



DEVELOPMENT OF A NATIONAL MUSIC SECTOR POLICY AND STRATEGY

Music Strategy Final Draft

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EXECUTIVE SUMMARY

The South African National Music Sector Policy and Strategy, within the custodianship of the Department of Sport, Arts and Culture (DSAC), serves as two separate documents that form a comprehensive framework and strategic guideline designed to direct 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*, *policy mechanisms* and *policy outputs* for the music sector. The following strategy document serves as a roadmap to unlock the full potential of the South African Music Sector through strategic interventions, activities and responsibilities. It outlines the government's proposed initiatives, implementation guidelines and monitoring and evaluation mechanisms to ensure that an enabling environment is developed to support the growth and sustainability of the music sector. The strategy aims to inspire, entertain, and unite the nation through the power of music by leveraging targeted initiatives, strategic partnerships, and a commitment to inclusivity.

The Department of Sport, Arts, and Culture (DSAC) derives its mandate from the South African Constitution, emphasizing freedom of expression, cultural participation, and access to information. The DSAC's role includes developing national policies for sports, arts, and culture, aiming to create an active, creative, and cohesive society. Music in South Africa has historically been a tool for political activism and cultural expression, playing a pivotal role during the Apartheid era. Today, it continues to reflect the nation's socio-economic challenges and diverse experiences. The digital music economy has expanded global opportunities for South African musicians, reshaping perceptions of African music and highlighting South Africa as a potential music hub. Despite progress, there is untapped potential in using music for national identity and economic benefits. The DSAC's policy and strategy aim to harness music's power for social cohesion, economic development, and preserving cultural heritage, ensuring it remains a beacon of hope and resilience for future generations.

A situational analysis was conducted to provide a comprehensive overview of the South African Music Sector by examining the supply-side dynamics, demand side dynamics and the enabling framework. The enabling framework focuses on improving stakeholders' capabilities and capacities along the value chain, including infrastructure, policies, and regulations. Supply-side dynamics cover music creation, production, artist management, promotion, and distribution, highlighting how South African music reaches the market. Demand-side dynamics analyse consumer behaviour and music consumption patterns, driving strategies to align with evolving tastes and preferred platforms.

This analysis unveiled that the sector is hindered by marginalization due to lack of information and resources, being underserved with insufficient dedicated resources, unregulated exploitation of music and creators, misaligned efforts within governance structures and industry associations, and undervaluation of indigenous music's cultural significance. To foster a thriving and inclusive music industry, national policies must prioritize diversity, education, and intellectual property regulation. Access to resources, support for artist collaboration, digital platform regulation, event safety, alignment of education with industry needs, and preservation of music history are essential. Addressing labour laws and promoting interdepartmental collaboration will also be crucial.

The vision which this strategy is aiming to achieve is, **“An inclusive, educated, transparent, fair, innovative and proudly South African sector that contributes to cultural conservation and preservation, social cohesion, financial sustainability and economic development.”**

This vision aims to achieve three key outcomes;

- i. Comprehensive Education and Training for the Sector
- ii. Promotion, Advocacy and Stakeholder Engagement
- iii. Effective Regulatory Frameworks and Enforcement

The programme outlines several programmes that would aid in achieving this vision through collaborative efforts of the stakeholders who will, in their own capacity fulfil certain roles and responsibilities.

Effective implementation of the National Music Strategy requires robust governance, monitoring, and evaluation systems. Key measures include establishing a dedicated implementation agency comprising music industry professionals and government representatives to oversee resource management, stakeholder coordination, and progress. This agency will facilitate transparency and collaboration through platforms like online forums and workshops.

Technology and partnerships with music associations and educational bodies should be leveraged to collect and analyse industry data. Periodic reviews will enable adjustments to the implementation plan. Regularly gathering feedback from music communities through surveys, town hall meetings, and online forums is crucial. Conducting periodic evaluations by qualified experts will assess the strategy's effectiveness and identify areas for improvement. Publishing regular progress reports will foster accountability and inform stakeholders of developments within the music sector.

However, successful implementation faces several barriers. The Department of Sport, Arts and Culture (DSAC) faces funding limitations its capacity to support grassroots initiatives and fulfil unfunded mandates. Additionally, competing interests, genre-based divisions, and internal conflicts within the music industry hinder cohesive strategy implementation and collective bargaining power.

In conclusion, South Africa's rich musical heritage and growing industry potential are undeniable. However, challenges must be addressed to ensure global success. The National Music Strategy provides a clear path forward, emphasizing the collective effort of all stakeholders—government, industry professionals, musicians, and the public.

1. INTRODUCTION

The South African National Music Sector Policy and Strategy, within the custodianship of the Department of Sport, Arts and Culture (DSAC), serves as two separate documents that form a comprehensive framework and strategic guideline designed to direct 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 following strategy document serves as a roadmap to unlock the full potential of the South African Music Sector through strategic interventions, activities and responsibilities. It outlines the government's proposed initiatives, implementation guidelines and monitoring and evaluation mechanisms to ensure that an enabling environment is developed to support the growth and sustainability of the music sector.

In the following sections, we will outline a comprehensive plan to achieve these goals. Through targeted initiatives, strategic partnerships, and a commitment to inclusivity, this strategy will guide the future of the South African music sector, ensuring it continues to inspire, entertain, and unite our nation.

- **Components of the Strategy:**
 - **Situational Analysis:** A comprehensive overview of the music sector.
 - **Vision Statement:** A concise statement describing the desired future state of the music sector in South Africa
 - **Strategic Initiatives and Output:** Key programs that will enable the achievement of the vision.
 - **Implementation Guidelines:** Practical steps through which the strategic goals can be achieved.
 - **Monitoring And Evaluation:** Establishing mechanisms for tracking progress and success indicators.

1.1 Mandate Review

The Department of Sport, 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 line with the 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 policies and programmes regarding sport and recreation in the country. 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.

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

The role of music in South African society, especially given its history of Apartheid and ongoing challenges, is profound and multifaceted. Music has historically been a powerful tool for political activism, social commentary, and cultural expression. During the Apartheid era, music played a pivotal role in uniting communities, spreading messages of resistance, and preserving cultural identity – with many artists using their music to challenge injustice and inspire change.

Music has the unique ability to transcend boundaries, bridge divides, and amplify voices that might otherwise go unheard. South Africa's rich tapestry of musical genres—from traditional to contemporary—reflects the diversity and resilience of its people.

In the contemporary context, the role of music has evolved to one of social commentary and expression of the South African experience against the backdrop of socio-economic challenges faced – as a 30-year-old democracy. The nation faces the triple challenge of poverty, inequality and unemployment. These challenges have a direct impact on the sense of self and national identity but also influence our ability to show up and compete within the ever-converging global community.

The digital music economy has expanded opportunities for South African musicians to reach global audiences and reclaim narratives. Through platforms like streaming services and social media, artists can directly connect with fans worldwide, bypassing traditional gatekeepers and amplifying diverse voices. This digital landscape has been instrumental in reshaping the global perception of African music and culture – with the global market developing a keen interest in African territories as potential music hubs and demand nodes.

In essence, while South Africa has made significant strides in leveraging music for social cohesion and identity formation, there remains untapped potential. Music remains a powerful tool for crafting a national identity and society that honours our rich musical and cultural heritage by preserving and conserving it. Thereby, ensuring that our history is well documented and preserved for future generations. Furthermore, the leverage afforded by the digital music economy presents an opportunity to start deriving economic beneficiation from the sector - earmarking the sector as a key contributor to job creation and poverty alleviation.

Therefore, it is against this backdrop that the Department of Sport, Arts, and Culture has developed this policy and subsequent strategy for the sector. As such, the overarching intent of this policy is that through collective efforts across government, industry and civil society, music can continue to be a beacon of hope and resilience for generations to come.

2. SITUATIONAL ANALYSIS

2.1 Overview of the sector profile analysis

This section aims to provide a comprehensive sector overview by examining three key segments: supply-side dynamics, demand-side dynamics, and the enabling framework. The enabling framework includes essential improvements needed to enhance stakeholders' capabilities and capacities along the value chain on both the supply and demand sides, as well as the enabling infrastructure.

The supply-side dynamics delve into the music sector's production and distribution, covering areas such as music creation, production, product and artist management, promotion and marketing, and vital distribution channels that bring music to consumers, offering insight into how South African music reaches the market. The demand-side dynamics centre on consumer behaviour, preferences, and music consumption patterns, including evolving tastes and preferred platforms. These insights drive effective strategies to align with consumer demand. The enabling framework is crucial, encompassing cultural preservation efforts, education and training, capital investment, collaborations and partnerships, infrastructure, policies, regulations, and industry standards that define the optimal environment for supply and demand dynamics in the music sector.

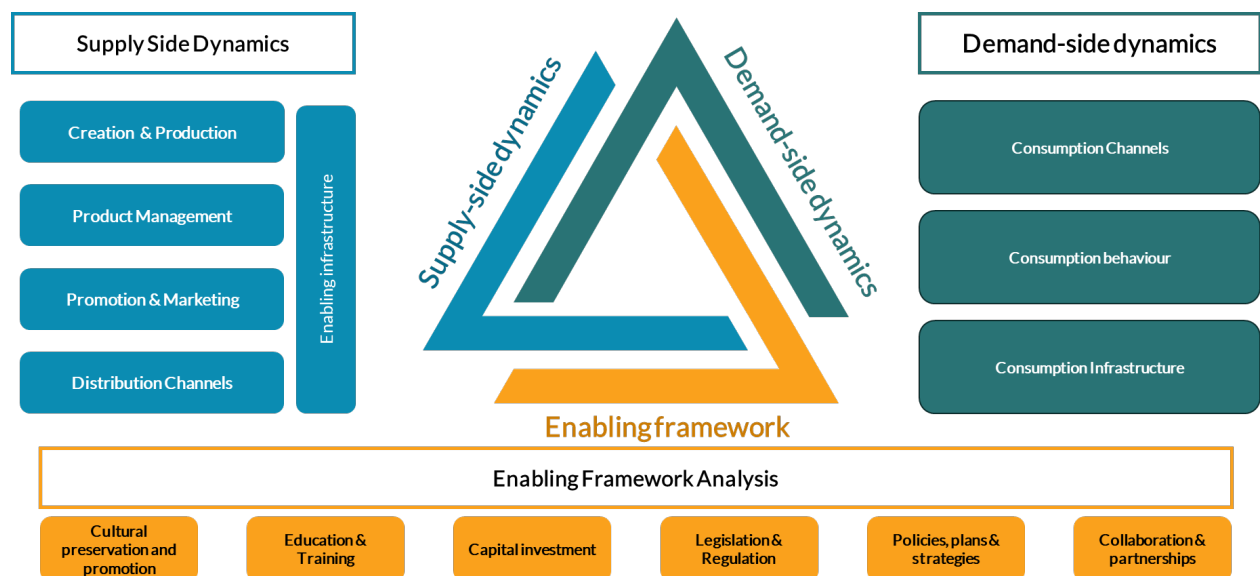


Figure 1: Sector Profile Conceptual Framework

2.2 Supply-Side Dynamics

2.2.1 Overview of the Music Supply Chain

The supply side dynamics encompass several key components, including creation and production, product management, promotion and marketing, distribution channels, and an enabling infrastructure. Below is an overview of the supply chain within the supply side, detailing the essential activities involved in producing artistic content, the flow of generated revenues, and the stakeholders who benefit from these earnings.

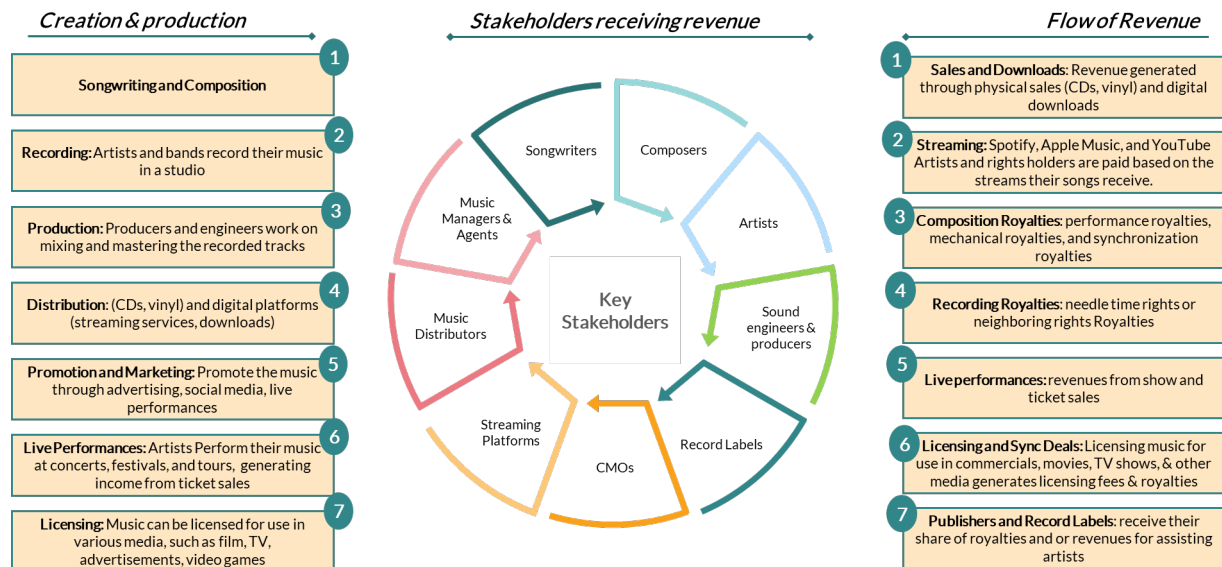


Figure 2: Music Supply Chain: Balancing the Art and Revenues

Stakeholders on the supply side

Creation and production stakeholders

The supply side of the music industry encompasses songwriters, composers, sound engineers, recording artists, and producers. In South Africa, the artist landscape includes both independent artists and those signed to record labels. Notably, established artists can enter special agreements with record labels to gain ownership of their master recordings.

The music scene in South Africa is diverse, with a multitude of artists across the country. However, the most recognised artists are typically associated with mainstream genres and often hail from major cities like Durban, Cape Town, and Johannesburg. Artists from less-represented provinces with limited market exposure often relocate to these urban centres for greater opportunities.

Within the industry, there are approximately 37,500 registered recording companies under the Recording Industry of South Africa (RISA). This formal recording market is largely dominated by players such as Universal, Sony, Warner, and Gallo, which collectively hold the majority of the market share. Independent recording companies, while numerous, collectively account for less than 10% of the market share in South Africa.¹

The main stakeholders managing revenues

- **Record labels:** Record labels are responsible for signing artists, producing and distributing their music, and promoting their careers. They receive a percentage of the artist's royalties from all sources of revenue.

¹ Recording Industry of South Africa.(2021),Custom Reports

- **Aggregators:** Companies that help independent artists to distribute their music to digital platforms. They typically charge a fee to artists, but they also provide several services, including negotiating deals with digital platforms, submitting music, collecting royalties, and providing artists with analytics.
- **Collective management organisations (CMOs):** CMOs are organisations that represent the rights of artists and copyright holders. They collect royalties on behalf of their members and distribute them to artists or record labels.
- **Digital music platforms** (streaming services and download stores): Digital music platforms pay royalties to record labels, CMOs, and Aggregators for the use of their music.
- **Promoters and Event Organisers:** Event organisers and promoters pay venue owners for use of their facilities to host music events, and pay artists to perform at these events, in addition to promoting these events to drive ticket sales and attendance.
- **Live music venues:** Live music venues provide the necessary infrastructure for live events space. These venues also leverage performing artists to draw crowds to their venues.
- **Music publishers:** Music publishers own the copyrights to songs. They receive royalties from the sale of sheet music, the use of music in film, television, advertising, and other media, and the sale of physical and digital copies of music.

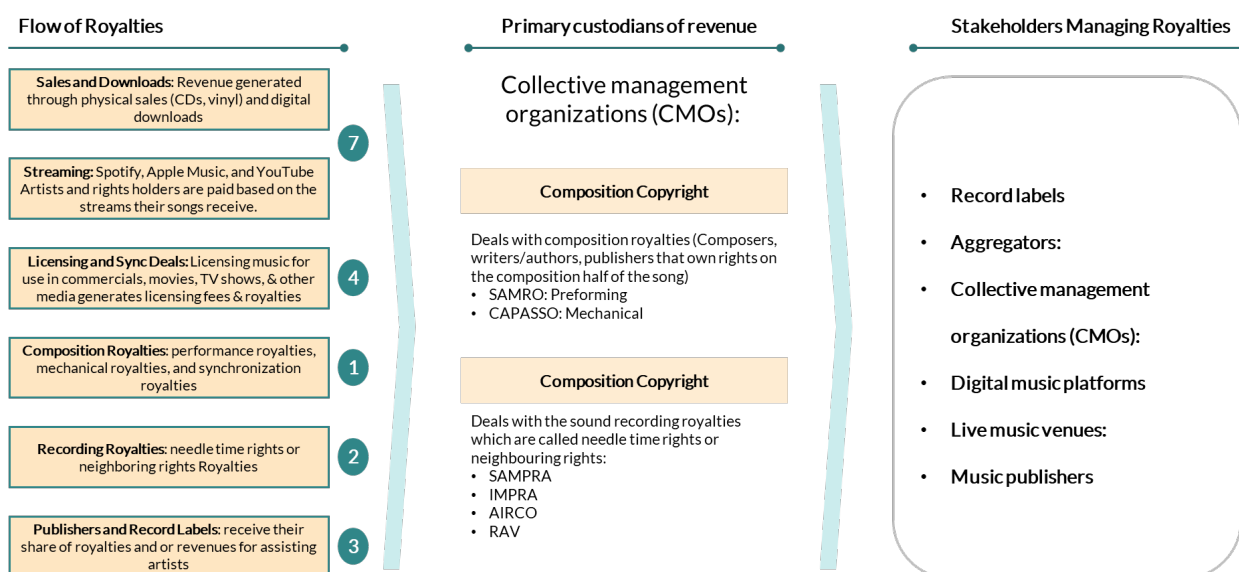


Figure 3: Flow of Revenues and Royalties

Among the key stakeholders in the South African music industry, the primary guardians of revenue handling and equitable compensation for artists are the CMOs. These CMOs bear the responsibility of gathering royalties on behalf of their members, who encompass songwriters, composers, music publishers, and record labels. Subsequently, these accrued royalties are distributed among the members in adherence to a predetermined and agreed-upon allocation formula. The pivotal role of CMOs lies in their dedication to securing just compensation for artists. They achieve this by negotiating equitable royalty rates with digital music platforms and

other music users. Furthermore, CMOs diligently oversee the precise and timely disbursement of payments to artists, ensuring that they receive the recompense they rightfully deserve.

Collective management Organisations (CMOs)

South Africa has a variety of CMO's collecting different royalties in the sector. Each of these CMOs specialises in either the collection of composition rights royalties or master rights royalties. Composition rights encompass royalties related to the composition of a song, involving composers, writers, authors, and publishers who hold rights in the composition aspect of the song. On the other hand, master rights pertain to sound recording royalties, commonly referred to as needle time rights or neighbouring rights.

Collecting organisations for composition royalties include the Southern African Music Rights Organisation (SAMRO) and the Composers, Authors, and Publishers Association (CAPASSO). Needle-time royalties are collected by the South African Music Performance Rights Association (SAMPRA), Independent Music Performance Rights Association (IMPRA). Audio-visual royalties are primarily collected by the Association of Independent Record Companies of South Africa (AIRCO) and RISA Audio Visual (RAV). All these organisations play a pivotal role in the industry's revenue collection efforts.

Composition Copyright Royalties

SAMRO and CAPASSO handle the management of royalties pertaining to composition rights, with a distinction in their respective areas of focus. SAMRO specialises in managing the performance rights of musical compositions, whereas CAPASSO oversees the mechanical (reproduction) rights of musical compositions.

SAMRO acquires copyright assignments for members. SAMRO primarily engages in licensing agreements with a wide range of entities, including radio and TV broadcasters, venues, digital platforms, schools, municipalities, promoters, and retailers. SAMRO maintains reciprocal agreements with international sister CMOs, holds membership in the international parent body CISAC, and its membership comprises composers and music publishers. SAMRO currently operates without specific regulations.

On the other hand, CAPASSO primarily focuses on licensing agreements with TV broadcasters, digital platforms (including SVOD services), telecommunications companies, production music users, retailers, and limited radio. CAPASSO acts as a royalty processing agent for other African societies, and its membership includes composers and music publishers. CAPASSO is responsible for licensing, collecting, and distributing royalties but does not claim copyright ownership. Similar to SAMRO, CAPASSO operates in an unregulated capacity. SAMRO and CAPASSO collaborate in the collection of royalties from digital platforms.

Master Copyright Royalties

SAMPRA, primarily focuses on managing the rights associated with the performance of sound recordings, commonly referred to as "needletime." Their licensing activities are primarily directed towards radio broadcasters and retailers. The organisation's membership comprises both record companies (producers) and performers, with most of South Africa's record companies being affiliated with SAMPRA. They have established bilateral agreements with various international sister CMOs and are a member of the international parent body, SCAPR.

SAMPRA administers the right of remuneration derived from performances of masters on radio, and it operates as a regulated entity.

IMPRA, also specialises in rights related to the performance of sound recordings, particularly "needletime" rights, which involves licensing radio broadcasters. Unlike SAMPRA, IMPRA's membership does not predominantly include many South African record labels.

AIRCO, the Association of Independent Record Companies South Africa, has initiated several initiatives to improve the South African music industry. AIRCO has established a dedicated CMO focused on collecting audiovisual royalties from the public broadcaster. This initiative serves as a proactive response to the psychological challenges and systematic challenges faced by artists. Additionally, AIRCO has played a pivotal role in founding the Independent Music Performers Association (IMPRA), aimed at collecting royalties for diverse contributors involved in the music creation process. These initiatives have facilitated the production of high-quality broadcast music videos by independent record companies and have heightened awareness of their value.

RAV is part of the RISA and specialises in collecting royalties from television broadcasters for the broadcast of music videos. These royalties are related to sound recordings rather than compositions. RAV's primary function is to distribute these royalties to the owners of music videos, with record companies being the primary beneficiaries of these distributions.

Royalties Revenues

Based on a study and report conducted by the Sound of the South (SOTS), the distribution of revenues among the top three CMOs is as follows: SAMRO accounts for 52%, CAPASSO for 25.2%, and SAMPRA for 18.6%. Other contributors collectively represent less than 5% of the total royalty collections.²

The report also highlights a unique characteristic of the local music industry, where the publishing and recording sectors are nearly balanced in size, with a 50.7% share for publishing and 49.3% for recording. This contrasts with international music markets where recording revenues typically outweigh those of the publishing business.

² Sounds of the South.(2020) South African Music Industry

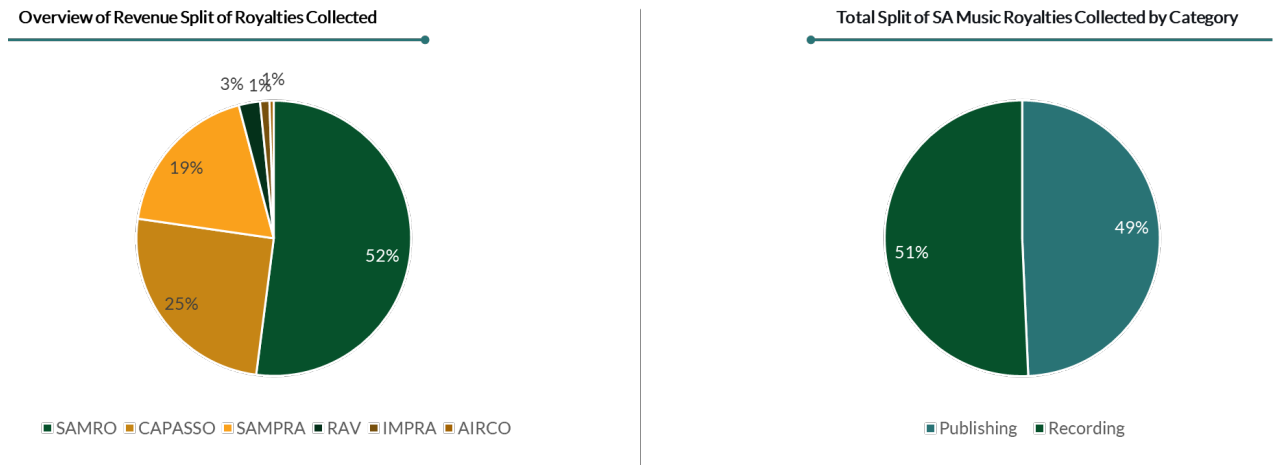


Figure 4: Royalties Revenues Split

Key Insights for CMOs

1. **Complex Royalty Splitting:** The process of splitting royalties among performers is complex and depends on their roles, with featured artists, non-featured artists, and other featured performers having different entitlements based on the number of participants and their roles in the recording.
2. **Equitable Remuneration vs. Equal Remuneration:** The distribution of royalties is equitable rather than equal, meaning that the amount received depends on the performance and the revenue generated by the music, which can vary significantly based on the platform and frequency of plays.
3. **Reporting and Tracking Issues:** CMOs face challenges in distributing royalties due to issues with playlists and reporting from users, particularly in the retail and hospitality sectors. Some users provide playlists manually, while others do not report accurately. These challenges can lead to delays in distributing royalties to rights holders. Several CMOs employ monitoring companies to trace music performances on radio stations and larger multinational platforms. However, monitoring smaller members, such as pubs, salons, small retailers, and restaurants, presents a more challenging task.
4. **Challenges in Collaboration:** Collaboration and coordination among CMOs have faced challenges. There have been issues with CMOs not effectively collaborating, leading to confusion among music users and artists regarding multiple licensing entities.
5. **Multiple CMOs Collecting for the Same Right:** There are multiple collecting organisations responsible for needle time rights and their interactions can be complex. Some stakeholders suggested that resolving these issues involves a combination of playlist management and mandates. For instance, in cases where multiple organisations handle one right, broadcasters can provide playlists indicating the ownership of repertoire by the relevant collecting society and disputes can then be resolved based on mandates provided by the organisation.
6. **Joint Licensing:** The concept of joint licensing has been proposed to simplify licensing processes for music users. However, it has faced resistance, particularly from some

CMOs. The new leadership's willingness to consider it might lead to future progress in this area.

7. **Role of Funding:** Some CMOs have established a Development Fund to support the development and promotion of South African music, including funding for music production, live performances, international touring, heritage preservation, and education and training. This fund plays a vital role in the growth of the South African music industry.

Key Challenges Identified:

1. **Limited International Exposure for South African Music:** The need to promote South African music internationally is vital, as currently, South African music is being performed less in foreign markets, resulting in lower international royalties.
2. **Preference for Music Academies:** Some CMOs recommend focusing on collaborations with music academies rather than NGOs when working to educate and support artists. They argue that academies can offer a more structured and reliable approach to teaching artists about the music business. They argue that some NGOs may not be as effective as other partners due to issues like mismanagement and lack of impact assessment.
3. **Industry Initiatives and Competition:** CMOs such as SAMRO, CAPASSO, and SAMPRA have initiated sponsorships and funding for artists and events. Competition and conflicts between Collecting Management Organisations can hinder collaborative efforts to support artists and events. They mentioned instances where competition and issues of "ambush marketing" arise between these organisations when sponsoring the same artists or events.
4. **Location of CMOs:** The CMOs' offices are exclusively located in Johannesburg, which can pose a challenge for artists residing in other cities and provinces who require in-person assistance. Furthermore, it is important to note that the offices of all CMOs are not situated within the same building or vicinity.
5. **Challenges Faced by Artists:** Insufficient awareness of the expected royalties an artist should receive from various CMOs, coupled with distinct membership tiers, has left many artists uncertain about the likelihood of receiving payment. Additionally, artists struggle to discern how their compensation is computed due to the absence of transparent documentation.

In this section, we have outlined the key stakeholders involved in the music supply chain, from those responsible for creating the art to those managing the revenues, with a particular focus on CMOs. This foundational understanding provides us with a broad overview of the industry's main players and how money flows within this complex ecosystem. The subsequent sections will focus on the various aspects of this supply chain, exploring the current state of production, creation, product management, marketing and promotion, distribution channels, and the enabling infrastructure that sustains the South African music industry.

2.2.2 Creation and Production

The process of creating and producing music encompasses various stages, beginning with songwriting and composition. This will be followed by a combination of activities depending on the ways in which the music will be consumed. For recording artists, this will include recording, mixing, and mastering; and for live performing artists, this will include performance rehearsals. Each of these activities demand a distinct skill set and specific equipment. For instance, songwriting relies on creativity and musical expertise, while recording and mastering necessitate technical proficiency and specialised tools. Performance requires expertise in sound engineering and production, lighting and sound technicians, stage management.

South African Music Genres

South Africa boasts a wealth of talent distributed across the country, but nurturing this diverse talent pool faces some significant limitations. Many South African musicians lack access to essential resources required for creating high-quality music, such as studio time, musical instruments, and recording software. These limitations are exacerbated by the geographical distance between artists and central hubs like Gauteng, KZN, and the Western Cape. Moreover, the absence of familial support further hampers aspiring artists from pursuing their creative passions. Despite these challenges, South Africa continues to produce exceptional music.

The 2023 IFPI report reveals that while music sales in South Africa experienced marginal growth of 2.4% in 2021, they saw a remarkable 31% surge in 2022. Sub-Saharan Africa emerged as the fastest-growing region for recorded music revenues in 2022. This growth can be attributed to intense competition for market share and significant investments in marketing by major digital streaming platforms.

Additionally, the Amapiano genre played a pivotal role in driving hits, with artists like DJ Maphorisa and Kabza attracting a substantial streaming audience in South Africa. Spotify, the music streaming leader, reported that Amapiano tracks achieved nearly 2 billion streams in the past year, marking a remarkable 143% increase compared to 2021. The genre's popularity is evidenced by the creation of over 240,000 playlists with Amapiano in their titles and more than 10 million playlists featuring at least one Amapiano track. Impressively, over 40% of Amapiano streams originate from listeners outside of South Africa.³

While international music, particularly American content, continues to hold sway over South African tastes, a noticeable shift is underway. Stakeholder insights suggest that Amapiano, is a unique South African genre, and should be embraced as a blessing rather than a threat to other mainstream genres. The focus should be on leveraging Amapiano's popularity to foster the creation of more genres. The ultimate goal is to champion diversity by gradually introducing audiences to a wide range of music styles. Encouraging collaborations between contemporary composers and those rooted in older musical traditions can catalyse the expansion of the local music scene over time

³ International Federation of the Phonographic Industry(IFPI).(2023), Global Music Report

Music creation and production in South Africa span various genres, as illustrated in the table below. Additionally, different provinces contribute their unique genres, which will be highlighted in the provincial analyses section.







	<i>Cultural & Historical Context</i>	<i>Popular Artists/Bands</i>	<i>Level of Commercial Success</i>
 Amapiano	2012, Amapiano blends house music, kwaito, gqom, and jazz, featuring high-pitched piano tunes, deep bass, and infectious rhythms	Maphorisa, Kabza de small, Major league djz, Uncle waffles, Focalistic, Musa keys, Dbn Gogo	A global phenomenon, and is helping to introduce SA music to a new audience. It is a cultural movement
 Gospel	85% of the population is Christian, and Gospel music played a vital role in the liberation struggle. SA Gospel is most popular in KwaZulu-Natal (KZN)	Benjamin Dube, Rebecca Malope, Soweto Gospel Choir, joyous celebration, Dr Winnie Mashaba, We will worship, Khanya and many more	Appeals to a wide range of people in SA. Heavily marketed and promoted in SA.
 Maskandi	1900s, a popular genre in SA, that is deeply rooted in Zulu culture and tradition, it is socially conscious, and it is entertaining	Inkosi Yamambuze, Bhukumuzi Mahlobo, Khuzani Mpungose, Thokozani, Magawugawu, Mthandeni, Manqele, Njelic' manqegaye	Loved the the Zulu people and other SA tribes. They use instruments. Artists still produce CDs and USBs, and they receive various awards
 Gqom	Blend of kwaito, house, and deep house, arose in the early 2010s among DJs in Durban's townships. It swiftly expanded from the townships to the rest of SA	Dj Tira, Distruction boyz, Moonchild, Dbn Gogo, Big Nuz, Busiswa, Dj Lag, Babes wodumo	Inexpensive to produce, appealing to a younger generation of consumers, who are often more willing to spend money on music.
 House/ Afro-House	Early 90s. A sub-genre of House music, fuses Kwaito, Tribal, Deep, and Soulful House.	Black Coffee, Shimza, Dj Kent, Heavy K, Sun El musician, Prince kaybee, Zakes Bantwini, Dj Fresh, Euphonik	Conduct adequacy assessments, walkthrough tests, and report to Audit Committee on control effectiveness
 Afro-HipHop	Early 1990s. It is characterized by its use of indigenous African languages, traditional African melodies and rhythms, and socially conscious lyrics	AKA, Cassper Nyovest, Nasty C, Kwesha, Riky Rick, Boity, Nadia Nakai, Sho Madjozi, A-Reece, Emtee	Conduct adequacy assessments, walkthrough tests, and report to Audit Committee on control effectiveness

Figure 5: Main South African genres

In the South African creation and production music industry, there are two aspects to consider: exportable music and non-exportable or challenging-to-export music. Exportable music encompasses South African cultural elements that resonate with global audiences through lyrics, language, meaning, beats, and sound. Genres like Afrohouse, Amapiano, and Gqom play a vital role in South Africa's global musical outreach. In contrast, music that is challenging to export is deeply rooted in local culture and less influenced by global trends or upbeat styles.

