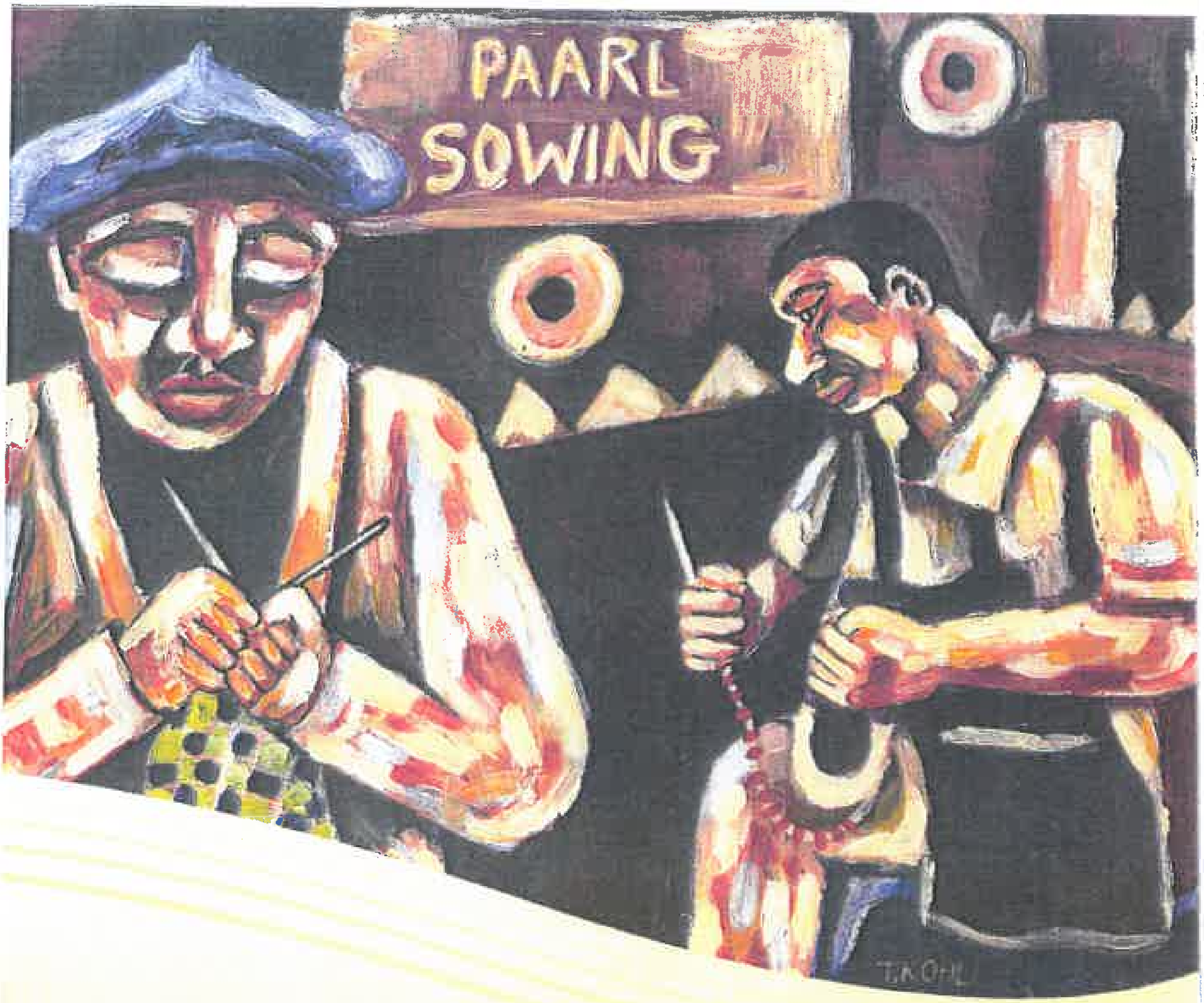

Part Two

PART TWO

The MEDS is evaluated and the OC summary assessments of all of the research reports completed in 2007 are provided hereafter.

