oppressive past, leveraging music to enable individual self-actualisation and collective cultural liberation. By promoting inclusivity and representation of diverse cultural and socio-economic backgrounds, the policy aims to strengthen our society by fostering a sense of community and belonging through musical expression and appreciation. Specifically, one of the key motivations for this policy is the need to increase demand for South African music by actively promoting initiatives that drive the consumption of local music, ensuring that South Africans can discover, access, and enjoy local music as swiftly as they do international music. Despite the rich and diverse musical traditions within the country, the local music sector often struggles to compete with international music due to limited visibility and support. By formulating a national music identity, we can create a unified brand that resonates with both

local and global audiences ultimately commercialising and monetising our distinctive South African flavour and style.

This initiative will involve strategic marketing campaigns, collaboration with media and entertainment companies, and the use of digital platforms to showcase and promote South African music. Additionally, educational programs and community initiatives can inspire young talent to pursue and celebrate the creation of indigenous music styles and raise awareness about the importance of supporting and appreciating local artists.

Moreover, the policy aims to establish a cohesive mechanism for collaboration among the government, private sector, and music industry practitioners, facilitating progress towards the diversification of music discovery and consumption channels, with clear targets for local content. Ultimately, the goal is to cultivate pride in the shared national identity of the South African people, celebrating our history and heritage as expressed in our music.

Outcome C: Economic Development through Financial Sustainability

Context

Financial sustainability is essential for maintaining viable activities within the music sector. In South Africa, the music sector grapples with the deep-rooted issue of financial exclusion and exploitation. The dominance of major players in the South African music industry can also be characterized by racial bias and exclusion, with historically disadvantaged groups facing systemic barriers to participation and advancement. In a country with a legacy of apartheid and racial inequality, the music industry may reflect and perpetuate these inequalities, with opportunities and resources disproportionately benefiting white-owned companies and artists. This can contribute to the marginalization of Black artists, composers, producers, and entrepreneurs, limiting their access to economic opportunities and hindering the development of a more inclusive and representative music industry. Many talented artists are recognized for their work but excluded from the business side, unaware of the economic value of their creations. These dynamic concentrates wealth in the hands of a select few, while many South African creators struggle financially.

Furthermore, the digital transformation within the sector has contributed to the economic marginalization of traditional and indigenous music creators, who struggle to unlock revenue from digital consumption channels. This has led to an undocumented music economy sustained by the continued sale of physical music products like USBs. This practice significantly limits the revenue-generating potential of musical works, as artists only receive income at the point of sale, forfeiting additional revenue when users make copies of the music. The absence of proper licensing and levy systems exacerbates this issue, resulting in unauthorized distribution and diminished economic benefits for artists.

This lack of financial sustainability hinders the sector's growth. Local entrepreneurs face difficulty securing funding due to the perceived high risk and lack of proven success in the music industry. Consequently, many organizations rely heavily on unpredictable government grants, creating an unsustainable funding model.

Objectives of Policy Outcome

Addressing the racial disparities and exclusionary practices within the South African music industry requires structural reform and concerted efforts to promote diversity, equity, and inclusion. This may include policies and initiatives aimed at levelling the playing field for independent practitioners – dedicated finance structures, promoting diversity in leadership and decision-making roles, and dismantling systemic barriers to entry and advancement.

Commercialising the sector through the development of viable business models, is also a crucial next step in the maturation of sector. By establishing economically viable operations, industry practitioners will no longer be limited in the impact they seek to affect. Reliable income streams will be unlocked, leading to the creation of sustainable jobs within the sector. This will contribute to poverty alleviation and help address the economic imbalance within the South African music industry.

Therefore, economic development through financial sustainability is a fundamental outcome that this policy seeks to enable. This includes supporting initiatives that encourage local ownership of music and businesses, maximizing local economic benefit. The policy aims to introduce industry standards of practice for custodians along the value chain, to enable professional career development within the sector and standardisation of processes. Additionally, the policy strives to introduce a blank tape levy model to preserve and sustain the physical music economy and ensure that artists participating within it are enabled to derive equitable remunerations for their music. The policy also aims to foster the growth and development of economically viable businesses and organizations within the sector. By commercializing the industry, investor confidence will rise, empowering creators to amplify their impact and contribute to broader economic growth and development.

More specifically, intellectual property rights facilitate trade and commerce by providing legal frameworks for the exchange of ideas, products, and services. South Africa must engage in trade agreements with key countries to protect IP rights which also foster international economic relations.

5. POLICY IMPLEMENTATION

5.1 Policy Implementation Mechanisms

The realisation of the vision and policy outcomes defined in the preceding sections requires targeted interventions which have been thematically grouped, and will be enabled by the following policy implementation mechanisms:

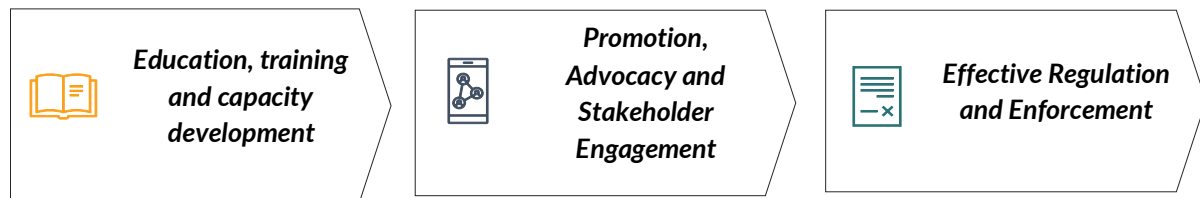


Figure 5-1 Implementation mechanisms within the Music Sector Policy Structure Framework

In line with the theory of change, enhancing education, promotion, advocacy, stakeholder engagement, and regulation within the music sector is crucial for creating a conducive operating environment. The sections that follow provide a detailed view of the envisaged implementation approach for this policy. Each policy implementation mechanism includes strategic programmes with targeted interventions which are detailed further in the supporting, National Music Sector Strategy. This section outlines the objectives for each policy output and explains how these interventions will lead to the realization of the policy outcomes.

Policy Outcome A: Cultural Conservation, Preservation and Promotion

Policy Output A.1: Revival of Music in Schools

The music in schools programme seeks to provide all children, regardless of socio-economic background, with the opportunity to receive formal training in music creation and production. This empowers them to pursue careers as professional musicians should they wish to do so. In addition to contributing to poverty alleviation for children from disadvantaged backgrounds, this program enhances representation within the professional music space. It also ensures the preservation of indigenous sounds unique to South Africa, cultivating new generations of artists who value their cultural heritage.

This programme directly supports cultural conservation, preservation, and promotion by ensuring that historically significant indigenous sounds are not lost. These students, empowered to create and produce music, become the next generation of cultural stewards. Furthermore, promoting a diverse range of young musicians combats underrepresentation in the professional music industry, fostering a richer and more vibrant national soundscape. This inclusivity not only dismantles socioeconomic barriers but also celebrates the unique musical heritage of South Africa.