Insights collected from interviews indicate that artists creating and producing music in less popular or non-mainstream genres often face challenges in terms of support and accessing markets. The view is that currently, South Africa's music scene is dominated by mainstream music. Artists appear reluctant to explore diverse genres and fully engage in the music-making process. In contrast, on the international stage, artists collaborate across various genres and support emerging talents. The sound in South Africa can feel repetitive, driven by profit-making, potentially stifling unique voices. The fear of experimenting with different sounds seems to stem from a focus on the market rather than artistic expression.

For non-exportable music, stronger regulations and policies are needed to support creation, production, and audience development. Big international record companies should be required to sign a percentage of non-mainstream artists.

Lastly, South Africa needs to consider leveraging the mainstream genres to establish South Africa as the dance capital of the world. To achieve this, the country needs:

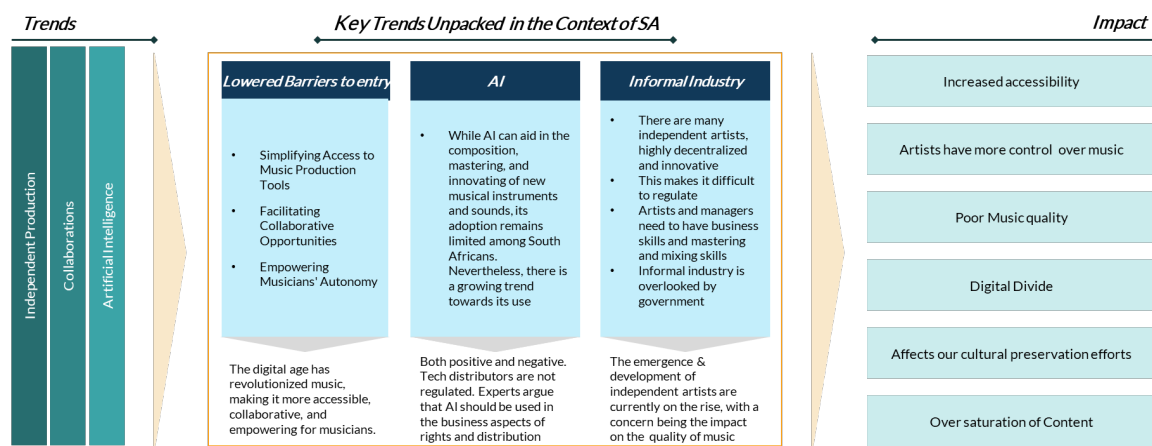
1. Proper governance and resources dedicated to this genre, with input from experienced artists like Black Coffee, Maphorisa and Shimza

2. Government investment in music events and festivals, including marketing, influencers, and signature events
3. Tax incentives or subsidies for clubs and bars that support this music and emerging DJs
4. DJ academies for learning and development
5. A dedicated safe area for dance music, similar to Ibiza or Mykonos to host our Afro-nation events

Influence of the Digital Era on Music Creation and Production

A growing trend among artists is the establishment of home-based mini studios, driven by the increased affordability and accessibility of music creation tools and software. This has reduced the dependency on expensive studios and instruments. Additionally, digital platforms and tools facilitate seamless collaboration among artists, transcending geographical barriers and resulting in a more diverse South African music scene.

While the digital era offers numerous advantages, it has also brought forth challenges. Issues like piracy and fair compensation for artists have emerged. Musicians must now navigate the complexities of streaming royalties and intellectual property protection. Additionally, digital sound production has led to a decline in the use of live instruments in music recording as well as for live performances. The diagram below illustrates the key trends in the South African context and their implications in the digital age.



The digital era is lowering barriers to music production but may affect quality, lead to content saturation, and challenge cultural preservation

Figure 6: Influence of the Digital era on creation & production

In addition to concerns about content oversaturation, content quality, and cultural preservation, South Africa's profound economic inequality exacerbates the digital divide. As the most unequal country globally, underserved communities continue to grapple with limited access to the internet, digital tools, and software necessary for music creation and production. They also face significant barriers to accessing financial support. Consequently, these challenges compound the difficulty of exporting non-mainstream genres and hinder the visibility and success of artists within these communities.

2.2.3 Product Management and Market Development

Product management in the music industry refers to the process of overseeing the development, release, and ongoing management of music products. It involves planning, executing, and optimising the entire lifecycle of a music product, from the initial concept to its distribution and promotion. Within the recording industry, this refers to the creation of albums, licensing and copyrights of the sound recordings. In the live performance industry, product management pertains to the development of setlists, technical setup such as lighting, sound, etc., tour planning, budgeting and all the coordination that goes into preparing for the live performance. Product managers in the music industry are responsible for making strategic decisions about which music to release, how to package it, and how to market it to maximise its commercial success.

Market development in the music industry is the process of expanding the reach and appeal of music products to new and existing markets. This involves identifying opportunities for growth, diversifying the audience, and finding new ways to engage consumers with music content. Market development involves expanding music into new regions, reaching new customer segments, and introducing diverse music styles to existing markets. It entails creating marketing strategies, branding, merchandising and promotions to boost music visibility and consumption. Market development is crucial for growing the music industry's revenue and reach.

The table below illustrates three crucial elements central to product management and market development, namely, licensing and copyright management, distribution and marketing strategy development, and catalogue management.

Table 2-1: Elements of Product management and Market development

Licensing & Copyright Management	Distribution & Marketing Strategy Development	Catalogue Management
<ul style="list-style-type: none"> Identifying and obtaining the necessary licenses for music recordings, compositions, and other copyrighted material Ensuring that all uses of copyrighted material are properly authorized and accounted for Monitoring and enforcing copyright compliance 	<ul style="list-style-type: none"> Identifying the target audience for a particular music product Develop a marketing plan to reach that audience and promote the product Managing the distribution of the product to retailers and other sales channels 	<ul style="list-style-type: none"> Organizing and maintaining a record label's or artist's catalogue of music recordings. Ensuring the music is properly archived, metadata is accurate, and the catalogue is effectively exploited Overseeing the release of new music and the re-release of older material. Managing the digital distribution of music.
<p>Responsible parties:</p> <p>DTIC, CMOs, Music publisher, record label, or other music company. However, artists and independent musicians may also manage their licensing and copyrights</p>	<p>Responsible parties:</p> <p>Music product manager, who works closely with the artist, record label, and other stakeholders to develop and execute a successful marketing and distribution strategy. However, independent artists may also manage their distribution and marketing strategy.</p>	<p>Responsible Parties:</p> <p>A catalogue manager works with the artist, record label, and other stakeholders to ensure that the music catalogue is properly managed and marketed. However, independent artists may also manage their catalogue.</p>

Key Insights

Licensing and Copyright Management

The insights regarding licensing and copyright management shed light on the implications of the current copyright amendment bill, the operations of CMOs, and the critical need for raising awareness and providing education to artists, particularly independent ones, in these areas.

Copyright Management

Stakeholders within the music industry emphasised the pressing need for policy adjustments and enhancements. First and foremost, there is a crucial requirement for a thorough

assessment of how the provisions introduced in the Copyright Amendment Bill and the Performance Protection Amendment Bill affect both the music industry and the broader creative sector. In particular, the introduction of "fair use" and its potential implications on artists' rights raises significant concerns. The music industry fears that these provisions, if not properly navigated, could result in complexity and potentially leave artists at a disadvantage, especially when faced with legal disputes involving major tech companies. Furthermore, stakeholders emphasise the importance of conducting comprehensive economic impact studies to gain insights into how these changes will reverberate throughout the creative sector. It is essential to understand the broader implications of these bills.

In addition to these concerns, the proposed alterations in copyright laws have the potential to sway artists' decisions regarding whether to concentrate on the local or international market. If artists perceive more robust copyright protection and more favourable conditions abroad, they might opt to direct their creative efforts toward those international markets.

In the realm of education, musicians and artists often lack knowledge about their intellectual property rights and the inner workings of the music industry. There is a crucial need for better education and support, particularly in underserved communities and independent artists. This directly relates to the education and training aspect of the enabling framework.

Licensing

Stakeholders emphasised the need for transparency and education regarding royalty distribution, especially for independent artists who may lack awareness of the process and their rights. As the industry evolves with more independent artists and music distribution platforms, adjustments in royalty collection and distribution methods are necessary to ensure equitable compensation for all parties. Policy changes must consider the changing dynamics of the industry, where many artists prefer independence and direct licensing to record companies. Achieving a balance between artists' and record labels' rights while adapting to evolving business models is crucial.

Furthermore, concerns exist about how collection societies operate, including issues of corruption and inadequate regulation, which can impact royalty collection and distribution. Governance and regulation in the functioning of collection organisations are essential for transparency and fairness in royalty management. In addition, stakeholders highlight the significance of accurate and complete metadata for tracking revenue, royalties, and copyrights in the digital age. Inaccurate or incomplete metadata from CMOs can lead to disputes and complications in royalty distribution.

Lastly, the idea of devolving music rights collection to provincial levels was discussed. This approach may involve increased administrative costs for CMOs but could lead to more localised operations, potentially simplifying royalty collection from various regions. The decision should be based on a thorough cost-benefit analysis for each collecting organisation.

Distribution and marketing strategy development

Distribution and marketing strategies encompass various aspects, including identifying the target audience, formulating an effective marketing plan to engage that audience, and efficiently managing distribution to retailers and other sales channels. In this landscape, the professional distribution and marketing services sector is primarily controlled by the nation's

four largest record labels, which possess significant financial resources. Nonetheless, there is a rising number of independent artists, and traditional agreements are losing relevance as artists no longer need to relinquish their music rights. However, unsigned and independent artists face substantial challenges in accessing critical markets for their music and monetising their work.

Key Insights

Record labels

When a record company invests in an artist, it usually secures ownership of the intellectual property rights related to the recording. Additionally, some record companies invest in the entire process, covering recording, marketing, and distribution of the music. In doing so, they shoulder the financial risk and play an integral part in delivering music to the public. However, as part of this arrangement, they also gain ownership of the associated intellectual property.

The domain of product management is predominantly shaped by the top four record labels, and their substantial influence is evident in the financial realm, as depicted below. Numerous independent record labels hold a market share of less than 10% in the music industry.

Table 2-2: Leading Record Labels

	Universal Group	Sony Music Entertainment	Warner Music	Gallo Record Company
Size	Largest in SA with a Market Share of 40%. R500 million in revenues per year	Second-largest record label with a share of 30%. R300 million in revenues per year	Third-largest with a market share of 20%. R200 million in revenues per year.	Fourth largest with a market share of 10%. R100 million in revenues per year.
Ownership	Owned by Vivendi, a French media conglomerate	Owned by Sony Corporation, a Japanese multinational electronics and entertainment company	Owned by Access Industries, an American private equity firm	Owned by Arena Holdings

Impact of Foreign Dominance on the South African Music Industry:

- The South African music industry is largely controlled by foreign-based companies
- Some argue that is a good thing; because it gives South African artists access to global resources and distribution networks
- Some argue that it is a bad thing because it means that the profits from the South African music industry are not flowing back into the economy
- It is argued that South African music has become more uniform due to foreign record labels prioritising artists whose music resonates with the global market
- Some contend that it hampers the growth of novel South African music genres, as foreign record labels are hesitant to support emerging artists
- Smaller Independent South African record labels have limited resources and limited exposure, but other record labels that focus on their niche markets have done well

Gallo, a prominent independent record label operating under the parent company Arena Holdings, plays a pivotal role in preserving and monetising a diverse catalogue of African music spanning multiple genres while providing unwavering support to artists. The company undertakes significant initiatives, such as reissuing lost or deleted albums, archiving invaluable

content, and revitalising classic songs to resonate with younger audiences. Gallo is committed to pioneering a digital music distribution and streaming platform with a distinct focus on African ownership and content. Notably, several prominent South African artists have invested in Gallo, actively participating in initiatives aimed at fostering the growth of the South African music industry. The significance of having more substantial and independent record labels like Gallo is evident, even beyond niche markets, for a thriving industry ecosystem.

Digital Transformation of the Music Industry: Independent Artists and Evolving Industry Roles

As the music industry undergoes a digital revolution, it is opening up a plethora of services to independent artists and labels. Key stakeholders, including record labels, recognise the shifting landscape of the industry. With the rise of digital technology, the roles of record labels, managers, and artists have all adapted. Digital platforms have not only transformed the production, distribution, and consumption of music but have also placed a greater emphasis on artists' involvement in their careers. This includes taking charge of digital marketing and self-promotion.

The table below summarises the current pros and cons of being an artist under a record label versus an independent artist in South Africa:

Table 2-3: Artists under record labels vs Independent Artists

	Under record label	Independent
Benefits	<ul style="list-style-type: none"> • Structured Business Support • Financial investment • Marketing and promotion expertise • Distribution to reach a wider audience • Industry connections 	<ul style="list-style-type: none"> • Full creative control • Higher royalties but relative • More freedom to release and promote content • Stronger connection with fans with the right strategy
Cons	<ul style="list-style-type: none"> • Less creative control and freedom • Lower Royalties but relative • Less control over their image • Pressure to produce hits • Unfair contracts 	<ul style="list-style-type: none"> • Lack of structural business support • Investment costs • Less/limited market exposure • Limited industry support for marketing on radio, getting booked, etc

One intriguing insight is that the music industry stands apart by not requiring formal qualifications or degrees for roles like artist managers. While this accessibility is beneficial for individuals entering the industry, it can also pose challenges when knowledge and skills are lacking.

With the growing number of artists pursuing independence, even establishing their own record labels, a significant challenge arises from the fact that many artists lack the necessary business acumen, resources, and market access. While social media offers some assistance, it falls short when it comes to long-term strategic planning and financial investment.

Additionally, independent artists now have the option to rely on aggregators for distributing their music across various digital platforms. These aggregators act as intermediaries and can provide added benefits, such as handling royalties and marketing. This trend presents a new form of competition for traditional record companies. Increasingly, artists and smaller labels are choosing these low-initial investment options, challenging the traditional record label model. While more competition can be seen as positive, larger record labels offer a wide range of professional business functions. Any decline in these functions might limit artists' access to them and pose a potential risk to the overall sustainability of the market. Notable aggregators

include Orchard, Content Connect Africa, and Africori, with some having been acquired by multinational record labels. However, there are also smaller aggregators in the market.

The ideal solution involves fostering partnerships between South African artists and record labels. Small South African record labels should prioritise niche markets and foster collaborations within South African genres to help preserve our cultural diversity, a facet that is currently lacking. All while actively working on developing audiences for South African genres.

Independent artists frequently operate with direct-to-fan models, relying on income from streaming, downloads, live performances, and merchandise sales. Navigating these revenue streams and understanding the complex royalty structures of streaming platforms can be challenging. South African artists, both independent and signed, now compete in a global music market. They face not only local competition but also international artists with significant resources and marketing power.

Catalogue Management

The intersection of Family Law and Intellectual Property in South Africa presents challenges, particularly in the context of community of property and the complexities involved in managing the estates of deceased creators. The country also faces issues with the sustainable protection of artists' wealth, especially when an artist's success is inversely proportional to their age, unlike markets such as the United States, where older music (referred to as "catalogue") maintains a significant audience share. This situation has led to a concerning trend of artists facing financial difficulties in South Africa. To address these challenges, it is crucial to ensure proper music archiving, accurate metadata, and effective catalogue exploitation. While some CMOs and record labels are working on these initiatives, this issue persists in South Africa's music industry.

2.2.4 Promotion and Marketing

The promotion and marketing of music encompass a diverse range of strategies and activities aimed at increasing visibility, generating interest, and driving sales or engagement for music releases and live performance events. These strategies can be highly tailored to an artist's specific genre, target audience, and goals, often necessitating the integration of various components to construct a comprehensive campaign that effectively captivates and builds an audience for music releases.

In the music industry, record labels typically manage these promotional efforts on behalf of their signed artists. Independent artists, however, often take on this responsibility themselves or seek assistance from marketing agencies or well-connected individuals within their network. In many cases, independent artists may engage in professional services to gain a competitive edge in the bustling music market. Furthermore, independent artists must consider securing a capable manager who is not only passionate about their music but also genuinely believes in their artistic vision. A dedicated and supportive manager can play a pivotal role in navigating the complexities of the music industry and advancing an artist's career.

Below are some of the key components of music promotion and marketing:

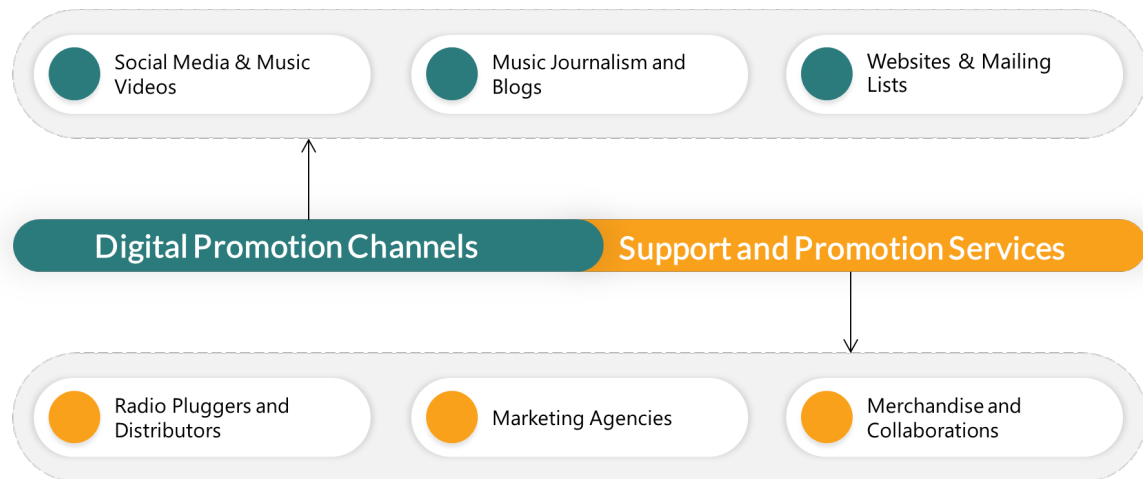


Figure 7: Components of marketing & promotion

Key Insights

Social Media

Utilising social media is cost-effective, but it demands a strategic approach. To make the most of it, one must:

1. Understand their Target Audience: Delve into the characteristics and preferences of your intended audience.
2. Analyse Online Behaviour: Gain insights into their online habits and interactions.
3. Monitor Competitors: Keep tabs on their competitors' activities across social media platforms.
4. Build a Brand Image: Craft a distinct brand identity that resonates with your target audience.
5. Foster Engagement and Fan Conversion: Maintain a sense of innovation to transform followers into dedicated fans.

Moreover, harnessing influencers with substantial followings can amplify music promotion. Content creation on social media necessitates skill, which may fall upon artists and independent artist managers if they opt not to outsource these tasks to record companies or marketing agencies.

Currently, a shortage of content creation expertise prevails, with low barriers to entry leading to an inundation of content on social media. Thus, establishing key value propositions is crucial. Additionally, there is a notable absence of collaborations between artists and influencers, akin to how fashion houses collaborate with influencers, which represents an untapped opportunity.

Music Videos

Creating music videos is a costly endeavor, and the videos must capture the audience's attention. A compelling, captivating, and unique music video can gain viral traction on the internet, irrespective of the song's popularity. Independent artists face challenges in producing

music videos, except when they team up with established artists or possess the financial resources and influence to do so.

Websites and Mailing-Lists

This is closely linked to having a strong presence on social media, as fans often subscribe to mailing lists through these platforms. Consequently, similar skills are needed. Developing a polished, professional website as a foundation for one's online presence is crucial. However, building a substantial and committed mailing list may be even more significant.

Music Journalism and Blogs

Music journalism in South Africa tends to align with the prevailing trends in popular music genres. However, there are noticeable gaps in documenting the contributions of our musical legends in less-represented genres. Addressing these issues calls for the establishment of a South African brand dedicated to music, specifically focusing on such initiatives. While some blogs offer free coverage, they may not have widespread recognition. To gain exposure on well-known blogs, artists typically require strong connections or acquaintances with well-connected individuals.

Marketing Agencies

Numerous music marketing agencies are available, yet artists often need to make financial investments in these services. Unfortunately, some artists may not fully realise the benefits, as the strategies employed may not always yield the desired effectiveness. Furthermore, underserved communities may face challenges in accessing these agencies.

Radio Pluggers and Distributors

Radio pluggers and distributors have served as valuable channels for artists to reach their audiences effectively. The expansion and development of these entities are crucial for extending their support to more artists, including those in underserved communities. Initiatives should be centred around devising strategies to empower these organisations to uplift artists within their respective communities as they proliferate in various regions across South Africa.

Merchandise and Collaborations

This approach is typically more effective for artists affiliated with record companies. Collaborating with established artists often signifies that you are an emerging artist with substantial support. Additionally, it is essential to have the financial resources to promote merchandise that aligns with your brand. Stakeholders have emphasised that, given the smaller profit margins in the digital age, artists must diversify their sources of income. This diversification can encompass merchandise sales, live performances, and collaborative efforts. Therefore, initiatives should prioritise building the capacity of local record companies and independent artists to facilitate collaborations and merchandise promotion effectively.

The Significance of Branding and Marketing in Music to Foster Artist Sustainability

Considering the insights gathered across various facets of promotion and marketing, it is evident that the development of an artist's brand, along with their music, is essential for achieving financial sustainability. Consequently, promotion and marketing play a pivotal role in this process. This extends to industries that are secondary to the primary music value chain,

such as journalism, marketing, branding, event promotion, and influencer collaborations. Unfortunately, these industries are not evolving rapidly enough to adequately support the arts. Many brand deals and partnerships are brokered through well-established multinational corporations, leaving local brands with limited capacity to contribute to the arts similarly.

Stakeholders propose creating a dedicated marketing approach for South African music through a public-private partnership, akin to the Brand South Africa initiative. This initiative would involve a specific budget solely for promoting South African music in all its forms, enhancing its visibility on global platforms, including digital platforms. Influencers, both local and international, would actively promote South African music to expand its global reach. This would require the development of a comprehensive marketing strategy and plan, potentially involving workshops for effective execution.

2.2.5 Distribution Channels

The music industry in South Africa features a blend of traditional and modern distribution channels. Radio, digital platforms, and live performances contribute significantly to the revenue stream. The digital transformation had a profound impact, with artists initially facing challenges in monetising their music online. It took some time for CMOs to start collecting royalties for online streaming, and getting South African music on these platforms was a gradual process. Live performances have experienced a decline, especially in small-scale events at restaurants and pubs, often accompanied by backtracks. Despite these changes, music distribution through radio remains a prominent channel, with community radio stations playing a pivotal role in its success. Some artists currently face challenges particularly those focused on indie and niche music genres. Stakeholders mentioned several factors that contribute to the difficulties in organising such events, including venue limitations, financial constraints, red tape, and a lack of access to sponsors.

Over the years, there has been a shift in revenue dynamics between digital and physical music platforms in South Africa. Digital revenues have now surpassed those from physical platforms. The following table and graph illustrate the current revenue distribution between these mediums.

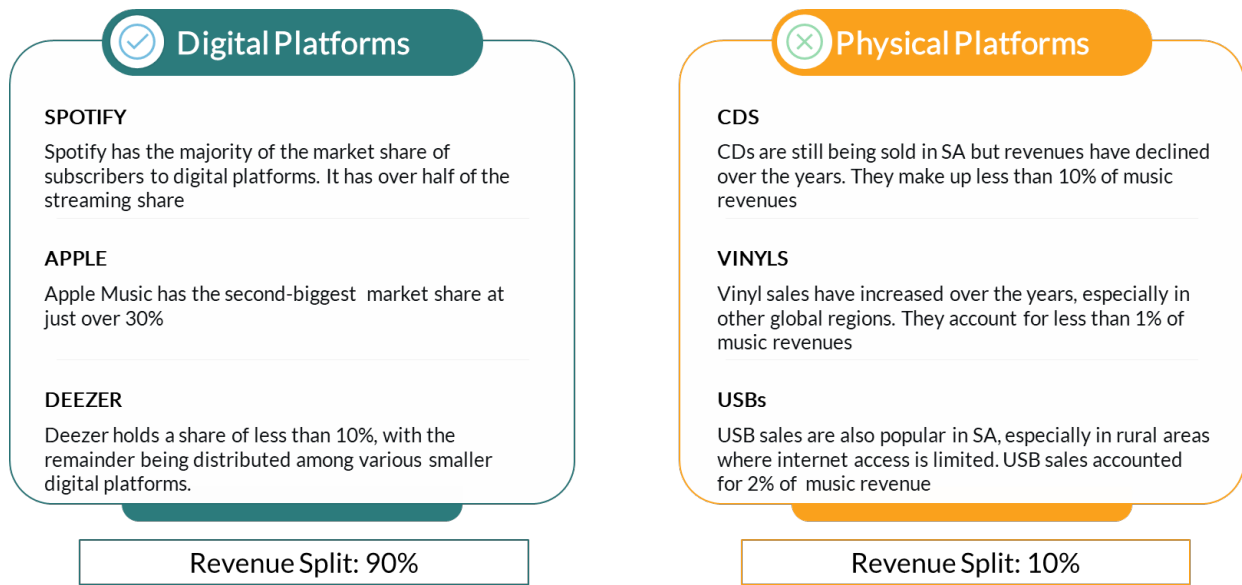


Figure 8: Digital Platforms vs Physical Platforms⁴

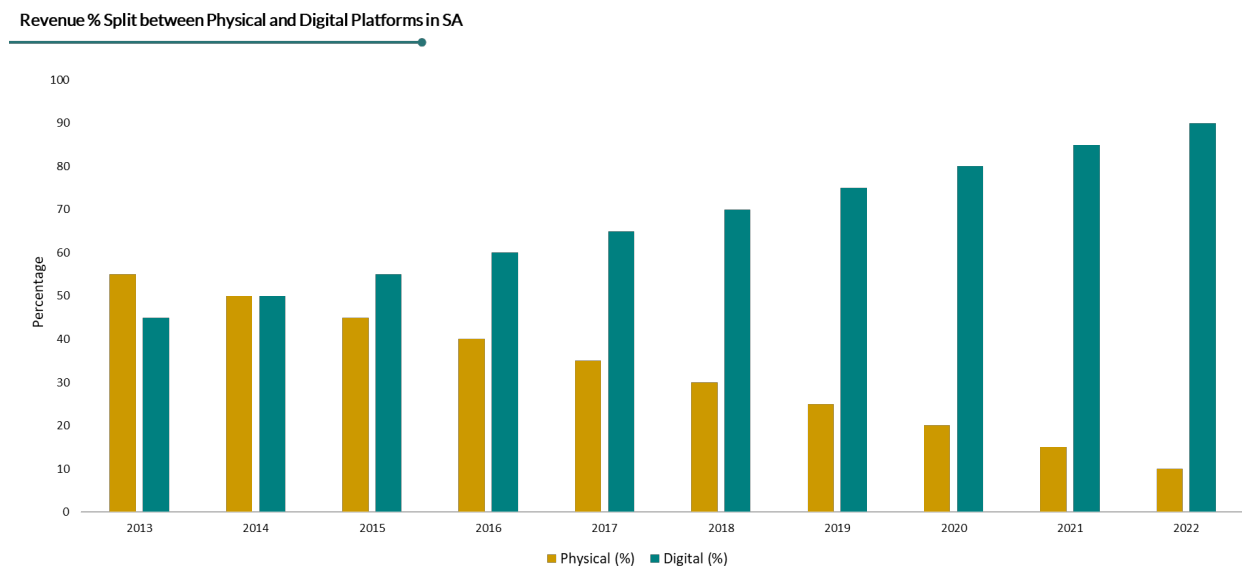


Figure 9: Digital and Physical Platforms revenue split⁴

Digital Platforms

Currently, Spotify, Apple Music, Deezer, and several other digital platforms collectively generate a more significant share of total music revenues than CDs, vinyl records, USBs, and other physical formats. Spotify's dominant position in the South African market can be attributed to several factors, including its early entry into the country, its extensive music library, and competitive pricing. Apple Music also enjoys popularity among music enthusiasts

⁴ South African Music Industry.(2023), The state of the South African Music Industry

in South Africa, thanks to its seamless integration with various Apple products and services, such as the iPhone and iPad. Although a smaller player in the South African market, Deezer has been steadily gaining traction in recent years. Deezer distinguishes itself with unique features like offline listening and high-quality audio streaming.

Physical Platforms

The decline in CD sales is primarily linked to the convenience and cost-effectiveness of digital streaming services. CDs entail higher production and distribution costs compared to digital music. However, despite the declining trend, CDs maintain a dedicated following in South Africa. Some music enthusiasts prefer to own physical copies of their favourite albums, valuing the superior sound quality CDs offer over digital formats.

In contrast, the surge in vinyl sales is credited to their appeal among audiophiles and collectors. Vinyl records are also considered a more environmentally sustainable option than CDs, which are made of plastic. Meanwhile, USBs continue to be a popular choice for purchasing and sharing music in South Africa, particularly in regions with limited internet access.

The sale of CDs, vinyl records, and USBs persists in the South African music industry, catering to niche markets in rural areas. Nonetheless, digital streaming services have firmly established themselves as the dominant mode of music consumption in South Africa.

Digital Royalty Collection by CMOs

In the past five years, SAMRO, CAPASSO, and SAMPRA have started to collect royalties from digital platforms like Apple Music, Spotify, and Deezer. This marks a relatively recent development, considering the recent surge in popularity of digital music streaming. Collecting royalties from these platforms is a vital step for these organisations, ensuring that artists and songwriters receive fair compensation for their music's use. This process also supports the music industry as a whole. However, it took time to establish these mechanisms. The procedure for collecting royalties from digital platforms is intricate, involving negotiations with the platforms, monitoring music usage, and distributing royalties to creators.

Furthermore, SAMRO, CAPASSO, and SAMPRA are actively enhancing the efficiency and effectiveness of their royalty collection systems while striving for fair compensation for artists and songwriters in the digital realm. SAMRO and CAPASSO have collaborated to improve their royalty collection efforts. In 2021, SAMRO also announced licensing agreements with TikTok, Facebook, and Netflix, which will benefit its members. These binding agreements allow SAMRO to immediately collect royalties for all copyright-protected content featured on these platforms on behalf of its members.⁵

South African Digital Platforms

Stakeholders emphasised the need to establish a South African digital music streaming platform that offers several advantages. It would cater to the specific needs of South African music enthusiasts, offering a broader selection of local music, localised pricing, and tailored features. Additionally, it would support the South African music industry by providing a

⁵ Polity.(2021),SAMRO to collect royalties from TikTok, Facebook, and Netflix

platform for artists to gain global exposure, generating revenue and increasing the visibility of South African music. Moreover, it would contribute to the promotion of South African culture and identity by showcasing local music to a global audience, raising awareness and fostering appreciation for South African culture and identity whilst growing the economy.

Launching a successful South African digital music streaming platform presents several challenges. Competing with established global players like Spotify and Apple Music, acquiring music rights, and attracting and retaining users are significant hurdles. However, with the right strategy and the establishment of public-private partnerships, there is potential for success given the growing South African music market and the demand for streaming services.

Live performances

The live performance landscape witnessed a decline, with a significant reduction in live musicians and a rise in DJ-centred events, exacerbated by the impact of COVID-19. Stakeholders highlight the need for initiatives that can cultivate an audience for smaller live events featuring bands with musical instruments.

This would necessitate establishing the right partnerships with venues. While large-scale events are showing signs of recovery, there is still a demand for live performance infrastructure, especially in underserved regions, which will be elaborated upon in the next section.

Radio

Music distribution through radio remains the dominant channel, with community radio stations playing a pivotal role. SAMRO, CAPASSO, and SAMPRA collect substantial royalties from radio, with SAMRO alone collecting R147 million in radio royalties in 2022. These royalties make up a significant portion of their overall revenue. For instance, radio royalties constituted 67% of SAMRO's total income in 2022.⁴

There is a perspective that commercial radio stations, driven by their larger clients' advertising preferences, hold more financial influence and can shape music programming. Multinational corporations also have greater sway in persuading radio stations to feature their music. In contrast, local radio stations often face financial constraints due to their advertising revenue. Notably, royalties are paid based on a formula relative to a station's income, which means that artists may receive different royalties from local and commercial stations, even if their songs are played equally.

Commercial stations, thanks to their extensive listener base, offer benefits to consumers. However, it is encouraging to see local stations increasing their support for local content, while commercial stations may not follow suit to the same extent. Initiatives should be explored to develop business strategies and models that empower local radio stations, enabling them to contribute more significantly to royalties, especially for those with a substantial listenership.

It is worth noting that all radio stations are subject to regulation by the Independent Communications Authority of South Africa (ICASA), which mandates a specific percentage of local content to be played. This regulatory framework aims to promote and support the local

music industry by ensuring that South African artists receive exposure and recognition on the airwaves.

Outdated Legislation and Policy Shortcomings

The South African Copyright Act lacks modernisation, notably excluding digital rights. Although the copyright amendment bill attempts to address this gap, it falls short in various other aspects. As far back as 2018, UNESCO highlighted the absence of policies that transcend mere digitisation or the reinforcement of specific elements, cautioning that without a targeted approach to counter the ascent and market dominance of major platforms or the monopoly of AI, the public sector may forfeit its role in the creative arena.