Chapter 5: Evaluation of the MEDS Research

This Chapter begins by outlining the research process. One important role of each member of the OC was to engage with the researchers and their government counterparts and to make their own assessments of their researcher's work, particularly with regard to the policy proposals advanced. The OC summary assessments of all of the research reports completed in 2007 are provided here.

1. The Research Process

The MEDS process engaged a number of researchers who possessed skills and knowledge of their particular sectors. Within a very limited time frame, the researchers were asked to review the state of their area, examine current policies and make proposals for future policy. With regard to the latter, researchers were encouraged to think broadly and to outline policies that could be implemented by the PGWC, and how the PGWC might engage with national policy. The researchers were particularly asked to 'think out of the box', and to propose new policy directions where appropriate. Researchers were asked to address the question of whether there is evidence to suggest that there is substantial growth and employment potential in this area and if so, how the Western Cape could exploit this potential.

Researchers were also asked to prioritise different proposals made and, where possible, to provide more specifics, including broad costing. They were, however, not expected to detail design or implementation of policies. As a result, while there is considerable variation in the detail provided, the proposals made by the researchers are usually cast in fairly general terms. Detailed policy design, including costing and implementation plans, will require considerable additional work to be undertaken by the DEDT and in close interaction between the relevant departments.

During the research phase, the teams were encouraged to interact with industry and other stakeholders, relevant provincial and national government officials, and members of the OC (termed the Scientific Community during the first phase of the MEDS). Notwithstanding these interactions, the proposals cannot be viewed as 'consensus statements', but rather as suggestions needing further refinement.

In its evaluation of the research reports, the OC, provides a summary of the main thrust and an interrogation of the quality of the research report. This interrogation pays particular attention to the conclusions and the policy recommendations in each report and provides an assessment of whether the policy conclusions are supported by the evidence and analysis contained in the report. Taking cognizance of the totality of the extensive MEDS research and the limited resources available, the OC further assess how significant policy action in this particular area is to the province.

2. Evaluation of the Informal Economy Retail & Tourism Report

The informal economy makes an important contribution to the economy of the Western Cape. In 2006, the MEDS informal economy study found that one out of ten people working in the province worked in informal enterprises. The objective in 2007 in undertaking a specific sectoral study of the informal economy – namely retail trade and tourism – was less about quantification, as it was in 2006, and more about qualification. We wanted to know how individuals and micro-enterprises operate in this sector, which factors affect firm conduct, whether we could identify general characteristics that identify high-performing micro-enterprises, and whether we could identify potential recipients for policy support.

As such, a careful qualitative study had to be conducted focussing on interviews with firms in specific geographical regions of the provincial informal economy. The study encompassed 163 high street traders in three locations: i) Site C, Khayelitsha, Kuwait taxi rank precinct, ii) Mitchell's Plain taxi rank precinct, and iii) the Wynberg station / taxi rank precinct. A further 80 sector businesses were interviewed. The consultant engaged with 64 entrepreneurs to gauge their policy requirements in three workshops, one for crafters, one for tourism businesses and one for hospitality enterprises (shebeens and taverns).

The non-random methodology employed means that we cannot generalize the findings of this study to the informal economy as a whole. However, this was not the intention. If the MEDS is to establish clear policy recommendations for the informal economy, it has to understand how the informal economy is differentiated: in terms of the heterogeneity across the province (urban, rural, etc.), in terms of the heterogeneity within a single geographical unit such as a township (and a taxi rank within that township, for example), and in terms of the heterogeneity of their linkages to different subsectors of the formal economy.

The informal economy study of 2007 can be seen as our first attempt to populate this matrix of information requirements with details. In order to develop a complete understanding of the informal economy, we reiterate the call that was made in 2006 for an informal economy survey the likes of which have been undertaken in Kwazulu-Natal and Gauteng.

