

Research Report

An Assessment of the Visual Arts in South Africa

Summary of Key Findings and Recommendations

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Art Source

Introduction

“For South Africa to fulfill its potential, the country needs to imagine itself as an “Afropolitan” nation, the avant-garde of a version of the African modern that is already in evidence in most contemporary African artistic and cultural forms. The country also needs to distance itself from an understanding of culture as pastness, a simple matter of customs and traditions, monuments and museums. We have to realise that culture is not yet another form of “service delivery”. It is the way human beings imagine and engage their own futures. Without this dimension of futurity and imagination, we can hardly write a name we can call ours or articulate a voice we can recognise as our own.” – Achille Mbembe¹, *Contemporary African Art: Negotiating the Terms of Recognition*

This document summarises key findings and recommendations from a major study of the visual arts sector commissioned by the Department of Arts and Culture (DAC) and undertaken by the Human Sciences Research Council (HSRC) working with a variety of partners. The project involved the conducting of an in-depth survey of over 350 artists, businesses and organisations working in the visual arts sector, together with a series of individual studies on museums and collections, education and training in the visual arts, funding, the policy and legislative environment for the visual arts and the position of the visual arts at a provincial level. The research project also involved the development of a database of over 6000 visual arts practitioners and 1200 business entities across South Africa.

The primary purpose of the project has been to present as accurate as possible a picture of the current position of the visual arts in South Africa, and to identify opportunities for growing the artistic, social and economic contribution of the visual arts in the society and economy. The report gives equal weight to the importance of each of these dimensions of the visual arts – while we have found that the visual arts plays a significant role in addressing the mandate of government in the social and economic realm, this contribution is predicated on there being an environment in which the exercise of the imagination and creative independence is nurtured and promoted. Aside from the important real and potential contributions that the visual arts make in, for example, education, public health and urban development, the core contribution of the sector revolves around the generation of compelling representations and propositions related to our understanding of who we are in a complex and rapidly changing world. The capacity of the work of artists to challenge our familiar and established patterns of perception and attitude, and to invoke both wonder and critical reflection, is fundamental to understanding the importance of the visual arts in a society composed of multiple identities, realities and ways of being in the world.

This summary proceeds through a synopsis of the key findings contained in the main report, followed by a set of related recommendations.

Overview of the Sector

The sector encompasses a diversity of activities, ranging from the production, presentation and critical reception of highly experimental, critically engaged creative work that may deploy a very wide variety of media and techniques (the so-called ‘contemporary’ visual arts), through to more conventional work that uses traditional ‘fine arts’ media and subject matter (the so-called ‘commercial’ visual arts), with a wide spectrum of activity occurring between these two poles.

¹ Mbembe, A. *African Art: Negotiating the Terms of Recognition*. accessed at: <http://www.chimurenga.co.za/page-127.html>

Partly fuelled by the unique history and contemporary realities of the South African society and economy, contemporary art in and from South Africa has achieved a significant profile globally, with a substantial number of artists being exposed on major international platforms for presentation and critical reception. In the post apartheid period, the South African visual arts have come to assume a significant position in the critical discourse on the contemporary arts, and their role and meaning in a postcolonial context. The sector has been invigorated by the emergence of a new generation of young artists, curators and entrepreneurs, who are increasingly connected into continental networks and critical forums.

The country has the most robust and structurally sophisticated visual arts economy on the continent, with an annual turnover of nearly R2 billion and a contribution of over R1 billion in added value to the national economy (R791 million of this in direct Gross Value-Added). The sector provides work and income for approximately 17 700 people in different capacities, 5 500 of these being full-time or part-time artists. The sector is composed almost entirely of small and micro-enterprises, and is largely commercially driven. While smaller than other parts of the creative industries such as book publishing and music, the economic dimensions of the sector are not insignificant, and warrant specific consideration from agencies and ministries concerned with economic development issues at a local, provincial and national level.

The sector has a highly educated workforce, with 72% of artists and 48% of employees and contract workers in businesses and organisations having qualified with a tertiary degree or diploma. There is evidence of a changing demographic within the industry, which has traditionally been largely white and middle class in profile. Based on the survey results, just over 57% of the entire workforce is black and just over 50% comprised of women. It also has a comparatively young workforce, with approximately 53,4% of people working in the sector (including artists) falling into the under-35 age group. However, while **women**, youth and black people account for a substantial proportion of employment in the sector, the senior management and ownership of businesses, institutions and organisations continues to be largely vested in white people.