2.2.6 Enabling Infrastructure

In the music industry's supply side infrastructure, Creation and Production, Distribution, and Royalty Collection and Distribution infrastructure are essential to facilitate the recording and production of music, ensuring that artists and technicians have the necessary tools and spaces. Distribution infrastructure is essential for getting music to consumers, especially in the digital age, where platforms and distribution networks play a pivotal role.

Informal studios and cracked mastering software are accessible to many musicians and technicians, serving most genres. However, professional recording and mastering infrastructure are limited, leading to an influx of artists to major music hubs. The shift to digital music consumption spurred major record labels to create their platforms like Africori, Warner, The Orchard, Sony, and Contents Connect Africa by Gallo. Live performance venues are in short supply, often requiring retrofitting for quality experiences, which can be challenging with limited budgets. In the realm of royalty collection and distribution, a lack of infrastructure for playlist development leads to disputes between CMOs and licensed users.

Recording studios

The table below lists public recording studios in each province. Some of these studios face operational and infrastructure maintenance challenges, leading to reduced performance compared to their intended capabilities.

Table 4: Public recording studios in each province

Gauteng	Western Cape	KwaZulu -Natal	Eastern Cape	Limpopo	Northern Cape	North West
Downtown Music Hub	Mother City Audio	KZN Music House	Eastern Cape Audio Visual Centre	Limpopo Arts Foundation	Northern Cape DSAC	BoP Studios
Soundlab Studios	Bellville Studios	SABC Durban Studios				
	Atlantic Studios	Playhouse				

The Downtown music hub, acclaimed with awards and accolades, including the South African Music Award for Best Recording Studio in 2022, stands out as a prime example of effective studio management and performance. The Downtown music hub in Johannesburg operates more efficiently than its counterparts, such as the KZN Music House in KZN and the Eastern

Cape Audio Visual Centre (Miriam Makeba). Initiatives are needed to enhance studio management and strategies to encourage artist utilisation. In 2023, the Northern Cape allocated R2.9 million to bolster local talent through the Northern Cape Recording Studio for music production, addressing the limited accessibility of professional recording and mastering infrastructure.⁶ This has resulted in an influx of artists from various regions to major music hubs like Johannesburg.

Distribution

The shift to digital music consumption necessitated the development of distribution platforms. In response, major record labels launched dedicated platforms to cater to the market. Independent record labels, in turn, should opt to establish their distribution platforms, which would afford them the vital autonomy to maintain complete control over the distribution of their music and content. This self-administered approach enables independent labels to customise their platforms according to their unique needs and the preferences of the artists they represent, including the implementation of tailored features, pricing structures, and marketing strategies aligned with their distinct vision and goals.

Furthermore, independent labels can diversify their revenue streams by offering supplementary services via their distribution platforms, such as merchandise sales, ticketing for live concerts, and exclusive content access. Additionally, they serve as valuable gateways for emerging artists who may lack access to the resources of major record labels. In this capacity, independent labels can function as nurturing environments for budding talent, facilitating the growth and development of artists' careers.

Live performances:

The scarcity of suitable live performance venues poses a significant challenge, as most locations require costly retrofits to provide a high-quality live experience, a task made even more challenging by limited budgets. The scarcity of suitable venues for smaller events is a significant hurdle for artists and event organisers. Stakeholders emphasised that sponsorship is vital for funding live music events, but it can be elusive due to the perceived risks and limited awareness of niche genres.

Furthermore, an evident lack of live performance opportunities exists, particularly in underserved communities. The available venues often come with prohibitive costs for local artists and independent record companies looking to book them. Addressing this issue requires thoughtful consideration.

In larger urban centres, concerns primarily revolve around ensuring the safety of large events. Additionally, some stakeholders propose the exploration of South Africa's exceptional regions for hosting festivals like Afro Nation, suggesting the development of these areas into tourist attractions. This approach could not only draw in tourists during concerts but also captivate

⁶ The South African.(2023),Northern Cape Govt funds R2.9m recording studio

audiences visiting to appreciate our captivating landscapes and rich cultural heritage through music.

Royalty Collection and Distribution

Collection societies play a significant role in collecting and distributing royalties, but there can be issues related to metadata.

In South Africa, several companies provide playlist tracking and monitoring services for CMOs. TuneCore, Distrokid, and SoundCharts, are notable players in this space, each offering a range of services. They have established a strong presence in the country and collaborate with various CMOs to oversee playlist activities on behalf of their members. When selecting a playlist tracking and monitoring service in South Africa, several factors warrant consideration. Price, reputation, accuracy, and features are key determinants. Opting for a reputable and trusted company ensures quality service. Additionally, accuracy in playlist data tracking is crucial, as is the availability of features that align with your specific needs, such as cross-platform tracking and report generation capabilities. Numerous companies offer these services, so choosing wisely is essential.

While CMOs currently engage in playlist tracking, the challenge lies in extending this service to smaller, licensed entities rather than prominent retailers or broadcasters. This limitation underscores the necessity of investing in enhanced infrastructure for precise playlist monitoring, ensuring transparent and equitable compensation for artists.

2.3 Demand-Side Dynamics

The aim of this section is to analyse the key trends within the vast market of music listeners in the country.

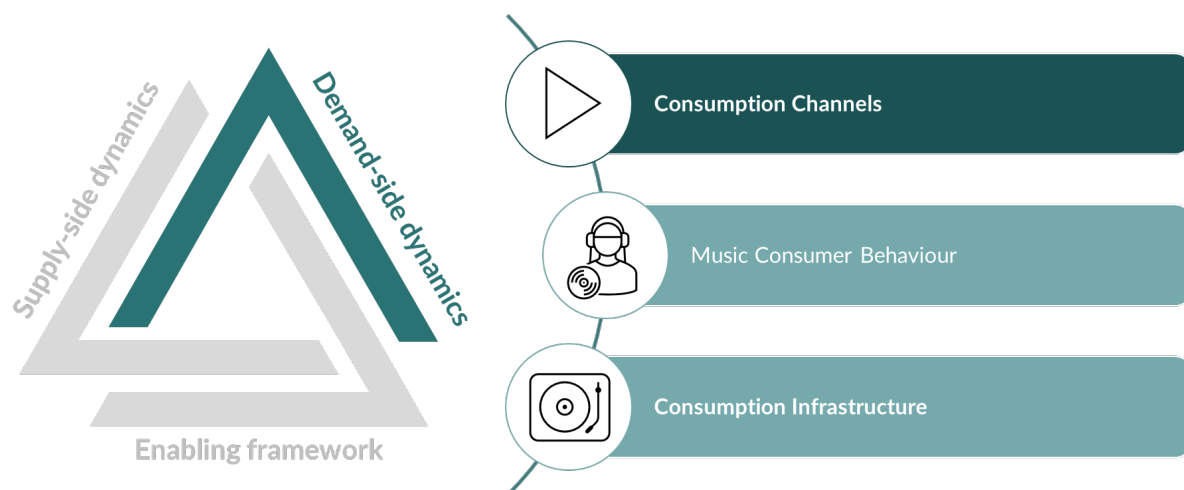


Figure 10: Demand-side dynamics

This is done with the understanding that; the behaviours and preferences of music consumers inform the strategic approach utilised by the supply-side, in developing an audience and consumer base for their music and brand.

Overall, the music consumption industry is experiencing rapid growth – projected 6.3% CARG over the next five years, as captured in the figure below.

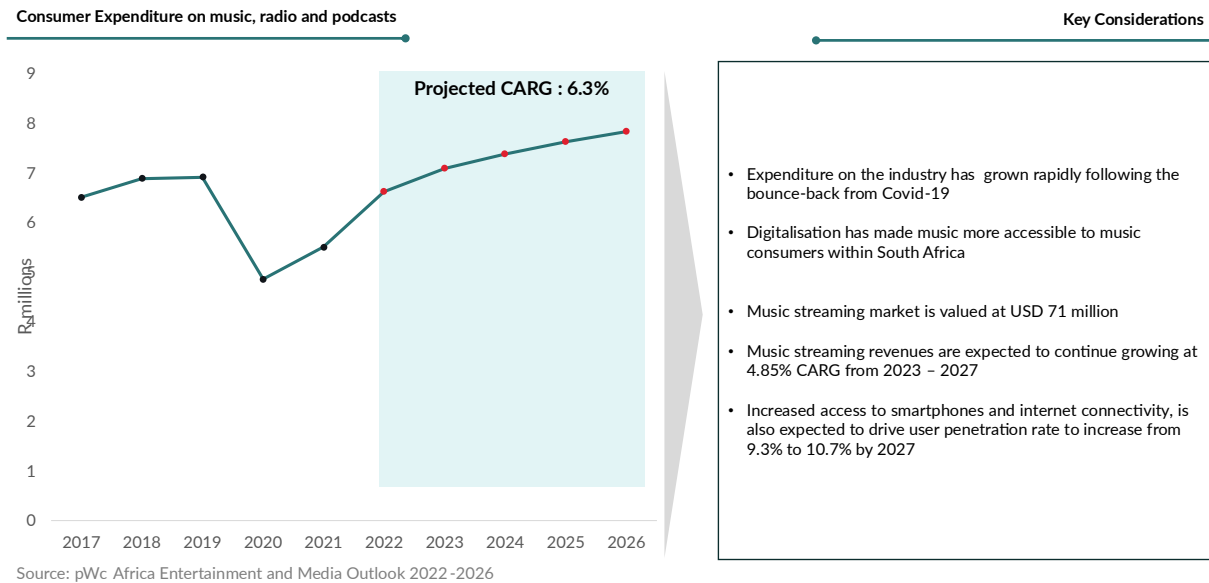


Figure 11: Music Consumer Expenditure Insights

2.3.1 Consumption Behaviour

The behaviour of music consumers is undergoing a rapid transition, driven by the digitalisation of the industry. South Africans are now listening to and engaging with more music than ever before, thanks to the accessibility provided by digital streaming platforms. However, the rate of market penetration varies across regions in the country. In semi-urban and rural areas, there has been a slower adoption of digital music platforms. Consumers in these regions tend to rely more on USB sticks and CDs for their music consumption, mainly due to lower smartphone penetration in non-urban areas.

The live music scene has experienced a decline due to disruptions caused by the pandemic. Nevertheless, with the current youth boom, a new generation of music consumers is emerging, and they have their own preferences for music consumption. This shift is evident in the decline of live band performances, as many vocalists now opt to perform with backing tracks rather than reproducing music live on stage. This has become a social norm among the youth.

2.3.2 Consumption Channels

South Africa still consumes a relatively significant proportion of international music compared to local music. This trend may be attributed to the growing accessibility of international music through digital streaming platforms. Therefore, it can be assumed that this preference for international music will continue to rise unless strategic interventions are implemented.

Local content quotas, which dictate the amount of local music played on radio stations, play a pivotal role in promoting and developing an audience for local music. However, commercial radio stations still have the upper hand in shaping audience preferences since they are not obligated to adhere to any local content quotas. Instead, they prioritise the interests of their investors. Nevertheless, radio stations remain an important mode of music consumption across the board.

2.3.3 Consumption infrastructure

The shift to digital music consumption has exposed a critical weakness in the industry's infrastructure. The challenges are as follows:

- **Internet Connectivity:** South Africans face some of the highest mobile data costs, posing a significant threat to the growth of the digital music economy. There is a shared sentiment that a locally owned music streaming platform is unlikely to thrive unless mobile data prices become more affordable for the general public.
- **Live Music Infrastructure:** The decline in live music performances at a small to medium scale means that venues equipped with infrastructure for live performances are becoming increasingly scarce.

2.4 Enabling Framework Analysis

The aim of this section is to analyse the current status of the foundational elements that stimulate and enable activities across the entire music value chain, and directly influence the demand and supply side dynamics.

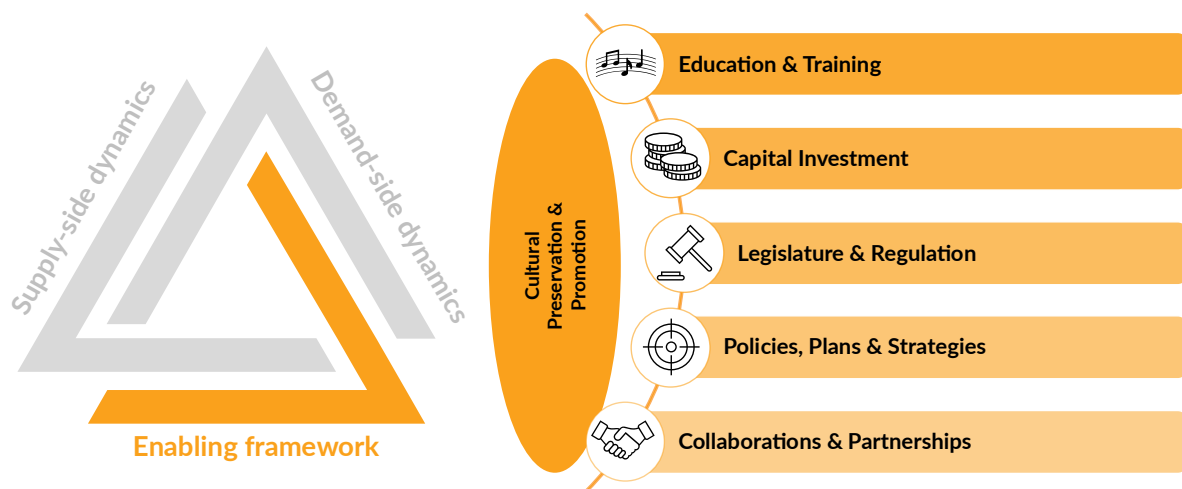


Figure 12: Enabling Framework

The figure above identifies the key pillars that encompass the enabling environment for the sector. At the centre of the enabling environment is the culture

2.4.1 Culture Preservation & Promotion

Culture is the foundation of the entire music sector. It is the fibre of our national identity, enabling us to connect deeply and making our nation uniquely beautiful on a global scale. Therefore, it is in the best interest of the individuals who are a part of this culture, as well as the custodians and beneficiaries of the music sector, to preserve and promote it.

Music serves as a powerful expression of a culture, whether it is traditional or folk music produced in our country or Western genres. Each song released carries a unique marker of what it means to be South African. Preserving and promoting our musical culture entails:

- Ensuring that the creatives responsible for musical expressions are fairly compensated for their work.
- Documenting our musical heritage.
- Archiving and building catalogues of South African music.
- Promoting local ownership of South African music and supporting local independent record companies/producers.

Essentially, it is about safeguarding our music from external exploitation while ensuring that it is heard and consumed, as this propagates the heritage to future generations.

This sentiment is critical in the current music industry climate for multiple reasons:

- There is a global focus on the African music scene, with various international markets responding to and resonating with our musical sounds.
- The presence of international music companies in the South African market, many of which already own significant portions of South African music.
- The anticipated amendment of the copyright and performers protection bill which could expose local artists to more exploitation if the 'Fair-use' clause is implemented.

Considering these factors, South African culture is the foundational enabler for the music sector because without it, music, and all other artistic expressions, would cease to exist.

2.4.2 Education & Training

The music sector requires a vast spectrum of skills and competencies to thrive. The figure below provides a high-level view of the skills and competencies required at each stage of the value chain:



Figure 13: Skills and Competencies Overview

The challenge is that there is a lack of cohesion and a comprehensive music education and training system that caters to the needs of the entire value chain.

Formal Education & Training

The formal music education and training industry can be broken down into three stages of development, each with prerequisites that need to be met to enter the next stage. It often requires fiscal resources to attain a formal qualification in music, The scope of education covered is generally concentrated on the creation & production of music. Education in other areas of the music value chain is generally attained through informal education or as a part of qualifications in separate industries.

General education and training (GET) occurs at the beginning of a child's schooling career. Education is administered in a traditional classroom setting from grade R to grade 9 and is provided to all learners in primary school and the first two years of high school. Further Education and Training (FET) is administered from grades 10 -12, as an elective subject for

students who wish to further their studies in music. Once a student attains their National Senior Certificate, they will have the opportunity to pursue Higher Education & Training, which is administered through a University, College or Academy. An overview of the education curriculum at all three stages is provided below:

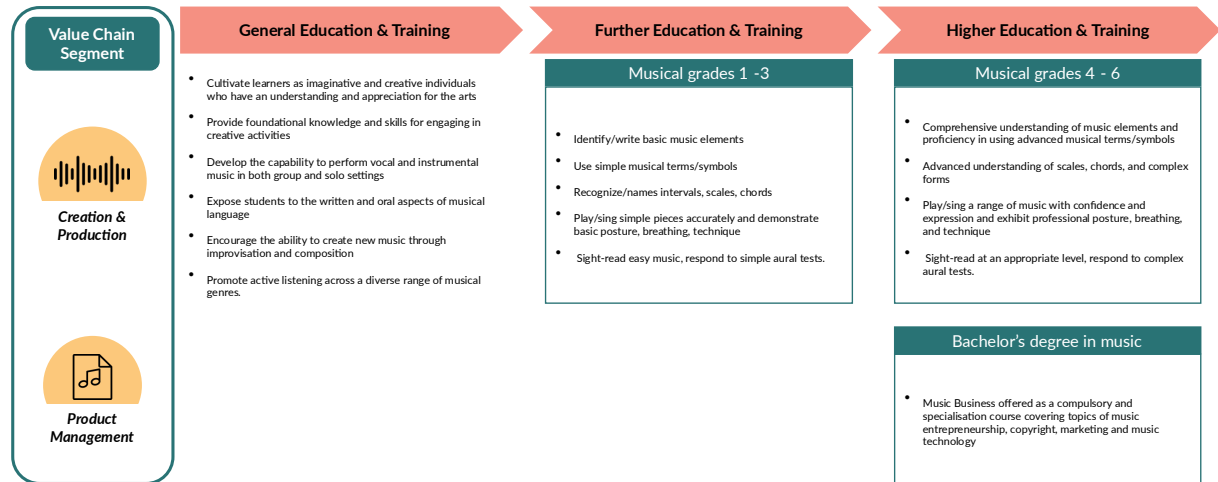


Figure 14: Formal Education and Training Curriculum

The developmental journey of a student in formal music education and training varies depending on the entity providing the training. The approach to learner development varies in the following ways:

- Learners in private schools tend to have a head start in practical music education compared to their counterparts in public schools. This resource disparity between public and private schools has a lasting impact on the quality of musicians produced through the education system.
 - At the General Education and Training (GET) level, music education in public schools is typically integrated into the Life Skills curriculum, covering various topics related to the cultural industries. Basic knowledge is provided during early childhood education, and practical elements like reading staff notation are introduced in the latter half of education. Practical music education is usually only administered at the Further Education and Training (FET) level.
 - In contrast, private schools often provide practical music education as early as the GET level. These schools are generally well-resourced and can better meet the needs of music students in terms of equipment, instruments, and training facilities.
- Unfortunately, music education and training at the FET level are not widely available. As mentioned earlier, practical music education requires investment in equipment, infrastructure, and facilities. Private schools are better equipped to address this need,

increasing the likelihood that students from higher-income backgrounds can pursue music studies and receive a quality education.

- For students within the public schooling system, furthering their music studies can be challenging. To address this issue, the Department of Education introduced the magnet school program. Magnet schools are public schools that focus on the arts and cultural industries and are better equipped to provide education for the industry. However, these schools are only available in Gauteng and the Western Cape provinces.
- Additionally, music education at the FET level often requires music tuition to complement classroom theory education. Students in private schools generally have better access to tuition services. In some cases, public schools may partner with private schools or community arts academies to support their music students, but this intervention is not a formalised requirement.
- Learners exiting the FET schooling system often face challenges in qualifying for Higher Education and Training (HET) at universities. They may not meet the prerequisites for music-related qualifications at higher education institutes. Wits University is one of the few universities offering a bridging program for students who do not meet the qualifying criteria for their music program.

Due to these challenges, a significant portion of education and training occurs informally. The informal music education and training industry is fragmented and more widely accessible than the formal sector. Private music tuition companies, music academies, colleges, institutes, community cultural centres, and online learning platforms are among the providers of informal education and training in music.

The Music Sector Job Market

Both formal and informal music education are pursued by individuals intending to establish themselves as professionals in this carrier. As such, an important part of evaluating the effectiveness of the music education system is to study the market entry prospects of qualified professionals in the industry.

The lack of sustainable job opportunities within the music sector was highlighted as an area of concern by education and training institutions across the country. Many pupils exiting the education system end up becoming teachers and lecturers themselves. For a select few, however, opportunities to perform as an artist do materialise.

The CATHSETA Sector Skills plan provides an overview of the skills requirements within the sector. The digitalisation of the music sector has had a significant impact on the value chain, uncovering new skills requirements for the arts, cultural and heritage sectors as large. The figure below provides an overview of emerging and hard-to-fill vacancies within the sector.

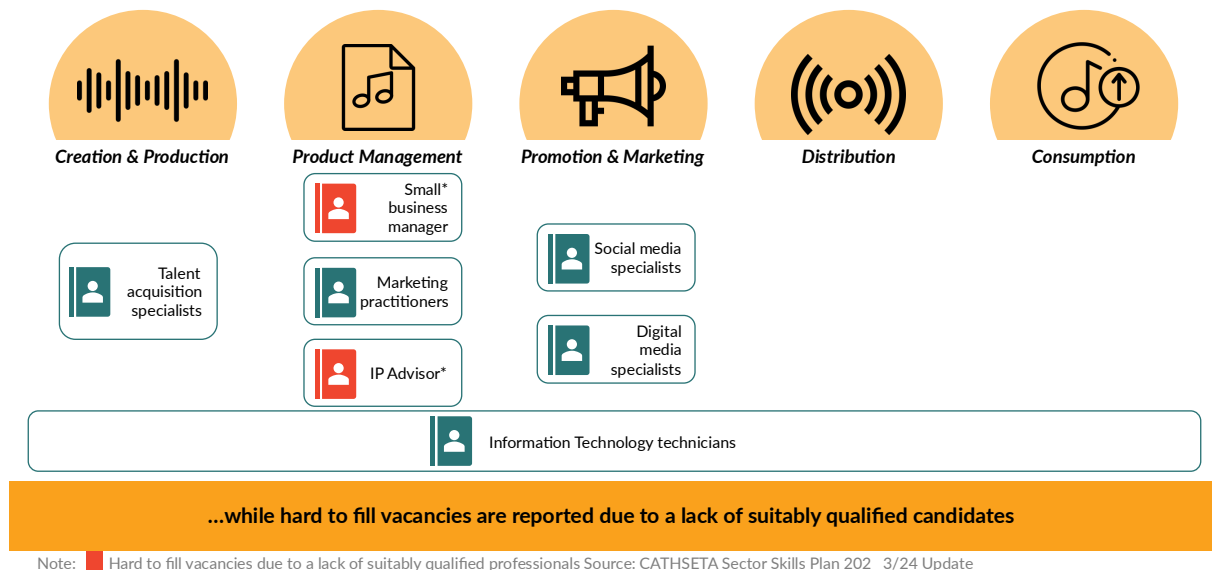


Figure 15: Sector Skills Requirements

2.4.3 Capital Investment

The music sector in its entirety can be analysed as a business. There is a product (the music) that is produced, which is valued by a set of consumers. These consumers access and engage with the produced product through a set of consumption channels.

There are processes that link the business model to the operating model of the sector. The operation of the sector is founded on three core elements, people, infrastructure & technologies, and culture. These come together to form an organisation of various industry stakeholders, executing functions that deliver value to the customer, through specific channels. As such, the business and operating model forms an ecosystem of activities and stakeholders that make up the entire music sector.

Capital is invested into the sector to drive growth and enhance the impact made through this sector. It can be seen as a tool that enables the sector to deliver value to its customers. As such, a successful investment is one that sustainably yields financial returns from the activities within the sector. An unprofitable sector is one that does not yield favourable returns on investment and ceases to grow.

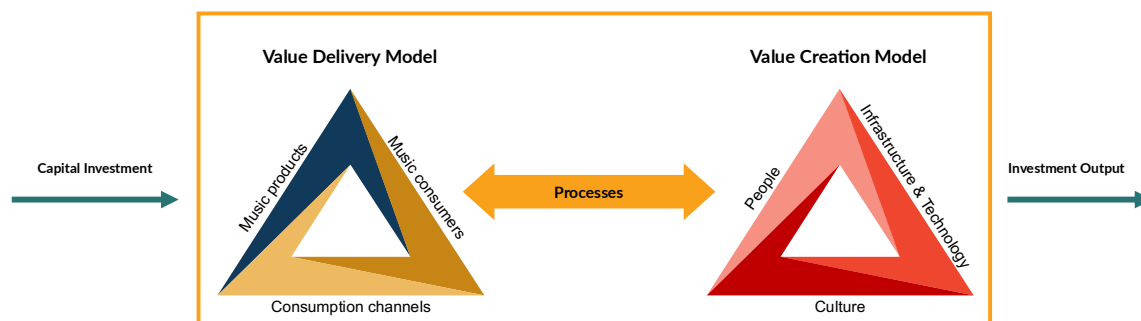


Figure 16: Capital Investment Model

Considering the business and operating model of the sector, three types of capital investment have been defined:

- **Capital investment in education and training** for the sector is provided, to ensure that the necessary skills and competencies for the supply chain are developed. As such, this form of investment is a big part of ensuring the people in the sector are adequately capacitated to deliver value to the music consumer.
- **Capital investment in infrastructure and technology** occurs to enable the production, distribution, and consumption of music.
- **Capital investment in culture preservation and promotion** speaks to developing the capacity of the industry to drive demand for music through audience development and to gain market share in what is in demand.

Each of these areas was analysed. The figure below provides an overview of how the state and private sector invest capital into the sector, in order to achieve particular outcomes.

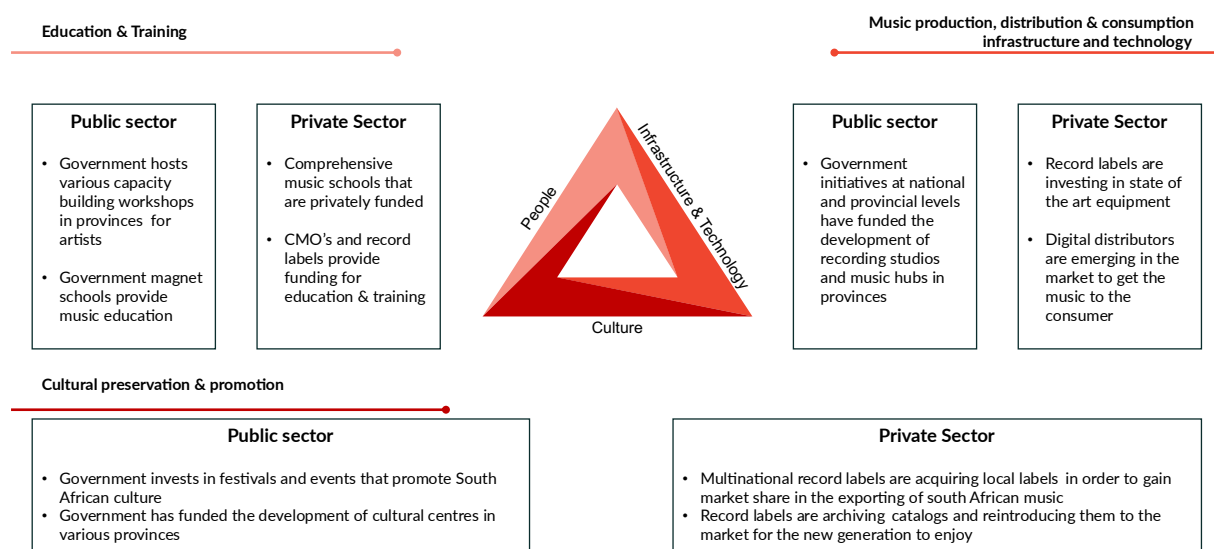


Figure 17: Public vs. Private Sector Investment

Private Sector Investment

Investment in the music industry from private entities is largely catalysed by the demonstrated potential of the sector to yield favourable returns. There are various ways in which private entities are investing in South Africa's music industry, as captured in the figure above. Some of the key drivers for these investments include:

- Industry growth and development, e.g., the 34.7% annual growth in the country's recording industry, making it the fastest growing in the world
- Increased awareness and cultural significance of the music, e.g. growing awareness and demand for the Amapiano genre globally
- Innovation and transformation of the industry, e.g. the amendment of the copyright bill, and increased policy increasing investor confidence in the market

All of these factors play a key role in an investor's appetite for the sector. South Africa's music industry has always been dominated by large multinational corporations, who have acquired a considerable market share over our local music while successfully developing an audience for

international music, locally. This has afforded these entities significant financial muscle and influence over the sector, making it difficult for South African companies to compete.

Consequently, the positive trajectory of the industry statistics paints a misleading picture of the industry's health– because we are seeing a continuous decline in local economic beneficiation from the industry growth we are seeing. Evidence of this is captured in the figure below:

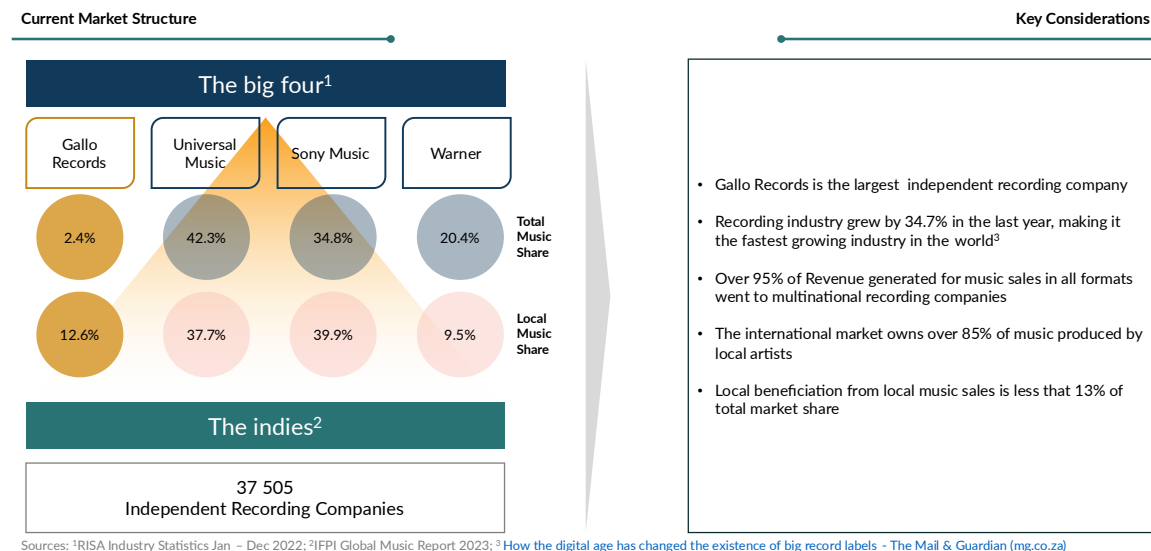


Figure 18: Music Sales Revenue Statistics

Public Sector Investment

The overarching mandate of the state is to create an enabling environment for the music industry to thrive. The implication is that drivers for government investment in the music industry are fundamentally different to those of the private sector. The state invests in the music industry with the following objectives:

- Stimulate economic growth and employment opportunities
- Foster social cohesion and development of a national identity
- Responding to changing dynamics and trends in the market

Considering the limited planned government expenditure on CCLs and imminent budget cuts over the next medium-term period, it is important to recognize the significant impact of constrained fiscal resources on the music industry. As per the **2024 National Treasury Budget Review**, Arts, culture, sports and recreation is allocated R11.9 billion of funds, making up 3% of the government expenditure towards the *Learning and Culture* function. The **2024 Estimates of National Expenditure** suggest an initial budget cut from the 2023 baseline for Sports, Arts and Culture of R 54.4 million in 2024/25. Therefore, any expenditure directed toward the music industry must be strategic to ensure the state realizes its objectives.

Considering the expenditure listed in the figure above, a key observation is that a lot of the investments made are designed to yield short time benefits to the sector and do not catalyse the industry to continue to grow sustainably and independently. The industry statistics provided above, highlight how vulnerable the music sector in south Africa is, due to the

economic influence of the multinational entities. Any market growth or revenue generated as a result of government intervention leaks out of the country and the beneficiation of the local economy is diluted.

In response to this, the DTIC and DSBD to assist in sustainable business development for the sector. However, this was unsuccessful because the music sector is generally regarded as risky. These government entities also have limited fiscal resources, and thus prioritise investments into industries with a higher probability of gaining a return on investment.

Regardless of this, independent businesses in the sector require significant support from the state. The main barrier to entry for these businesses is the dominance of the multinationals, who have greater financial muscle and thus greater influence on the market. Independent businesses are left lacking the necessary capital and expertise to compete with established multinationals and sustain their businesses with the funding that has been provided.

2.4.4 Legislation & Regulation

Legislation for the music sector finds its roots in the constitution, which guarantees the right to freedom of expression, which includes freedom of artistic creativity and recognises the cultural diversity of the nation and the role of arts and culture in promoting human dignity, social justice, and democracy. Following from this overarching piece of legislature, are various other acts from which key industry stakeholders derive their mandates. The foundational legislature for the sector is captured in the figure below.