Roles and Responsibilities

Lead: DBE, DHET

Support: DSAC

Target Beneficiaries

- Students, especially those from disadvantaged backgrounds
- Music industry players

Key Results

- Increase in the number of music students meeting the entry-level requirements at institutions of higher learning
- Increase in the number of skilled musicians across the spectrum of indigenous music genres and sounds

Policy Output A.2 Bridging the Digital Divide

This programme aims to demystify the digital music economy, thereby empowering stakeholders to participate and compete effectively. By ensuring the participation and representation of indigenous music creators in this digital economy, we enhance the longevity of their unique cultural expressions, which might otherwise go undocumented and therefore neglected. This program not only equips artists with the necessary skills and knowledge to navigate the digital landscape but also ensures that the rich diversity of South African music is preserved and celebrated in the global market.

This directly supports all three pillars of cultural conservation, preservation, and promotion. By empowering indigenous music creators to participate in the digital music economy, it ensures their unique cultural expressions are documented and reach a wider audience. This combats neglect and fosters cultural conservation. Furthermore, the program actively preserves this rich musical heritage by providing the tools and knowledge for digital archiving and distribution. In doing so, the program celebrates South Africa's musical identity.

Roles and Responsibilities

Lead: DCDT

Support: DSAC, DHET, DSBD, DST

Target Beneficiaries

- Indigenous Music Creators
- Music consumers
- Cultural institutions and archivists

Key Results

- More indigenous and/or marginalised musical sounds are becoming digitally accessible
- Creators of the music are unlocking new revenue streams for themselves through their music

Policy Output A.3: Venues and Infrastructure Revitalization

This programme aims to enhance audience development and support for local music by improving access to quality infrastructure for music creation and production, as well as live music consumption across provincial markets. This program focuses on creating and upgrading spaces for music creation and consumption, which will improve the quality of music produced and foster a more competitive music sector. By growing audiences for South African music and increasing the demand and consumption of local music, the program boosts the revenue-earning potential of the sector. This revival of the live music industry will drive greater economic activity, aligning with and contributing to the economic development objectives of the policy. Additionally, it will ensure that investments and infrastructural upgrades are made sustainably, with clear commercialization targets for all these facilities.

This programme ties into cultural conservation, preservation, and promotion through fostering the creation of new music, strengthening the live music scene where traditional forms are often kept alive, and exposes audiences to a wider variety of South African music. This revitalization not only preserves cultural heritage but also creates a more robust music industry, leading to increased commercialization and promotion of local music on a national and potentially international scale.

Roles and Responsibilities

Lead: DSAC, DPW

Support: DSBD, National Treasury, DEDT, DHET, DTIC

Target Beneficiaries

- Music Industry players such as artists, music producers, promoters, etc.

Key Results

- Advancement in the quality of music production in the country
- Growth in live performances, music events and concerts
- Establishment of live music circuits with more artists touring the country

Policy Output A.4: Archiving

This programme aims to capture the essence of a culture at a specific point in time. By preserving recordings of traditional music, folk songs, and indigenous instruments, a link to the past is safeguarded. This allows future generations to experience the sounds that shaped their heritage and fostered a sense of belonging enabling listeners to learn about past social movements through protest songs or communities keeping their traditions alive by listening to archived recordings of ancient rituals.

Through digital preservation techniques and robust storage solutions, recordings can be safeguarded, guaranteeing that future researchers, musicians, and the general public can access this rich aural tapestry. Archives can be a springboard for promoting a nation's musical heritage. By making archived recordings accessible through online platforms or dedicated listening centres, we foster appreciation for a country's diverse musical landscape. This not only educates the public but also provides a platform for lesser-known artists and traditional music forms.

Roles and Responsibilities

Lead: DSAC

Support: DCDT, DST, DHET

Target Beneficiaries

- Industry Associations
- Academics such as researchers, lecturers, and students,
- Musicians such as orchestras, artists, and producers

Key Results

- Digital and physical repositories that allow the public, researchers, and enthusiasts to access a wide range of music
- Resources for educational institutions and students studying music history, theory, and performance.
- Improved management of royalties and rights by maintaining accurate records of music ownership and usage

Policy Output A.5: Industry Accreditation and Qualifications

The Industry Accreditation and Qualifications programme formalizes music education and training, ensuring the presence of qualified music educators in schools. It also aims to foster professionalism and trust among practitioners across the value chain by standardizing the professional requirements for key roles in the sector. By formally recognizing and integrating self-taught musicians into the formal schooling system, the program creates pathways for career advancement and economic sustainability within the music industry. Additionally, by standardizing and accrediting key roles and functions in the sector, career development pathways are established, underpinned by the accreditation of specific skill sets, which enhances credibility and professional earning potential in the music sector.

This programme focuses on music education and professionalisation. By ensuring qualified music educators in schools, it strengthens the foundation for transmitting cultural traditions and musical knowledge to future generations. Furthermore, by integrating self-taught musicians and fostering professionalism across the music industry, the programme creates a larger pool of talent equipped to promote and share this cultural heritage through performances, recordings, and education.

Roles and Responsibilities

- Lead: DSAC, CATHSETA
- Support: DBE, DHET

Target Beneficiaries

- Self-taught musicians
- Music Industry Professionals
- Students

Key Results

- More self-taught musicians are being afforded opportunities for career advancement within the sector

Policy Outcome B: Social Cohesion through a shared National Identity and Brand

Policy Output B.1: Cultural Education in Schools

Revising cultural education in schools is essential to enrich the educational experience of all learners, foster a shared national identity, and strengthen the music sector in South Africa. This policy aims to integrate indigenous knowledge and practices into the curriculum, raising awareness about South Africa's rich cultural heritage from a young age. By doing so, we not only honour our diverse traditions but also inspire young South Africans to embrace and celebrate their unique identities.

One compelling example of this cultural dynamism is the trend of war cries in South African high schools, which have garnered international attention on social media. These war cries, enhanced with a distinct South African musical flavour, showcase the creativity and cultural pride of our youth. The viral spread of these performances, even catching the attention of global music artists like Ye, underscores the potential of our indigenous practices to resonate on a global scale. This phenomenon highlights the importance of integrating diverse South African histories and popular cultural elements into the school curriculum to nurture and amplify this inherent creativity.

Moreover, the current educational content in South African schools often leans heavily towards Eurocentric ideals and pop culture. To create a more inclusive and representative curriculum, we must shift towards incorporating local, South African material. This approach ensures that learners see themselves reflected in their studies, fostering a sense of belonging and pride in their heritage. By emphasizing local content, we can encourage a deeper connection to our national identity and a greater appreciation for the diverse cultural expressions within our country.

