

Editorial Comment

The Creative Economy in Africa and the Diaspora

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1. The Creative Economy: Here comes the sun for economics

The ‘Creative Economy’ – or economic activity at the intersection of creativity, commerce and copyright – is edging ever closer to recognised stature in the realm of traditional economics [(Newbiggin, 2014); & (Nesta, 2018)]. It is connected with the sub-field of ‘Cultural Economics’, which has been in existence for some time, although it is regarded as a less important sub-field of micro-economic application. Cultural Economics has a code in the Journal of Economics Literature (JEL) classification under “Z” (along with sport and tourism) (American Economic Association, 2018), an important sign of recognition. This recognition is hard won. While the economic canonisation of the creative economy is a long way away, the arguments on its pure economic, spinoff and other social and intangible benefits are gaining strength. The growing support for the creative economy, and scholarship on it, is in particularly sharp focus as new economies at the juncture of technology, digital and business are underpinned by creative content, thinking, and problem-solving. Thus, this special edition on the ‘Creative Economy in Africa and the Diaspora’, comes

at a critical time to shine light on some of the manifestations of the creative economy in South Africa, on the continent, and beyond.

In Africa, the creative economy concept is still evolving, as is a reliable research base, particularly studies featuring economic data. Whilst the concept and analysis of the creative economy is well established in places such as the United Kingdom, Australia and Europe, where early scholarship emerged and contemporary advances in the field continue, the uptake in policy and even mainstream discussions is only really emerging now globally, and on the African continent. In Africa creative economy research is emanating mainly from South Africa, Nigeria, Kenya, Cape Verde and Ethiopia [e.g. see (Hadisi & Snowball, 2016); (Hadisi & Snowball, 2018); (United Nations Conference on Trade and Development, 2011); & (United Nations Conference on Trade and Development, 2015)].

There are also some estimates of the contribution of Africa to the global creative economy, though these are not comprehensive, and often emanate from popular and news sources rather than sustained scholarship. Due to this, Africa-wide and regional information is sparse. The seminal 2015 EY report, developed for UNESCO, ‘Cultural Times’, was the first global survey quantifying the global economic and social contribution of the industries. It found that CCI revenue generated globally accounts for 3% of the world’s GDP or a total of \$2,250-billion/\$2-trillion and created a total of 29.5 million jobs worldwide, employing 1% of the earth’s working age population, (EY, 2015). The African slice of that pie is comparatively very small, with the report outlining that in 2013 African cultural and creative industries (CCIs) generated US\$4.2 billion and created 547,500 jobs, (EY, 2015). Comparatively, estimates put South Africa’s creative economy between 1.9% and 3% contribution to national GDP [(Hadisi & Snowball, 2016) & (Hadisi & Snowball, 2018)]. According to EY (2015), the Africa and Middle East region together achieves US\$58-billion in revenues (3% of the world total) and creates 2.4 million jobs (8% of total CCI jobs). Yet, it argues that the African market is poorly structured and cultural goods are largely provided through the informal economy (EY, 2015, p. 16). Informal CCI sales in emerging countries however do account for US\$33-billion in revenue, creating 1.2 million jobs (EY, 2015, p. 16).

Globally creative economies can contribute very little or as much as 10% to national GDPs. South Korea (9% to GDP), Brazil (10% to GDP) and interestingly Russia (6%) feature quite highly. China and the USA are on par at around 4% contribution to GDP (with actual data and figures ranging widely); and in

Africa, South Africa and Ethiopia and between 2.5% and 4.7% respectively. The recent United Nations Conference on Trade and Development Creative Economy Outlook and Country Profile Report (United Nations Conference on Trade and Development, 2018a), demonstrates the lack of regional data coming from Africa. The only recent available and consolidated data comes from the Southern African Development Community (SADC), which shows the region having less than 0.1% or USD \$777 million, of the world's market share of the export of creative goods in 2015 (UNCTAD, Creative Economy Outlook, 2019).