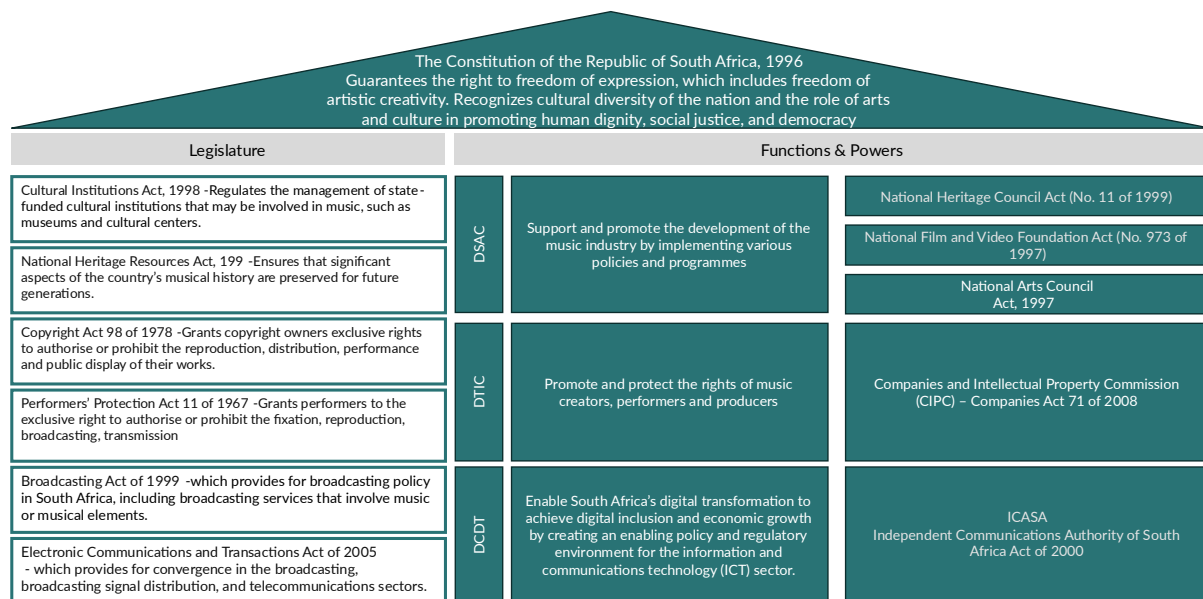


Figure 19: Legislative Framework

The Department of Sport, Arts and Culture plays a crucial role in supporting and promoting the development of the sector, and this derives its mandate from various pieces of the legislature and thus executes various functions in this regard, supported by its statutory bodies. These include:

- **National Arts Council (NAC)** - providing financial and other support to the arts, including music (grants to artists, musicians and music organisations, promote the development of music education, and support R&D)

- **National Film and Video Foundation (NFVF)** - promoting and developing the film and video industry, promoting export of SA films and videos, supporting research and documentation of the film and video industry
- **National Heritage Council (NHC)** - advising the government on matters relating to South African heritage, including music (recommends measures to protect and preserve SA heritage and promote public awareness)

The Department of Trade, Industry and Competition derives its mandate from the Copyright Act and the Performers' protection acts. Both acts currently have amendment bills that are expected to receive presidential signatures soon. The implementation of these bills will have a tremendous impact on the way IP rights are administered and royalties are generated in the music industry. The figure below provides an overview of the progress made on the bills, based on reporting from the Parliamentary Monitoring group:

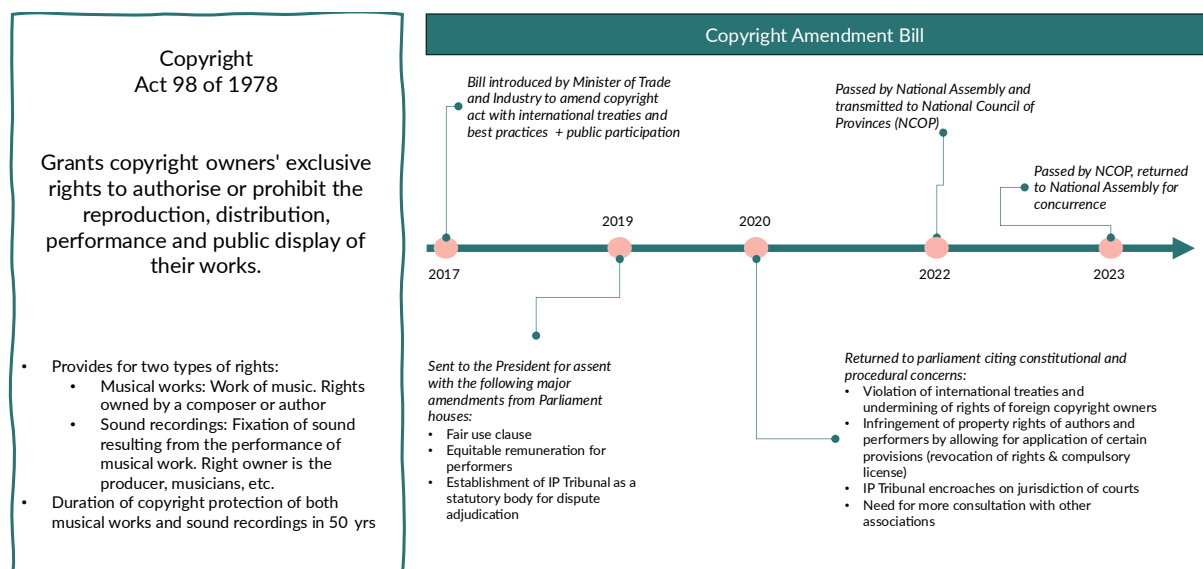


Figure 20: Copyright Amendment Bill History

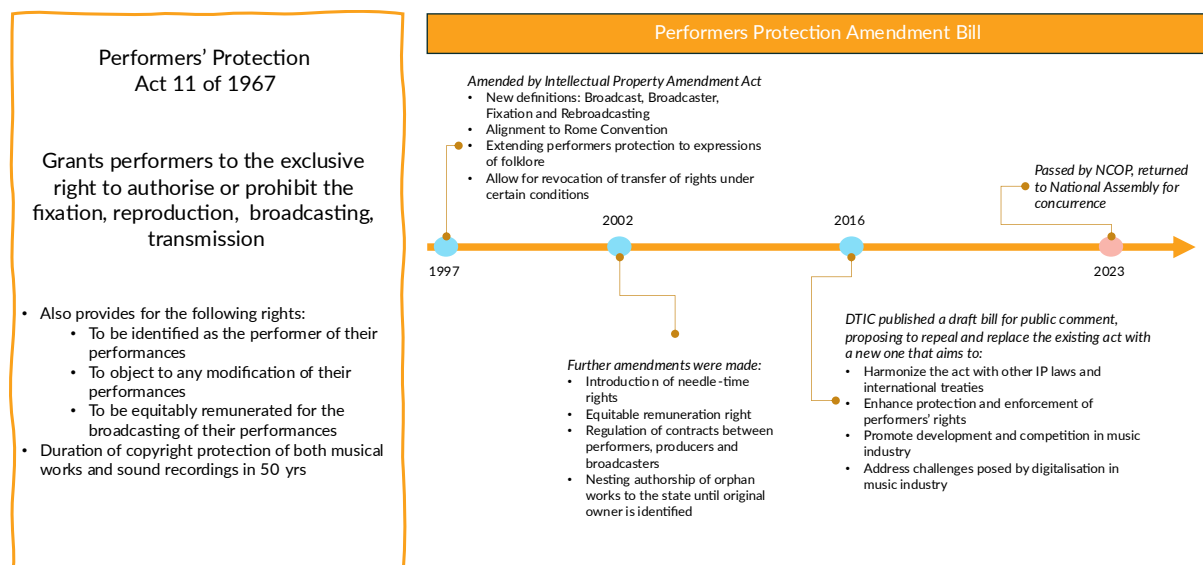


Figure 21: Performers Protection Amendment Bill History

The DTIC implements its current mandate through the support of its statutory body, the CIPC which registers and regulates the intellectual property rights of music creators, owners, and users.

The Department of Communication and Digital Technologies also derives its mandate from a piece of legislature aimed at enabling the sector's digital transformation. The implementation of its functions is supported by ICASA, whose mandate is to license and monitor various ICT services and activities, such as broadcasting, telecommunications, postal services, radio frequency spectrum, and number portability.

The department of basic education and training, and the department of higher education and training - as well as the various qualification authorities and structures (e.g. CATHSETA), have played an important role in human capital development for the music industry from early childhood to tertiary level education and training.

Although this is not a comprehensive list of legislatures that govern or influence activities within the music sector, there are some vulnerabilities within our current legislative framework. These are highlighted in the figure below:

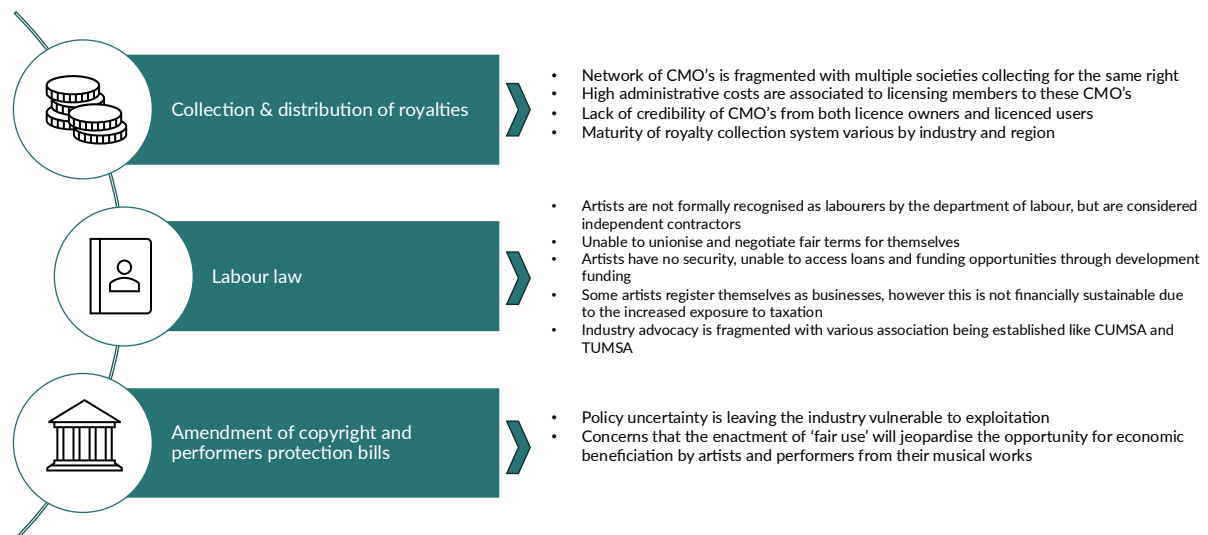


Figure 22: Key Legislative Challenges

The amendment of the copyright and performer protection bills is within the final stage of development and is expected to be signed soon, to address and resolve these challenges. There are polarising views in the industry regarding whether these bills are in the best interest of artists or further opening them up to exploitation by the market.

2.4.5 Policies, Plans and Strategies

There are six key policies, plans and strategies driving government intervention and enablement of the music sector.

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.
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.
Cultural and Creative Industries Masterplan	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.
Mzansi Golden Economy Programme	This programme is an initiative of DSAC that aims to make strategic investments to optimize the economic benefit of the arts in South Africa. By improving investment in key areas of the creative economy, it is anticipated that job creation and productivity will be enhanced, and the sector's global competitiveness will be increased. The MGE programme consists of six streams: cultural events, touring ventures, public art, art bank, sourcing enterprise and audience development.
National Youth Policy	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.
Social Cohesion and Nation Building	This is a national priority that aims to promote national unity, cohesion and nation building, among South Africans. It is based on the recognition that despite positive strides since 1994, South African society remains divided along racial, class, gender and spatial lines. It also acknowledges that social cohesion is essential for achieving social and economic development.

Figure 23: Policy Landscape of the music sector

The overall viewpoint on the needs of the music sector is captured in six pillars, which are defined below:

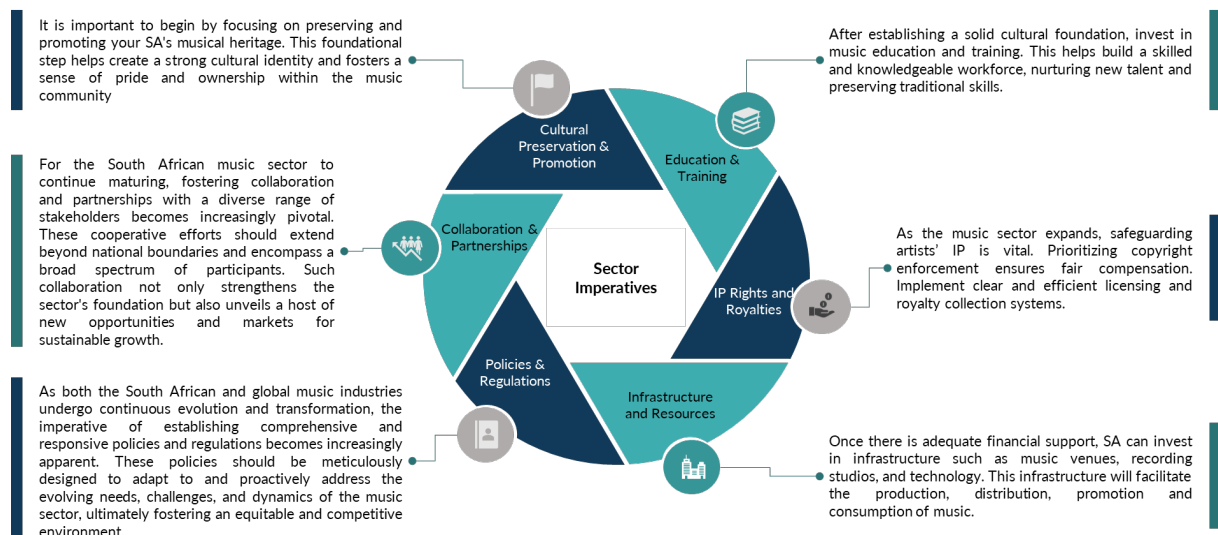


Figure 24: Sector Imperatives

It is evident that our policy landscape is comprehensive in addressing the most pressing needs of the cultural and creative industry on a thematic level. However, the main challenge is that because the music industry is only a sub-category of the cultural and creative industry, the impact to be realised in the industry gets diluted as most policies, plans and strategies are designed to address more broadly defined challenges across the board. As such, there is a gap in the state's intervention in tackling unique challenges faced by the music industry. This further

validates the need for the development of policy and strategy specifically focused on the music sector in the country. Our analysis and engagement with stakeholders across the industry highlighted the following insights and challenges on the status of each of the sector imperatives for the music industry:

- **Culture Preservation & Promotion:**

To ensure the preservation and promotion of our culture in the music industry, we must be deliberate in how we export and share our craft. This entails treating our work with professionalism, establishing contacts, securing ownership of rights, and generating income. Additionally, we need to foster a deep appreciation for our local talent and archive our musical heritage. Reintroducing old songs to new generations can play a crucial role in this effort.

- **Education & Training:**

A critical imperative is providing comprehensive training opportunities for individuals pursuing music careers, starting from early childhood through tertiary education. This ensures that talent is nurtured at all levels, and there is a need for increased career prospects for music graduates. Furthermore, there is a gap in formalised music business education, particularly in the field of music law, which should be addressed to equip future professionals with essential knowledge.

- **IP Rights and Royalties:**

Educating music stakeholders about their intellectual property (IP) rights is crucial. This includes clarifying what IP ownership means and how it translates into royalties. Transparency and openness in financial transactions are essential to build trust among stakeholders. Eliminating the challenge of artists needing to travel to Gauteng to meet with Collection Management Organisations (CMOs) can be achieved by streamlining administrative processes and making them more user-friendly.

- **Infrastructure and Resources:**

The music production infrastructure in South Africa is expanding, marked by the proliferation of independent studios and readily available software. However, infrastructure for live performances faces significant limitations, primarily stemming from a scarcity of venues, particularly in remote or rural regions of the country.

- **Policies & Regulations:**

To ensure the sustainability of the music industry, a responsive approach to legislation, regulations, and policies is vital. This approach is crucial for addressing disruptive forces such as digitalisation and safeguarding the interests of all sector stakeholders. A well-defined regulatory framework is essential to avoid vague responses in the face of these challenges.

- **Collaboration & Partnerships:**

Collaborative mechanisms involving different government entities, including the Department of Sport, Arts and Culture (DSAC), the Department of Trade, Industry and Competition (DTIC), the Department of Small Business Development (DSBD), and others, are of utmost importance. Effective collaboration should occur at all levels of government to collectively drive meaningful impact within the music industry, fostering a stronger and more cohesive sector.

2.4.6 Collaboration & Partnerships

The music industry frequently wrestles with the persistent question of its organisational state. It is not uncommon to hear assertions that the industry is more misunderstood than disorganised, and this characterisation is sometimes invoked by those in positions of authority as a justification for not providing support to the industry.

The industry is reasonably well-established, with numerous grassroots forums, industry associations, and bodies, each contributing to the industry in its own unique manner. However, the sector suffers from fragmentation, with many organisations operating independently, often duplicating efforts and achieving limited progress. Instances of organisations ceasing to exist are as prevalent as the emergence of new ones. Consequently, the perennial challenge lies in finding ways to coordinate these efforts to attain tangible and focused outcomes for the sector.

The figure below captures the principal insights and recurring themes gathered from stakeholder engagements, highlighting the most notable gaps within the sector that hinder its growth and development.

Current Collaboration Network	Challenges	Opportunities
Royalty Distribution SAMRO and CAPASSO have developed a joint-license for digital streaming royalties	<ul style="list-style-type: none"> Multiple CMO's collecting for the same rights : <ul style="list-style-type: none"> Audio-visual: RAV and AIRCO Needle-time rights: SAMPRA, and IMPRA Lack of political will for the three most established CMO's to collaborate , namely SAMRO, SAMPRA and CAPASSO 	<ul style="list-style-type: none"> Optimization of the CMO network to better service the industry: <ul style="list-style-type: none"> Reduced administration costs Increase licensing coverage Streamline administrative processes
Exporting South African Music Moshito Music Conference and Exhibition is considered Africa's premier conference and is a platform for artists, promoters and music businesses to connect and access opportunities	<ul style="list-style-type: none"> International market access is only afforded to the select few who have industry knowledge and are well connect Lack of coordinated efforts to drive this Deterioration of industry support for collaboration forums like Moshito with declining attendance from international stakeholders and local artists 	<ul style="list-style-type: none"> Establish an ecosystem around South African music for the world to consume Engage international music promoters in the roll out of marketing programmes for South African artists, events and festivals to showcase talent
Business Development DTIC and DSBD are mandated to support business development for the sector	<ul style="list-style-type: none"> Investment and support for business in the music industry has significantly declined, with DTIC prioritizing other film and crafts because they are lower risks DSAC does not fund business ventures as they are seen to be outside of their mandate Most government funded festivals, events and industry associations are not sustainable 	<ul style="list-style-type: none"> Give independent music businesses increased market share over the industry Dissolve monopolies held by multinational companies Create sustainable job opportunities for industry practitioners across the value chain
Cultural Preservation Various provincial DSAC offices fund cultural music celebrations and events	<ul style="list-style-type: none"> Lack of collaboration and cohesion of efforts between National DSAC and all provincial offices Efforts are fragmented and duplicated in certain instances 	<ul style="list-style-type: none"> Drive national-wide music development initiatives that have a deep-rooted provincial focus Supporting independent music development and increased local ownership Enable the establishment of live music circuits for performers in the industry Leverage infrastructure from three music hubs to drive national objectives of gain market share of the local music industry
Information exchange and industry coordination Organisations like Moshito and CCIFSA were established to enable industry to meet and coordinate its efforts	<ul style="list-style-type: none"> Artists are not informed on initiatives being rolled out to support them ,e.g. funding opportunities Lack of participation from industry due to past disagreements Lack of comprehensive databases of the music industry across all nine provinces- it is not being monitored 	<ul style="list-style-type: none"> Leverage digital tools and technologies for industry monitoring and data driven decision making The state and industry associations can collaboratively develop information repositories that are easily accessible for artists and engage them directly

Figure 25: Collaborations and Partnerships

2.5 Market Segmentation

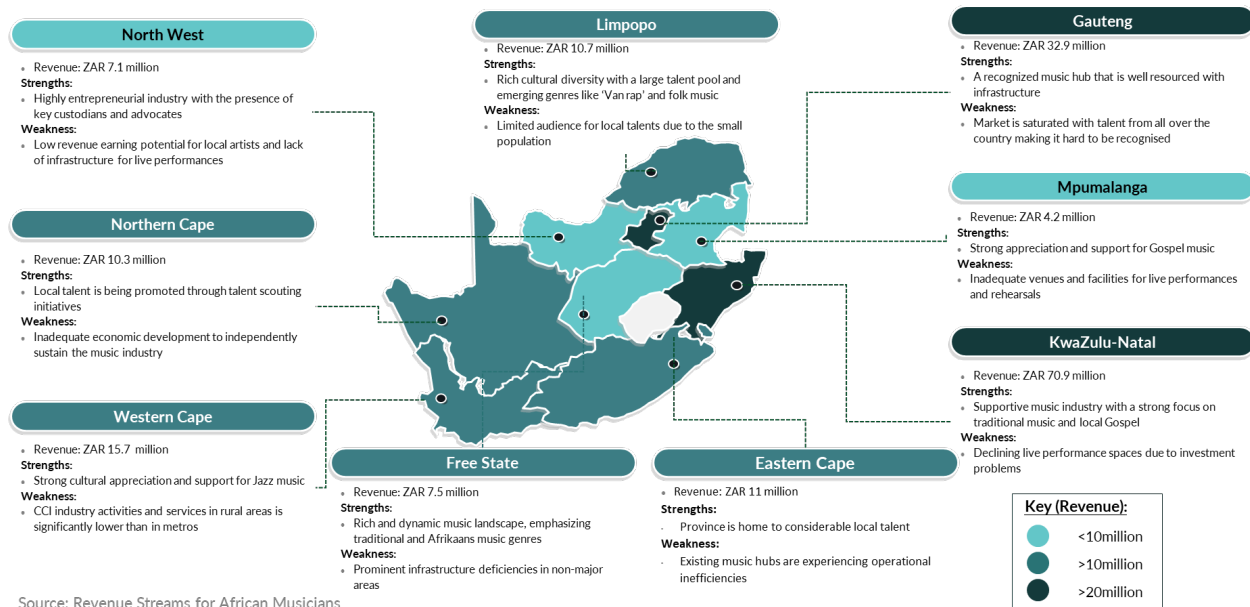


Figure 26: Status of the Music Industry per Province

The South African music industry boasts a rich cultural heritage, evident in its choral music tradition and passionate local fanbase for genres like Isicathamiya, Gospel, Gqom and Jazz. However, limitations in infrastructure, training opportunities, and access to national markets hinder its growth. Investments in recording studios and performance venues alongside professional training programs would further strengthen the sector.

Capitalising on the growing interest in indigenous music and the potential for music tourism requires developing tours and festivals that showcase the country's unique sounds. Digital platforms offer a promising avenue for promotion and distribution, but support is needed to equip artists with the skills to navigate this space. Funding programs, mentorship initiatives, and fostering collaboration between established and emerging artists are crucial for overcoming financial limitations and knowledge gaps.

Protecting intellectual property through stricter copyright enforcement is essential. Additionally, strategies to cultivate local audiences for niche genres and implementing royalty collection and distribution systems will ensure fair compensation for artists. The strategy aims to address these areas so that the music industry can flourish, empowering its artists, attracting investment, and solidifying the country's cultural identity.

2.6 Market Structure and Socio-Economic Analysis

This section aims to comprehensively analyse and assess the social and economic considerations derived from the data obtained in both the sector profile and market segmentation analysis.

Key objectives include:

- Utilising the socio-economic and market structure analysis as a cornerstone for shaping South Africa's National Music Strategy.
- Leveraging these insights to establish economic priorities, market-oriented initiatives, competitive positioning, and policy alignment
- Developing a contextual understanding of economic challenges, identifying opportunities, and delineating areas for improvement

2.6.1 Market structure

Analysing the market structure provides insights into the competitive landscape. Policymakers can leverage the findings to design and implement effective policies and regulations that foster a conducive environment for the music sector's growth. Below is a high-level overview of the current music market structure.

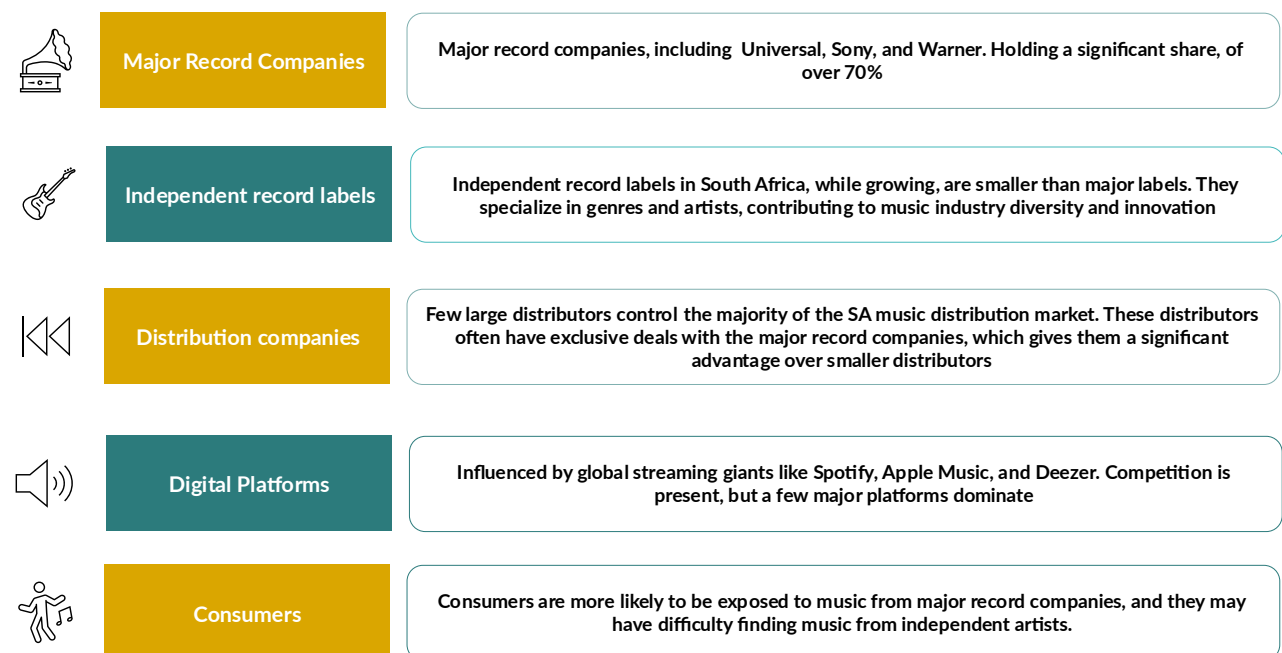


Figure 27: Market Structure Overview

The music market structure is shaped by various characteristics and competitive dynamics. It distinguishes between mainstream and non-mainstream genres:

- Mainstream genres, like Afrohouse, Amapiano, and Gqom, are easily exportable and resonate with global audiences.
- Non-mainstream genres are deeply rooted in local culture and less influenced by global trends.

Artists in less popular or non-mainstream genres often face support challenges. Mainstream genres currently generate the most revenue due to their popularity, while non-mainstream genres have predominantly local audiences.

In terms of the number and size of firms operating in the market, multinational record labels such as Universal, Warner, and Sony dominate the industry, leaving less than 10% market share for independent South African record labels.

The level of competition is evolving, with independent labels entering the market, although many are eventually acquired by multinationals. The key is to maintain independence even when absorbed by multinationals, ensuring the nurturing of South African unique genres and new talent.

The ease of entry and exit for new firms varies. While it is relatively easy for independent artists to enter the music industry, they face resource and business skill limitations, necessitating an entrepreneurial mindset.

Differentiating offerings is challenging in the music industry, but opportunities exist to create better value propositions, fostering win-win situations and artist recognition. Artists can differentiate themselves through unique sounds and genres, emphasising creativity, passion, and audience development, even in non-mainstream genres.

2.6.2 Socio-Economic Impact of the Music Sector

In a rapidly evolving industry, data-driven decision-making is paramount. Understanding the socio-economic dynamics empowers stakeholders to make informed choices regarding investments, policies, and resource allocation.

Artists in South Africa grapple with a multitude of socio-economic and mental health pressures. These include limited access to funding and credit due to unpredictable income, seasonal gig opportunities dependent on commercial success, and a lack of employment benefits or labour market recognition. Financial insecurity and the demands of projecting success on social media also take a toll on personal savings and mental wellbeing. The centralisation of the industry in major centres creates barriers to entry, hampering local music streaming services, while family law complexities add to their woes. Furthermore, artists face challenges in education and skills development, with limited structural business support. Gender inequality persists in income sharing, influenced by social norms and traditional studio roles, exacerbating the difficulties artists encounter in their careers.

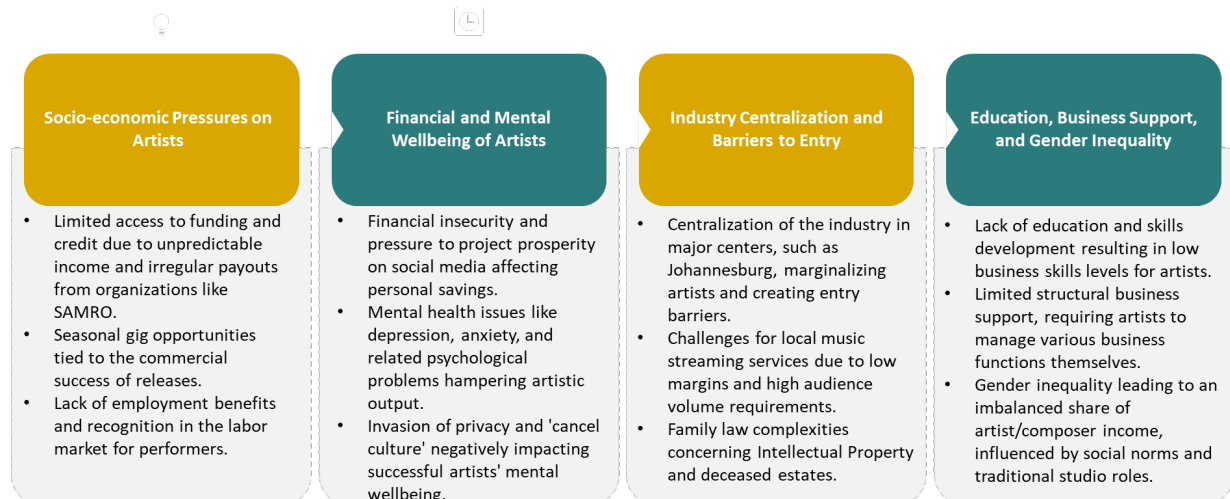


Figure 28: Socio-economic Challenges

Demographics significantly shape music consumption patterns. Consumers are often exposed to music from major record companies, making it challenging to discover independent artists. Additionally, this situation may result in higher music prices due to the bargaining power held by major record labels, which ultimately affects consumers. Moreover, this dynamic can stifle innovation, as major record companies tend to prioritise artists who conform to narrow definitions of commercial success, limiting opportunities for diverse voices to gain recognition. Various South African provinces, including North West, Mpumalanga, Limpopo, Northern Cape, Free State, and Eastern Cape, face disparities in terms of access to markets, business skills, music education, resources, and access to collective management organisations (CMOs). As a result, many artists gravitate toward major cities in Gauteng, KwaZulu-Natal, and Western Cape to advance their careers. Some DSAC provincial departments have initiated strategies to support artists more effectively within their regions, but clear, market-driven initiatives are essential to address this issue comprehensively.

Different musical genres and traditions find varying levels of acceptance within communities across South Africa. Certain traditional genres, like Maskandi in KwaZulu-Natal, enjoy widespread popularity. Similarly, genres such as Isichatamiya in the Eastern Cape, Van Rap in Limpopo, and Sotho Rap in the Free State hold the potential for growing their audiences. Local record labels can play a pivotal role in nurturing niche sounds embraced by South Africans. Achieving this potential necessitates imparting business skills, offering infrastructure and funding, and ensuring organisational accountability. The formulation of a well-strategised approach for market-driven initiatives and their efficient implementation will pave the way for success.

Disparities among artists living in rural areas, townships, and urban regions are prevalent in many South African provinces. Inclusivity can be enhanced through the development of tangible, long-term solutions. Offering funding exclusively for events is unsustainable; artists must be equipped with entrepreneurial skills for sustained success. DSAC's national strategy should extend to the provincial level, with a focus on accountability and clear outcomes. Additionally, the broad mandate of CCIFSA requires refinement to establish specific outcomes, outputs, and activities that member organisations must report on, ensuring consistency in their efforts.

The South African music industry boasts an estimated annual worth of approximately R2 billion, encompassing recorded music, live performances, and music publishing. Recorded music takes the lead in revenue, constituting about 60% of the total, followed by live music at 30% and music publishing at 10%. Interestingly, the International Federation of the Phonographic Industry (IFPI) suggests that recorded music and publishing revenues are roughly equal. The industry is experiencing rapid growth, thanks to factors like the rising popularity of streaming services, the digital music market's expansion, and the increased international recognition of South African music. However, an economic disparity persists, where only a small percentage of artists access the majority of available revenues. Music streaming has yet to bridge this gap, but User Generated Content on social media platforms offers the potential for broader exposure and fan engagement with local music content.

2.7 Comparative Benchmarking

South Africa should benchmark its music sector with global leaders in the industry, such as South Korea, Canada, and Australia, to gain international insights and best practices. Additionally, looking at the music sectors in African countries like Nigeria and Kenya can provide valuable regional insights. Kenya's emphasis on preserving traditional music aligns with South Africa's cultural diversity and heritage.