The visual arts industry is overwhelming urban in character, largely concentrated in the three major metros of Johannesburg, Cape Town and Durban. Artists and businesses operating outside of these centres report substantial difficulty in developing sustainable careers and businesses, owing to their isolation from buyers, markets, skills and information. Though small in number, there are a variety of exemplary projects across the country that demonstrate the impact of the visual arts in education, urban and rural development, public health and job creation.

The report notes a lack of effective coordination in governmental engagement with the sector. Significantly, from the survey of business and organisations in the sector conducted as part of this study, the most frequently cited major obstacle to business and organisational development (from a list of 35 possible issues) is the 'lack of industry promotion from government'. While there have been some significant initiatives and investments made within some of the metropolitan municipalities and provinces, local, provincial and national government interactions with the sector have largely occurred in isolation from one another. The coordinating and policymaking role of the national department has on the one hand historically been confined to the resourcing and arms-length oversight over a set of institutions inherited from the colonial and apartheid period, and ad-hoc investments in some significant individual projects and initiatives on the other. The need for a more systematic engagement with the industry as a whole and the harnessing of the

complementary roles of other national ministries and local and provincial government departments and agencies represents a key focus of the recommendations attached to this report.

The industry perception of disassociation from government also however needs to be balanced against the somewhat informal and unregulated character of the industry itself. Alongside the need for more coherent engagement with the sector on the part of government, there is a complementary need for industry organisations and artist associations to present a more coherent face to government, and consideration needs to be given to how these organisations can be most effectively resourced to do so without compromising their autonomy and independence.

The report proposes a set of key principles, or cross-cutting considerations, informing and shaping recommendations related to the development of the sector. Five key overarching principles are proposed:

- Regard for the core values which drive activity in the sector in the formulation of any governmental engagement or intervention within the sector: innovation, experimentalism, independence, flexibility and tolerance.
- An approach to governmental engagement which achieves a balance and integration between a concern for the intrinsic value and meaning of the visual arts and the more instrumental applications of the visual arts in education, health, urban development and so on.
- Recognition of the importance of building connection and synergy between the urban centres of the industry and the less-resourced and more rural regions of the country.
- A commitment to achieving greater equity in the sector with regard both to wider access to the enjoyment and benefits that flow from exposure to and participation in the visual arts for a more diverse cross-section of the population, as well as to achieving the greater empowerment of black and women artists, entrepreneurs and initiatives in the sector.
- Industry development needs to occur *with* not *for* the sector. The approach to implementing recommendations should emphasise consultation, transparency of process and accountability.

Demand for the Visual Arts

Audiences for the Visual Arts

A key finding of the report suggests that public consumption of the visual arts – whether as audiences or consumers – is much smaller than most international comparators in the developed world, and that there is a significant untapped domestic market for the visual arts. While a 2009 research report commissioned by Business Arts South Africa suggests that 3.18 million adult South Africans (slightly less than 10% of the adult population) are ‘extremely interested’ in the visual arts and between 34% and 45% of adult South Africans go to art exhibitions, analysis of primary data on attendance at public and private art museums and collections estimates that only 1,2 million South Africans of ALL ages (2% of the total population of the country) visit these institutions annually, with the likelihood of some duplications in these visitor numbers.

By comparison, a 2002 report on the visual arts in Australia indicated attendance of galleries at 6.5 million in 2001/2, with 22% of the adult population (3.2 million) visiting art galleries

and 3 million attending art museums. While the study did not extend to an analysis of the population of people who actually buy visual artworks (for which there is no existing data), international studies show that this is a small proportion of those who consume the visual arts in the context of art museums and galleries.

Any strategy for the development of the visual arts in South Africa will need to have as a fundamental objective the widening of access to the experience of and participation in the visual arts. Aside from the public benefits that are associated with exposure to the visual arts, the growth and development of a domestic market will be dependent on the growth and development of a larger audience base and the integration of the visual arts into public life. This consideration has been integrated into the specific recommendations related to the market for the visual arts (Section 3), the organisational landscape for the visual arts (Section 4) and education and training in the visual arts (Section 6).