Building a national identity through school curriculums that reflect the actual lives and histories of students is crucial for societal cohesion. When young South Africans understand and value their cultural roots, they are more likely to embrace and celebrate their unique identities. This cultural awareness influences both the demand and supply sides of the national music sector, as young people become more inclined to produce and consume music that reflects their heritage. This, in turn, supports the growth of a vibrant, authentic South African music industry.

Cultural education in schools is a vital policy output that can significantly enhance the educational experience, promote a shared national identity, and strengthen the music sector. By integrating indigenous knowledge and practices into the curriculum, we can cultivate a generation of proud, culturally aware South Africans who contribute to the richness of our national tapestry and drive the evolution of our music industry.

Roles and Responsibilities

Lead: DSAC, DBE, Provincial Education Departments, SAQA, National Arts Council of SA

Support: National Arts Council of SA, Media (SABC)

Target Beneficiaries

- South African educators and learners
- Talent acquisition organisations and programmes
- Indirect beneficiaries: SA Music sector, local artists and producers
- Long term beneficiaries: Future generations, SA Economic sector

Key Results

- Improved Educational outcomes: Students will enjoy a richer, engaging and relatable educational experience that includes learning about their cultural heritage and indigenous practices. Culturally relevant content can boost student engagement and motivation, potentially leading to improved academic performance and reduced dropout rates.
- Increased cultural awareness, social cohesion and strengthened national identity.
- The music sector will benefit from a new generation of musicians and artists who are inspired by and rooted in their cultural heritage and a developed identity.
- There will be a heightened demand for local music, arts, and cultural products, boosting the creative economy and providing economic opportunities for local artists.
- Greater cultural awareness and appreciation can attract more cultural tourism, contributing to the country's economy.
- The systematic inclusion of indigenous knowledge in the curriculum will help preserve and transmit this knowledge to future generations.
- The curriculum will be more inclusive and representative of South Africa's cultural diversity, moving away from Eurocentric models and incorporating local perspectives.

Policy Output B.2: Cultural Exchange

The proposed policy output, "Cultural Exchange," aims to establish a robust and well-managed programme dedicated to fostering international cultural exchange specifically tailored for the South African music sector. While cultural exchange programmes already exist between South Africa and other countries, this initiative seeks to expand and enhance these efforts, with a particular focus on grassroots artists from underserved, disadvantaged, and rural communities.

This Cultural Exchange programme will facilitate opportunities for young South African talent to debut on the international stage, garnering endorsement, funding, and training from internationally acclaimed musical veterans, foreign music schools, and global music programmes. A key component of the programme will be its branding and execution, building prestige around these opportunities and ensuring they are seen as valuable and transformative experiences.

To illustrate, the programme could involve partnerships with renowned music festivals in Europe, North America, North Africa and South Korea where South African artists perform and collaborate with international artists, blending diverse musical styles and traditions. Another

example could be residencies at esteemed music schools, where our local musicians receive advanced training and mentorship, subsequently returning to South Africa to share their new skills and knowledge, thereby enriching the local music scene.

DSAC's commitment to this initiative will include attending and promoting events where participating artists perform at the culmination of their cultural exchange period. These performances will be broadcast and marketed as part of broader branding and national identity-building initiatives mentioned in other areas of this policy document, showcasing our local talent and reinforcing South African cultural pride.

The output also aims to create ambassadorship opportunities, where emerging South African musicians represent our nation's rich and diverse musical heritage on global stages, fostering international recognition and respect for our unique sound. It provides a platform for cultural dialogue, allowing other cultures to see the similarities and opportunities within South Africa, and encouraging locals to celebrate and share our distinct musical identity across borders, rather than conforming to homogenous Western ideals.

Additional benefits of the Cultural Exchange programme include the potential for economic growth through increased tourism and international partnerships, the strengthening of diplomatic relations through cultural diplomacy, and the fostering of a greater appreciation for diversity and creativity within the South African music industry. DSAC must take a proactive role in driving this programme, establishing strong partnerships with global entities, and highlighting the significance and impact of cultural exchange on the national and international stages.

Roles and Responsibilities

Lead: DSAC, National Arts Council of SA, DTIC

Support: SA Tourism, DIRCO, SABC, Local Municipalities and Provincial Arts and Culture Department, NFVF, International Music Schools and Institutions, SA Embassies based in foreign countries, Foreign Embassies and Consulates, International Music Festivals and Events, Higher Education Institutions with Music and Arts Departments, SAT

Target Beneficiaries

- Grassroots Artists from Underserved, Disadvantaged, and Rural Communities
- Emerging Musicians and Music Producers
- Local Music Communities and Cultural Organisations
- Cultural Ambassadors and Diplomatic Entities

Key Results

- South African musicians and producers will gain significant visibility on global platforms, leading to international recognition and new career opportunities
- Enhanced skills and knowledge transfer; participating artists will return with advanced skills, knowledge, and innovative techniques learned from international mentors and institutions, enriching the local music industry.
- The programme will foster stronger diplomatic relations and mutual understanding through cultural exchange, enhancing South Africa's cultural presence and influence globally.

- The programme will stimulate economic growth by attracting international investments, sponsorships, and tourism related to South African music
- Artists from underserved, disadvantaged, and rural communities will gain unprecedented access to international platforms, resources, and networks
- The programme will boost national identity and cultural pride by celebrating and promoting South African music and heritage on the world stage
- The initiative will lead to the establishment of long-term, sustainable partnerships with international music institutions, festivals, and organisations

Policy Output B.3: Cultural Visibility Drive: Increasing visibility of marginalised genres and grassroots artists

This output is designed to enhance the visibility of South African grassroots artists and marginalised music genres, ensuring they receive the recognition and opportunities they deserve. In a country rich with diverse musical talent, many artists from underserved, disadvantaged, and rural communities struggle to gain the exposure necessary to thrive. Increasing their visibility is crucial not only for their personal and professional growth but also for the enrichment of South Africa's cultural landscape.

One compelling reason for boosting the visibility of grassroots artists is the preservation and celebration of South Africa's unique musical heritage. Marginalised genres often carry the history, stories, and traditions of our communities. By shining a light on these artists, we ensure that our rich cultural tapestry is not only maintained but also celebrated globally. Furthermore, providing these artists with a platform can inspire younger generations, fostering a new wave of creativity and innovation within the local music scene.

To effectively increase visibility, we can leverage popular and influential figures in the music industry. For instance, collaborating with a highly followed celebrity or a well-established broadcasting entity to release a monthly playlist on Spotify featuring up-and-coming South African artists can significantly boost their reach. This initiative would allow a wider audience to discover and appreciate the diverse talent that South Africa has to offer, ultimately leading to more opportunities for these artists.

Another strategy is organising national roadshows or music tours featuring the top-performing South African artists of the year. In collaboration with private music event companies, these tours can showcase the musical talents of grassroots artists across the country, including in smaller towns that typically lack access to such events. Branding these tours to build popularity and a strong reputation over time will create a celebrated platform for artists to gain recognition and develop their careers.