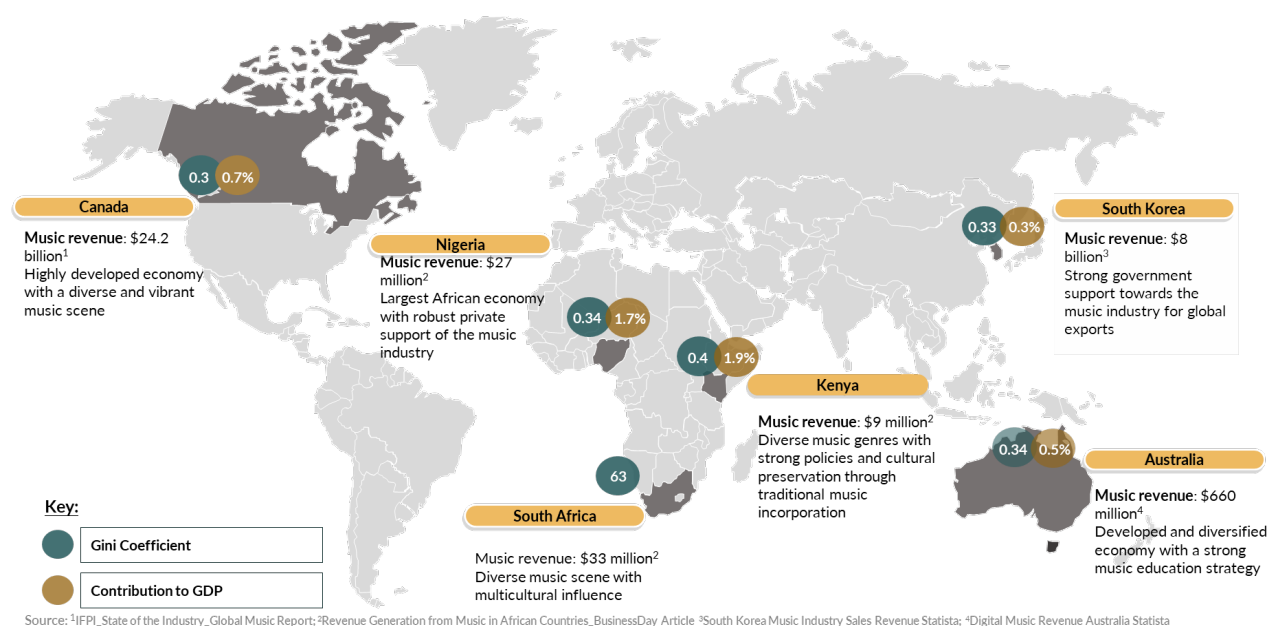


Figure 29: Comparison among global leaders in the industry

Below are several lessons that can be adopted by these countries.

Key lessons for the context of South Africa

South Korea's success in building a thriving entertainment industry, with K-pop at its forefront, offers valuable lessons for South Africa to consider and adapt to its unique context. South Korea's comprehensive ecosystem around its entertainment sector, driven by the rapid growth of local Korean agencies, is a notable strength. South Africa can draw inspiration from this approach, focusing on nurturing and promoting local talent by encouraging the growth of prominent local music agencies. By supporting these agencies, South Africa can enhance its music industry's capacity to produce world-class content.

In addition, South Africa can take a page from South Korea's book by blending international influences into its music scene while preserving its distinctive cultural identity. Copyright enforcement is a vital aspect of this strategy, safeguarding local artistry and content. Furthermore, South Africa can leverage technology and training to enhance the marketing and production of high-quality music content, allowing its artists to compete effectively on the global stage. These initiatives, combined with government support and awareness at the presidential level, can help South Africa unlock the full potential of its music industry.

Meanwhile, Canada's model of providing support to its musicians at international conferences and festivals holds valuable insights for South Africa. To apply this to South Africa's context, the country can establish a clear strategy through a dedicated music office. This music office should represent the interests of the provincial music industry and musicians, ensuring that their needs and goals are addressed effectively. This strategy should be revisited and updated every five years to keep it aligned with the evolving music landscape.

Furthermore, South Africa can take inspiration from Canada's approach to music education. To nurture talent from early childhood to high school, South Africa can develop music education initiatives that align with university requirements, creating a seamless and coherent pathway for aspiring musicians. By doing so, South Africa can provide a strong foundation for its artists and foster an environment that helps them succeed on both the national and international stages.

Similarly, South Africa can benefit by establishing a coherent and achievable music strategy that spans from early childhood education to the tertiary level as is the case in Australia. This comprehensive strategy should provide a well-defined pathway for aspiring musicians and ensure alignment for success at various stages of their careers. Collaboration among the Department of Higher Education and Training (DHET), the Department of Sport, Arts, and Culture (DSAC), other government stakeholders, and academic associations should result in a comprehensive music education strategy that nurtures and supports South African musicians at all levels of their development.

South Africa can also learn from Australia's strategy for promoting local talent during conferences. This includes involving foreign promoters and equipping artists with essential business and presentation skills, which are vital for international success. To harness its untapped potential, South Africa can enhance the operational strategy for the Moshito Conference, making it a more effective platform for local musicians to connect with international opportunities. Additional stakeholders and substantial improvements are crucial for the conference's success. South Africa can implement these lessons by actively engaging with foreign promoters to create opportunities for local talent on the global stage. Workshops and training sessions for artists can be instrumental in refining their presentation and business skills for international appeal.

Nigeria also holds several key lessons for South Africa such as:

- Harnessing the South African diaspora is an excellent strategy to promote local culture and music globally. South Africa can leverage its diaspora to support and expand its music industry on the international stage.
- A robust private sector's support for funding musicians is essential for industry growth. South Africa can encourage more significant private sector involvement in funding its musicians, helping them achieve their potential.
- Shifting the focus towards international competition instead of regional dominance can be a game-changer. South African musicians should look beyond regional markets and aim for global recognition, following Nigeria's model.
- Encouraging independent content production can empower artists to become self-sufficient, reducing their reliance on major funding sources and fostering a more vibrant music ecosystem.

- South Africa can take a cue from Nigeria by incentivising entrepreneurs to invest in the entertainment sector, recognising its significant economic potential.
- Celebrating and promoting South Africa's unique culture and languages can enhance global appeal, attracting international audiences.

South Africa has a significant opportunity to harness its diaspora, forming a global network to boost local music and culture internationally. A strong cooperation between the government and the private sector, will offer financial support and foster an environment for international competition. Encouraging artists to create independent content calls for training and mentorship programs. Incentivising entrepreneurs to invest in the entertainment sector can be facilitated through financial incentives. Furthermore, promoting South Africa's distinctive cultural identity and languages can involve cultural exchange initiatives, global marketing, and showcasing the nation's diversity through music and the arts.

Lastly, supporting the development of music in South African languages can help preserve and celebrate the country's linguistic and cultural diversity. South Africa can actively promote music in various languages to ensure representation and cultural richness.

Promoting the use of South African music in schools and other educational settings can instil a sense of pride and connection to local music from a young age. Requiring schools to teach South African music and offering opportunities for students to participate in music ensembles and programs can help foster a deep appreciation for local music traditions.

Creating a government agency responsible for promoting South African music overseas can help boost international exposure. This agency can work on marketing, collaborations, and export strategies to share South African music with the world.

3. STATUS OF THE MUSIC SECTOR

This section provides a summary of the music sector's status, which will serve as the foundation for crafting a successful music industry strategy. This involves an evaluation of the situational analysis to outline the key characteristics that hinder the progress of the sector.

A comprehensive situational analysis of South Africa's music sector reveals several key findings. Globalisation's influence has transformed the industry, while traditional genres and instruments remain scarce. Generational gaps and a shortage of cross-genre collaborations hinder artistic innovation. Historical music awareness lags, especially in non-mainstream genres, due to limited resources and awareness. Early childhood development and traditional music skills are lacking. Insufficient skills in mixing and mastering, along with resource limitations in magnet schools, pose challenges. The misalignment between school curriculum and university requirements is a notable issue. Skilled teachers are in short supply, particularly in underserved communities. Underserved communities also struggle to understand intellectual property ownership and the role of CMOs. Fragmented royalties management, lack of artist labour law clarity, and insufficient unionisation are additional concerns.

Underserved provinces lack recording studios, and inefficiencies plague studios outside major cities. Community halls are insufficient, and the high cost of music education presents a barrier. Funding for business development is limited. There is a need for more Public-private

partnerships in the sector. DHET, DTIC, and DSBD policies lack emphasis on music funding and education. Inter-departmental collaboration between industry associations and educational institutions remains limited.

International and local collaborations among artists are in short supply. Marketing, especially for non-mainstream genres and South African music, is ineffective, exacerbated by the lack of documentation. The absence of business education for artist managers and artists, as well as a deficiency in content creation skills and monetisation knowledge, hampers progress. Artist and influencer collaborations are in short supply, as are bilateral agreements and inter-departmental collaborations.

A limited understanding of how digital platforms work, and a lack of technical skills hinder progress. Digital platforms remain unregulated. Radio stations, while regulated by iCASA, still prioritise international music. The absence of South African digital platforms, limited live performance venues, IP issues, along with piracy and illegal downloads, further compound the challenges in the industry. Live performance venue safety remains a concern.

In summary, the key characteristics hindering the progress and development of the stakeholders involved are:

- a) **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.
- b) **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.
- c) **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; monopolisation of radio airplay, performance opportunities, etc.
- d) **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 advocating groups, etc.
- e) **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.
- f) **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.

This suggests that national policies and strategies need to prioritise diversity, education, and intellectual property regulation. Access to resources, support for artist collaboration, and digital platform regulation are crucial. Safety at events, aligning education with industry needs, and preserving music history are also essential. Additionally, addressing labour laws and promoting interdepartmental collaboration will foster a thriving and inclusive music industry.

4. NATIONAL MUSIC SECTOR STRATEGY

This section outlines a comprehensive strategy to propel the music industry forward. It involves a contextual analysis which will inform the strategic initiatives, designed to address challenges and capitalise on potential. The focus will be on outlining actionable steps with clear, measurable outputs, ensuring the successful implementation of the strategic vision.

Considering the state of the music sector, established in the situational analysis a strategic direction has been developed in response to the challenges and pain points experienced across the value chain. This strategy is aligned to the National Music Sector Policy and defines the required intervention to realise the vision and policy outcomes as outlined in the policy. As such, the policy document forms the strategic intentions and parameters for all interventions and activities to be implemented for the growth and development of the South African music sector.

4.1 Strategic Intentions (Impact and Outcomes)

Within the music ecosystem, the government's greatest sphere of influence lies at the grassroots level providing education, promotion, advocacy, and regulation so that more industry players can advance to a level of competing within the global market which requires an understanding of the business of music.

The vision which this strategy is aiming to achieve is,

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

The following figure explains the various concepts chosen for use in the vision.

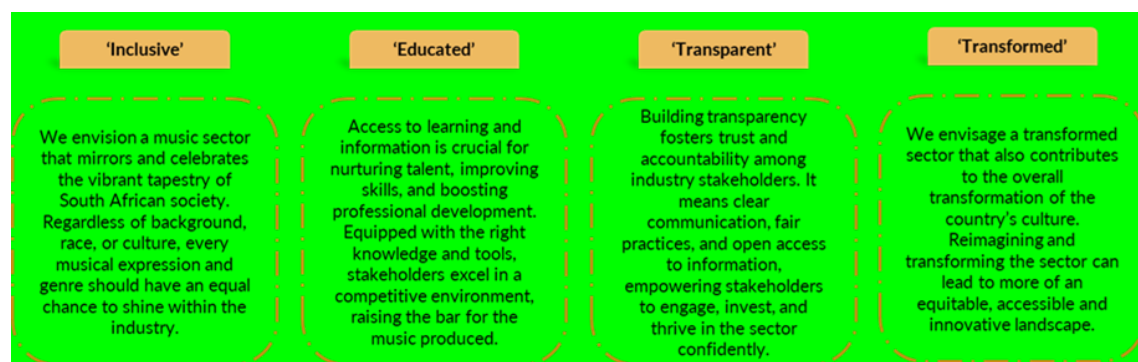
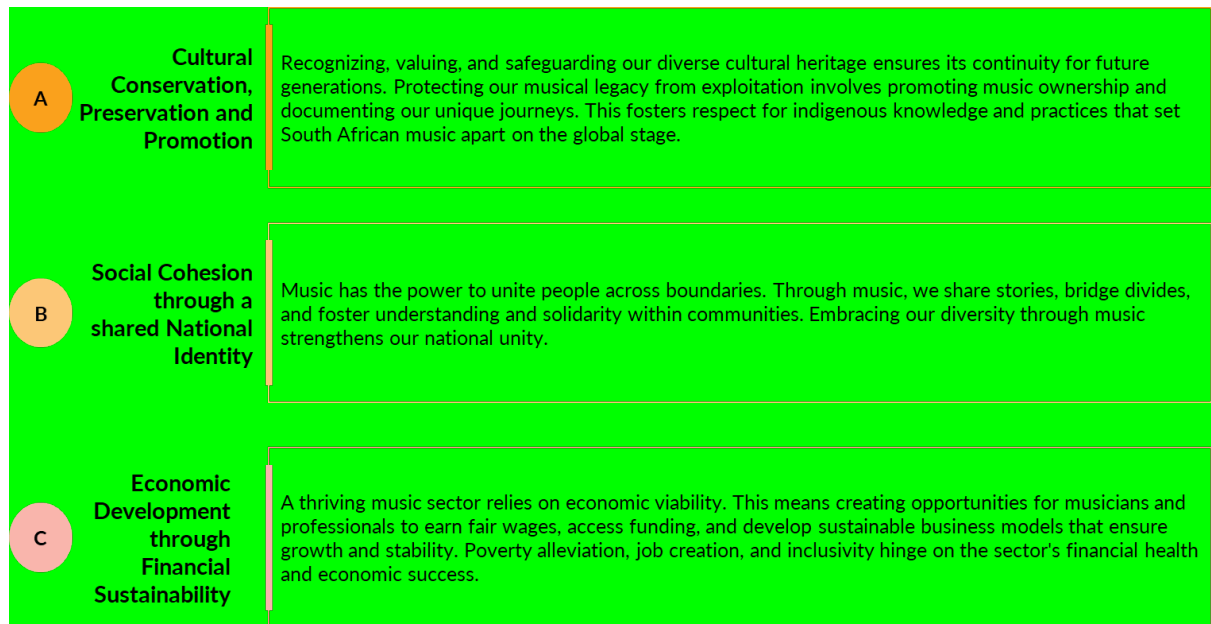


Figure 30: Explanation of concepts in the vision statement

This statement encapsulates the impact that this policy and strategy seeks to achieve. There are three policy outcomes that foundationally capture how this impact will be created, as captured in the figure below:

**Figure 31: Policy Outcomes**

4.2 Strategic Outputs

This National Music Strategy is grounded in the policy direction outlined in the policy document, aiming to achieve a set of strategic policy outputs that will lead to the desired outcomes described earlier. These outputs are based on extensive research, discussions, and engagement across the sector to pinpoint the most impactful interventions. The following sections detail the purpose of each strategic programme supporting these outputs and highlight the key results each aims to achieve within the sector.

Outcome A: Cultural Conservation, Preservation and Promotion

Policy Output	Background	Objective	Key Results
A.1. Reviving Music in Schools	<p>Music education in South African schools faces significant accessibility challenges. There is a lack of skilled educators to teach music at the required level of complexity, inadequate infrastructure to offer comprehensive and versatile learning experiences, and insufficient funds, especially in disadvantaged communities.</p> <p>Consequently, music education is often limited to private schools, which have better resources to attract skilled educators and build dynamic music programmes. This situation creates opportunities for private school students, setting them up for professional careers in the industry, while such opportunities remain rare within the public schooling domain.</p>	<p>Enhancement of music education within the public schooling system by:</p> <ul style="list-style-type: none"> Ensuring quality education is administered by seasoned musicians who are qualified to teach Ensuring access to necessary infrastructure for learning 	<ul style="list-style-type: none"> 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
A.2. Bridging the digital divide	<p>The digital music economy remains largely unfamiliar to many industry practitioners, particularly in rural and semi-urban areas. Artists in these regions struggle to access digital revenue streams due to a lack of information, limited access to data and necessary devices, and administrative challenges with Collective Management Organisations (CMOs), which are predominantly based in urban centres.</p>	<ul style="list-style-type: none"> Empower marginalised artists and industry practitioners by capacitating them with the knowledge and tools required for them to participate and access revenues in the digital music economy 	<ul style="list-style-type: none"> 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	Background	Objective	Key Results
A.3. Venues and Infrastructure Revitalisation	<p>South Africa's live performance industry is facing significant challenges. Venues are scarce and often priced beyond affordability, dissuading promoters and hindering the hosting of festivals and concerts. Moreover, the infrastructure for live music production in many venues is inadequate, impacting instrumentalists, choirs, and the overall vibrancy of the live performance scene. This deficiency not only affects local artists but also presents a missed opportunity to boost tourism in the country.</p> <p>The state has recognised these challenges and has invested in creative centres, music hubs and recording studios nationwide. Eastern Cape have been established. However, utilisation of these facilities remains low, necessitating artists to travel to metropolitan areas for professional recording and mastering. Additionally, the maintenance of these facilities is at risk due to budget constraints.</p>	<p>Drive an increase in quality music production and growth in live performances by:</p> <ul style="list-style-type: none"> Improving and maintaining live performance and music production infrastructure in existing venues and facilities Streamlining access to these venues and facilities 	<ul style="list-style-type: none"> 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
A.4. Archiving	<p>South Africa's music industry suffers from a lack of adequate archiving, jeopardising its cultural heritage and future development. Without proper preservation of recordings, instruments, and music knowledge, the rich tapestry of South African sounds risks degradation and loss. This not only</p>	<p>Preserving Cultural heritage by:</p> <ul style="list-style-type: none"> Archiving traditional music, folk songs and recordings of traditional instruments 	<ul style="list-style-type: none"> Digital and physical repositories that allow the public, researchers, and enthusiasts to access a wide range of music

Policy Output	Background	Objective	Key Results
	<p>severs the connection between future generations and their musical roots, but also hinders scholarly research and artistic inspiration.</p> <p>The absence of a strong archive weakens the national identity tied to music, and limits opportunities to showcase South Africa's vibrant musical landscape on the global stage.</p>	<ul style="list-style-type: none"> Making archived recordings accessible to the general public as well as musicians and researchers. 	<ul style="list-style-type: none"> 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
A.5. Industry accreditations and qualifications	<p>In South Africa's music industry, many self-taught musicians excel in their respective genres without formal music education. However, there is a lack of platforms to formalise their training, hindering the preservation of unique sounds and genres for future generations.</p> <p>Additionally, the dynamic nature of the sector sees many practitioners emerging without formal qualifications, including artist managers, promoters, record label owners, sound engineers, and legal advisors. This absence of formal accreditation makes it challenging to hold individuals accountable for the quality of their services, leading to instances of exploitation and dissatisfaction among stakeholders.</p>	<p>Formalise the informal music education landscape by:</p> <ul style="list-style-type: none"> Developing pathways for self-taught musicians to be evaluated and awarded accreditations for their expertise Creating a conducive environment for career development and professional advancement in the music sector 	<ul style="list-style-type: none"> More self-taught musicians are being afforded opportunities for career advancement within the sector

Outcome B: Social Cohesion through a shared National Identity

Policy Output	Background	Objective	Key Results
B.1: Cultural education in Schools	<p>South Africa's education system has long been influenced by Eurocentric ideals, marginalising local cultural expressions and indigenous knowledge. Post-apartheid South Africa has made strides towards inclusivity, but the current educational content still reflects a bias towards Western perspectives, often neglecting the rich tapestry of indigenous South African cultures. This oversight has resulted in a disconnect between young South Africans and their cultural heritage, leading to a diminished sense of identity and belonging. The trend of high school war cries gaining international attention highlights the untapped potential and global resonance of South African indigenous practices. Recognising the cultural dynamism and creativity of our youth, it is imperative to integrate diverse South African histories and cultural elements into the school curriculum. This approach aims to correct historical imbalances, promote societal cohesion, foster a shared national identity and inspire young talent, ultimately contributing to a thriving, authentic South African music industry.</p>	<ul style="list-style-type: none"> • Incorporate South African indigenous musical expressions and cultural practices into the school curriculum. • Enrich the educational experience for all learners by providing a more inclusive and representative curriculum. • Promote a sense of belonging and pride in students by reflecting their cultural heritage in their studies. • 	<ul style="list-style-type: none"> • Build a cohesive national music identity through a curriculum that encourages students to understand, appreciate, and value their cultural roots and the cultural expressions of others. • A flourishing creative sector driven by students inspired by diverse musical styles and cultural expressions. • New and innovative musical genres and expressions emerging from the blending of traditional and contemporary influences. Strengthen the South African music industry by fostering a new generation of culturally aware and musically skilled individuals

Policy Output	Background	Objective	Key Results
B.2: Cultural Exchange	<p>Historical and socio-economic disparities have long marginalized grassroots and informal sector musicians in South Africa. Despite the rich and diverse musical heritage of South Africa, emerging artists from disadvantaged backgrounds have faced significant barriers to accessing international platforms and opportunities for growth. Recognizing these challenges, DSAC seeks to establish a robust cultural exchange programme tailored to elevate these artists on the global stage. This initiative aims to correct historical imbalances, promote South African music, and create transformative experiences for emerging musicians. By fostering international collaborations, mentorship, and training, the programme aims to build a sustainable and vibrant music industry that celebrates and amplifies the unique sounds of South Africa. This policy output also aligns with broader national identity-building efforts, highlighting the importance of cultural pride and diversity in the global arena.</p>	<ul style="list-style-type: none"> • Help local musicians develop advanced skills and knowledge that they can bring back to enrich the South African music scene. • Create a well-branded and prestigious cultural exchange programme that is seen as a valuable and transformative opportunity for participants. • Develop South African musicians as cultural ambassadors who represent the nation's rich and diverse musical heritage on global stages • Encourage South Africans to celebrate and share their unique musical identity across borders, rather than conforming to homogenous Western ideal 	<ul style="list-style-type: none"> • Improved career prospects and increased visibility for artists from underserved, disadvantaged, and rural communities. • Provide opportunities for young South African musicians, particularly those from underserved, disadvantaged, and rural communities, to debut on international stages. • Enable artists to receive training, mentorship, and funding from internationally acclaimed musical veterans, foreign music schools, and global music programmes. • Generate economic benefits through increased tourism, international partnerships, and cultural exports

Policy Output	Background	Objective	Key Results
B.3: Cultural Visibility Drive: Increasing visibility of marginalised genres and grassroots artists	Historically, the South African music industry has often focused on mainstream and commercially successful genres, overshadowing the rich diversity of musical expressions emanating from underserved, disadvantaged, and rural communities. These communities possess a wealth of unique musical heritage, yet their voices have been largely underrepresented on both national and international platforms. Additionally, structural barriers such as limited access to resources, platforms, and networks have hindered the growth and visibility of these artists. Recognizing the cultural and economic potential of these hidden talents DSAC seeks to implement a Cultural Visibility Drive to elevate grassroots artists and marginalised genres. By fostering inclusivity and celebrating the diversity of South African music, this programme aims to create a more equitable and vibrant music industry that reflects the true cultural richness of the nation.	<ul style="list-style-type: none"> • Increase visibility of South African grassroots artists and marginalised music genres within the country and internationally • Provide platforms and opportunities for artists from underserved, disadvantaged, and rural communities to showcase their talents 	<ul style="list-style-type: none"> • Highlight and celebrate the uniqueness of South African cultural practices on both national and global stages • Shift the focus from Eurocentric ideals and pop culture to local South African material. • The music industry becomes more diverse, reflecting a broader range of South African cultural expressions and traditions • Artists from underserved, disadvantaged, and rural communities have increased career opportunities and pathways to success

Policy Output	Background	Objective	Key Results
B.4: Enforcing The Usage of Local Content through Regulatory Mechanisms	<p>The use of South African music on public platforms, in public spaces and by local organisations is often overshadowed by international content. The country's cultural policies and media landscapes have often favoured foreign music, leading to a lack of representation and opportunities for local artists. This imbalance has not only stifled the growth of the South African music industry but also hindered the development of a cohesive national cultural identity. The need to address these issues is significant, given the economic potential of the creative sector and the role of music in reflecting and shaping national identity. DSAC recognises that without deliberate regulatory mechanisms, local artists will continue to face significant barriers to entry and sustainability in the industry. This policy output aims to create a supportive environment where South African music can thrive, fostering cultural pride, economic growth, and international recognition. By mandating the use of local content across public and private platforms, the policy seeks to rectify historical imbalances, promote national unity, and ensure that the rich tapestry of South African music is celebrated and preserved for future generations.</p>	<ul style="list-style-type: none"> • Mandating the inclusion of local music in business operations, events, and media to ensure that South African music is prominently featured across various public and private platforms • Establish clear regulatory frameworks that mandate the use of local content in various sectors, ensuring compliance and accountability • Monitor adherence to local content regulations across different sectors and enforce compliance through appropriate measures 	<ul style="list-style-type: none"> • Establishment of robust regulatory frameworks that ensure compliance and accountability in promoting local content across sectors. Shift the focus from Eurocentric ideals and pop culture to local South African material. • Greater visibility and promotion of South African music across various platforms, including radio, television, and digital streaming services • Stimulated economic activity within the local music industry through increased demand for local content, leading to higher revenue streams for artists and stakeholders • Increased public awareness and appreciation for local music, educating audiences about the importance of supporting local content and its cultural significance

Output C: Economic Development through Financial Sustainability

Policy Output	Background	Objective	Key Results
C.1 Business Incubation and capacity development	The South African music industry is hampered by financially unstable businesses and entities, many of which depend heavily on government funding. This reliance limits their influence and ability to compete with major industry players. Educational gaps at both the individual and organisational levels lead to financial insecurity, making it difficult for business owners to secure funding. Mentorship is vital for artists to learn industry essentials, but many associations are still restricted by limited funding. Transforming these entities into self-sustaining businesses can enhance impact and create sustainable jobs. Prospective entrepreneurs also face challenges in securing long-term funding due to difficulties in demonstrating ROI, deterring key investors.	Build financial sustainability across the value chain by: <ul style="list-style-type: none"> Equipping artists with the knowledge and capability to operate sustainability and make a livelihood for themselves using music Equipping industry practitioners with the necessary tools to establish economically viable businesses Streamlining access to funding and business investment opportunities; and support services through business incubation 	<ul style="list-style-type: none"> 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
C.2 Organisational review for SA Music Implementing Agency	The impact of the proposed music policy and strategy requires dedicated resources for effective implementation. A specialised agency with a clear mandate, implementation plan, and KPIs could drive significant outcomes for the sector, as seen in successful international models. Currently, South	Establish SA as a key music destination on the continent and globally by: <ul style="list-style-type: none"> Actively promoting local artists on global stages and platforms 	<ul style="list-style-type: none"> Increased presence and representation of SA within international music forums (with more artists becoming household names beyond our borders)

Policy Output	Background	Objective	Key Results
	<p>African music sporadically breaks into the international stage without sustained momentum. Establishing mechanisms to consistently promote local talent globally is crucial.</p> <p>Many artists have ceased performing due to a lack of opportunities, threatening the diversity of South Africa's musical expressions. Additionally, fragmented and outdated information hampers stakeholders' understanding of industry processes. A dedicated agency could streamline information, provide strategic support, and ensure South African music maintains a strong international presence.</p> <p>It is important to recognise that there are institutions within in the sector established for the purpose of promoting the South African music brand, such as SAMIC and CCIFSA. Therefore there is a need for government to conduct an institutional review of the sector to understand how existing capabilities and stakeholder networks can be leveraged to enhance the envisaged impact.</p>	<p>Develop audiences for SA music in international markets</p> <p>Bridge the gap between the grassroots industry and the global music business by facilitating access and establishing a SA music brand</p>	<ul style="list-style-type: none"> Growth in the country's tourism industry as a result of the international pull created by our vibrant music sector

Policy Output	Background	Objective	Key Results
C.3 Standards development and regulatory support	<p>The South African events and entertainment industry faces challenges due to unclear regulations, uneven safety standards, and limited support for technical service providers.</p> <p>Additionally, the dynamic nature of the sector sees many practitioners emerging without formal qualifications, including artist managers, promoters, record label owners, sound engineers, and legal advisors. This absence of formal accreditation makes it challenging to hold individuals accountable for the quality of their services, leading to instances of exploitation and dissatisfaction among stakeholders.</p> <p>Establishing a more structured and supportive environment for both businesses and artists is crucial for the development of the industry</p>	<p>Establish clear regulatory frameworks, safety standards and licensing requirements for businesses providing technical services in the events and entertainment industry</p> <p>Creating a conducive environment for career development and professional advancement in the music sector</p>	<ul style="list-style-type: none"> Increased awareness of standards and compliance requirements Professionally graded and accredited industry practitioners Improved safety and quality in technical services within the industry
C.4 Licensing and Copyright Enforcement	<p>Music user licensing in South Africa faces challenges due to limited coverage, with many businesses using personal playlists and streaming accounts for public consumption, depriving artists of fair remuneration. Collective management organisations (CMOs) cite high administrative costs as a barrier to achieving broader coverage. This unethical practice not only</p>	<p>Promote and raise awareness of compliance and regulations regarding the usage of music in public settings by:</p> <ul style="list-style-type: none"> Enforcing music user licensing regulations 	<ul style="list-style-type: none"> Growth in royalties collected and distributed Increased compliance amongst music users across industries

Policy Output	Background	Objective	Key Results
	<p>impacts artists' livelihoods but also undermines the integrity of the music industry.</p> <p>In addition to this, a significant proportion of the music sector relies on the physical music products such as USB's to distribute its music – this is more prevalent in the traditional and indigenous music space. This exchange significantly limits the venue generating potential on the musical work, with the artists limited to the revenue received at the point of sale, forfeiting the potential revenue to be made should the user make copies of the music.</p>	<ul style="list-style-type: none"> • Optimising licensing, royalty payment and compliance review processes • Introduce a blank tape levy on USB's and other devices that can be used to copy music <p>Local Music Consumption Regulations that promote and enforce large SA businesses and institutions and even SA embassies based in other countries to use SA content for advertising, marketing, events and coverage.</p>	
C.5 Enhanced Social Security for Artists	<p>Several artists operate under a web of informal employment making them excluded from the benefits and rights afforded to employees under the Basic Conditions of Employment Act such as UIF, safety standards and other labour related matters. This leaves artists vulnerable to the highly dynamic nature of the industry</p>	<p>Establish social security systems that will afford artists rights and benefits such that they are protected from unforeseen circumstances</p>	<ul style="list-style-type: none"> • Equal rights and benefits for artists as other employees

Policy Output	Background	Objective	Key Results
C.6 Establishment of cross- functional collaboration forums	<p>South Africa's music industry faces multifaceted challenges, including fragmented royalty collection, limited international market access, and decreasing government support for business development. Efforts to preserve cultural heritage often lack coordination, impacting industry growth. Despite existing networking platforms, collaboration among industry stakeholders remains disjointed.</p> <p>Recognising the importance of cohesive action, the establishment of cross-functional collaboration forums aims to foster unity and coordination. This initiative seeks to strengthen the music industry landscape in South Africa, promoting mutual benefit and sustainability for all stakeholders involved.</p>	<ul style="list-style-type: none"> Foster an implementation approach that leverages the capabilities across government departments and the expertise of various sector representatives to drive towards achieving the envisaged impact on the sector 	<ul style="list-style-type: none"> More cross-functional partnerships driving the implementation of key initiatives Greater synchronisation of efforts within the various government departments and the sector Clear resolution to critical issues in the sector, specifically: Improved access to finance and investment for practitioners Introduction of a blank tape levy system with clear targets for its implementation, development, and maturation to enhance economic benefits for artists, considering different levy models and the required

Policy Output	Background	Objective	Key Results
			<p>capabilities and shortcomings of each</p> <ul style="list-style-type: none"> Enhanced copyright protection of artists' IP in response to AI and digital advancements in the sector Increased protection of artists and service providers' rights
C.7 Industry Monitoring and Tracking	<p>Monitoring and tracking the economic impact of South Africa's music sector is essential for its growth and development. Without clear feedback mechanisms, coordination and prioritisation of efforts become challenging.</p> <p>Establishing robust feedback loops is crucial, as it can unlock more investment opportunities and build strong business cases for government funding. However, mistrust and opacity within the industry hinder progress, with limited channels for holding stakeholders accountable and ensuring fairness.</p>	<ul style="list-style-type: none"> Improve industry monitoring and tracking mechanisms by establishing robust feedback loops that generate accurate data and insights on the status of the sector 	<ul style="list-style-type: none"> Improved trust and accountability Improved responsiveness to industry needs A more conducive environment for the growth and economic development of the sector