TABLE 1: CREATIVE GOODS: EXPORTS BY REGIONAL ECONOMIC GROUP, 2002, 2015

	Value (in millions of \$)		Market share (%)
	2002	2015	2015
America			
FTAA	32.403	54.145	10.4
NAFTA	30.205	52.139	10
MERCOSUR	829	1.010	0.2
Asia			
ASEAN (10)	9.347	23.462	4.5
ASEAN (3)	49.021	198.600	39.6
Africa			
SADC	573	777	0.1
Europe			
EU27	85.119	170.783	32.7
International			
ACP	1.173	903	0.1
LDCs	100	299	0
SIDS	89	155	0

Source: UNCTAD, 2018

Without reliable data it is hard to conclusively say what Africa's contribution is. However, with a young population and digital transformation – ecommerce, new infrastructure, expanding middle classes, and resource hungry investors – the African market looks as attractive as ever [see (EY, 2015)]. Here lies opportunity. But also challenges. These include copyright, intellectual property, access, education, and training alongside the well-known existing difficulties of doing business on the continent. If African countries could develop their creative economies to come on par with the global contribution, or reach around 2-3%, the African creative economy could bare fruits on promises for jobs,

sustainable growth, inclusivity and employment. In addition, the African Union Agenda 2063 has as Aspiration 5 ‘Africa with a strong cultural identity, common heritage, values and ethics’ included in its focus areas (African Union, n.d.). Priority area 3, within this, is the promotion of cultural heritage, creation of arts and businesses, which includes demand-side interventions (such as local content promotion) and supply-side support (investment in vocational institutions and the development of micro-cultural enterprises). This indicates there is long-term strategic acknowledgement of the cultural and creative economy at a regional level, however unclear policy and practice pathways are. It is a positive step.

2. Understanding the Creative Economy

The creative economy concept is dynamic and its expression is neither new nor a trend, though it has become a buzzword and over the past 15 years, increasingly linked to creative activities and associated technology, digital transformation and innovation. The ‘creative economy’ concept was popularised after John Howkins (2002) published his ideas on creativity and innovation in his book *The Creative Economy: How People Make Money from Ideas*, (Howkins, 2002). According to him, the term “creative economy” refers to the socio-economic potential of activities that trade with creativity, knowledge, and information.

Definitions are difficult because there is often conflation. In this case, the creative and the cultural are often merged when they represent two distinct but related concepts. Then, the ‘creative economy’ and the ‘creative industries’ are also used interchangeably, and often with reference to ‘cultural industries’. UNCTAD, which developed the ground-breaking seminal *Creative Economy Reports* (2008; 2010), says that the creative economy is an evolving concept which builds on the interplay between human creativity and ideas, and intellectual property, knowledge and technology. “Essentially it is the knowledge-based economic activities upon which the ‘creative industries’ are based. The creative industries – which include advertising, architecture, arts and crafts, design, fashion, film, video, photography, music, performing arts, publishing, research & development, software, computer games, electronic publishing, and TV/radio – are the lifeblood of the creative economy. They are also considered an important source of commercial and cultural value” (United Nations Conference on Trade and Development, 2018b).

Conversely the cultural industries feature cultural tourism and heritage, museums and libraries, hobbies, sports, and outdoor activities. A neat categorization is that the creative industries produce work that can be protected

by copyright, and the cultural industries produce symbolic meaning. The goods and products by the “core” cultural sector (as shown in the Figure I below) create symbolic meaning, but are not necessarily market-orientated or commercial; examples of which are museums, libraries, heritage sites, experimental fine art. These have significant public good values (externalities), which is often why they garner funding and government support. The creative industries use some of what the “core” produces to develop marketable products and services, including design, architecture, video games, advertising, some film, for example. Their outputs are not necessarily symbolically meaningful, but they do generate intellectual property. Arguments for their support are thus around the job creation and economic growth potential.

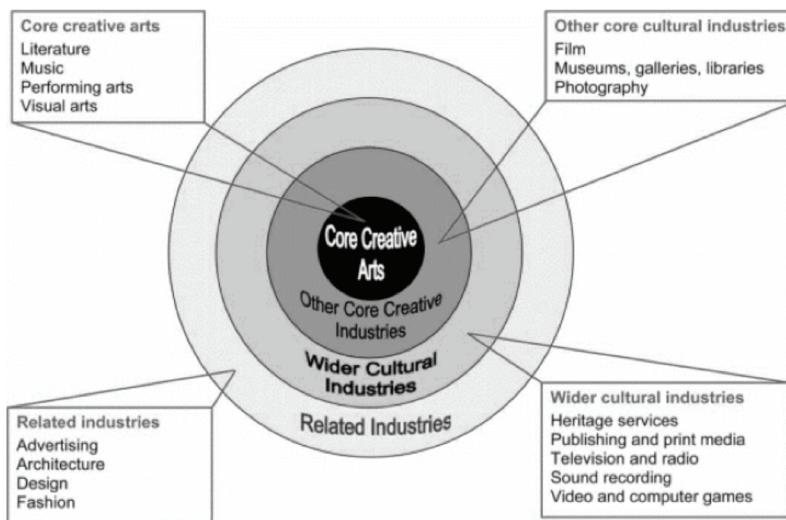
In popular and academic discourse the cultural and creative industries are often grouped as one under the acronym ‘CCIs’. Equally, the ‘cultural’ and ‘creative’ economy terms are often used interchangeably despite their distinctive, but connected symbolic-copyright relationship. For this special edition, the focus is largely on the creative industries and the overall sum of their activities on the creative economy, though the softer impacts of the creative work are also explored in some papers. In this context, the United Nations Development Programme (UNDP)’s creative economy definition is useful, and focuses on creative assets potentially generating economic growth and development, (UNDP, 2010). According to the UNDP (2010), the creative economy:

- Can foster income generation, job creation and expert earnings while promoting social cohesion, cultural diversity and human development;
- Embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives;
- Is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy;
- Is a feasible development option calling for innovative, multidisciplinary policy responses and inter-ministerial action; and
- At the heart of the creative economy are the creative industries, (UNDP, 2010).

Similarly, the British government’s definition of the creative industries as “those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” is central to our understanding.

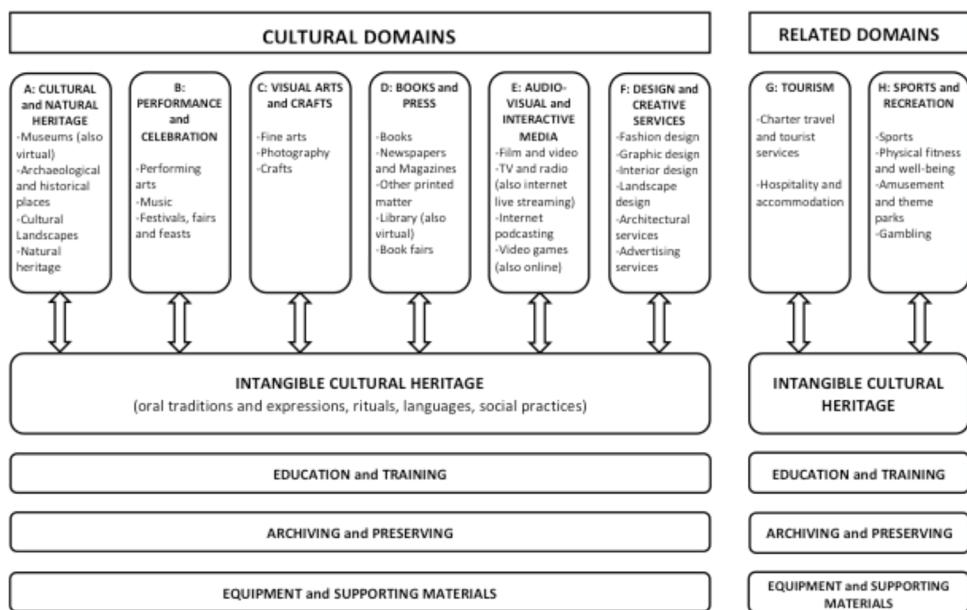
Underpinning these definitions is Throsby's 'concentric circles' model, a generally accepted framework for understanding the relationship between the creative arts and cultural industries (Throsby, 2008). In this model, "core creative arts" – such as literature, music and the performing and visual arts – are understood as products and endeavours most closely associated with artistic creativity and innovation. Moving from core to periphery, the proportion of commercial content relative to cultural content increases, but these creative industries still draw on the core creative arts for material, skills and innovation. In terms of measurement, Throsby (2008) argues the economic contribution of the creative artist should also acknowledge their input into the creative industries.

FIGURE 1: THROSBY'S CONCENTRIC CIRCLES MODEL OF THE CULTURAL INDUSTRIES (2008)



Measurement is important when attempting to assess the value of contribution, economic or intrinsic. To this end, the UNESCO's Framework for Cultural Statistics (2009) has been critical in establishing a framework, (see Figure 2), for measurement, though with a bias toward the cultural economy, (UNESCO, 2009). It outlines the interaction of cultural domains with related domains, and also intangible cultural heritage and supporting industries such as education and archiving.