The benefits of increasing the visibility of South African grassroots artists are manifold. It will lead to greater diversity in the music industry, providing audiences with a wider array of musical styles and stories. Enhanced visibility can also drive economic growth within the music sector, as new talents attract investments and create job opportunities. Additionally, this initiative will foster national pride and unity by highlighting the unique contributions of artists from all corners of the country, thereby strengthening our cultural identity. By implementing the

Cultural Visibility policy outcome, we can ensure that all South African artists, regardless of their background, have the opportunity to shine on both national and international stages.

Roles and Responsibilities

Lead: DSAC, DCDT

Support: National Arts Council of SA, Radio Stations, Artists with a strong following, Social Media Influencers, Corporate Sponsors

Target Beneficiaries

- Grassroots Artists from Underserved, Disadvantaged, and Rural Communities
- Emerging Musicians and Music Producers
- Event Organisers and Promoters

Key Results

- Grassroots and marginalised artists gain significant visibility and recognition, leading to new opportunities and career advancement. Including enhanced digital presence for grassroots artists through curated playlists and online promotions, leading to greater discoverability and streaming success.
- Increased representation of diverse and underrepresented musical genres in the mainstream, enriching South Africa's cultural tapestry.
- Boost in economic activity within the music industry, including increased investments, job creation, and revenue from events and digital platforms.
- Greater community engagement and cultural pride as local artists and genres are celebrated and supported nationally and internationally.
- Effective collaborations with celebrities, influencers, and media entities, leading to high-profile endorsements and widespread promotion.

Policy Output B.4: Enforcing The Usage of Local Content through Regulatory Mechanisms

This policy output seeks to enforce the inclusion of South African music across various public and private platforms, thereby nurturing the local music industry and promoting our national cultural identity. By mandating the use of local content in businesses, events, and media, we can ensure that South African artists, particularly those from grassroots and underserved communities, receive the recognition and opportunities they deserve.

Enforcing the use of local content in South African-based businesses and organisations, such as supermarket chain stores, fashion shows, and embassy events, is crucial for several reasons. Firstly, it promotes national pride and cultural unity by showcasing our unique musical heritage. Our music tells the story of our diverse communities and experiences and giving it prominence in everyday spaces reinforces a shared national identity. Additionally, local content creates

economic opportunities for South African artists, fostering growth in the creative sector and stimulating local economies.

To enforce the usage of local content in all public spaces and platforms, we can implement several strategies. For instance, regulatory frameworks can be established that require a minimum percentage of local music to be played in public venues and at events. Compliance with these regulations can be monitored and enforced by relevant government bodies, such as the Department of Sport, Arts and Culture (DSAC) and the Department of Communications and Digital Technologies (DCDT). Incentives, such as tax breaks or grants, could also be offered to businesses and organisations that actively promote local content.

Another effective approach is through partnerships with influential entities. Supermarket chains (such as Woolworths and Checkers) and event organisers can collaborate with local artists to feature their music in-store, while fashion shows can incorporate live performances or soundtracks by South African musicians. Embassy events abroad can serve as cultural showcases, highlighting our music and fostering international appreciation for our local talent.

The benefits of regulating the usage of local content are manifold. Increased airplay and visibility of local music will boost the careers of South African artists, leading to higher income, more performance opportunities, and greater recognition both locally and internationally. This, in turn, will inspire and support the next generation of musicians, ensuring a continuous flow of new talent into the industry. Moreover, promoting local content will enhance cultural tourism, attracting visitors eager to experience South Africa's vibrant music scene.

Additionally, the policy outcome will address local content broadcasting requirements under the DCDT, ensuring that all government departments, implementing agencies, and entities subscribe to, promote, and support the national music identity and the usage of local content. This cohesive approach will create a unified effort across all sectors, reinforcing the importance of local music and its integral role in our national identity and our economy.

Roles and Responsibilities

Lead: DCDT

Support: DSAC, SABC, Private Sector Businesses and Organisations, Dept for Infrastructure (Public space and facilities), South African Tourism, SA Embassies,

Target Beneficiaries

- Grassroots Artists from Underserved, Disadvantaged, and Rural Communities
- Emerging Musicians and Music Producers

Key Results

- Local musicians and artists will gain heightened visibility and recognition both nationally and internationally, leading to expanded fan bases and career opportunities.
- Promotion of local content will reinforce South Africa's cultural identity and heritage, fostering national pride among citizens and showcasing our diverse musical traditions.

- Enhanced support for local artists and increased usage of local content will stimulate economic growth within the music sector, generating revenue and job opportunities.
- Public and private platforms will diversify their content offerings by including more local music, enriching cultural experiences for audiences and consumers.
- Music education and skill development initiatives will benefit from increased access to local talent and resources, nurturing the next generation of musicians and industry professionals.
- Increased visibility of South African music will attract cultural tourists and enhance South Africa's international reputation as a hub of musical innovation and creativity.
- Communities, particularly in underserved areas, will benefit from cultural events and initiatives that celebrate local talent, fostering community pride and social cohesion.

Policy Outcome C: Economic Development through Financial Sustainability

Policy Outcome C.1: Business Incubation and Capacity Development

The Business Incubation and Capacity Development Programme aims to enhance financial sustainability across the music value chain. Through innovative and dynamic education and capacity-building initiatives, industry practitioners can learn how to develop and grow economically viable businesses along the value chain. Additionally, this programme aims to streamline and enhance access to support, finance and market opportunities for marginalised groups and informal sector businesses through business incubation initiatives. This will require a synchronisation of existing funding models, capabilities and infrastructure within the current sphere of state institutions to drive towards inclusive economic development tactics that inspire innovation and entrepreneurship in the sector.

Roles and Responsibilities

- Lead: DSBD, DTIC, DSAC
- Support: Provincial EDTEAs, NAC, NFVF, IDC, Other relevant SETAs

Target Beneficiaries

- Industry associations and bodies dependant on government funding for operations
- Entities and business owners from marginalised groups (Africans, Women, Youth and People with disabilities)

Key Results

- More independently funded and financially sustainable industry bodies, associations and businesses
- Increased business ownership in the music sector by marginalised groups
- Increased job opportunities and sustainable employment in the sector
- Growing capability and support for local businesses in the sector

Policy Outcome C.2: Organisational review for SA Music Implementing Agency

The South African music industry possesses undeniable talent, yet to maximize its impact, a more streamlined approach to development and promotion is necessary. While existing efforts

to cultivate the South African music brand deserve recognition, a centralized structure can significantly enhance their effectiveness.

This programme seeks to establishment of a dedicated statutory bodies that centralises the resources and capabilities dispersed across various government agencies and institutions. This platform would act as a central hub, consolidating vital industry resources, fostering robust stakeholder networks, and building the capabilities needed to propel the South African music brand onto the global stage.