The research generated four main conclusions:

- **Informal sector advantages**: Informal sector businesses emerge through entrepreneurial risk taking; a process that involves trial and error as the entrepreneur explores the market opportunities. Once trading, the business evolves, but does not (necessarily) become formal.

- **Entrepreneurial initiative and social capital**: Informal business development is not contingent on direct institutional training or enterprise development support.

- **Reciprocal gestures**: Micro-businesses do not create employment, but instead provide a means for skills acquisition and commonly feed opportunities down-stream, facilitating growth in micro-enterprises.

- **Business realism**: Informal sector entrepreneurs start their business with seed capital derived mainly from employment or family loans and utilize accessible and affordable infrastructure / equipment, including their homes, running their business on a cash basis.

It is important to state that one of the defining features of the informal economy is the under-development of physical infrastructure. Therefore, continued local investment associated with upgrading services and other public goods provision must remain at the top of the policy agenda. In combination with this general policy direction (which will always provide the most far-reaching benefits to everyone living in the informal economy), the provincial government must also develop specific policies aimed at targeting:

- Establishing an appropriate policy framework to guide initiatives based on a set of principles that are transparent and well researched;

- Fostering an enabling business environment by, for example, reducing discrepancies between provincial and municipal approaches to informal enterprises;

- Creating opportunities through local economic development, including everything form zoning issues to assisting informal enterprises market their services;

- Re-focussing business support services by, for example, providing training, utilising public-private partnerships, and appropriate mentoring programmes;

- Integrate micro-enterprise development within existing sector programmes.

3. Evaluation of the Music sector report

The research reviewed the national and international policy context. It argued that current international market conditions favour niche music (music classifiable as "World Music") over generic mass-appeal 'pop'. There is also rapid rise to dominance of digital distribution in the most lucrative export markets. The industry business model has historically been one of vertical integration, where the four giant labels who dominated the industry (85% market share in the USA, 70% in the rest of the world) decided on distribution and airplay – 'creating' hits and artists. However the music industry value chain has been profoundly changed and the advent of digital music has lead to the steady erosion of the power of the major labels worldwide. Both unit sales and dollar revenues of the majors are showing a steady downward trend. However the industry remains viable and indeed more profitable for individual artists, and new gatekeepers who control wireless access and aggregate music for onward sale to digital music shops. This creates a great opportunity for a minor player in the music industry – such as the Western Cape music industry – to benefit economically. The keys to success are having a high quality export product, and the necessary access to bodies that negotiate rights and royalties.

The music industry is an industry with low barriers to entry, with potential to create a high number of quality jobs, e.g. for sound engineers, events managers, and musicians. The fundamental market imperfections of the industry globally are due to linkage failures – e.g. seasonality of employment, lack of airplay and inadequate live performance venues. International experience suggests that information creation and dissemination (including strong interfaces with education) are key to their success. Strengthening the interface with education both supports the industry's knowledge base and mitigates seasonality.

The research argued that the Western Cape music scene is well situated because it is rich in high quality music which is rooted in local cultures. Therefore real opportunity existed for South African indigenous music traditions. There are three areas of economic potential:

- local (live) performance;
- music and heritage tourism; and
- recording (especially to reap the opportunities presented by digital music distribution).

The emphasis should be on export markets, both for its tradeability advantages as well as to accelerate the process of learning. This requires positioning to take advantage of the rise of digital distribution (even in underdeveloped communities in the Western Cape), inculcating a culture of rights registration and claiming, mitigating the effects of seasonality by identifying supplementary employment opportunities, and lobbying at national level for the refinement and enforcement of local music airplay quotas.

Performance: The research stressed the importance of live performance which functions as a pathway to a recording career, acts as a quality-control process, and is a profitable product in its own right. It suggested the following policy mechanisms to achieve this: strengthening information linkages at various points in the music profession hierarchy, from one-stop digital music information centres, encouraging spatial industry clusters, supporting and extending the 'Cape Mic' industry networking initiative, developing focused capacity development initiatives for musicians and promoters, equipping existing spaces (multi-purpose community centres, school halls) with the resources to serve as occasional local-level performance spaces, and lobbying for more effective implementation of local music airplay quotas.