The Market for the Visual Arts

The study notes the complex articulation of roles among dealers, gallerists, auction houses, public and private museums and collections and individual artists in the sale of artwork. It has also highlighted the variety of kinds of work and associated markets that exist within the visual arts, from critically engaged 'contemporary' work that acquires value through a complex process of subscription involving institutions, dealers, art critics and collectors through to 'commercial' art with an essentially decorative function and whose value is determined through a less elaborate and more conventional supply/demand dynamic. The report also notes the general lack of regulation in the industry, with no widely accepted protocols or guidelines governing the business relationships between artists and galleries, as well as between artists and agencies of government which may seek to commission work or services from artists. A key recommendation emanating from this report concerns the development of such protocols and guidelines.

The present research project has gone some way towards quantifying the value of the market for the visual arts in South Africa, estimated to be in excess of R1 billion per annum. Turnover for sale of artworks the visual arts is valued at just over R1 billion per annum, excluding the value of auction sales – 83% of this revenue is generated from sales through galleries, and 17% from sales from artist studios and the direct commissioning of work from artists. A growing auction market for the visual arts which contributes an additional (roughly estimated) R250-500 million in gross turnover to the overall economic impact of the sector through the activities of auction houses, in the secondary market. This is less than 5% of the value of the UK auction market, suggesting that South Africa has a small but nevertheless significant developing secondary market for the visual arts relative to international comparators.

Both the domestic and international consumption base for South African visual arts is small by international standards, relative to both advanced economies and the rapidly expanding economies of India and China. As the Chinese and Indian examples make clear, growth in the art market is very directly linked to growth in the wider economy. The development of large new strata of wealth in these countries, now spread across the globe, has fuelled both domestic and international demand for Chinese and Indian art. While South African contemporary art has a significant profile internationally, UNCTAD trade data suggests that South Africa has a very small share not only of the global market for the visual arts, but also of the developing world portion of this market. At present, very few galleries are able to promote artists that they work with or represent internationally, owing to the substantial costs associated with attendance at art fairs and other trade events. The report

recommends that efforts be made to make the export promotion incentives and schemes of the Department of Trade and Industry and related agencies more accessible to entrepreneurs in the visual arts sector, and proposes greater coordination between the DAC and departments concerned with the international promotion of South Africa and tourism promotion.

The Joburg Art Fair represents a significant privately driven intervention (with some support from the Gauteng provincial government) aimed at growing the market for the contemporary visual arts. The Art Fair has both demonstrated that the visual arts can attract very substantial audiences (with positive year-on-year audience growth between 2008 and 2010), but has also demonstrated the vulnerability of the sector to periods of economic downturn, with gallery sales in the immediate context of the Fair showing negative growth during the course of the last three years. Greater public sector investment in smart initiatives aimed at encouraging new buyers into a complex marketplace have been given priority in the recommendations attached to this report, with a view to also facilitating more targeted investment in a growing specialist art publishing sector in the country.

Public sector demand for the visual arts has principally focused around the commissioning of public art - in the inner city of Johannesburg alone, this investment is estimated as being in the region of R15 million during the course of the last five years, creating substantial work opportunities for over 200 artists during this period. The need to promote the commissioning of both temporary and permanent public art more widely – particularly on the part of local government – is indicated as a key recommendation. Similarly, the report notes the significance of the Joburg Art Bank as an important initiative both with regard to broadening demand for the work of younger and emergent artists, and for cultivating new buyers for the visual arts. Stymied by underinvestment, the report proposes that the national Department and the City of Johannesburg, together with other stakeholders, examine the feasibility of developing this as a major national scheme.