5. STRATEGY IMPLEMENTATION

5.1 Implementation Plan

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
Outcome A: Cultural Conservation, Preservation and Promotion			
A.1. Reviving Music in Schools	<p>a) Develop comprehensive curriculum models that ensure students are equipped with the necessary skills and competencies to enter Higher Education Institutions covering 'music creation', and 'music business' (aligned to industry demand and opportunities)</p> <p>b) Establish magnet schools in every province to ensure all students have access to the necessary infrastructure for education (by leveraging existing equipment in cultural centres and music hubs while investing to augment any infrastructure gaps)</p>	<p>DBE, DHET</p> <p>Facilitate and enable the development of comprehensive curriculum models.</p> <p>Integrate self-taught musicians into the formal education system.</p> <p>DSAC, Provincial DSAC's</p> <p>Provide expertise on required skills and competencies</p> <p>Identify and integrate self-taught musicians into the formal education system.</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Students, especially those from disadvantaged backgrounds Music industry players <p>Policy Linkages:</p> <p>Curriculum and Assessment Policy Statement (CAPS)</p> <p>Department of Basic Education (DBE) Arts and Culture Subject Guidelines</p> <p>National Development Plan (NDP) Vision 2030</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>c) Develop a pipeline of educators who are informal (self-taught) music experts to teach music in the formal schooling system</p> <p>d) Develop aptitude testing programmes at schools to specifically identify musical talent from a young age and channel identified individuals into music programmes</p>	<p>Industry and Higher Education Institutions</p> <p>Advise on youth skills development need to fill industry skills gaps</p> <p>Cultural and Creative Centres, Recording Studios:</p> <p>Partner with the government to provide access to music education infrastructure</p>	<p>Skills Development Act (No. 97 of 1998)</p> <p>National Skills Development Strategy (NSDS)</p> <p>National Youth Policy (NYP)</p>
A.2. Bridging the digital divide	<p>a) Develop educational material on the digital music economy to educate artists on how they can leverage technology in their career (recording, distributing, streaming and other revenue channels, brand development, building Superfan bases, etc.)</p> <p>b) Host periodic webinars and online classes for education on the fundamentals of the digital music economy</p> <p>c) Digital music economy roadshows should be held country wide, to ensure information and education reach even the most remote</p>	<p>DCDT</p> <p>Lead the development of educational material on the digital music economy.</p> <p>DSAC, DSI, DHET, DSBD</p> <p>Support the development of educational material on the digital music economy.</p> <p>Coordinate digital music economy roadshows across the country</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Indigenous Music Creators Music consumers Cultural institutions and archivists <p>Policy Linkages:</p> <p>National Development Plan (NDP) Vision 2030</p> <p>Digital Economy Master Plan</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	areas - providing CMO hot desks to address the administrative challenges some artists face	<p>Industry Experts:</p> <p>Provide expertise and services (e.g., sound engineering, music industry organisations).</p> <p>Participate as instructors for webinars and online classes.</p> <p>CMOs:</p> <p>Set up CMO hot desks during roadshows to address artists' administrative challenges.</p>	<p>CT White Paper on Telecommunications and Broadcasting</p> <p>Department of Communications and Digital Technologies (DCDT) Digital Inclusion Strategy</p> <p>Fourth Industrial Revolution (4IR) Strategic Implementation Plan</p> <p>Creative Industries Master Plan</p> <p>SA Connect</p>
A.3. Venues and Infrastructure Revitalisation	<p>a) Conduct a country-wide review of public arenas, venues and creative centres to determine the condition of these facilities, utilisation rate, maintenance costs and performance, and invest in their revitalisation</p> <p>b) Develop and implement commercialisation strategies for these facilities - driving toward self-sufficiency</p>	<p>DSAC and Provincial DSACs:</p> <p>Assist in the review and evaluation of venue conditions, utilisation rates, and maintenance needs.</p> <p>Collaborate on the implementation of commercialisation strategies.</p> <p>Industry Practitioners:</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Artists Music producers Promoters <p>Policy Linkages:</p> <ul style="list-style-type: none"> National Development Plan (NDP) Vision 2030 Revised White Paper on Arts, Culture and Heritage

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	c) Review and streamline the acquisition of permits in order to increase availability of venues, arenas and creative centres for performances	Partnership and collaboration in the process DPW, National Treasury, DTIC, Municipal Governments and Provincial EDTEAs: Advise on and support the commercialisation strategies and drive towards self-sufficiency for these facilities.	<ul style="list-style-type: none"> Integrated Urban Development Framework (IUDF) and supportive Urban Renewal Programmes Municipal Infrastructure Grant (MIG) Policy National Arts Council (NAC) Policies Community Work Programme (CWP) Strategic Integrated Projects (SIPs) Programme
A.4. Ownership & Archiving	<p>a) Convert analogue recordings to high quality digital files and implement robust storage solutions</p> <p>b) Establish dedicated listening centres where consumers can interact with ancient sounds and instruments</p> <p>c) Collaborate with educators and media outlets to integrate archived music into educational programs and broadcasts</p>	<p>DSAC, Provincial DSAC's:</p> <p>Develop a comprehensive catalogue of historical and current sounds, music and instruments for safekeeping, publicise and promote</p> <p>DCDT, DSI, DBE & DHET:</p> <p>Support the development of a comprehensive catalogue of historical and current sounds, music and</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Industry Associations Academics such as researchers, lecturers, and students, Musicians such as orchestras, artists, and producers <p>Policy Linkages:</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
		instruments for safekeeping, publicise and promote	<ul style="list-style-type: none"> • National Development Plan (NDP) Vision 2030 • Revised White Paper on Arts, Culture and Heritage • South African Audio-Visual Heritage Act (No. 19 of 2006) • National Archives and Records Service of South Africa Act (No. 43 of 1996) • South African National Policy on Digitization of Heritage Resources (2019) • South African National Heritage Council (NHC) Strategic Plan • Promotion of Access to Information Act (PAIA) (No. 2 of 2000)

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
A.5. Industry Accreditations and Qualifications	<p>a) Establish an accreditation system for self-taught musicians</p> <p>b) Develop a pipeline of accredited musicians to be employed as music educators, in line with the revival of music in the school programme</p> <p>c) Develop a certification system for industry practitioners in the industry that will standardise the professional requirements for fulfilling key roles along the value chain, e.g. artist managers, artist and music promoters, legal advisors, financial advisors, marketing manager/PR, etc.</p> <p>d) Introduction of a blank tape levy system with clear targets for its implementation, development, and maturation to enhance economic benefits for artists, considering different levy models and the required capabilities and shortcomings of each</p>	<p>DSAC, CATHSSETA:</p> <p>Establish industry monitoring processes and reporting mechanisms.</p> <p>Facilitate regular audits and compliance monitoring of industry-enabling institutions</p> <p>DBE, DHET:</p> <p>Support the establishment of monitoring processes aligning to music education curriculum models</p> <p>Music Advisory Committee:</p> <p>Support the establishment of monitoring processes in respective provinces</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Self-taught musicians Music Industry Professionals Students <p>Policy Linkages:</p> <p>National Qualifications Framework Act of 2008 – Recognition of prior learning Policy</p> <p>National Skills Development Strategy (NSDS)</p> <p>Continuing Education and Training Act (2006)</p> <p>National Development Plan (NDP) Vision 2030</p> <p>Sector Education and Training Authorities (SETAs)</p>
Outcome B: Social Cohesion through a shared National Identity			

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
B.1: Cultural education in Schools	<p>a) Collaborate with educational authorities to revise and integrate indigenous South African musical expressions and sounds as a prerequisite for school curricula</p> <p>b) Develop new curriculum frameworks or update existing ones to include modules or subjects dedicated to South African musical heritage</p> <p>c) Conduct workshops, seminars, and training sessions focused on indigenous musical traditions, ensuring teachers are well-prepared to deliver culturally relevant education.</p> <p>d) Create educational resources such as textbooks, multimedia materials, and lesson plans that incorporate South African musical content.</p> <p>e) Establish assessment criteria and methods to evaluate students' understanding and appreciation of South African musical heritage.</p> <p>f) Engage with policymakers, parents, and the broader community through media</p>	<p>Department of Basic Education (DBE):</p> <p>Integrate indigenous South African musical expressions into school curricula.</p> <p>Provide guidance and support to schools and teachers in implementing cultural music education.</p> <p>Develop and distribute educational resources related to South African musical heritage.</p> <p>Provincial Departments of Education:</p> <p>Adapt national curriculum frameworks to local contexts and needs.</p> <p>Monitor and support schools in implementing cultural music education initiatives.</p> <p>DSAC:</p> <p>Collaborate with DBE to develop curriculum frameworks for cultural music education.</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Self-taught musicians Talent acquisition organisations Music Industry Professionals Students <p>Policy Linkages:</p> <p>National Curriculum Statement (NCS)</p> <p>Revised White Paper on Arts, Culture and Heritage</p> <p>South African Schools Act (Act 84 of 1996)</p> <p>National Development Plan (NDP)</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>campaigns, workshops, and public forums to advocate for the integration and support of cultural music education.</p> <p>g) Collect data on student engagement, teacher feedback, and learning outcomes to continuously assess the effectiveness of cultural music education initiatives and inform future improvements</p>	<p>Facilitate teacher training and professional development in cultural music.</p> <p>Engage with policymakers, parents, and the broader community through media campaigns, workshops, and public forums</p> <p>NAC:</p> <p>Provide grants and funding opportunities for cultural music education projects in schools</p>	
B.2: Cultural Exchange Programme	<p>a) Develop guidelines, objectives, and eligibility criteria for participation in the programme, emphasizing inclusion of grassroots artists from underserved communities</p> <p>b) Establish formal agreements and collaborations with international schools and organisations to facilitate exchange opportunities for South African artists abroad and vice versa</p> <p>c) The programme should provide logistical support such as travel arrangements,</p>	<p>DSAC:</p> <p>Establish the cultural exchange programme framework and guidelines.</p> <p>Facilitate partnerships with international cultural organizations and festivals.</p> <p>Provide funding and logistical support for participating South African artists.</p> <p>NAC:</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Self-taught musicians Grassroots artists Cultural ambassadors and diplomatic entities <p>Policy Linkages:</p> <p>National Development Plan (NDP) Vision 2030</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>accommodation, and visa assistance. Offer mentoring and professional development opportunities to prepare artists for international exposure</p> <p>d) Create promotional materials, including digital content, press releases, and social media campaigns, highlighting the programme's objectives and success stories</p> <p>e) Ensure visibility and networking opportunities for participating artists</p> <p>f) Produce reports, case studies, and success stories to demonstrate the programme's impact. Share findings with relevant stakeholders and use data to refine future iterations of the programme</p>	<p>Administer grants and funding for artists participating in the cultural exchange programme</p> <p>Dept. of Tourism, NFVF, DTIC, SA Tourism, DIRCO, SABC</p> <p>Collaborate with DSAC to facilitate and enhance the establishment of these programmes</p>	<p>International Relations and Cooperation Policy Framework</p> <p>South African Broadcasting Corporation (SABC) Local Content Strategy</p> <p>National Youth Policy (NYP)</p>
B.3: Cultural Visibility Drive: Increasing visibility of marginalised genres and grassroots artists	<p>a) Conduct a comprehensive mapping exercise to identify marginalised genres and grassroots artists across South Africa</p> <p>b) Develop targeted promotional campaigns to highlight marginalised genres and grassroots artists</p>	<p>DCDT, DSAC:</p> <p>Drive research, facilitate partnerships with social media influencers and industry influencers, develop campaigns, create partnerships with award ceremonies</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Grassroots Artists from Underserved, Disadvantaged, and Rural Communities Emerging Musicians and Music Producers

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>c) Curate playlists and promote emerging South African artists on platforms like Spotify, Apple Music in collaboration with social media influencer and industry influencers</p> <p>d) Work with industry stakeholders to create award categories at well-established award ceremonies to recognise emerging artists from marginalised and rural areas</p>	<p>Provincial Departments of Arts and Culture, SAC, ICASA, NAC:</p> <p>Support local artist showcases, concerts, and promotional campaigns within their respective provinces.</p> <p>Coordinate with regional cultural institutions and media outlets for collaborative initiatives</p>	<p>Policy Linkages:</p> <p>National Development Plan (NDP) Vision 2030</p> <p>Revised White Paper on Arts, Culture and Heritage</p> <p>South African Music Rights Organization (SAMRO) and other CMO Policy</p> <p>Broadcasting Act (1999) and ICASA Regulations</p>
B.4: Enforcing The Usage of Local Content through Regulatory Mechanisms	<p>a) Establish clear regulatory guidelines mandating the use of local content in businesses, events, and media platforms</p> <p>b) Assign responsibilities to relevant government agencies or regulatory bodies to oversee adherence to local content quotas. Implement reporting and auditing processes to track compliance</p> <p>c) Conduct public campaigns, workshops, and seminars to educate stakeholders about the cultural and economic significance of the regulation</p>	<p>DCDT, DSAC, ICASA, SABC:</p> <p>Develops and implements regulatory frameworks and guidelines for local content quotas in public and private organisations and institutions, particularly those with a public reach (such as supermarket chain stores)</p> <p>Promote public awareness through campaigns</p> <p>DTIC:</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Grassroots Artists from Underserved, Disadvantaged, and Rural Communities Emerging Musicians and Music Producers <p>Policy Linkages:</p> <p>South African Broadcasting Corporation (SABC) Charter</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>d) Offer tax incentives, grants, or funding opportunities to entities that exceed minimum local content requirements or demonstrate exceptional support for South African music</p> <p>e) Collect data on the visibility, reach, and economic benefits of South African music resulting from regulatory interventions. Use findings to adjust strategies and improve effectiveness</p>	<p>Facilitate incentives and support programs for businesses that promote local content.</p> <p>Integrates local content requirements into government procurement processes and policies</p>	<p>Independent Communications Authority of South Africa (ICASA) Regulations</p> <p>Department of Communications and Digital Technologies (DCDT) Broadcasting Regulations</p> <p>National Development Plan (NDP) Vision 2030</p>
Outcome C: Economic Development through Financial Sustainability			
C.1 Business Incubation and capacity development	<p>a) Develop educational material on the professional music business, explaining what it means to be a professional in the music business, covering elements like entrepreneurship, freelancing, IP and copyright laws and rights, royalties, collaborations, etc.</p> <p>f) Host workshops and conferences with international bodies to keep abreast with</p>	<p>DSBD:</p> <p>Develop educational material and coordinate the roll out of incubation programmes</p> <p>DSAC:</p> <p>Facilitate and support educational material development; as well as assist in coordinating the mentorship programme beneficiaries</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Industry associations and bodies dependant on government funding for operations Entities and business owners from marginalised groups (Africans, Women, Youth and People with disabilities)

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>the latest developments in the global industry</p> <p>g) Create masterclass programmes that empower music business owners in the industry with the necessary information, tools and skills in their respective fields – such as, artist management, promotion and events management, distribution and record label management, etc.</p> <p>h) Incubate up and coming artists through a prestigious mentorship programme in collaboration with seasoned artists, managers, promoters, record label owners, etc.</p> <p>i) Roll-out an industry commercialisation strategy dedicated to helping music businesses and organisations become financially sustainable and economically viable.</p>	<p>Industry Experts and Associations:</p> <p>Provide expertise for educational content and masterclasses.</p> <p>Collaborate in workshops, conferences, and mentorship programmes.</p> <p>Drive business development initiatives.</p> <p>Services SETA, DTIC, NAC, NFVF, DTIC:</p> <p>Support artist incubation and mentorship, provide advisory services, funding and support</p> <p>CMOs and Institutions:</p> <p>Support artist incubation and mentorship.</p>	<p><u>Policy Linkages:</u></p> <p>Cultural and Creative Industries Masterplan</p> <p>Music Industry Strategy and Action Plan</p> <p>Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan</p> <p>National Youth Policy (2020 – 2030)</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
C.2 Organisational review for SA Music Implementing Agency	<p>a) Conduct a robust institutional review of the sector in order to establish the unique role, capabilities and strategic networks that exist, with the objective of streamlining resources and capabilities towards the targeted development of the SA music brand by:</p> <ul style="list-style-type: none"> Establishing an SA Music Desk – a one-stop platform for local and international industry practitioners and stakeholders to get connected, gain market access discover talent and contribute to the growth of the sector Develop and advance the grassroots industry through the administration of an SA Music Fund Creating avenues for exporting South African music and getting our artists on international platforms Establishment of robust information dissemination channels by leveraging social media, websites and other industry stakeholders 	<p>DSAC:</p> <p>Drive the sourcing of funding for and institutionalisation of the entity.</p> <p>Provincial DSAC:</p> <p>Collaboration with and supporting the establishment of the agency</p> <p>Partnering with the agency to drive key outcomes</p> <p>Other similar agencies e.g. Tourism SA, Brand SA</p> <p>Provide key insights and partnerships for marketing and branding</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Grassroot music industry practitioners International industry practitioners looking to gain market access, partner and collaborate with the grassroots industry <p>Policy Linkages:</p> <p>Revised White Paper on Arts, Culture and Heritage</p> <p>Music Industries Task Team Report</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
C.3 Standards development and regulatory support	<p>a) Implement a comprehensive regulatory framework for technical service businesses (such as the events and entertainment industry that encompasses clear safety standards, licensing requirements, and guidance for navigating compliance processes.</p> <p>b) Establish competency-based training programs for technical service providers to improve safety and quality within the music industry</p> <p>c) Develop a certification system for industry practitioners in the industry that will standardise the professional requirements for fulfilling key roles along the value chain, such as, professional musicians, music educators, artist managers, artist and music promoters, legal advisors, financial advisors, marketing manager/PR, etc.</p>	<p>DSAC and DTIC: Establish regulatory frameworks, safety standards and licensing requirements</p> <p>CATHSSETA and CIPC: Collaborate to streamline the development of standards and regulatory requirements</p> <p>Industry Associations: Partnership and collaboration in the process</p> <p>Higher Education and Training Institutes: Assist in the development and implementation of accreditation and certification systems</p> <p>DBE and DHET: Collaborate with DSAC on integrating accredited musicians into the formal education system</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Industry practitioners and technical services businesses – record labels, promoters, event coordinators, etc. <p>Policy Linkages: National Development Plan – Vision 2030 National Youth Policy (2020 – 2030) Music Industries Task Team Report Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
C.4 Licensing and Copyright Enforcement	<p>a) Drive a country-wide music user licensing initiative that streamlines the user licensing process in collaboration with CMOs</p> <p>b) Enforce the requirement for music users to submit playlists of music consumed, utilising verified software that can be audited</p> <p>c) Roll-out compliance certification drives that award compliant music users in order to promote compliance and raise awareness of the importance of remunerating artists for their work</p>	<p>DTIC: In collaboration with DSAC and CMOs, facilitate the implementation of initiatives</p> <p>CMOs: Collaborate with CIPC to streamline the licensing process. Support enforcement and compliance efforts.</p> <p>DSAC , CIPC, SAPS, Home Affairs: Facilitate market access and compliance certification drives. Promote awareness of the importance of remunerating artists.</p> <p>Local Industry Associations and Provincial DSACs: Assist in facilitating market access for music user licensing. Support compliance certification drives and awareness campaigns.</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Composers, authors, lyricists, recording artists and performing artists <p>Policy Linkages: Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan Music Industry Strategy and Action Plan</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
C.5 Enhanced Social Security for Artists	<p>a) Design and implement a social security system that will cater to the needs of local artists to enable them to overcome labour-related issues</p> <p>g) Streamline the information regarding artists' rights and benefits to better secure their well-being</p>	<p>DEL:</p> <p>Facilitate the design and implementation of social security systems, in collaboration with DSAC</p> <p>Trade Unions:</p> <p>Collaborate with DEL to identify the needs of artists</p> <p>DSAC and Industry Associations:</p> <p>Promote awareness of the benefits and rights to artists</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Composers, authors, lyricists, recording artists and performing artists <p>Policy Linkages:</p> <p>Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan</p>
C.6 Establishment of cross-functional collaboration forums	<p>a) Establish inter-departmental forums at a national, provincial and district level to streamline decision-making, monitoring tracking and reporting on progress</p> <p>b) Establish collaborative forums between public, private sector and civil society to ensure that government measures are aligned to the needs of industry and to formulate strategic partnerships that</p>	<p>DSAC:</p> <p>Act as the key enabler for the establishment of collaborative forums, setting KPIs for each one, aligned to the policy and strategy goals</p> <p>Music Sector Advisory Committee:</p> <p>Participate and deliver on KPIs</p> <p>National Treasury, DEL, DHA, DCDT,</p> <p>Participate in inter-departmental forums</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> Government entities mandated with creating an enabling environment for a thriving music sector Industry associations and representatives Industry practitioners and businesses <p>Policy Linkages:</p>

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	<p>leverage the capabilities within industry to drive impact</p> <p>c) Investigate incentivization mechanisms for investors and advocate for the amendment of relevant legislation to encourage investment</p>	<p>Collaborate to streamline decision-making, monitoring, tracking, and reporting</p> <p>NEF, IDC, NAC, NFVF</p> <p>Support the establishment of collaborative forums</p> <p>Industry Associations and Private Sector:</p> <p>Engage in collaborative forums with public and civil society sectors.</p> <p>Align government measures with industry needs and formulate strategic partnerships</p>	<p>National Development Plan – Vision 2030</p>
C.7 Industry Monitoring and Tracking	<p>a) Establish industry monitoring processes with reporting mechanisms to gauge the impact of interventions and growth of the sector (this will also assist in prioritisation and resource allocation decision-making over the course of implementation)</p> <p>b) Conduct regular audits and compliance monitoring of the industry enabling institutions to promote accountability and</p>	<p>SACO, DSAC:</p> <p>Establish industry monitoring processes and reporting mechanisms.</p> <p>Facilitate regular audits and compliance monitoring of industry-enabling institutions</p> <p>Music Committee:</p>	<p>Beneficiaries:</p> <ul style="list-style-type: none"> • Government entities mandated with creating an enabling environment for a thriving music sector • Industry associations and representatives • Industry practitioners and businesses

Programmes	Key Interventions	Roles and Responsibilities	Beneficiaries and Policy Linkages
	transparency in the industry (CMOs, record labels, venues, etc.)	<p>Support the establishment of monitoring processes in respective provinces</p> <p>DSAC, provincial DSAC, DTIC, CIPC, DCDT, ICASA:</p> <p>Collaborate and share information on the status of industry compliance</p>	<p>Policy Linkages:</p> <p>Music Industries Task Team Report</p> <p>Draft Creative Industries Masterplan Annexure 2: Music Key Action Plan</p>

5.2 Roles and Responsibilities

The successful implementation of this policy hinges on a collaborative effort with clearly defined roles and responsibilities for all stakeholders. A strong sense of ownership and accountability will be the engine propelling us towards achieving our strategic goals.

This framework outlines the key players and their contributions:

- **Government Departments:** These departments will lead the charge by facilitating and developing the core programs outlined in the policy. Examples include the Department of Sport, Arts and Culture (DSAC), the Department of Basic Education (DBE), and the Department of Higher Education and Training (DHET) and Department of Employment and Labour (DEL)
- **Government Entities:** These entities will provide crucial support by coordinating efforts across departments and ensuring smooth implementation.
- **Industry Associations and Professional Bodies:** These organizations will lend their expertise through an advisory role, advocating for the policy's success.

- **Enablers:** Financial institutions, academia, and media channels will act as vital enablers for the policy. Financial institutions can provide resources, while academic institutions can contribute knowledge and research. Media channels can raise public awareness and support for the initiatives.

This collaborative approach, with clear ownership at each level, fosters alignment, efficiency, and accountability. The table below highlights the specific stakeholders involved in implementing the strategic programs within each policy focus area:

Strategic Output	Government	Entities	Associations	Enablers
Education and Training	DSAC, DBE, DHET, Provincial DSACs and EDTEAs	<ul style="list-style-type: none"> • Umalusi - Council for Quality Assurance in General and Further Education and Training 	<ul style="list-style-type: none"> • Recording Industry of South Africa (RISA) • Association of Independent Record Companies (AIRCO) • Association for Entertainers of South Africa (AESA) 	<ul style="list-style-type: none"> • Schools, colleges, etc. • Cultural and creative centres • Recording studios
Promotion, Advocacy & Stakeholder Engagement	DSAC, DTIC, DSBD, Provincial EDTEAs, National Treasury, DEL, DHA, DCDDT	<ul style="list-style-type: none"> • National Arts Council • Small Enterprise Development Agency (SEDA) • National Empowerment Fund • Industrial Development Corporation • National Arts Council • National Film and Video Foundation 	<ul style="list-style-type: none"> • South Africa Music Promoters Association (SAMPA) • Concert Promoters & Event Network of SA • South Africa Music Council (SAMIC) • Trade Union for Musicians South Africa (TUMSA) • Moshito Music Conference • Music Managers Forum of South Africa (MMFSA) • ACUMDA • CCIFSA 	<ul style="list-style-type: none"> • Tourism agencies • Funding agencies • Cultural and creative agencies • Media and Communication Channels

Regulation Implementation	DSAC, DTIC, DEL	<ul style="list-style-type: none"> Cultural and Intellectual Property Commission 	<ul style="list-style-type: none"> Music Publishers Association of South Africa (MPASA) Trade Union for Musicians South Africa (TUMSA) South African Cultural Observatory (SACO) 	<ul style="list-style-type: none"> SAMRO CAPASSO SAMPRA IMPRA RISA- AV
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5.3 Governance, Monitoring and Evaluation

The successful execution of this strategy hinges on the establishment of robust governance, monitoring, and evaluation systems. These will ensure the sustained implementation of the outlined efforts and their alignment with intended outcomes. Below are a few ways to ensure that the strategy outlined in the previous chapter is sufficiently governed, monitored and evaluated.

i. The Establishment of a Dedicated Implementation Agency

The creation of qualified music industry professionals and government representatives would aid in the governance of the strategy. This agency would be the custodian of the strategy, overseeing resource management, stakeholder coordination, and driving progress. The agency could also foster transparency and collaboration by establishing a platform (online forum, workshops) for ongoing communication with musicians, industry bodies, educators, and government officials. This allows for collective problem-solving and ensures the strategy remains relevant to stakeholder needs.

ii. Leveraging Technology and Partnerships

Technology and partnerships with relevant institutions (music associations, educational bodies) should be leveraged to collect and analyse data on the music industry's performance. This data is crucial for tracking progress and identifying areas for improvement which should be done through periodic reviews which would allow for adjustments to the implementation plan if necessary.

iii. Community Feedback and Periodic Evaluations

Regularly solicit feedback from music communities through surveys, town hall meetings, and online forums to ensure the strategy remains responsive to the evolving needs of musicians and industry professionals. This should be coupled with periodic evaluations commissioned by qualified experts to assess the overall effectiveness of the strategy to provide an objective assessment of impact and identify areas for further development.

iv. Transparency and Reporting

Regularly publish reports on the progress achieved and challenges encountered to foster accountability and keep stakeholders informed. Regular reporting will also keep the various stakeholders of developments within the music sector such as new music hubs or regulatory policies that need to be adhered to, etc. which will streamline the communication process within the sector.

5.4 Barriers to Execution

A strategy can only be impactful if it is implemented. The reality is that various factors can hinder successful implementation. For successful implementation, it is important that barriers to execution are acknowledged and resolved. Some of the barriers identified include:

i. Funding Limitations

Compared to other departments, DSAC consistently receives one of the smallest budgetary allocations from the National Treasury. This disparity restricts the department's capacity to invest in critical areas outlined in its strategy.

Limited funding can have a cascading effect on the department's ability to achieve its strategic goals such as restricted support for grassroots initiatives. Many strategic objectives focus on development at the community level, such as promoting participation in local music programs. Without sufficient funding, reaching these communities and offering adequate resources becomes difficult.

Possible solutions to the barrier above include:

- a) Forging strategic partnerships with private foundations and philanthropic organisations that align with the objectives of DSAC's initiatives in the South African music sector. By leveraging these partnerships, DSAC can access additional resources and funding streams to support targeted programs and projects. For example, collaborating with foundations that focus on education, cultural preservation, or youth empowerment can provide vital support for initiatives aimed at music education in underprivileged communities, preserving indigenous music traditions, or empowering emerging artists.
- b) Streamline and simplify the grant application processes within DSAC to make them more accessible and user-friendly for music industry stakeholders, including artists, educators, and organizations. By reducing bureaucratic hurdles and ensuring transparency in the allocation process, DSAC can enhance efficiency and effectiveness in distributing available funds. This streamlined approach can maximize the impact of grants by directing resources to where they are most needed, whether it's supporting music education programmes, funding live performance venues, or investing in infrastructure development.
- c) Demonstrate the tangible social and economic benefits of DSAC programmes and initiatives through comprehensive research, data analysis, and impact assessments. By quantifying the positive outcomes of its programs, DSAC can strengthen its advocacy efforts and make a compelling case for increased budgetary allocations from the National Treasury. For instance, showcasing how music education programs contribute to youth development, job creation in the creative industries, and cultural enrichment can help policymakers understand the value of investing in the music sector as a driver of socio-economic growth and development in South Africa.

ii. Stakeholder Dynamics

The South African music industry is characterised by a complex web of competing interests. Genre-based divisions, disagreements on royalty structures, and internal conflicts within artist representative bodies can create an environment of fragmentation. This makes it difficult for DSAC to implement a cohesive strategy that caters to the diverse needs of the entire industry.

Without a unified voice representing the industry's priorities, DSAC might struggle to allocate resources effectively as initiatives that benefit one segment might not address the needs of others. Additionally, A fragmented industry weakens its collective bargaining power. Without

a united front, the music sector might struggle to advocate for its needs when DSAC negotiates with other government departments or funding bodies.

Introducing new policies or initiatives can be met with resistance if there is a lack of consensus within the industry. This can hinder progress and slow down the implementation of the strategy.

Possible solutions to the barrier above include:

- a) Establishing inclusive platforms and forums for open dialogue and collaboration between diverse stakeholders in the South African music industry, including artists, industry associations, educators, policymakers, and community representatives. These platforms can serve as spaces for sharing ideas, exchanging best practices, and collectively shaping the future direction of the music sector. By fostering a culture of collaboration and consensus-building, DSAC can ensure that its policies and initiatives are informed by the perspectives and priorities of all relevant stakeholders.
- b) Identify and promote areas of mutual benefit and shared interest among stakeholders in the South African music ecosystem. For example, strengthening intellectual property protection laws can benefit both artists and industry stakeholders by safeguarding their creative rights and promoting fair compensation for their work. Similarly, improving music distribution channels and expanding access to digital platforms can create new opportunities for artists to reach audiences and generate revenue, while also stimulating growth in the music industry as a whole.
- c) Encourage and facilitate collaboration among artists at both the grassroots and professional levels through joint projects, collaborative performances, mentorship programs, and networking events. By fostering a sense of community, solidarity, and shared success among artists, DSAC can help nurture a vibrant and supportive music ecosystem in South Africa. This collaborative ethos can also contribute to talent development, skills transfer, and the exchange of creative ideas, driving innovation and excellence within the local music industry.

6. CONCLUSION

South Africa boasts a rich musical heritage, pulsating with a vibrant tapestry of genres and talented artists. The success stories of local and global stars, along with the industry's growing revenue, stand as testaments to the immense potential that lies within. However, as with any symphony, there are challenges that need to be addressed to ensure a harmonious and powerful performance on the global stage.

This National Music Strategy provides a clear path forward. However, successful implementation hinges on the collective effort and commitment of all stakeholders: government, industry professionals, musicians, and the public alike. By establishing a robust governance framework, employing effective monitoring and evaluation practices, and proactively addressing potential challenges, we can ensure that South Africa's music industry not only thrives but also resonates powerfully on the global stage.

The successful implementation of this strategy requires a collective effort from all stakeholders. The government, with its resources and policy-making power, sets the tempo. Industry professionals, experienced musicians and business leaders provide the technical expertise and direction. Musicians, the heart and soul of the industry, bring their creativity and passion to life. And finally, the public, the enthusiastic audience, plays a vital role in supporting and amplifying South African music.

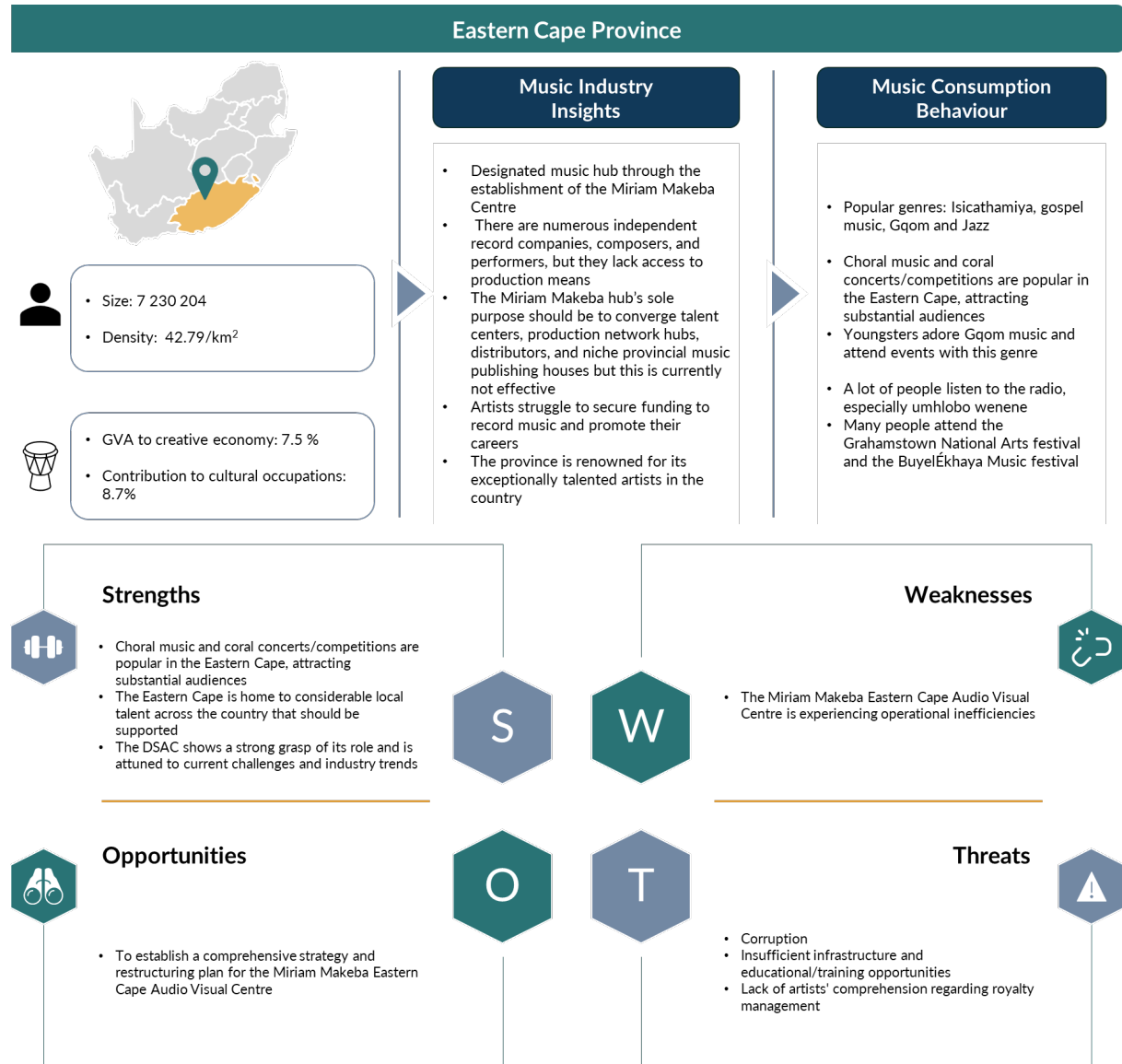
By establishing a robust governance framework, a well-coordinated performance is ensured. This framework will oversee resource allocation, stakeholder engagement, and the overall direction of the strategy. Effective monitoring and evaluation practices, acting as musical notations, will track progress, identify areas for improvement, and allow for adjustments to the strategy as needed.