Musical and Heritage Tourism: Tourism is a large income earner for the Western Cape, and a significant percentage of tourists have an active interest in cultural, historical and heritage tourism. At a policy level local music heritage tourism can be developed in the following areas: live music (especially festivals), custom developed music theme tours, and the Cape Minstrel Carnival. The study argues that the first key element in underpinning heritage tourism as a driver of music industry growth is marketing information. Improving the music focus of websites, leaflet and map information, and music information presented at tourism events will be neither expensive nor difficult, since the history is already well researched. This can be done through: Creating a centrally coordinated information system, and training music promoters and musicians on how to send information to such portals. Creating tourist information that showcases music, culture and heritage, with background information, suggested music trails, etc. The second key element identified refers to skills building. Community-based and formal training in basic marketing skills such as identifying a target audience, choosing marketing channels and understanding the costs/benefits of different marketing options will benefit both local communities and tourists. Training for township-based tour guides and service providers is also important. Training should not only include subject knowledge, but also logistical skills like transportation arrangements and time keeping.

Digital Recording and Distribution: Digital downloads are profitable and have upended traditional music business models and value chains. This has opened far broader export marketplace opportunities to niched 'world music' products. Dominant business and technological models have not yet been established which provides opportunities for first movers, but South Africa lags behind in respect of technology and digital readiness. To ameliorate this, the report recommends a 'fast follower' strategy of developing readiness through education and information, and forging relationships with international players. The Western Cape music industry is currently not well organised, and does not speak with a united voice. In isolation, the various players will not be able to address the rights and royalty issues crucial to making digital music downloads profitable for local musicians and independent labels. The industry needs to organise locally and participate nationally with a united voice.

Recommendations: The three principal recommendations of the report are:

1. focusing on indigenous music as a niche for commercial development
2. viewing digitisation as an immediate export opportunity
3. setting up a music body to:
    - create a hub for information exchange of events in the music industry
    - negotiate rights and royalties for Western Cape musicians and independent labels
    - integrate the industry at all levels, e.g. artists, labels and services/support industries.

These recommendations are supported by the Oversight Committee. Since a major challenge in writing the report has been the shortage of reliable data, it is also recommended that the initiatives outlined above are accompanied by data-gathering processes that can support future economic planning.

4. Evaluation of the Spatial Dimension Report

The MCA report, entitled "Spatial Dimension of the MEDS", is to be seen in the context of the Department's endeavour to improve its analytical grasp of industrial policy issues outside of the Cape Town metropole. The report was commissioned in part in order to explore the feasibility of a broader, more systematic engagement with growth and job creation opportunities in Cape Town's hinterland.

The MCA team was given the task to engage in depth with the economic reality in three municipalities in the Eden District, namely George, Knysna, and Bitou. More specifically, MCA was expected to identify economic sectors with above average growth potential and analyse what sort of market failures impeded economic activity from fully realising this potential. The remit also included the mapping of the identified sectors so as to facilitate spatial planning in the area.

MCA in essence made use of two types of data to undertake the study. First it analysed regional output and export data in order to determine the size and growth trajectory of economic sectors over the past decade. This allowed the team to differentiate between more and less important economic activities. Second, it surveyed and selectively interviewed companies in these sectors in order to gain a micro perspective on opportunities for and constraints on growth. In addition, the team viewed relevant local policy documents and spoke to other stakeholders, primarily in the public sector.

The first part of the analysis resulted in the identification of the agroprocessing and wood processing sectors as harbouring significant growth potential. The second part yielded responses from some two dozen firms from across the value chain.

The study concludes with separate recommendations for each sector. The character of many recommendations is not such as to be actionable by the Department. For example, the recommendation to increase access to agricultural land clearly falls outside the responsibility of the Department.

4.1 Strengths and weaknesses

The strong point of the study is that it directly engaged with firms. This kind of primary information is always hard to get but is also extremely useful.