FIGURE 2: UNESCO's FRAMEWORK FOR CULTURAL STATISTICS (2009)



3. Creative Economy snapshots from across the African continent

Recent anecdotal and academic country level data is available. UNCTAD has just published its latest *Creative Economy Outlook Report* (2018) with data on the trade in creative goods of 137 countries featuring, where available, data on the creative economies of some African countries, though it is retrospective for the trade in creative goods for the period 2005 to 2015, (United Nations Conference on Trade and Development, 2018a).

On the continent, South Africa's creative economy is among the most well-mapped thanks to the establishment of the South African Cultural Observatory, a dedicated research centre tasked with analysing the country's CCIs and arts, culture and heritage sectors. In 2014, a consultancy report on the mapping of South Africa's creative industries, (DAC, 2014-2015), found that South Africa's creative economy sector contributed over R90.5-billion to the national economy. This comprised 2.9% of the GDP in 2013/14, exceeding, for instance, the contribution of agriculture to the GDP (2.2%). The sector also contributed R24-billion in taxes in the 2013/14 period. The SACO's Cultural Employment in South Africa paper which found that CCI jobs made up 2.93% of jobs in the country in 2014, slightly more than mining (Hadisi & Snowball, 2016). A

follow up report, (Hadisi & Snowball, 2018), based on 2015 Labour Market Dynamics Survey from Statistics South Africa found that:

- In 2015, cultural occupations made up 2.52% of all employment in South Africa;
- The cultural sector also provided employment in non-cultural ‘support’ occupations for 4.2% of all those who had a job in 2015; and
- Altogether, the ‘Cultural Economy’ accounts for an estimated 6.72% of all employment in South Africa.

Then, information from other African countries is often anecdotal and popular. For instance, 2018 news emanating from Nigeria’s arts and entertainment creative sector, via Financial Quest, showcases the performance of the Nigerian film sector, (Financial Quest, 2018). According to industry sources, an average of 50 films are released on a weekly basis and demand for Nollywood movies extends well beyond Nigeria. Nollywood is said to be the second largest employer in Nigeria after agriculture. According to the article, in 2016, the Nigerian economy fell into recession, but while the oil sector struggled, the creative industries saw impressive growth. The music industry alone is expected to double present-day revenue by 2020 to approximately \$86m.

In Ethiopia, a 2014 World Intellectual Property Organisation (WIPO) report, ‘The Economic Contribution of Copyright Industries in Ethiopia’, shows this sector contributing about 4.73% to the annual GDP (Belete & Tadesse, 2014, p. 7). Belete and Tadesse (2014) noted that in 2012, the three largest sub-sectors – press and literature; radio and television; and music, theatrical production, and operas – accounted for 78.72% of the total contribution of core copyright industries in terms of gross value added. Motion pictures and video contributed only \$30 million to the country’s GDP in 2012, constituting 5.54% of the total share of the core copyright industries. The official data also revealed the current low level of development of Ethiopia’s software industry (Belete & Tadesse, 2014, p. 7). “The copyright industries also provided jobs to 240,287 persons, which is 4.2% of the urban population employed by the different economic sectors” (Belete & Tadesse, 2014, p. 7). According to Belete and Tadesse (2014), the copyright industries contributed more to the country’s GDP than mining and quarrying, hotels and restaurants, financial intermediation, education and health, and social work; and also performed better than mining and quarrying, transport and communication, and financial intermediation in terms of employment generation (Belete & Tadesse, 2014, p. 8). This data led WIPO to argue that

copyright-related issues are highly relevant and important for Ethiopia, due to their enormous potential for economic development (Belete & Tadesse, 2014, p. 8).

In neighbouring Kenya, the 2014 Kenyan Economic Survey showed that arts, recreation and entertainment segments employed close to 67,000 Kenyans in 2013, and the industry grew by half a billion shillings to Shs 3.4 billion (USD \$33 million) in 2013, (Kenya National Bureau of Statistics, n.d.). Kenya's creative sector is said to be worth about Shs 200 billion (USD \$2 billion). Kenya Association of Manufacturers values the local fashion design and apparel retail markets at \$330 million annually. However, a 2015 study by Tom Fleming, "Scoping the Creative Economy in East Africa", points out that Kenya has previously failed to tap on its vast creative treasury, (Fleming, 2015). The establishment of the HEVA Fund may support creative industry growth in Kenya and East Africa in the future (*Edge Magazine*, 2016).