The creation of a South African Music Fund will be the foundation of all operations of this agency. This fund would be strategically directed to fuel local and international demand and consumption for South African music – amplifying efforts to develop and sustain the SA music brand globally. By achieving measurable targets, the agency would demonstrate its commitment and effectiveness in fulfilling its mandate.

This programme will open international markets for South African music enabling local artists to access new revenue streams and economic opportunities, thereby contributing to the economic development of the sector.

Roles and Responsibilities

- Lead: DSAC, Provincial Departments

Target Beneficiaries

- Grassroot music industry practitioners
- International industry practitioners looking to gain market access, partner and collaborate with the grassroots industry

Key Results

- Increased presence and representation of SA within international music forums (with more artists becoming household names beyond our borders)
- Growth in the country's tourism industry as a result of the international pull created by our vibrant music sector

Policy Outcome C.3: Standards development and regulatory support

The Regulatory Support and Standards Development Programme aims to establish clear regulatory frameworks, safety standards, and licensing requirements for businesses providing technical services in the events and entertainment industry. This program will provide guidance and support to businesses navigating regulatory compliance, permit applications, and certification processes. It will collaborate with industry associations, trade unions, and professional bodies to develop industry standards, codes of practice, and certification programs that promote excellence and professionalism in technical services.

Roles and Responsibilities

- Lead: DTIC
- Support: DSAC, CIPC, Provincial EDTEA's, DL&E, Municipal Governments

Target Beneficiaries

- Industry practitioners and technical services businesses – record labels, promoters, event coordinators, etc.

Key Results

- Improved safety and quality in technical services within the industry
- Increased awareness of standards and compliance requirements

Policy Outcome C.4: Licensing and copyright enforcement

The Licensing and Copyright Enforcement programme aims to promote equitable compensation for South African artists. By recognizing and awarding compliant music-consuming businesses and facilities, this program will work to increase music user licensing, raise awareness of its importance, and discourage the exploitation of music creators. For instance, municipalities could introduce music licenses as a strict requirement in order for businesses in the hospitality industry to lawfully operate. Similarly, the DTIC could drive robust policies that call for the inclusion of music permits in the business permit process.

This approach, in turn, contributes to the conservation and preservation of South African culture. Additionally, the program aims to introduce local music consumption guidelines for industry music users, ultimately enhancing cultural liberation and expression by encouraging South African businesses to prioritize the use of South African music in brand campaigns. This aligns with advancing the SA music brand and fostering the development of a shared national identity that resonates through music.

Commercializing and monetizing South African music is another critical aspect of this policy. Our unique cultural expressions have already attracted attention from global musical powerhouses, with instances of South African content being copied and adapted for international audiences without proper recognition or compensation. This policy will establish a clear regulatory framework, that will enable us to lay claim to our unique style, protect our cultural expressions effectively, and ensure that local artists benefit from their creations. This involves strengthening intellectual property laws and creating robust frameworks for the protection and licensing of South African music. This also involves the establishment of a blank-tape levy system to unlock financial beneficiation beyond the digital music consumption economy.

Roles and Responsibilities

Lead: DTIC

Support: DSAC, DEDT, DCDT, SAPS, Home Affairs

Target Beneficiaries

- Composers, authors, lyricists, recording artists and performing artists

Key Results

- Growth in royalties collected and distributed
- Increased compliance amongst music users across industries

Policy Outcome C.5: Enhanced Social Security for Artists

The enhancement of social security for artists aims to address labour-related issues faced by music creators. Building on extensive research already conducted in the sector, this initiative will utilize the insights and outcomes from previous studies to inform and implement effective interventions. The program will focus on developing a tailored social security system that meets the specific needs of artists, considering their unique employment conditions and irregular income patterns. This includes exploring models and best practices from other countries to create a comprehensive system encompassing health insurance, retirement benefits, unemployment support, and disability coverage.

Efforts will also be made to raise awareness among artists about their rights and available social security options, providing them with the necessary information and resources to secure their well-being. Collaboration with relevant government departments, industry associations, and trade unions will be key to designing and implementing these measures. By leveraging existing research and collaborating with key stakeholders, this initiative aims to provide artists with financial stability and peace of mind, allowing them to focus on their creative work and contribute more effectively to the cultural and economic development of the country.

Roles and Responsibilities

- Lead: DEL
- Support: DSAC, Provincial governments

Target Beneficiaries

- Composers, authors, lyricists, recording artists and performing artists

Key Results

- Equal rights and benefits for artists as other employees

Policy Outcome C.6: Establishment of cross-functional collaboration forums

The Establishment of Cross-functional Collaboration Forums Programmes aims to formally establish clear platforms for open communication between various stakeholder groups, ensuring that information is optimally disseminated, interventions and activities are coordinated and ultimately, cultivating a culture of constructive collaboration and partnership in the development and growth of the music sector.

The key challenges which will need to be investigated and innovatively addressed through these cross-functional collaboration forums include:

- Improving access to finance and investment for industry practitioners by leveraging existing funds (e.g., NFVF, NAC, NEF, etc.). Furthermore, investigate incentivization mechanisms for investors through tax, in collaboration with the National Treasury, and advocate for the amendment of relevant legislation to encourage investment. This

initiative will be dedicated to exploring innovative funding models for the sector, leveraging the resources and access of both the public and private sectors. Ideally, this effort would culminate in the creation of an SA music fund, streamlining the allocation of resources for the development of the SA music brand, in conjunction with the SA music implementing agency.

- Advocating for the amendment of labour legislation to better protect music labourers by creating mechanisms for collective bargaining through trade unions like TUMSA.
- Enhancing copyright protection in response to AI and other digital advancements emerging in the global sector by investigating and exploring ways to protect artist IP and promote the competitiveness of the SA music sector. Furthermore, this will include enhancing the responsiveness and agility of policy and legislation to keep pace with the sector's evolution.

As such, inter-departmental collaborative forums will be established, recognizing the interconnectedness of these focus areas to the respective mandates of key role players. Additionally, forums for streamlined information dissemination and the cascading of interventions and targets across the national, provincial, and local governmental spheres will be necessitated. Finally, the program will enhance collaborative forums between government and industry through routine formal engagements and information exchange with key industry associations, providing a platform for industry lobbying and advocacy on key issues the state should prioritize. By uniting diverse stakeholders toward a shared goal, efforts can be synchronized to optimally leverage and allocate resources, creating a coordinated and effective sector. Collectively, these initiatives will cultivate a dynamic music ecosystem that promotes South African music locally and positions South Africa as a competitive player within the global music market. This policy output aims to strengthen the music sector's competitiveness and harness its revenue-earning potential to drive economic development.