The Organisational Landscape for the Visual Arts

The report includes extended consideration of the position of a range of public and independent institutions, organisations and initiatives concerned with the wider presentation of the visual arts, the development and exposure of new talent, and the realisation of the benefits of the visual arts in the areas of education, health and broader social development. Four broad categories of infrastructure have been considered:

- Art museums and collections
- Community arts centres and arts development organisations
- Non-commercial project spaces and artist-run initiatives
- Artist associations and industry organisations

Art Museums and Collections

South Africa has a substantial and relatively well-maintained infrastructure of public art museums and institutions, containing a store of visual artworks whose value is estimated, conservatively, at R2.2 billion. However, by comparison to countries with comparable levels of public infrastructure for the visual arts (such as, for example, Australia), our national and municipal public art museums and collections are dramatically underfunded. The traditional role that public art museums play in promoting the consumption of the visual arts and in both influencing (and growing) the market for the visual arts through the direct acquisition of visual artworks is severely constrained in the South African context on account of low levels of recurrent funding for these institutions. The capacity for significant new

acquisitions is negligible by even the most modest international standards – a pattern established under the apartheid government that has been largely sustained to the present day.

This study estimates that the national department of Arts and Culture invested in the region of R20 million rand in four national art museums and collections in 2008/9 – less than 5% of its total allocation of R432 million to national heritage institutions. Local government in the major metros and secondary cities collectively invested in the region of R50 million in 12 municipal museums in 2008/9. To place these figures in perspective, in the same year, the Australian government contributed A\$41.7million to the overall A\$61 million operating budget of the Australian National Gallery in Canberra in the same year – the equivalent of approximately R280 million spent on just one institution. This pattern of underinvestment is not specifically a phenomenon of the post apartheid period – it is however a pattern which has been sustained during this period.

The difficulties of public art museums and collections represent a complex public policy issue. This is partly due to the fact that they represent – in their location, built form and contents - the institutional legacy of an apartheid economy that invested significantly in a costly public arts infrastructure designed for the consumption of a minority of the population. New investment in heritage infrastructure has, unsurprisingly, been largely concentrated around new heritage projects (such as the Robben Island Museum and the Freedom Park) that engage with a political history and future orientation that is felt to have a broader resonance and audience than the historical and contemporary and visual arts can lay claim to. While these projects do have, in varying degrees, a visual arts dimension, neither the responsible departments and agencies across government nor the sector itself have managed to make a compelling case as to why the ‘inherited’ art museums and collections should also warrant new public or private investment. Further exacerbating this situation, the process of empowering a new generation of institutional leadership and management able to effectively direct and champion the interests of these institutions has been slow and uneven.

While substantial efforts have been made to transform the collections and programming of these institutions, and to mount innovative outreach and schools programmes, they have struggled to attract – from either government or the corporate/philanthropic sector – anything remotely approaching the levels of support that similar institutions in developed economies are predicated on. In spite of these disadvantages, institutions have managed to maintain a high rate of exhibitions and associated programming, providing space for the exposure of cutting edge talent within the country

The capacity of these institutions for generating revenue is also limited - on the one hand by their mandate as public institutions concerned with promoting access to the arts for all South Africans (only one charges a nominal entrance fee), and on the other by low levels of public benefaction and the consumption associated with significant attendance levels (catering, merchandise and so on). In contrast to the United States, where corporate and individual philanthropy (assisted by generous tax incentives) has built and sustained the largest public infrastructure for the visual arts in the world, significant and sustained philanthropic support for South African museums and collections has been the exception rather than the rule, with corporates more likely to invest in their own bespoke, in-house galleries and collections. Particularly in the case of municipal institutions, the regulatory framework for public finance at a local government level establishes a variety of

bureaucratic constraints around the attracting of external resources to these institutions, which the recommendations contained in this report also seek to address.

A parallel review of the policy and legislative framework for heritage institutions commissioned by the Department has recommended the development of a comprehensive funding policy for heritage institutions, which this report supports. This report further recommends that two key targets for complementary resources for these institutions that should be incorporated into the development of this funding policy are the corporate sector (for both acquisitions and capital infrastructure development) and the National Lottery Distribution Trust Fund (for capital infrastructure development and outreach programming).