The study also has a number of weak points. On more than one occasion the team capitulated in front of data sources that did not lend themselves to easy interpretation. For example, although the department provided the team with access to RSC levy data, this information was not used at all, the reason being alleged but not further elaborated internal contradictions of the database. This is a pity because it is totally unclear whether the alleged problem was a temporary glitch or a systemic fault. Consequently it is not possible for the Department to evaluate the feasibility of RSC levy data use for the analysis of other-municipalities, let alone the Province at large.

Also, the firm analysis lacks a minimum of critical distance. Statements of managers and owners are taken at face value even though they may of course simply reflect rent-seeking behaviour. For example, this concerns a lament about import competition. Globalisation does of course affect companies in the Eden Municipality, and some likely negatively. Firms can react defensively but they can also adapt to changing markets through investments in new technology and the like. This dimension, unfortunately, remains rather foggy.

Finally, the report occasionally misses the bigger picture. For example, it treats demands by the furniture industry for more local wood production as though the Western Cape were awash with water which of course it isn't. In other words, opportunity costs of recommendations are neglected and trade-offs not elaborated on. This weakens the analytical insights of the study and, thus, its usefulness for policy practice.

5. Evaluation of the World Cup Linkages Report

There are two parts to this report. The first part is an assessment of the potential impact of the 2010 FIFA World Cup on the provincial economy. The second part makes proposals to allow provincial government to support business, particularly small business, to gain maximum exposure to the commercial opportunities offered by 2010.

As regards the potential impact on the provincial economy, there are a very large number of unknowns that make calculating accurate figures impossible. This report draws on two sources to develop its estimates – first, from existent studies and secondly, from comparative data from other recent World Cup events and from comparable sporting events. The best estimates suggest that the event is likely to raise provincial GDP by an average of 1 per cent over the period 2006 – 2010. In terms of employment, during the same period, 160,000 direct job years and a further 100, 000 indirect job years would be created.

This is a rather moderate impact – and certainly much lower than the perceptions of many of the public and indeed of business proprietors. While the impact will be uneven and some sectors will clearly receive a much more significant boost, the impact on business in general will not be major. This suggests strongly that business investments in general should be guided by overall and longer term considerations and not by expectations of any major short-term expansion in demand generated by 2010.

While there are a number of imponderables that could modify these estimates, for e.g. which teams will play matches in Cape Town, this is not likely to significantly alter the overall picture. The MEDS recommends that this forecast be made available to the general public and to the business community, making clear the sources and the assumptions on which it is based.

The report provides detail of the major categories of demand such as construction, ICT and media, accommodation and transport. Apart from estimates of the likely demand, derived from secondary sources where those are available, the report also outlines the main procurement channels. Finally, the demand is periodised – the period leading up to 2010; 2010 event and post-2010. Of value is the listing of procurement requirements on the part of FIFA, in particular. Again, this is not generally well understood by local business. There is value in making this information available to local business.

The second part of the report proposes an "instrument" designed to allow local business, and particularly small business, to gain maximum benefit from 2010.

This begins with an assessment of current support activities. The authors find that currently there are no comprehensive mechanisms that link all purchasers with the potential market. At present linkages are being determined principally at a national level and there is a lack of correspondence and definition of roles as between national and provincial spheres. There is considerable confusion, particularly in relation to accommodation. There are some initiatives to support SMME supply linkages – e.g. Red Door and SEDA and some sector initiatives (e.g. in craft and tourism). However, these mechanisms are probably not very effective at present. Firms and enterprise associations are expressing considerable frustration at accessing information and are very sceptical as to the opportunities presented by 2010. Overall, there is little doubt that the situation is currently very far from optimal. The conclusion seems quite clear: there are very few, if any, effective mechanisms at present that provide a linkage between firms and the market opportunities presented by 2010. Unless this issue is addressed, local firms, more especially smaller firms, will only secure a very limited benefit from 2010.