Roles and Responsibilities

- Lead: DSAC
- Support: DTIC, DEL, DTIC, DBE, DHET, DSBD, DEL&E, Home Affairs, SAPS

Target Beneficiaries

- Government entities mandated with creating an enabling environment for a thriving music sector
- Industry associations and representatives
- Industry practitioners and businesses

Key Results

- More cross-functional partnerships driving the implementation of key initiatives
- Greater synchronisation of efforts within the various government departments and the sector
- Improved access to finance and investment for practitioners
- Enhanced copyright protection of artists' IP in response to AI and digital advancements in the sector
- Increased protection of artists and service providers' rights

Policy Outcome C.7 Industry Monitoring and Tracking

The Industry Monitoring and Tracking program fosters a culture of accountability by establishing feedback mechanisms to measure impact and prioritize actions based on industry needs. By enhancing accountability and transparency, trust and collaboration among stakeholders are fostered, which will drive sustainable growth in the sector. Thereby fostering a cohesive stakeholder landscape with coordinated efforts and interventions that enable the realisation of sector outcomes.

Roles and Responsibilities

- Lead: SACO
- Support: DSAC, DTIC, DCDT, CIPC

Target Beneficiaries

- Government entities mandated with creating an enabling environment for a thriving music sector
- Industry associations and representatives
- Industry practitioners and businesses

Key Results

- Improved trust and accountability
- Improved responsiveness to industry needs
- A more conducive environment for the growth and economic development of the sector

5.2 Target Beneficiaries and Stakeholders

This policy is designed to address the challenges faced by the South African music sector across its entire value chain, fostering a vibrant and sustainable ecosystem that benefits a wide range of stakeholders.

Direct Beneficiaries:

- Students in public schools: The revival of music education programs will equip students with artistic skills, fostering cultural appreciation and potentially igniting passions for future careers in music.
- Music creators, producers, and performers: Comprehensive education and training programs will empower artists with the necessary skills to navigate the music industry, improve production capabilities, and understand the digital landscape. Business incubation and capacity development initiatives will equip them to manage their careers effectively and build sustainable businesses.
- Record labels: A more skilled and professional music sector will provide them with a wider pool of talented artists to invest in and develop. Improved access to capital investment for independent labels, capacitating them to compete at sufficient scale for profitability.
- Promoters: Improved infrastructure and a growing audience base for South African music will present more opportunities for profitable live music events.

- Industry professionals: Standardized industry qualifications and accreditation will enhance professionalism, trust, and career development opportunities within the sector.

Indirect Beneficiaries:

- Music consumers: Increased access to high-quality South African music through various channels and platforms will enrich their cultural experiences.
- Multinational record labels: A thriving South African music scene with a strong global presence will attract their attention and potentially lead to co-productions and international distribution deals for local artists.
- International businesses: Increased global recognition and appreciation for South African music will create a more attractive market for international brands and businesses seeking to connect with South African audiences.

Overall Impact:

By nurturing the talent pipeline at the grassroots level and empowering all stakeholders within the music value chain, this policy aims to create a self-sustaining and internationally competitive South African music industry. This will contribute to economic growth, job creation, cultural preservation, and national pride.

5.3 Resource Allocation and Prioritization

The successful implementation of this policy relies on allocating resources strategically across different areas. However, the reality is that the desired level of intervention and impact often exceeds the available funding. To address this, the policy prioritizes a sequential approach, focusing on initiatives that deliver the most significant impact within the current resource constraints.

By prioritizing initiatives with readily achievable results, we empower the music sector to develop its own capacity and capabilities. This, in turn, allows us to tackle more complex and impactful projects in the future.

This approach, illustrated in the figure below, ensures we maximize the long-term impact of the policy. We start by addressing foundational issues, building a strong base for the sector to grow. As the sector matures, so too will the scope and impact of our interventions. This sequential approach ensures we use resources efficiently and achieve the greatest positive change over time.

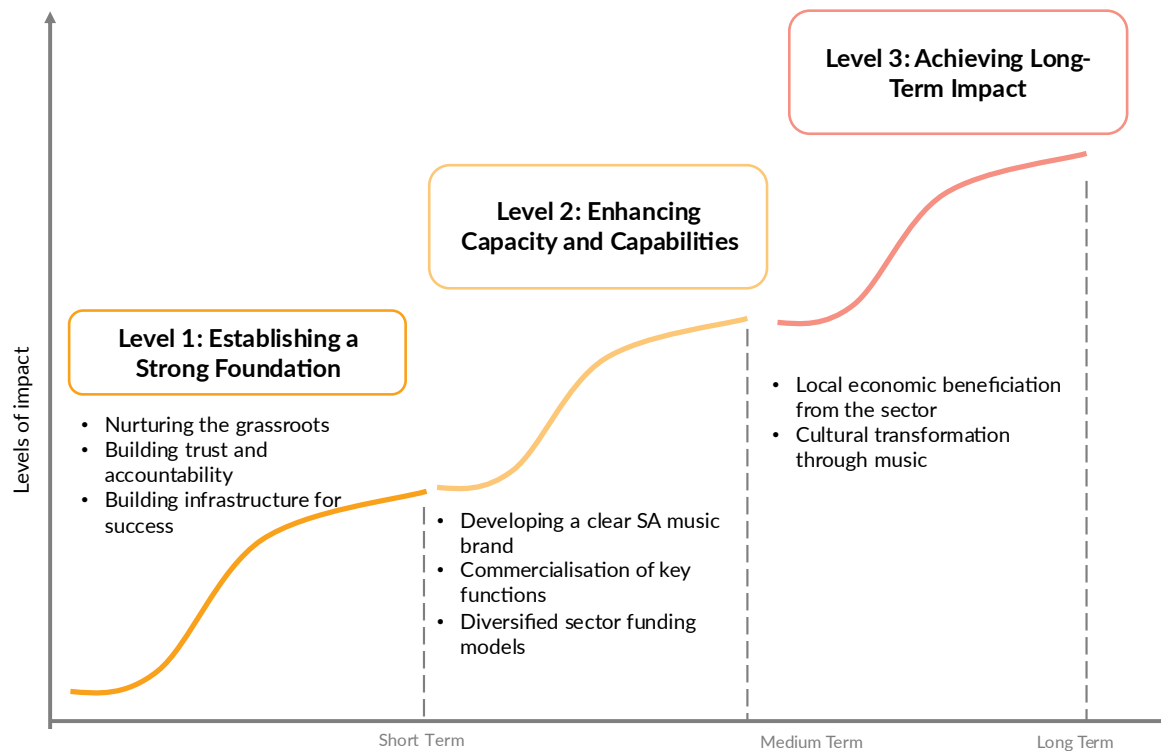


Figure 5-2 Waves of Impact

Here is a breakdown of the key considerations:

Level 1: Establishing a Strong Foundation

The initial implementation stage of the policy focuses on establishing a robust foundation for the South African music industry. This level prioritizes initiatives that nurture talent and create a supportive environment for artists to thrive.