Community Arts Centres and Arts Development Organisations

This report also explores the difficulties that attach to the position of an emergent national infrastructure of community arts centres and the role that this should be playing, both in supporting the provision of arts education in schools as well as in enabling wider access to the experience of and participation in the arts, particularly for communities located away from the traditional urban clusters of arts infrastructure. While the late 1990s saw significant investment in the physical infrastructure of these entities from government, these institutions – both those which are independently run and those run by local or provincial government - have struggled to attract significant and sustained investment from government, and are beset by a variety of ongoing constraints and challenges at the level of leadership, management, funding and programming. The focus on investment in capital infrastructure at the expense of investment in programming and the human infrastructure necessary to animate these centres has led to many of the centres built in the 1990s becoming proverbial ‘white elephants’.

Alongside government-owned centres, a number of old and newer non-governmental arts development organisations have developed a variety of innovative programmes concerned with the visual arts in job creation, skills development, education, public health and advocacy. In spite of their direct linkage to the social and economic development mandates of government, these organisations struggle to survive in an unstable and insecure funding environment, with limited access to reliable and recurrent sources of core organisational funding from the state, and an over-reliance on project funding from government and international agencies. This report suggests that there is in fact a sufficient pool of resources (principally within the National Lottery Distribution Trust Fund) that would enable these organisations to both survive and grow, but that these resources are not at the present time being effectively distributed or accessed. The need for greater synergy and connection between the activities of these organisations, governmental community arts centres, and the outreach programmes of public art museums and collections is also indicated as a priority.

Artist-Run Initiatives

A signal feature of the organisational landscape of the visual arts in South Africa is the near complete absence of independent and artist-run initiatives for the cultivation, presentation and promotion of innovation within the visual arts. Outside of the public and corporate museums and collections, the overwhelming majority of organisations involved in the distribution and presentation of the visual arts are commercial entities. There are only a handful of independent, artist-driven and non-profit project spaces and residency programmes around the country with a primary mission around the exposure of new talent, new ways of working and international exchange and collaboration outside of a commercial, profit-driven framework. These organisations play a critical role in the overall ecology of the

visual arts, but operate within a funding environment that is inimical to not only the proliferation and growth of these entities, but also to the basic survival of the few that exist. The need to demonstrate social and economic impact attached to a lot of publicly available funding places these organisations in an even more difficult position to the aforementioned arts development organisations, as their outcomes and impacts are even more difficult to define and measure.

Artist associations such as the South African National Association for Visual Arts (SANAVA) (and its many affiliate organisations), the Kwazulu Natal Society for the Arts (KZNSA) and the Association for Visual Arts (AVA) in the Western Cape have played an important role in developing new market platforms and opportunities for artists through competitions, international exchanges, workshops and member exhibitions. The Visual Arts Network of South Africa (VANSA) has emerged in the last five years as an industry organisation concerned with policy-related issues, advocacy and industry development projects through a network of artists, curators, administrators, businesses and organisations around the country. All of these organisations face similar constraints to arts development organisations with regard to their sustainability within a difficult funding environment.

The Position of Artists

Artists constitute the core human resource that sustains the sector, generating the artworks around which the activities of the rest of the sector largely revolve. It is estimated that there are in the region of 5 500 artists in South Africa, mostly concentrated in three major metros – Johannesburg, Cape Town and Durban. While – as noted above – there is evidence of substantial shifts in the overall demographics of the workforce for the visual arts, the majority (58%) of practicing artists are white, with a particularly poor representation of black women artists (comprising just 12% of the total population of artists based on the survey commissioned as part of this project).

Though it is estimated that artists directly generate 36% of value of the overall turnover of the sector and 32% of the Gross Value-Added through direct sales and private commissions, the social and economic position of most artists in South Africa is precarious. By comparison to professionals in other fields with similar levels of experience, training and qualification, the earnings of visual artists are low with poor levels of access to various forms of personal cover and security. The study notes that the average income of practicing professional artists is in the region of R149 000 per annum, with a marked income differential between black and white artists. Based on the survey sample, white male artists (the highest earners) earn on average R229 000 per annum and black female artists (the lowest earners) earning R67 000 per annum. Within these groups, there is generally a tiny strata of high-earning artists, a small group of artists able to earn a reasonable income from their work, and a large group of artists to who rely on other sources of income for their survival.