The report provides considerable detail as to practices adopted to link businesses to market opportunities in a variety of countries. A number of lessons seem clear. *Inter alia*, there needs to be a high level of cooperation and partnership between government and business, with the core budget funded by government. Rather than focused exclusively on the event, attention should be paid to longer term opportunities. The key objective is to support firms so that they can compete more effectively through information, guidelines, training, service and quality improvement. In the main,, initiatives drew on widening the work of existing institutions rather than creating institutions *de novo*.

These observations informed the report's proposal for a Support Centre. The suggested name for the proposed centre is the 2010 Cape Business Connection. The report provides clearly defined objectives; activities; timelines; specified customers; operational channels and linkages with existent organizations. The report goes on to specify a modus operandi – how both buyers and sellers would become aware of the Centre; what value it would offer and how one would access support. The report then provides some detail on the resource requirements.

There is no need to summarise these details here.

2010 presents a number of very difficult challenges. No single mechanism is likely to overcome all of the challenges and obstacles. However, despite this, the authors reach a clear conclusion namely that provincial government should "...put a one year pilot project out to tender, with tight reporting to DEDT and a coordination committee involving Host City and Provincial 2010 coordinators, as well as SMME support entities."

Timing is critical. If the Centre is to be linked to 2010, it would need to be operational by mid-2008. If this cannot be done, the project should be delinked from 2010 and established as a pilot to link SMMEs to government and corporate contracts more generally.

This is a comprehensive and persuasive report. The report finding that the situation with regard to support for firms to access 2010 related market demand is currently very unsatisfactory is convincing. The proposed solution is based on considerable interrogation of comparative experience combined with a detailed assessment of the local situation. The report has the strong virtue of having entailed considerable engagement and consultation with key stakeholders, business associations and firms.

In brief, the report, does, in our view, provide a convincing way forward. There is no reason, and indeed no time, to suggest that any other study be done. If the provincial government is to do anything significant in this area, this report should form the basis for that initiative. It should also be noted that the report is suggesting, at this stage, initiation only of a pilot project. It may well be that some further workshopping and testing of the proposed project should be undertaken – both to assess its overall viability and to give some more definition to its operation – but our recommendation would be to move forward on the basis proposed in the report.

As the authors of the report stress – time is of the essence. If something is to be done, it will need to be initiated very soon. The view of the authors that if it cannot be done soon, a mechanism to link SMMEs to government and corporate contracts should still be established but delinked from 2010 is however more questionable. 2010 provides particular opportunities and challenges and it is clear that currently the linkage mechanisms with regard to the potential market demand generated by 2010 are very unsatisfactory. The case for a more general and longer-term linkage mechanism has still to be made and would need to be further investigated.

6. Evaluation of the Desk Top Study of the International Experience with Respect to the Creative Industries

This study confirms that the creative industries are seen globally, in both developed and developing countries, as having considerable potential to raise output, employment and the emergence of new small businesses. While data is scanty and consistent time series unavailable, there is evidence that both output and employment and business growth in this sector, in a number of localities, exceeds national growth rates.

It is also evident that creativity and creative development has significant spread effects – the success of one feeds into and reinforces the possible success of others. As such, akin to innovation, this is an area where market failure is integral and widespread. This creates opportunities for government intervention. However, we still know very little about what works best. The international experience covered in this report – and the examples of Sao Paulo and India are probably the most instructive – provide some clues as to what has been attempted, but we lack systematic evidence for the impact that such policies have had in enhancing output, employment and new business formation.

We should note that the international experience is that policies are effected and implemented at national levels, but there are also many examples of policies effected at the city and the regional levels.

The report makes 5 policy recommendations.

The first is for a mapping of the industry and its various sub-sectors. The proposal is that data gathering be complemented by asking respondents to specify needs and challenges. There is little doubt that we have no effective data and that such data would be very useful. However, collecting this data will be expensive and time consuming and the costs will have to be offset against the potential advantages. In the first instance, we should perhaps focus on mining existent data sources – statistical complemented by interviews with representative bodies which can give some indication of employment and earnings.