With this collaborative spirit, a commitment to excellence, and the implementation of this National Music Strategy, South Africa's music industry can not only thrive domestically but also resonate powerfully on the global stage.

APPENDIX A: MARKET SEGMENTATION

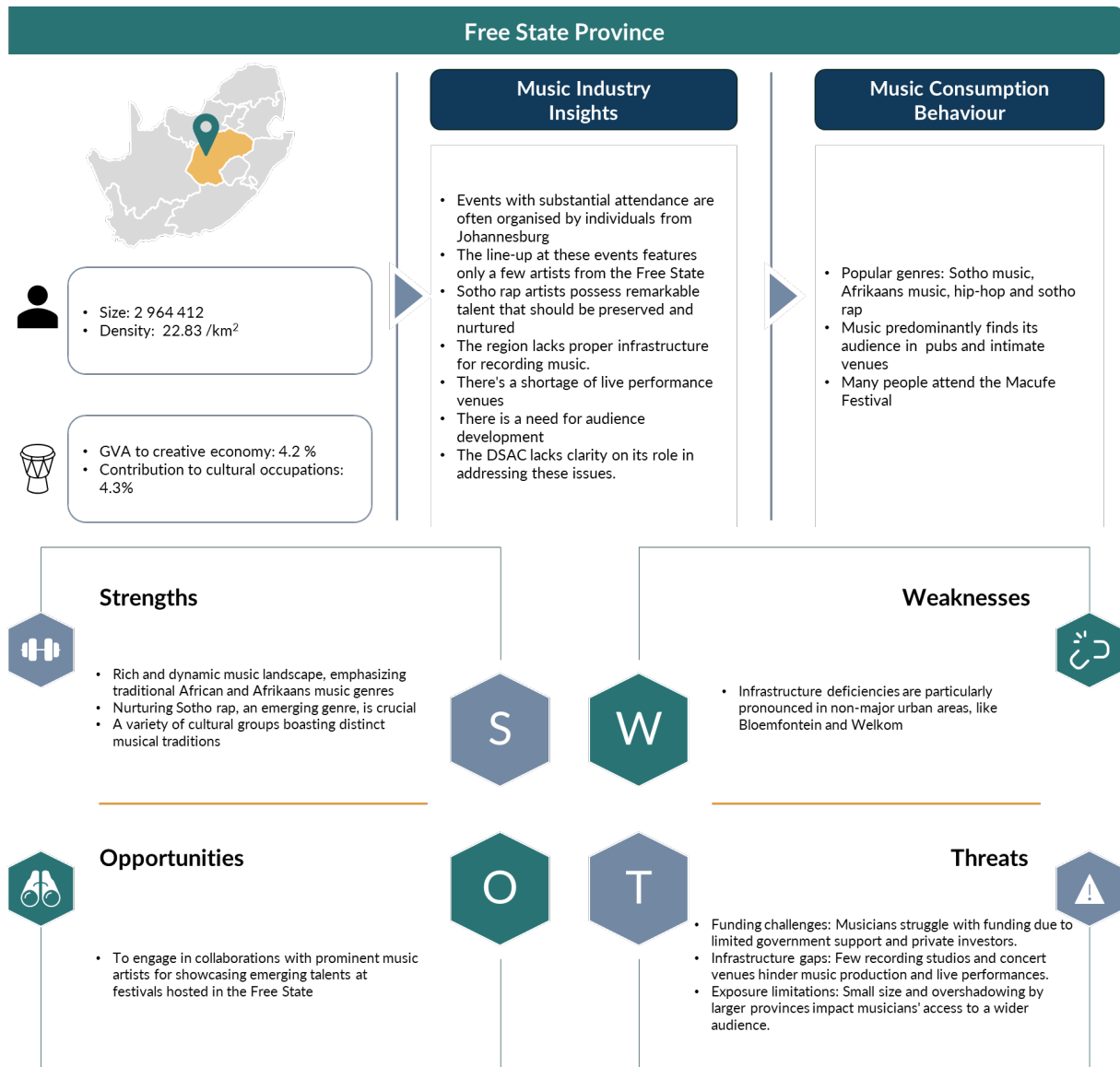
Eastern Cape

The Eastern Cape's music sector draws strength from its rich cultural heritage, particularly evident in its tradition of choral music. Nonetheless, the province faces limitations in music infrastructure and professional training opportunities. It holds opportunities in the form of a growing local interest in indigenous music and the potential for music tourism. Despite these prospects, the sector grapples with the threat of restricted access to national and international music markets.



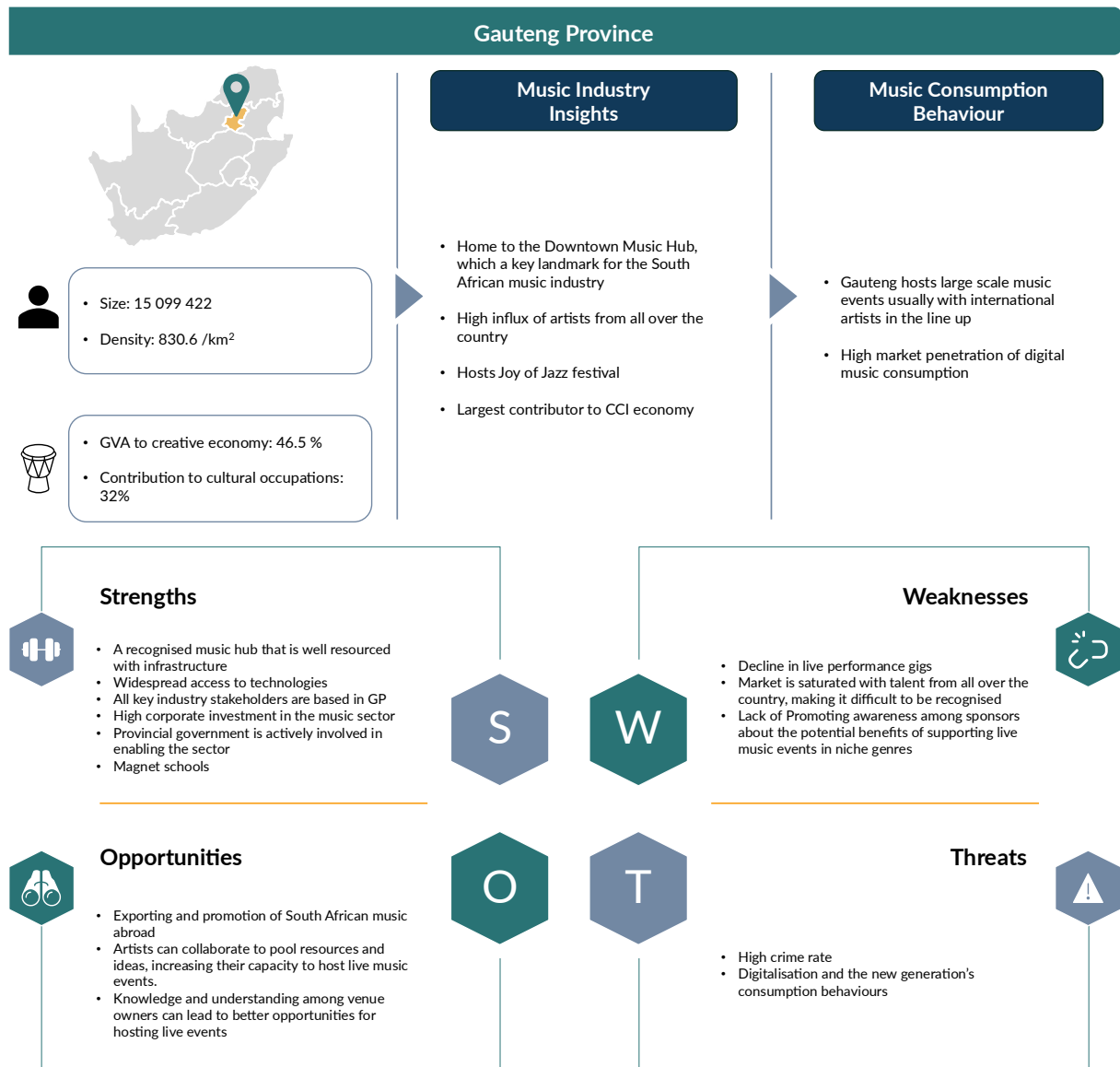
Free State

The Free State's music sector is distinguished by its rich traditional music and dance heritage, complemented by a rising enthusiasm for contemporary genres. However, the industry grapples with inadequate music infrastructure and limited opportunities for professional training. Nevertheless, the province holds promise in the realm of music tourism and festivals, although challenges remain in terms of accessing national and international music markets.



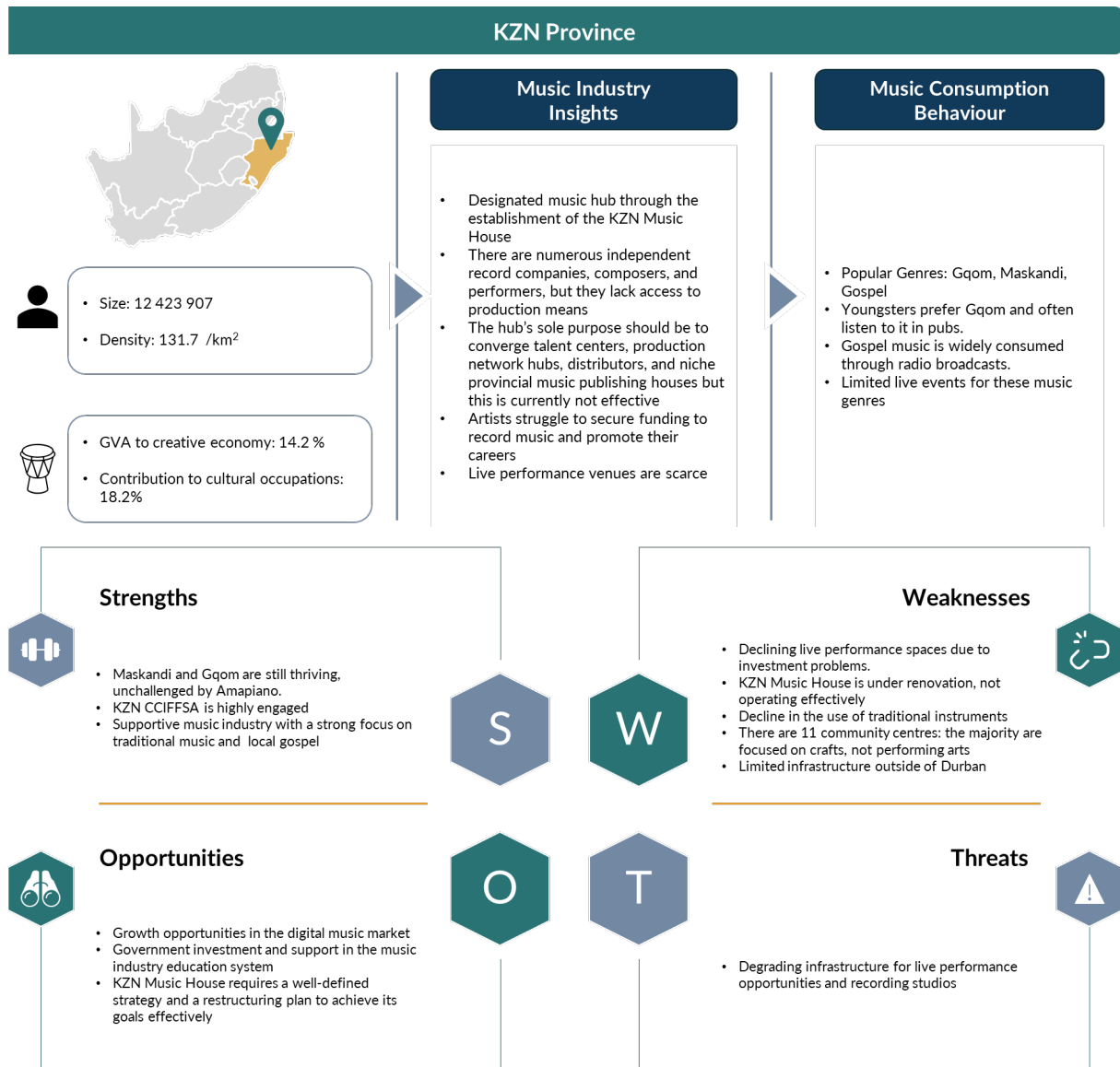
Gauteng

Gauteng's music scene thrives as it serves as the economic hub of South Africa, boasting a diverse range of musical genres. However, emerging artists may find it tough to break through due to intense competition. While digital platforms offer fresh avenues for exposure, challenges such as piracy and copyright infringement continue to impede progress.



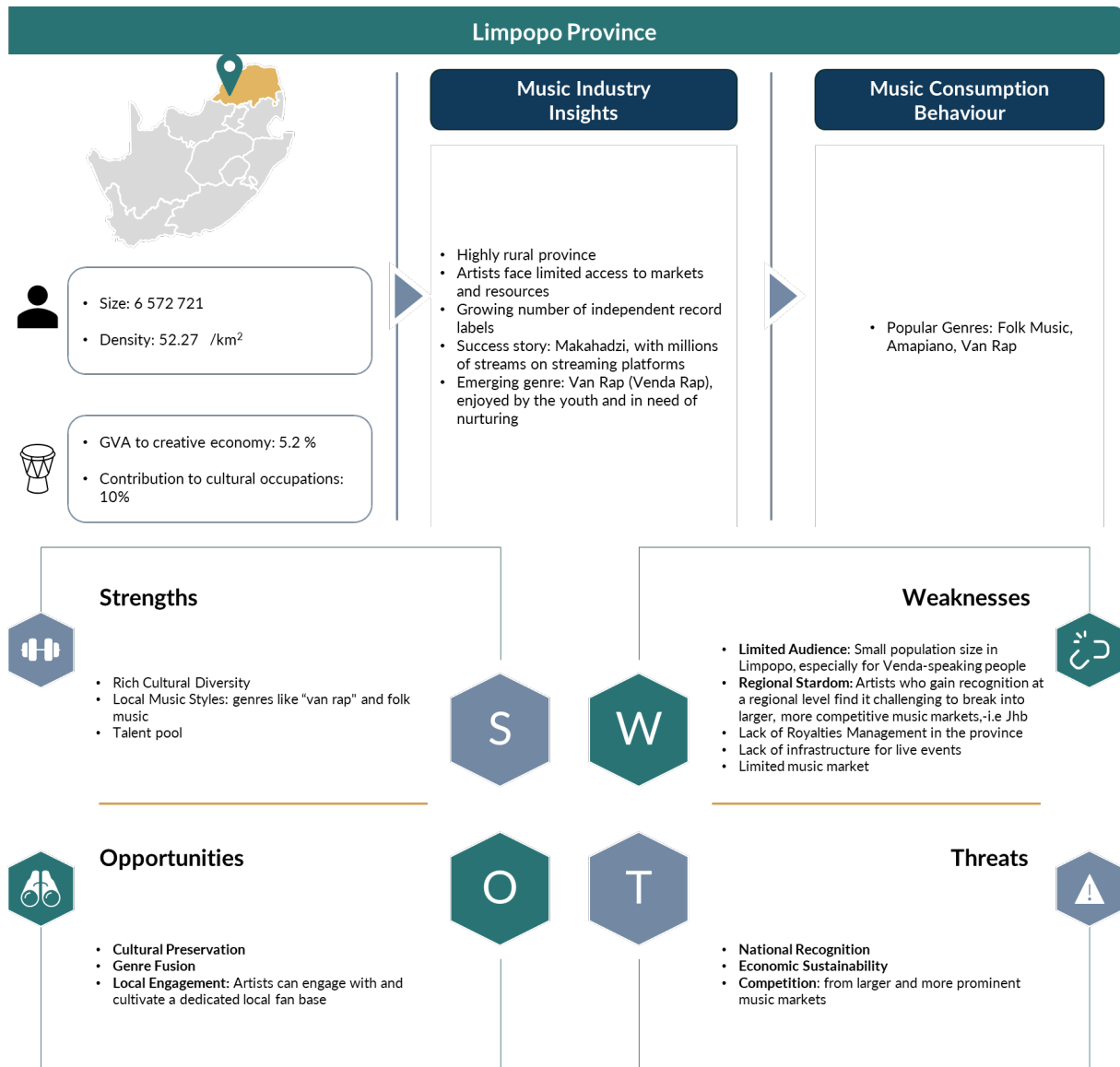
Kwa-Zulu Natal

KwaZulu-Natal boasts a vibrant music scene encompassing both traditional and modern genres. However, allegations of undue influence by government officials and politicians represent a notable weakness. The province offers opportunities for growth in music tourism, festivals, and live music events. Yet, it contends with high competition and insufficient support for emerging artists as potential threats.



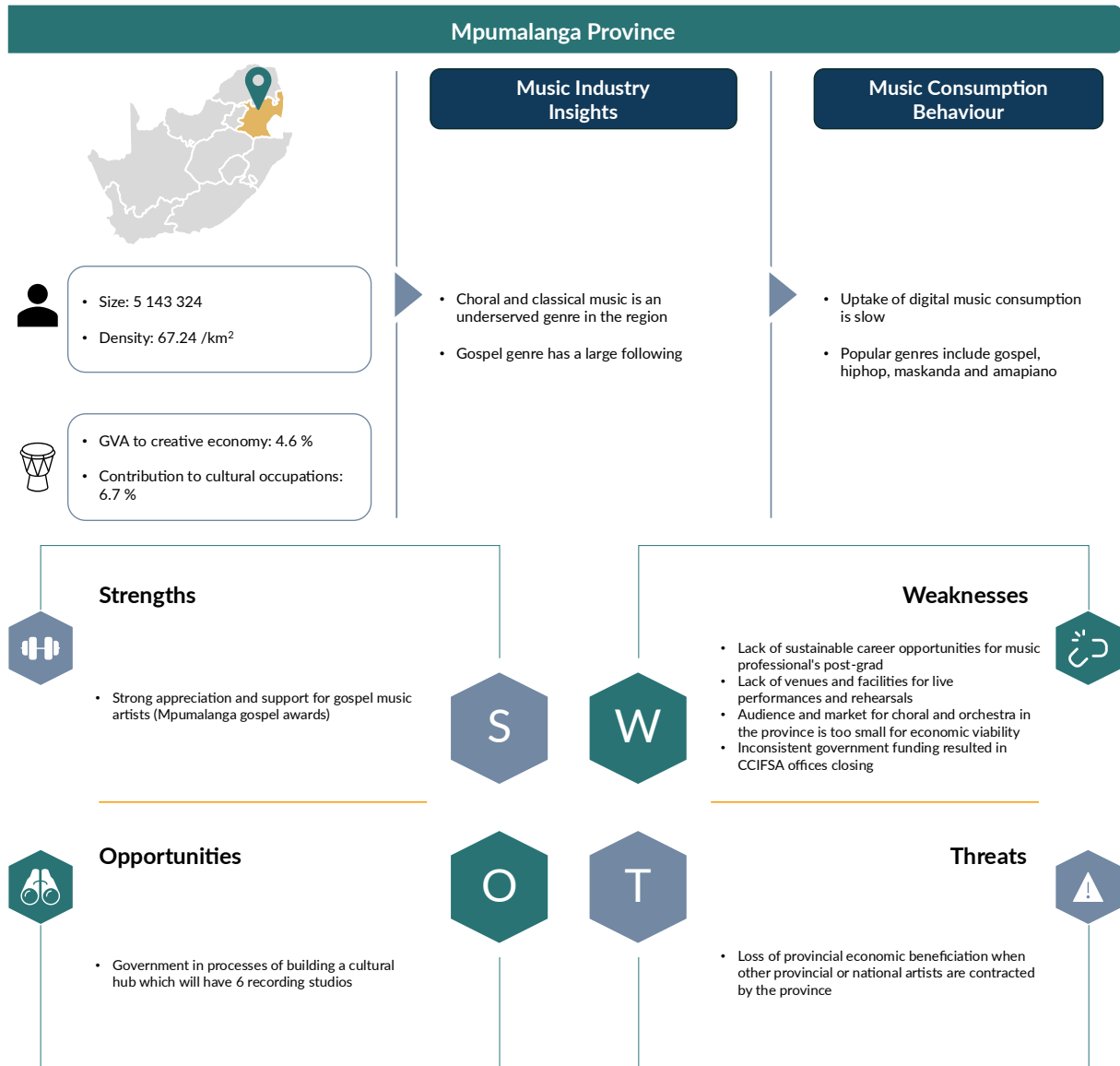
Limpopo

Limpopo's music landscape is deeply rooted in its cultural heritage, notably exemplified by the success of artists like Makhadzi. Despite this strength, the province faces weaknesses in its music infrastructure and professional training opportunities. Opportunities arise from the growing local interest in indigenous music and dance forms, with potential for music tourism. Nevertheless, the province confronts threats stemming from its limited access to national and international music markets.



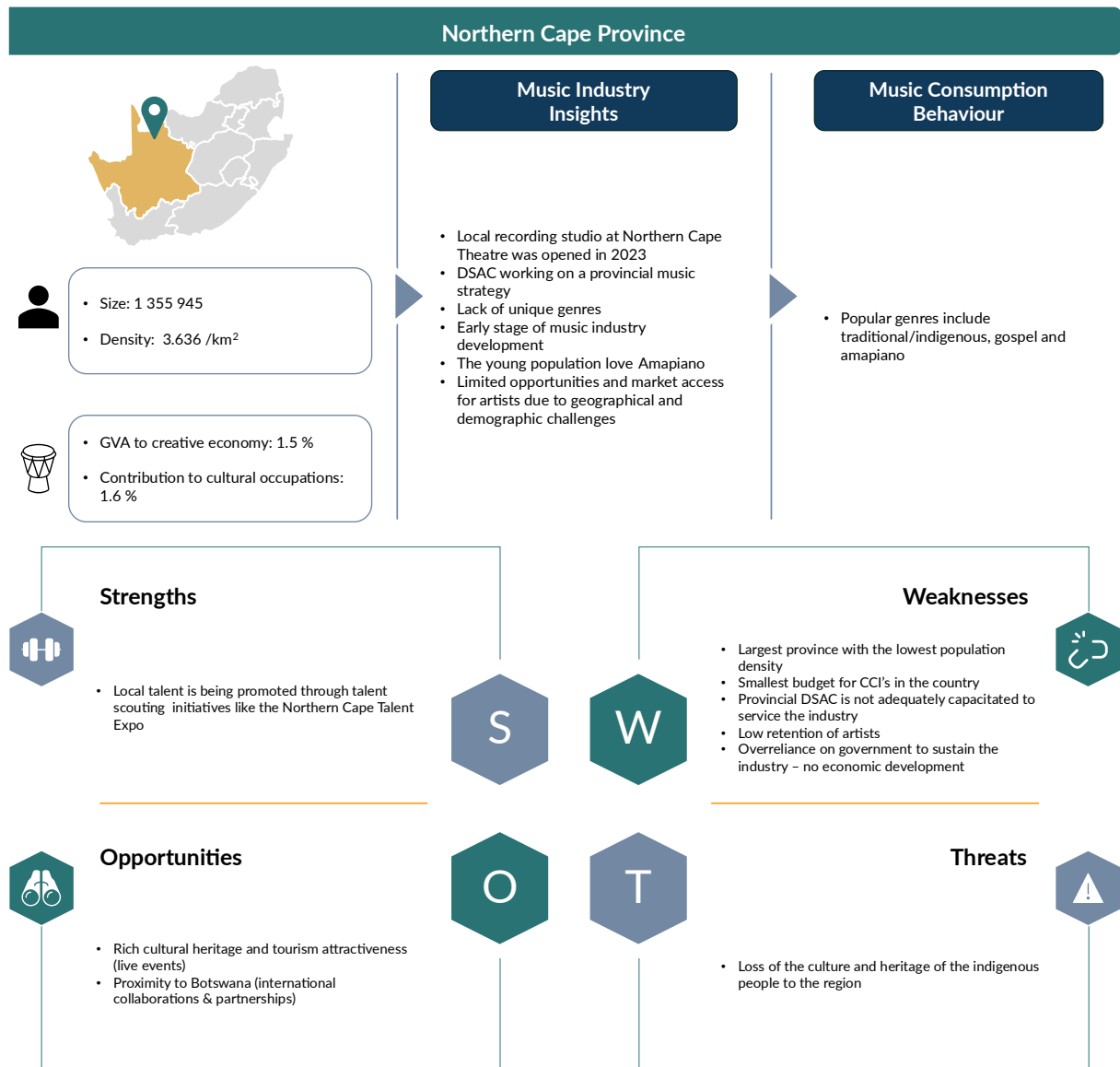
Mpumalanga

Mpumalanga's musical landscape reflects its rich cultural heritage, although artists might find opportunities somewhat limited due to the province's relatively small size. Initiatives like the multimedia studio in Mbombela aim to bolster local talent. Nevertheless, artists may encounter challenges when seeking resources and opportunities beyond the province's borders.



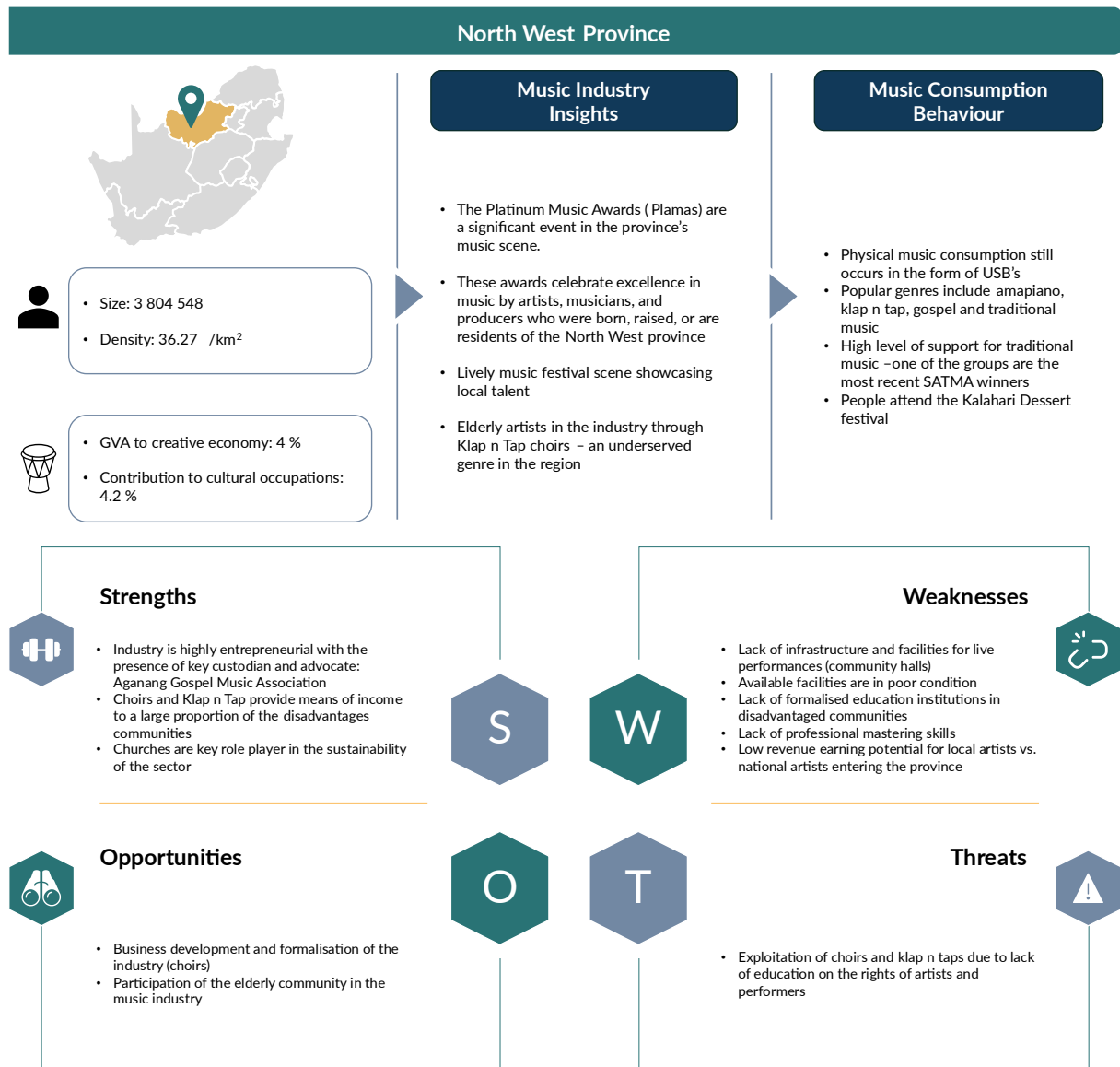
Northern Cape

The Northern Cape, with its distinct cultural heritage, provides a rich source of inspiration for crafting unique musical expressions. Despite the music industry's relative underdevelopment in comparison to other provinces, there are clear growth opportunities in the digital music market. However, artists may encounter challenges when looking to access resources and opportunities beyond the province's boundaries.



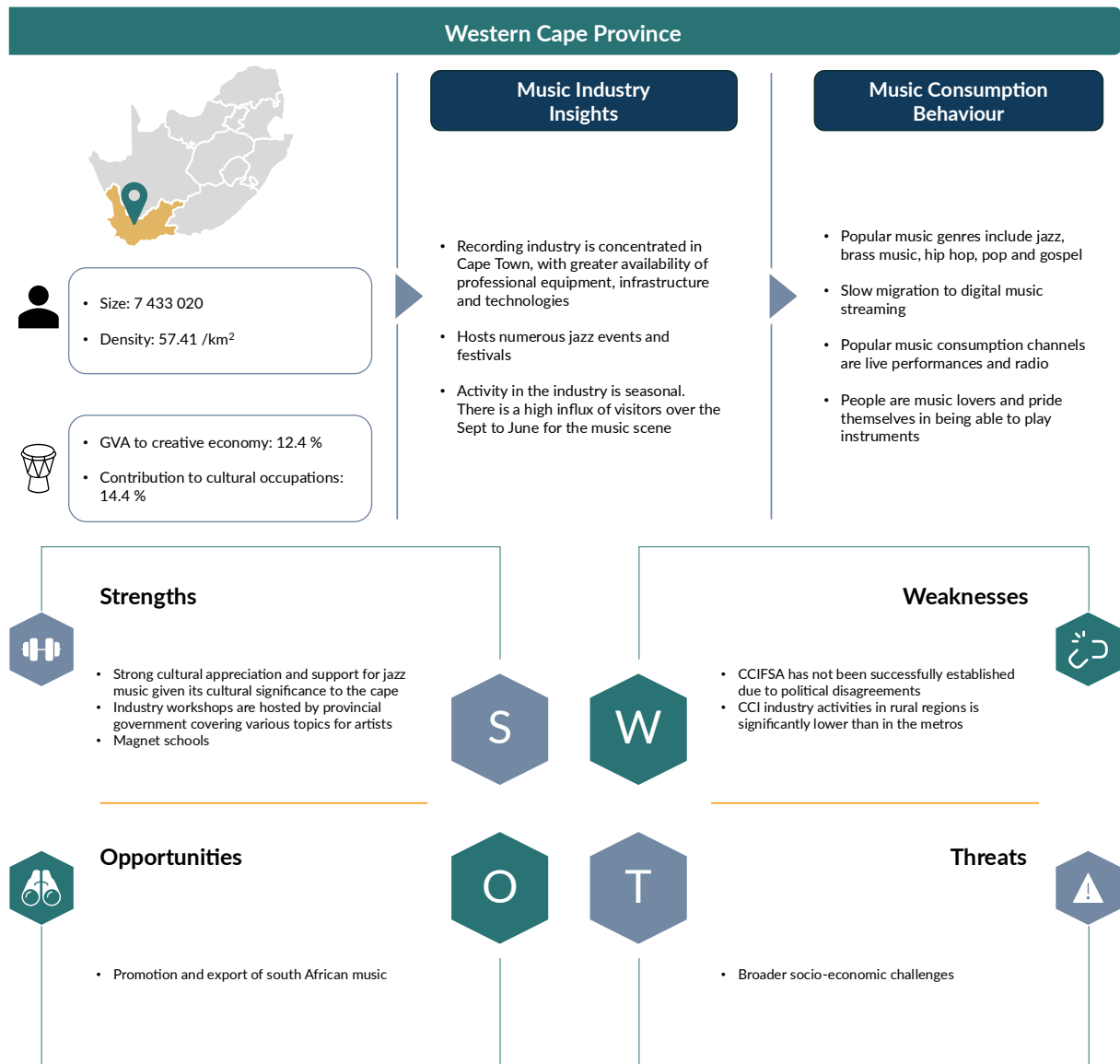
North West

Drawing from its strong cultural heritage, North West has the potential to create unique and engaging musical experiences, even though the province's music industry may be less developed compared to others. Prospects for growth in the digital music market are evident. Yet, artists could face hurdles in accessing resources and opportunities beyond the province.