- **Nurturing Grassroots Development:** This includes reviving music education programs in schools, offering training workshops for emerging artists, and supporting capacity development initiatives. These programs equip the next generation of musicians with the necessary skills and knowledge to succeed in the music industry.
- **Building Trust and Accountability:** Establishing clear industry regulations and guidelines fosters trust among artists, industry professionals, and the government. This creates a fair and transparent environment that encourages confidence and long-term investment in the sector.
- **Investing in Infrastructure:** This level prioritizes investments in key infrastructure, such as recording studios, performance venues, and music libraries across the country. This ensures that artists have access to the resources they need to create high-quality music and share it with audiences.

By addressing these foundational elements, Level 1 lays the groundwork for a sustainable and vibrant music industry where talent can be identified, nurtured, and ultimately contribute to the sector's growth.

Level 2: Enhancing Capacity and Capabilities

Building upon the foundation established in Level 1, Level 2 focuses on enhancing the capacity and capabilities of the South African music industry.

- **Developing a Distinct South African Music Brand:** This level defines the unique identity of South African music, highlighting its rich diversity and cultural significance. This fosters a distinct market appeal on a national and international scale.
- **Commercialization of Key Functions:** Equip artists and industry professionals with the skills needed to navigate the business side of music. Training programs focus on areas such as marketing, artist management, music rights management, and effective distribution strategies.
- **Diversifying Funding Models:** Explore and implement innovative funding models beyond government grants. This could involve public-private partnerships, crowdfunding initiatives, and engaging with philanthropic organizations. These diversified models ensure long-term financial stability and support for the sector.

By empowering artists and industry professionals, Level 2 ensures that the South African music scene has the capacity and capability to compete in a globalized market.

Level 3: Achieving Long-Term Impact

Level 3 focuses on achieving the long-term vision for the South African music industry and maximizing its positive impact on the nation.

- **Local Economic Beneficiation:** This level fosters a vibrant music economy that creates jobs and generates revenue within South Africa. Policies and initiatives encourage music tourism, promote music exports, and attract investment into the sector. This not only supports artists but contributes to the nation's economic growth and diversification.
- **Cultural Transformation through Music:** Music serves as a powerful tool for cultural expression and identity. This level supports initiatives that celebrate South African music and culture, both domestically and internationally. This fosters national pride and strengthens cultural identity on a global stage.

By achieving local economic beneficiation and cultural transformation, Level 3 ensures that this policy leaves a lasting and positive impact on the nation. This sequential approach prioritizes achievable goals at each stage, building a sustainable and impactful music industry for the future.

Regarding resourcing requirements, this policy acknowledges that financial resources are not the only means of support. In addition to government funding, the policy will explore strategies for leveraging:

- **Public-private partnerships:** Collaboration with private companies can unlock additional funding for specific initiatives.
- **Philanthropic contributions:** Partnering with foundations and organizations with a focus on arts and culture can provide further financial support.
- **In-kind contributions:** Collaboration with educational institutions and industry professionals can offer expertise, training opportunities, and access to equipment.

By adopting a strategic and diversified approach to resource allocation, the policy can maximize its impact and foster a vibrant and sustainable music ecosystem for the benefit of all stakeholders.

5.4 Roles and Responsibilities

It is within the mandate of DSAC to develop and implement policies and strategies that promote the growth of cultural and creative industries. As such, the implementation of the policy will be steered by DSAC, in collaboration with various government departments, sector representatives and industry stakeholders, to ensure that cohesive progress is made in creating an enabling environment that is conducive for the realization of industry objectives. As such, the table below highlights the responsibilities and resources requirements for implementation of the policy, as well as the envisaged impact on beneficiaries this will create.

The policy will prioritize transparency and accountability in resource allocation by:

- Open communication: Clearly communicating allocation decisions and the rationale behind them to stakeholders.
- Oversight mechanisms: Establishing oversight mechanisms to ensure funds are used for their intended purpose.
- Regular reporting: Publicly reporting on resource allocation and expenditure.

The table below provides a high-level view of the envisaged roles and responsibilities of key stakeholders in driving the realization of policy outcomes.

Table 5-1 Roles and Responsibilities

Outcome	Lead	Support
A. Cultural Preservation, Conservation and Promotion	Department of Communications and Technologies, DSAC, Department of Education, and Associated Institutions: Facilitate and coordinate key initiatives to preserve and promote musical heritage	Government Departments (DBE, -, DTIC, DSBD, CIPC): Provide support and alignment with national educational and economic policies. Industry: Partner with government to provide expertise and ensure compliance.

<p>B. Social Cohesion through a Shared National Identity</p>	<p>Department of Communications and Digital Technologies, DSAC and Associated Institutions: Facilitate and coordinate initiatives, establish collaborative forums, and set monitoring processes. Partner with government and industry for implementation and digitization efforts.</p>	<p>Industry: Collaborate with DSAC, participate in the promotion of local music, support live music circuits, and engage in forums</p> <p>Promoters and Associations: Organize and support live music events, engage with networks for performer lineups, and participate in collaborative efforts</p> <p>National Library and Record Labels: Digitize and archive local musical works.</p>
<p>C. Economic Development through Financial Sustainability</p>	<p>DTIC,DSBD, Department of Finance and Associated Institutions such as IDC, NEF: Facilitate and coordinate initiatives to drive economic growth and financial sustainability in the music industry.</p>	<p>Government Departments (DSAC, DHET, CIPC): Provide support and alignment with national educational, economic, and regulatory policies</p> <p>Industry: Partner with government to provide expertise, infrastructure, and ensure compliance</p>

5.5 Monitoring and Evaluation

To ensure the long-term success of this policy and maximize its impact on the South African music industry, a robust monitoring and evaluation framework will be established. This framework, aligned with the visual representation in Figure 5-2, will track progress towards achieving the desired policy outcomes outlined in Table 5-1.