The second recommendation is the establishment of a formal creative industries body. This is likely to be very difficult and it is very questionable whether one overarching organisation is possible, given very divergent sub-sector interests. A creative approach may be for the provincial government to publicise the existence of a small fund or even of a location or building for which any group of creative people may bid – artists, musicians, performers etc. An "open window" approach may be a best first attempt to sew the seeds of some collective action in this area.

The third recommendation is to raise the profile of the creative industries. This would include publicity, arranging events and the development of a directory. This industry, perhaps more than any other, is handicapped by information lacks. A major problem is to bring "products" to the attention of the consuming public. There are indeed a variety of ways in which government can help this process – perhaps particularly by making information available to foreign tourists. This requires further examination, but it will be important not to assume that government itself should undertake such activities. In general, it would be more effective to see government facilitating private providers of information.

The fourth recommendation is to invest in business support infrastructure and other mechanism. A number of activities are listed – they include consistent and accessible internet facilities, finance services, office space, tax incentives and mentorship programmes between business leaders and creative entrepreneurs. This is a very large list. The justification for some of these is unclear and indeed unlikely. There would be no particular reason to privilege this sector by granting favourable tax relief, for example. Of particular import – and it is a strong recommendation that the MEDS has made earlier – is the importance of good IT infrastructure. A local wide area network for the Cape Town region is probably the single biggest contribution that could be made to the development of this sector.

It would be of benefit to all the various sub-sectors and indeed a good IT backbone is becoming essential infrastructure for any creative city or region.

The fifth and final recommendation is to give those engaged in the creative industries access to business and entrepreneurial skills. The following skills are recommended: business management skills, computer and internet skills, marketing, brand awareness and arts administration. In generic terms, this may well be correct. But, at this stage, in this region, we have little understanding of what skills people do have and at what level and what skills are needed. This will be an important part of any mapping exercise.

There are some omissions that need consideration. The report makes little mention of marketing and investment. With regard to marketing – provincial government needs to look at both the local market and the international market. What seems clear is that 2010 is a real opportunity to showcase to the world and a clear strategy is needed as to how to exploit this. With regard to investment – there are investment opportunities that need to be embodied in concrete business plans that can be "marketed" to potential business investors. This could be done via WESGRO.

Conclusion

The world around us is changing. The MEDS has to change as well in order to adapt to new circumstances and preserve its relevance to economic development in the Western Cape. At the national level, industrial policy has been given a new framework and some new focus, neither entirely consonant with the MEDS philosophy developed over the past four years. It will be important to engage with the national government, and especially the dti, in order to achieve a constructive alignment between industrial policymaking at national and local level.

At the same time the Western Cape is trying to understand better what its competitive advantage is. Clearly a critical aspect of its competitive advantage is the combination of knowledge intensity, cultural activity, multi-dimensional tourism, and life style attractiveness that have classified it as a 'creative' region. Whilst the MEDS has emphasised this aspect in its analysis and strategies, its precise implications for a complex industrial policy are still a matter for continuous elaboration. Given the diversified nature of the Western Cape economy, its access to global trade routes and international tourism, we can anticipate that in the future it will develop a range of new products and activities in which it has the potential to be globally competitive. It is therefore important that provincial policy remains open to such new developments.

The spectre of climate change is in some ways the most foreign and intractable issue, if only because it is so new and its ramifications are so enormous, and enormously complex. But change and adaptation to new circumstances have always lain at the core of the human condition. Climate change is not an issue we can neglect or simply leave to the environmentalists to worry about. We ignore it at our peril.

Poverty and inequality will disfigure this country and the province for a long time to come. The important question is whether things, on balance, get better or not. This, in turn, requires that we have a much firmer understanding of the dynamics that link the informal with the formal economy. It is here that the MEDS can make a modest but effective contribution to the problems facing the Western Cape.

Many challenges in a changing context – this is what the MEDS 2007 and its successor in 2008 have to contend with.

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