Western Cape

The Western Cape is a hotspot for live music and plays host to a multitude of music festivals. However, artists outside major urban centres may face obstacles linked to limited infrastructure and resources. On a brighter note, the digital music market in the region shows promise. Yet, the overall economic landscape could have an impact on the music industry's trajectory.



APPENDIX B: COMPARATIVE BENCHMARKING

South Africa should benchmark its music sector with global leaders in the industry, such as South Korea, Canada, and Australia, to gain international insights and best practices. Additionally, looking at the music sectors in African countries like Nigeria and Kenya can provide valuable regional insights. Kenya's emphasis on preserving traditional music aligns with South Africa's cultural diversity and heritage.

The approach to comparative benchmarking is illustrated below. It begins with the identification of pain points in South Africa's music sector, derived from the sector profile and provincial analysis, which was then consolidated in the market structure and socio-economic analysis.



Figure 32: Approach to Comparative Benchmarking

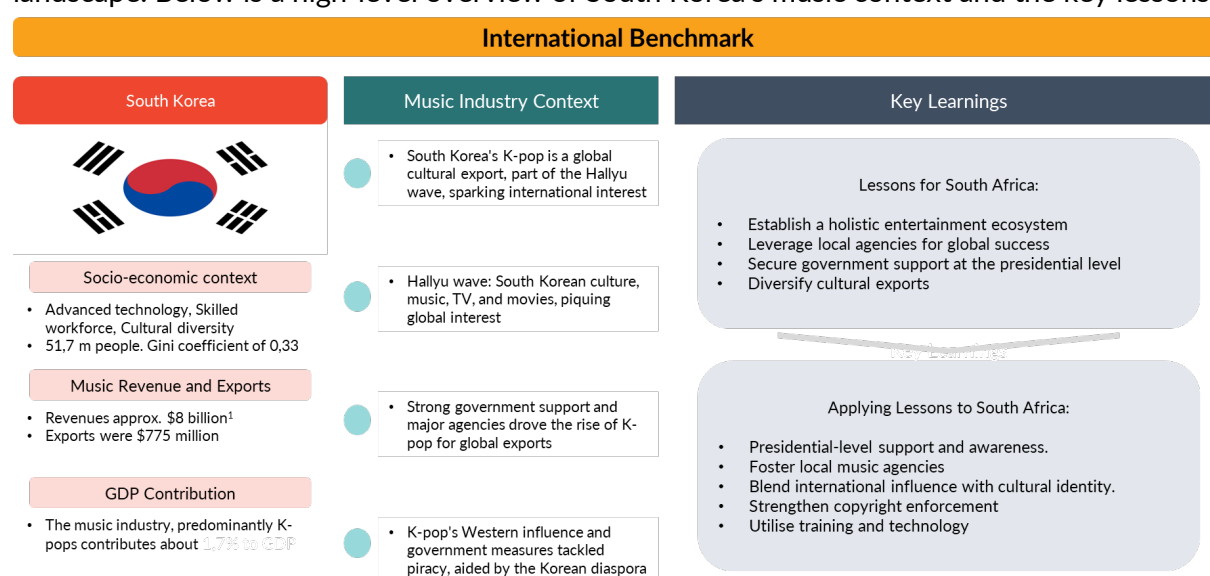
Non-Continental Countries

South Korea

In the realm of South Korea's music context, it is essential to recognise the broader socio-economic framework that has facilitated its rise. South Korea is a developed nation known for its technological prowess, boasting a skilled workforce that has harnessed a fusion of traditional and modern cultural influences. With a population of approximately 51.7 million, the nation exhibits a Gini coefficient of 0.33, reflecting a relatively equitable distribution of wealth and opportunities.

Turning our attention to the music sector's financial landscape, South Korea's music industry was reported to generate revenues of approximately \$8 billion in 2021, while exports reached a notable \$775 million.³ The growth trajectory is equally impressive, with revenues and exports expanding annually by approximately 31% and 26%, respectively. This dynamic industry, primarily driven by the K-pop phenomenon, plays a pivotal role in the nation's economy, contributing around 3% to the GDP. Music production, live concerts, merchandise sales, and tourism together forge a formidable economic engine that generates substantial revenue and employment opportunities in South Korea.

Politically, South Korea operates as a democratic republic under a presidential system of government. The National Assembly, serving as the legislative body, holds the reins for lawmaking, budget approval, and governmental oversight, shaping the country's political landscape. Below is a high-level overview of South Korea's music context and the key lessons.



Source: ¹South Korea Sales Revenue Music Industry

Figure 33: Context of South Korea

South Korea's Music Industry

South Korea's music context showcases remarkable strengths that have propelled it to global recognition and admiration. Foremost among these strengths is the resounding success of South Korea's music industry, particularly the meteoric rise of K-pop, which has gained significant international attention and stands as a major cultural export. South Korea's artistic prowess isn't limited to music alone; it is part of a broader phenomenon known as the Hallyu wave, or HYLE, encompassing the entire spectrum of South Korean culture, from music to TV shows and movies. This cultural wave has piqued the interest of global audiences and stoked an immense fascination with South Korean culture and entertainment on an international scale.

The reasons behind this exceptional success are multifaceted. At the core, the South Korean government has been a stalwart supporter of its entertainment industry since the early 1990s, with commitments from the presidential level to export entertainment and cultural content to the world. This support has played a pivotal role in nurturing the industry's growth. Additionally, the collective efforts of influential South Korean agencies such as HYBE, YG, JYP, and SM Entertainment have significantly contributed to the emergence of pop music on a global scale. K-pop, in particular, has adeptly blended Western musical influences, resonating with global audiences.⁷ Moreover, the government has taken a proactive stance by facilitating the introduction of sanctions to the influx of foreign pop music and enforcing copyright laws to counter piracy-related issues. Lastly, the far-reaching Korean diaspora has played an invaluable role in spreading and popularising South Korean culture worldwide, further elevating its influence.

Key lessons for the context of South Africa

South Korea's success in building a thriving entertainment industry, with K-pop at its forefront, offers valuable lessons for South Africa to consider and adapt to its unique context. South Korea's comprehensive ecosystem around its entertainment sector, driven by the rapid growth of local Korean agencies, is a notable strength. South Africa can draw inspiration from this approach, focusing on nurturing and promoting local talent by encouraging the growth of prominent local music agencies. By supporting these agencies, South Africa can enhance its music industry's capacity to produce world-class content.

In addition, South Africa can take a page from South Korea's book by blending international influences into its music scene while preserving its distinctive cultural identity. Copyright enforcement is a vital aspect of this strategy, safeguarding local artistry and content. Furthermore, South Africa can leverage technology and training to enhance the marketing and production of high-quality music content, allowing its artists to compete effectively on the

⁷ The Economist.(2023),The Global Phenomenon

global stage. These initiatives, combined with government support and awareness at the presidential level, can help South Africa unlock the full potential of its music industry.

Canada

Within the Canadian music context, it is crucial to lay the foundation by understanding the country's socio-economic backdrop. Canada boasts a highly developed and diversified economy, ranking among the world's largest economies. Trade is the lifeblood of Canada's economic landscape, with the United States serving as its most significant trading partner. The nation is celebrated for its multiculturalism, home to a population of approximately 38.3 million, and it prides itself on a relatively low Gini coefficient of 0.3, indicative of a more equitable distribution of income and opportunities.

In terms of the financial aspects of the music industry, Canada's music revenues in 2023 amounted to approximately \$24.2 billion. Despite being a smaller market, the music industry contributes meaningfully to Canada's GDP, making up approximately 0.7%. These financial dynamics underline the industry's significance within the Canadian economy.

When it comes to Canada's political landscape, the nation is structured as a parliamentary democracy with a federal system, underpinned by a robust rule of law and a steadfast commitment to multiculturalism. This unique political framework operates within the context of a constitutional monarchy, with a Prime Minister serving as the head of government. Below is a high-level overview of Canada's music context and the key lessons.

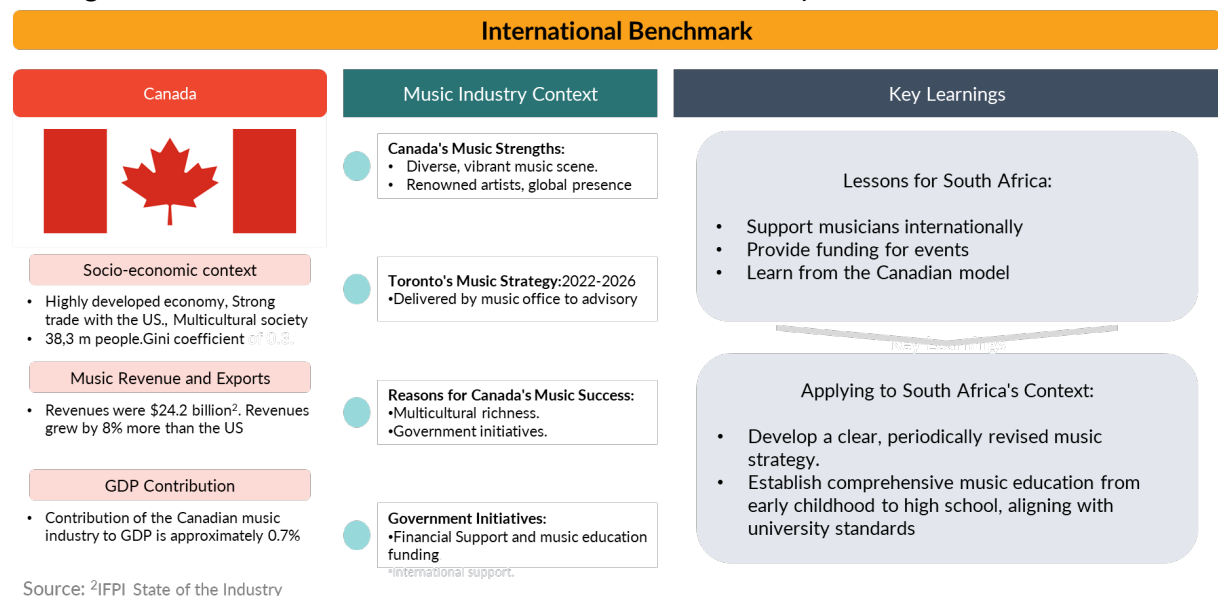


Figure 34: Context of Canada

Canada's Music Industry

Canada boasts a vibrant and diverse music scene that spans an array of genres, from chart-topping pop and rock hits to the rhythms of hip-hop, the energy of electronic music, and the elegance of classical compositions. This dynamism has enabled Canadian musicians to achieve

international stardom, with notable artists like Justin Bieber, Drake, The Weeknd, and Shawn Mendes leaving an indelible mark on the global music landscape. Canadian music is well-represented in the global industry, and its multifaceted approach caters to a broad spectrum of musical tastes. Moreover, a clear strategic vision for the future, outlined in a comprehensive 2022-2026 plan by the Toronto Music Office and delivered to the Toronto Music Advisory, underlines Canada's commitment to fostering its thriving music sector.⁸

Canada's achievements in the music industry are underpinned by several compelling reasons. The country's multicultural essence has played a pivotal role in nurturing musical diversity and fostering a rich tapestry of sounds. Additionally, a strong government commitment is evident in initiatives such as the Canada Music Fund (CMF) and FACTOR (Foundation Assisting Canadian Talent on Recordings), a public-private partnership offering crucial financial support to Canadian musicians. Music education is championed through government funding, ensuring that music schools and programs at all levels of education receive the necessary financial support. Moreover, Canada's dedication to nurturing its musicians extends to international conferences and festivals, providing vital support that propels Canadian artists onto the global stage. These factors collectively contribute to Canada's strong standing in the international music arena.

Key lessons for the context of South Africa

Canada's model of providing support to its musicians at international conferences and festivals holds valuable insights for South Africa. To apply this to South Africa's context, the country can establish a clear strategy through a dedicated music office. This music office should represent the interests of the provincial music industry and musicians, ensuring that their needs and goals are addressed effectively. This strategy should be revisited and updated every five years to keep it aligned with the evolving music landscape.

Furthermore, South Africa can take inspiration from Canada's approach to music education. To nurture talent from early childhood to high school, South Africa can develop music education initiatives that align with university requirements, creating a seamless and coherent pathway for aspiring musicians. By doing so, South Africa can provide a strong foundation for its artists and foster an environment that helps them succeed on both the national and international stages.

Australia

In Australia's music context, it is important to establish the foundation by delving into the socio-economic landscape. Australia boasts a highly developed and diversified economy with a population of around 26 million, underpinned by high living standards. The country shines in

⁸ Nordicity Toronto Music Office.(2022),Music Industry Strategy:2022-2026

various areas, offering a well-developed healthcare system, robust education, and top-tier infrastructure. Multiculturalism is at the core of Australian society, fostering diversity and inclusion, while the nation maintains a relatively equitable Gini coefficient of 0.34, indicating a fairer distribution of wealth and opportunities.

When we shifted our focus to the music industry's financial aspects, in 2022, Australia's music revenues reached approximately \$660 million. This vibrant industry contributes notably to the nation's GDP, accounting for approximately 0.5%. These figures underscore the importance of the music sector within Australia's economic landscape.

Politically, Australia operates as a federal parliamentary democracy and a constitutional monarchy. The British monarch serves as the ceremonial head of state, represented in Australia by the Governor-General. This political structure reflects Australia's unique governance model. Below is a high-level overview of Australia's music context and the key lessons.

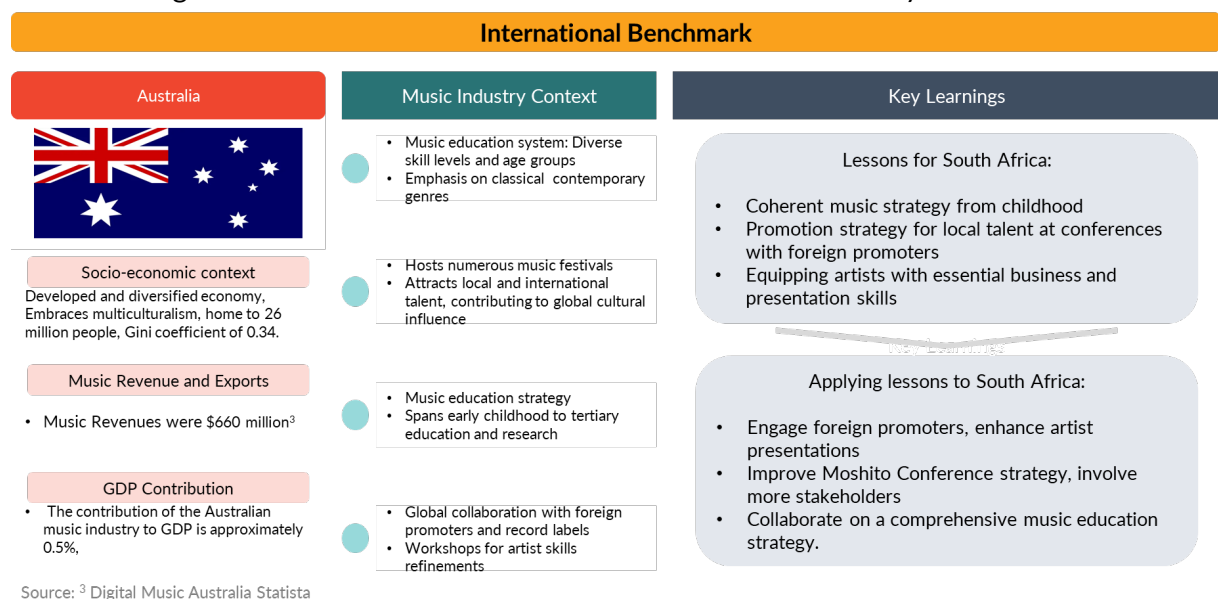


Figure 35: Context of Australia

Australia's Music Industry

Australia's music context boasts an array of strengths that have solidified its position in the global music arena. First and foremost, the country enjoys a well-developed music education system that offers an extensive range of programs and opportunities catering to students of all ages and skill levels. This strong tradition of music education extends its embrace to both classical and contemporary music, nurturing a diverse pool of talents. Australia's vibrant music scene further thrives through the multitude of music festivals hosted across the nation, which attract not only local artists but also international talent. This collaborative ambience contributes to the export of Australian music worldwide, significantly enhancing the country's cultural influence on a global scale.

Australia's musical accomplishments are underpinned by several compelling reasons. The country has set a clear course for the future with a comprehensive Music education strategy

that stretches from 2019 to 2029.⁹ This strategy is well-rounded, focusing on early childhood, schools, community involvement, teacher training, tertiary education, and research. Moreover, Australia actively supports its musicians by inviting foreign promoters and record labels to assist local artists in gaining international exposure within their respective countries. As an additional testament to its dedication, Australia hosts workshops and training sessions, equipping local musicians with the presentation and business skills essential for achieving international acclaim. These measures collectively contribute to Australia's success and continued prominence in the global music industry.

Key lessons for the context of South Africa

South Africa can benefit by establishing a coherent and achievable music strategy that spans from early childhood education to the tertiary level. This comprehensive strategy should provide a well-defined pathway for aspiring musicians and ensure alignment for success at various stages of their careers. Collaboration among the Department of Higher Education and Training (DHET), the Department of Sport, Arts, and Culture (DSAC), other government stakeholders, and academic associations should result in a comprehensive music education strategy that nurtures and supports South African musicians at all levels of their development.

South Africa can also learn from Australia's strategy for promoting local talent during conferences. This includes involving foreign promoters and equipping artists with essential business and presentation skills, which are vital for international success. To harness its untapped potential, South Africa can enhance the operational strategy for the Moshito Conference, making it a more effective platform for local musicians to connect with international opportunities. Additional stakeholders and substantial improvements are crucial for the conference's success. South Africa can implement these lessons by actively engaging with foreign promoters to create opportunities for local talent on the global stage. Workshops and training sessions for artists can be instrumental in refining their presentation and business skills for international appeal.

African Countries

Nigeria

Delving into Nigeria's music context, we need to first explore the socio-economic backdrop. Nigeria, as one of the largest economies in Africa, embodies an emerging market heavily dependent on the oil and gas sector. However, the nation grapples with income inequality, leading to a wide disparity in living standards between urban and rural areas. In some regions, access to quality education can be limited, resulting in relatively high illiteracy rates. Nigeria's population is immense, making it the most populous African country with approximately 213

⁹ Government of South Australia, Department of Education.(2019),Music Education Strategy 2019 to 2029

million people, and it is marked by a large and rapidly growing youth demographic. This dynamic socio-economic environment is characterised by a Gini coefficient of 0.35, which signifies some level of income inequality.

Shifting to the financial aspects of the music industry, Nigeria's music revenues impressively surpass \$27 million. This thriving sector plays a significant role in Nigeria's economy, contributing approximately 1.7% to the nation's GDP, underscoring the economic importance of music within the country.

From a political perspective, Nigeria operates as a federal republic with a presidential system of government. It is organised into three tiers of government: federal, state, and local. This multi-tiered governance structure plays a crucial role in the nation's political landscape and decision-making processes. Below is a high-level overview of Nigeria's music context and the key lessons.

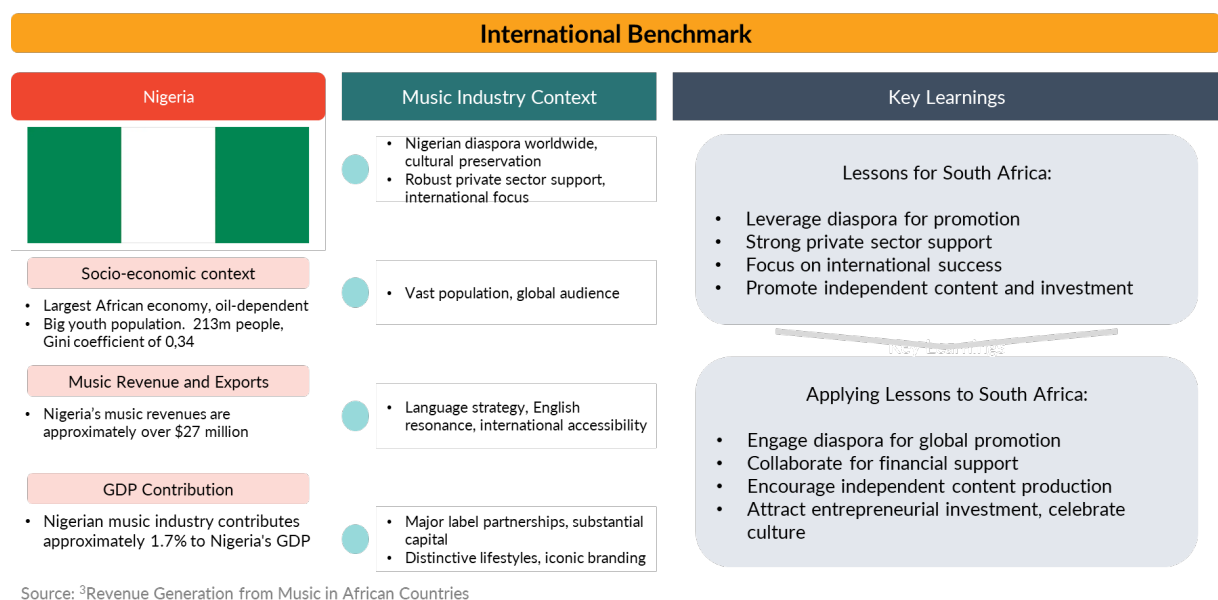


Figure 36: Context of Nigeria

Nigeria's Music Industry

Nigeria's music context is marked by several remarkable strengths that have propelled it to international recognition. To begin, Nigerians in the diaspora have left an indelible mark across the globe, with 2 million residing in the UK and proudly preserving their cultural roots wherever they go. Unlike some other African nationalities that assimilate into new environments, Nigerians maintain a strong connection to their heritage, strengthening their musical identity. The private sector significantly supports musicians in Nigeria, providing robust funding and resources. This backing encourages artists to aim for international recognition rather than limiting themselves to regional prominence. Additionally, Nigerian musicians have embraced a proactive approach, independently producing content without waiting for major funding. Entrepreneurs play a pivotal role in the country's entertainment industry, recognising its

economic potential and investing heavily. This not only fuels the industry's growth but also demonstrates Nigeria's unique cultural attributes, including the distinctive Pidgin language.

Several compelling reasons underscore Nigeria's success in the music industry. The country's vast population provides a substantial and dedicated audience for its musicians. Language is a crucial element of their strategy, with English hooks that resonate with a quarter of the global population, reaching approximately 1.75 billion English speakers. Furthermore, Nigeria's partnerships with major record labels such as Universal, Sony Music, and Warner Music have empowered the industry with substantial capital, facilitating global expansion. Beyond music, Nigerians excel at crafting distinctive lifestyles, epitomised by iconic elements like eyepatches and masks, adding to the nation's unique cultural identity and contributing to its success on the world stage.

Key lessons for the context of South Africa

- Harnessing the South African diaspora is an excellent strategy to promote local culture and music globally. South Africa can leverage its diaspora to support and expand its music industry on the international stage.
- A robust private sector's support for funding musicians is essential for industry growth. South Africa can encourage more significant private sector involvement in funding its musicians, helping them achieve their potential.
- Shifting the focus towards international competition instead of regional dominance can be a game-changer. South African musicians should look beyond regional markets and aim for global recognition, following Nigeria's model.
- Encouraging independent content production can empower artists to become self-sufficient, reducing their reliance on major funding sources and fostering a more vibrant music ecosystem.
- South Africa can take a cue from Nigeria by incentivising entrepreneurs to invest in the entertainment sector, recognising its significant economic potential.
- Celebrating and promoting South Africa's unique culture and languages can enhance global appeal, attracting international audiences.

South Africa has a significant opportunity to harness its diaspora, forming a global network to boost local music and culture internationally. A strong cooperation between the government and the private sector, will offer financial support and foster an environment for international competition. Encouraging artists to create independent content calls for training and mentorship programs. Incentivising entrepreneurs to invest in the entertainment sector can be facilitated through financial incentives. Furthermore, promoting South Africa's distinctive cultural identity and languages can involve cultural exchange initiatives, global marketing, and showcasing the nation's diversity through music and the arts.

Kenya

Kenya's music context is closely tied to its socio-economic and political landscape. Firstly, Kenya boasts a diverse economy encompassing agriculture, manufacturing, and services

sectors, positioning itself as one of the leading economies in East Africa. However, it is important to note that corruption is a persistent issue in Kenya, affecting various sectors, including government, business, and law enforcement. With a population of approximately 53 million, Kenya experiences a Gini coefficient of 0.4, suggesting some degree of income inequality.

In terms of financial aspects, Kenya's music industry generates around \$9 million in revenues. The sector is instrumental to Kenya's economy, contributing approximately 1.88% to the nation's GDP. This underscores the economic significance of music within Kenya.

Turning to the political landscape, Kenya functions as a multi-party democracy with a presidential system of government. In this political system, the President holds the dual role of both head of state and government, wielding substantial influence over the nation's governance and decision-making processes. Below is a high-level overview of Kenya's music context and the key lessons.

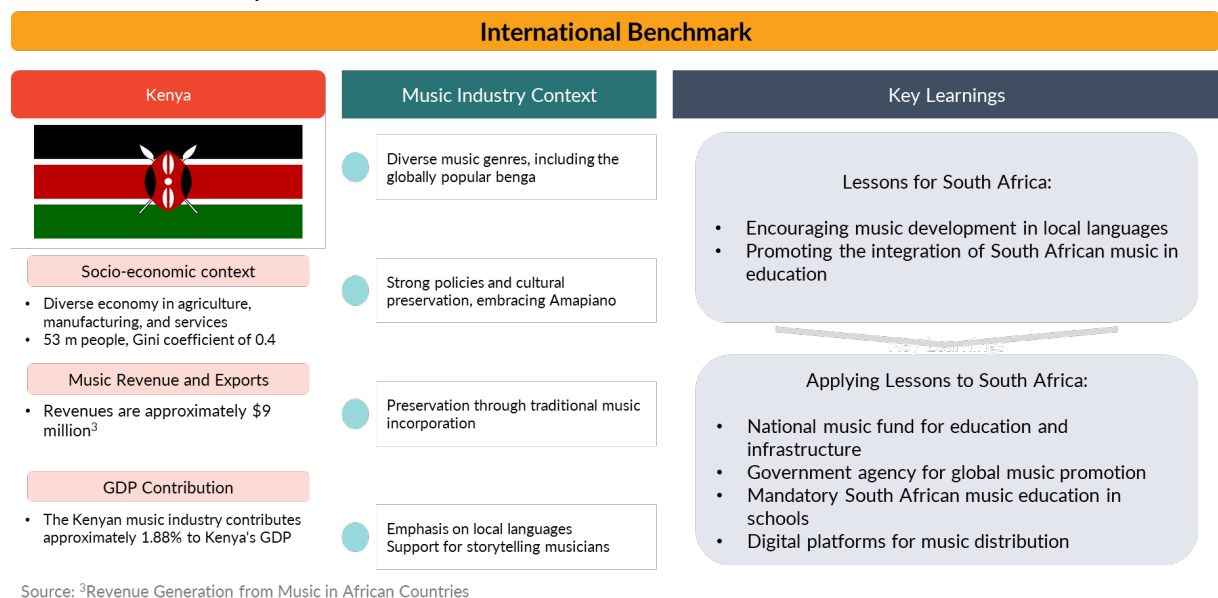


Figure 37: Context of Kenya

Kenya's Music Industry

Kenya's music context boasts unique strengths and reasons contributing to its thriving music industry. Firstly, the Kenyan music landscape encompasses a rich array of genres, including benga, hip-hop, and gospel. Among these, benga stands out as the most popular genre in Kenya, gaining global recognition in recent years and establishing itself as a cultural export. Additionally, Kenya exhibits robust policies and cultural preservation initiatives, ensuring the safeguarding and promotion of its diverse musical heritage. One notable feat is the seamless incorporation of Amapiano, a contemporary music genre, into various Kenyan music styles, signifying the industry's adaptability and innovation.

Several key reasons underlie the success of Kenya's music industry, notably its commitment to preserving Kenyan culture. This preservation is achieved by incorporating traditional Kenyan music genres like benga and taarab into modern music forms. The use of Kenyan languages in music further enriches the musical tapestry by celebrating linguistic diversity and cultural

heritage. The industry plays a pivotal role in supporting Kenyan musicians in telling Kenyan stories through their music and promoting narratives and experiences unique to the nation. These factors collectively reinforce the Kenyan music industry's robust cultural identity and its potential for global resonance.

Key lessons for the context of South Africa

Supporting the development of music in South African languages can help preserve and celebrate the country's linguistic and cultural diversity. South Africa can actively promote music in various languages to ensure representation and cultural richness.

Promoting the use of South African music in schools and other educational settings can instil a sense of pride and connection to local music from a young age. Requiring schools to teach South African music and offering opportunities for students to participate in music ensembles and programs can help foster a deep appreciation for local music traditions.

Lastly, creating a government agency responsible for promoting South African music overseas can help boost international exposure. This agency can work on marketing, collaborations, and export strategies to share South African music with the world.

APPENDIX C: CONSULTED STAKEHOLDERS LIST

Organisation	Name
Department of Small Business Development (DSBD)	Mhlanganisi Masoga
Department of Trade, Industry and Competition	Meshendri Padayachy
Companies and Intellectual Property Commission (CIPC)	Kadi Petje
Trade Union for Musicians South Africa (TUMSA)	Gabi Le Roux, Nomvula Maneli, Lesiba
IP Justice	Tebogo Sithathu
South African Music Rights Organisation (SAMRO)	Karabo Senna, Clinton Hornett
Association of Independent Record Companies (AIRCO)	Mandla Maseko
Recording Industry of South Africa (RISA)	Nhlanhla Sibisi
Joy of Jazz (Concert Promoters)	Peter Tladi
Independent Music Performance Rights Association (IMPRA)	Dodo Monamodi
Africori Record Company	Yoel Kenan
Gallo Music Records	Rob Cowling

Composers & Publishers Association of South Africa (CAPASSO)	Jotam Matariro
Performing Artist	Una Rams
Performing Artist	Muneyi Romeo
Performing Artist	Lerato Molapo (Lira)
Department of Sport, Arts and Culture (DSAC)	Zwelakhe Mbiba, Nombuso Tshabalala
Western Cape Provincial Government	William Masemola
Darkstar Productions	Kevin Leicher
Northern Cape Provincial Government	Jane Shangwina
Nelson Mandela University's Department of Music	David Bester
Mzansi Youth Choir	Wouter Kellerman, Tholsi Pillay
South African Music Performance Rights Association (SAMPRA)	Pfanani Lishivha
Performing Artist	Samkelo Mdolomba (Samthing Soweto)
South African Cultural Observatory (SACO)	Masilakhe Njomane
Mpumalanga Provincial Government	Shaka Mkhwanazi
Limpopo Provincial Government	KV Mokgonyana
Miriam Makeba Eastern Cape Audio Visual Centre	Sazi Gcaba, Rose Mdlambuzi, Ndumiso Mtshali
Cultural & Creative Industries Federation of South Africa (CCIFSA)	Thokozani Zulu (T'zozo)
Performing Artist	Dokotela Sparks Bantwana
Durban Arts Business Academy	Dulas
Eastern Cape DSAC	Stofile Mzonke, Nozuko Lubedu
Morris Isaacson Centre for Music	Lungile Zaphi, Daliwonga Tshangela
Durban Music School	Kim Matthews
University of the Witwatersrand – Music Lecturer	Chantal Willie-Petersen
Universal Music Publishing	Ryan Hill
Aganang Gospel Music	Tshepiso Modisadife
Mpumalanga Chamber Orchestra	Zweli Mdakane
K-Cap	Edmund Mhlongo

Advisory Committee Representative - Mpumalanga	Sipho Makhabane
Advisory Committee Representative -Western Cape	Martin Myers
Advisory Committee Representative -Eastern Cape	Mbeki Mbali
Advisory Committee Representative -Limpopo	George Mugovhani
Advisory Committee Representative -Kwa Zulu Natal	Mbuso Khoza
Advisory Committee Representative -Free State	Thokozile Nogabe
Music Academic	Matlotlo Malekane
Mzansi National Orchestra	Bongani Tembe
Music Publishers' Association of South Africa (MPASA)	Moonga Mkandawire
South African Music Council (SAMIC)	Vusi Leeuw
Creative Expo	Arthur Mafokate