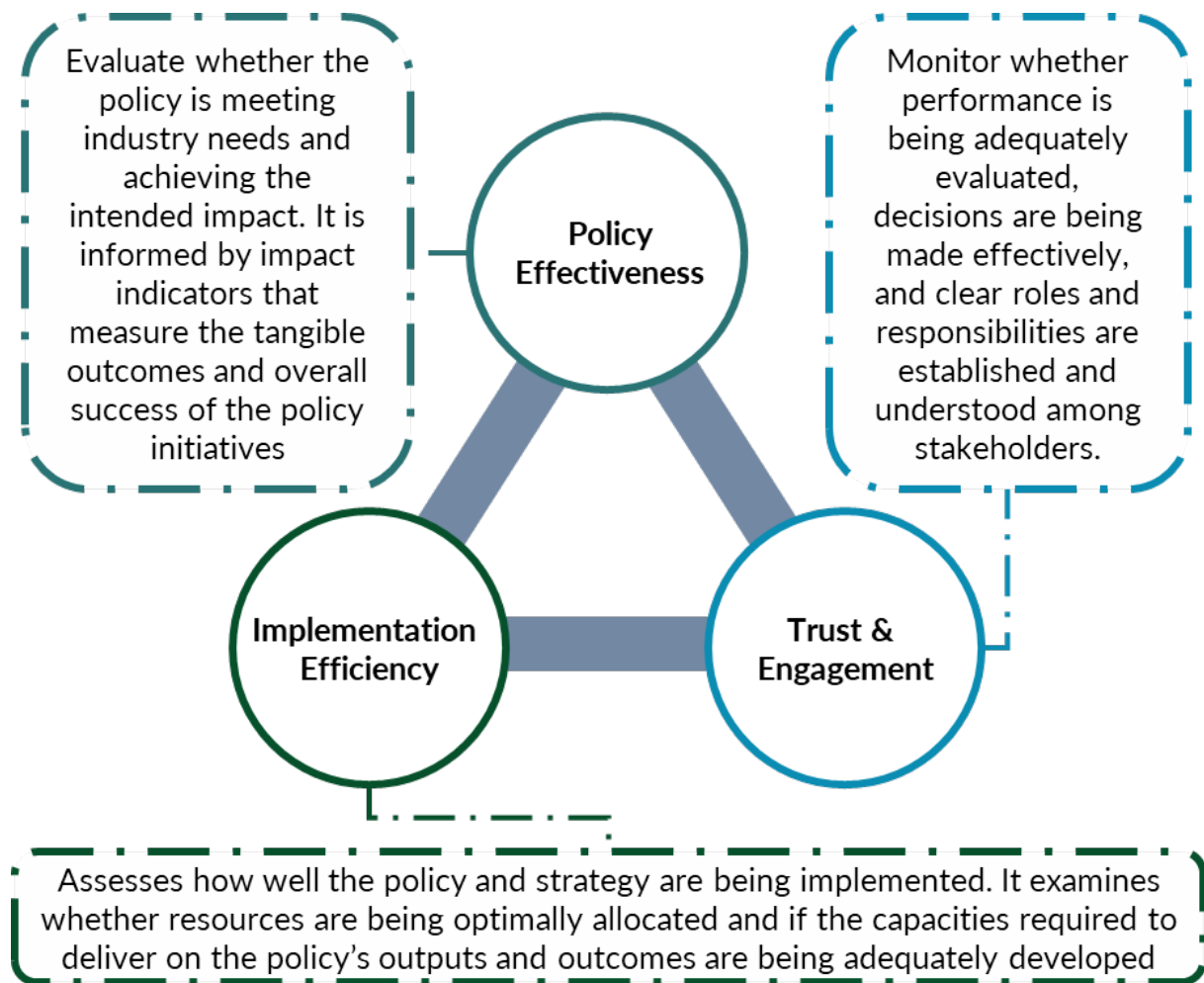


Figure 5-3 Monitoring and Evaluation Framework

6. GOVERNANCE

By establishing a strong governance framework that emphasizes performance reporting, transparency, and risk mitigation, the South African Music Industry Policy can ensure its effective implementation and achieve its goals for the benefit of the music sector.

6.1 Performance Reporting and Accountability

A robust performance management framework will be established to track progress towards achieving the policy objectives. This framework will include:

- **Key Performance Indicators (KPIs):** Identifying measurable indicators for each policy initiative. These KPIs will track progress in areas such as the number of artists trained, music businesses established, or audience engagement with South African music.
- **Regular Reporting:** Implementing a system for regular reporting on the performance of the policy initiatives. This will involve collecting data, analysing results, and disseminating reports to stakeholders.
- **Independent Evaluations:** Conducting periodic independent evaluations to assess the overall impact of the policy on the music sector. This will provide an objective assessment of the policy's effectiveness and identify areas for improvement.

6.2 Transparency and Information dissemination

The policy will prioritize transparency and open communication with stakeholders. This will be achieved through:

- **Publicly Available Policy Documents:** Making the policy document and its implementation plan readily accessible to the public online.
- **Stakeholder Engagement:** Establishing regular communication channels with stakeholders, including artists, industry professionals, and the public. This will involve hosting workshops, forums, and meetings to share information, solicit feedback, and address concerns.
- **Reporting on Resource Allocation:** Publicly reporting on how resources are allocated across different policy initiatives. This will promote transparency and accountability in resource management.

6.3 Risk Assessment and Mitigations

The policy acknowledges potential risks that could hinder its successful implementation. The follow table provides an initial assessment of the policy risks and proposes mitigation measures.

Table 6-1 Risk Assessment and Mitigations

Strategic Risk	Risk Description	Impact (1-5)	Probability (1-5)	Risk Rating (1-25)	Mitigating Intervention(s)
Ineffective Monitoring and Evaluation	Failure to accurately track progress and identify areas for improvement.	3	3	9 (Low)	- Implement a robust performance management framework with clear KPIs. - Conduct regular internal reviews and independent evaluations.
Insufficient Funding	Limited resources to	5	5	25 (High)	- Explore alternative funding sources such as

	implement all policy initiatives.				public-private partnerships and philanthropy. - Prioritize initiatives based on their impact and cost-effectiveness.
Lack of Stakeholder Buy-in	Resistance from stakeholders could hinder implementation.	4	3	12 (Medium)	- Proactive stakeholder engagement through workshops and forums. - Address concerns and ensure transparency in decision-making.
Misuse of Funds	Misallocation of resources could undermine policy objectives.	5	2	10 (Low)	- Implement strict financial controls and oversight mechanisms. - Conduct regular audits and hold individuals accountable for misuse of funds.

7. CONCLUSION

The South African music industry is brimming with potential, yet historical inequalities and the dynamic global landscape present significant challenges. This National Music Sector Policy and Strategy stands as a roadmap to overcome these hurdles and unlock the transformative power of music.

Through a multi-pronged approach, the policy prioritizes nurturing young talent, fostering a supportive infrastructure, and empowering industry professionals. By investing in the "grassroots" – music education, capacity building, and infrastructure development – we lay the foundation for a future generation of thriving artists.

Furthermore, the policy focuses on building a distinct "South African Music Brand," one that celebrates the nation's rich cultural tapestry and resonates with audiences worldwide. Equipping artists and industry professionals with the skills to navigate the business side of music ensures they can compete effectively and reap the economic benefits of their creativity.

Ultimately, this policy aims to achieve long-term economic and social benefits for South Africa. By fostering a vibrant music economy that generates jobs and exports cultural treasures, the policy contributes to national development. Moreover, by celebrating and promoting South African sounds, the policy strengthens national identity and fosters a sense of shared pride.

By implementing this strategic and sequential approach, we can ensure that South African music continues to be a powerful force for social cohesion, cultural expression, and economic prosperity for generations to come.