4. Special edition on Creative Economy – a summary

African creative economies represent an opportunity for growth, development and investment. However they are tied to world markets, and with a limited but expanding African middle class, a strategy to grow local and regional demand to offset global variances seems reasonable. Yet, Africa's challenges – especially transport, infrastructure and logistics – remain a handbrake for all industries. As such, the African creative industries could be positioned to pioneer digital solutions and delivery of creative goods and services, fast tracking the development of these industries. However some entrenched pathway dependencies may enable the already dominant creative economy superpowers such as the UK, USA, China and Europe, and position them for greater growth while Africa trails. Understanding and scholarship on the creative economy is therefore important. This special edition on the creative economy features seven papers which discuss the universal to the particular of the creative economy in operation, mainly in South Africa, but with policy and practice implications for the rest of the continent.

Serge Hadisi and Prof Jen Snowball take a bird's eye view of the South African creative economy and employment in the cultural and creative industries in their paper. Using data from the Statistics South Africa Labour Market Dynamics South Africa (2008 – 2015), this is the first South African study to use the UNESCO classifications to define cultural employment. The analysis investigates the question of diversity and transformation in the CCIs, as

well as the growth rate in cultural employment compared to other occupations. Results show that cultural and creative occupations contribute significantly to employment in South Africa, making up 2.5% of total employment in 2015.

In ‘Breaking through the morass: Narratives of resistance and persuasion by individuals in creative economy careers’, Prof Willie Tafadzwa Chinyamurindi digs deeper than employment and explores the career development processes of people involved in creative work within the creative economy in South Africa. He finds the presence of pervasive structural constraints which need to be managed at different stages of a creative career. Based on the findings and narratives generated from this work, suggestions are made that affect individuals within the creative economy and for those who counsel these individuals.

From labour to overall mapping, the nature and expression of the creative economy is crucial. This is reinforced by data from Tazleen Jooste and JC van der Linde who look at the mapping the spatial distribution of public funding for arts, culture and heritage in South Africa, where the use of geographic information systems (GIS) to analyse spatial data from multiple sources is relatively rare in cultural research, (Jooste & van der Linde, 2018). This paper demonstrates how creative hotspots can be identified using data from the Mzansi Golden Economy (MGE) funding programme between 2015 a 2017. Findings show that creative industries tend to cluster around larger cities, as does the allocation of public funding. However, some funding categories, such as the Provincial and National Flagships category, are much more geographically dispersed, contributing to equitable cultural funding in South Africa.

Spatial planning for the CCIs is not a new concept. This is something that Prof Richard Haines and Dr Andre Gouws explore, by looking at the question of the institutional promotion of the CCIs in South Africa, arguing for formal, systematic CCI clusters. A formal CCI cluster initiative is proposed, on a multi-agency and public-private partnership basis, with the Departments of Trade and Industry and Arts and Culture as central players, looking to reinforce the international trade and leverage existing and new incentives.

Taking spatial expression to the city level Dr Alude Mahali explores how the CCIs have a hand in dismantling Apartheid’s spatial violences and the potential to foster a renewed sense of belonging and good citizenship in public spaces through three case studies: the Maboneng Township Arts Experience (Johannesburg and Cape Town), the Infecting the City public arts festival (Cape Town) and the Open Streets initiative (Cape Town). These map how people interface with their cities and exemplify the potential role the CCIs play in

mediating feelings of belonging, promoting access and supporting socio-economic development.

Lastly Munyaradzi Chatikobo's paper then explores the realm of cultural policy as a tool to grow and support the CCIs. He notes that most local, provincial and national arts and culture programmes in South Africa detach themselves from socio-economic programmes. The separation relegates the creative industries to the periphery limiting their opportunities for economic growth. Using the concept of 'implicit cultural policies' and other related concepts this paper explores economic opportunities for creative industries 'beyond creative industries'; the challenges of the South African cultural policy framework which could be impeding potential economic growth of the creative and cultural industries and recommendations towards realisation of opportunities missed by the creative industries.

Biographical notes

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Chris Tapscott is an Emeritus Professor and former director of the School of Government at the University of the Western Cape. A sociologist, he has, over the years, undertaken extensive research on behalf of ACCEDE on issues relating to citizenship, participatory democracy and social exclusion, social movements, and the limitations of the local state. Recent work has focused on the prospects of a democratic developmental state, and on issues of governance and accountability in BRICS states.

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