Only 19% of all artists are able to spend more than 70% of their time on their creative work and immediately associated activities, and one in four artists report only being able to devote 25% or less of their time on their creative work. The majority of artists have to supplement their income through other activities in order to survive, and there is a marginally *negative* correlation between the proportion of time invested in core creative activity and economic return. The majority of artists are unable to afford medical cover, life insurance and the various forms of cover related to professional practice. 57% have experienced significant periods in which they have been unable to earn income during the last five years. Considering their income levels, a surprisingly large proportion (59%) report

being registered for income or company tax in some form, though it is likely that much of this taxation may be in the form of ad-hoc tax deductions related to teaching and other work in the arts.

South African artists also report lower levels of gallery representation than their international counterparts, and the ratio of exhibition opportunities to artists is lower than in developed economies. Business relationships between gallerists and artists are seldom reduced to writing, and not subject to any industry-agreed (or externally imposed) standards, codes or protocols. Indeed, there is a complete vacuum in this area, with artists sometimes rendered vulnerable to the superior bargaining power of gallerists and dealers. Collection of payments related to copyright occurs on an ad-hoc basis, and it is generally only relatively established artists that are in a position to manage this issue in relation to their work, or earn any income from this source. Few artists – even more established artists – are in a position to take legal action against violations of their moral or intellectual property rights.

The survey found that the five most frequently cited obstacles to career development for artists are:

- access to funding
- the high cost of materials and supplies
- lack of demand/buyers
- lack of industry promotion from government
- a shortage of exhibition/project opportunities locally

The three most frequently cited primary professional development needs of artists were:

- learning how to market themselves more effectively,
- finding a gallerist to represent them and
- opportunities for research and study related to their practice

Assistance in obtaining funding was cited as the most significant secondary professional development need.

The report notes that the absence of a range of professional support mechanisms for artists in relation to the protection and exploitation of creative rights in their work, and the intrinsic constraints associated with collective bargaining in the visual arts owing to the self-employed status of the majority of artists. Consideration of how the economic position of artists might be improved has been integrated as a consideration into the bulk of recommendations in the report, whether through indirect measures aimed at expanding the market for their work and the creation of new platforms or through direct interventions around the professional development, the institution of collective management of copyright or legislative measures associated with resale rights.

Education and Training

The provision of education and training in the visual arts in the schooling system is arguably the single most significant area for governmental engagement in the visual arts, both in relation to the objective of nurturing the future audiences and consumers for the visual arts, as well as in achieving qualitative changes in the demographics of talent within the industry. That it is both a costly and long term area for intervention should not deter serious and urgent engagement with the many challenges that face the realisation of a quality arts education for all learners in South African schools, whether at primary or high school level.

Though the visual arts (as part of the Arts and Culture learning area) is now a compulsory component of formative education up to grade 9, the majority of schools have neither appropriately trained teachers and facilities to enable the provision of quality visual arts education at either a primary or high school level, in part the legacy of an education system which denied the majority of South Africans access to arts education.

The report also notes that the provision of specialised visual arts education at a grade 10-12 level (where it is an elective subject) continues to be largely confined to former 'Model C' schools. In 2009, less than 2% of all students took visual arts as a grade 12 subject, with 70% of all enrolments concentrated in Gauteng, Kwazulu Natal and the Western Cape. In 2009, black learners accounted for only 50% of these enrolments.

The report draws attention to the existence of a Memorandum of Understanding between the national Departments of Education and Arts and Culture, aimed at guiding their joint investment in arts education and training, as well as to a variety of policy documents produced by the (then) Department of Education which specifically promote the idea of artists working in schools in addressing the skills deficit within schools. The report notes that the implementation of a concerted strategy between the two departments for arts education at a formative level remains unrealised, and proposes that this joint engagement should be reactivated with major joint investment in programmes that widen access to participation and appreciation of the visual arts, and which create substantial work for particularly young and emergent professional visual artists. Such programmes should also harness the infrastructure and outreach programming of art museums and collections and community art centres.

While the country has a substantial network of tertiary art schools that offer internationally competitive professional degrees in the visual arts, these institutions face a number of challenges:

- Art schools are mostly located in the context of historically advantaged institutions in urban areas. Art departments at institutions such as Fort Hare and Walter Sisulu University remain dramatically under-resourced by comparison to their counterparts in historically advantaged universities.
- The report notes that there is a further erosion of black intake into visual arts programmes at a tertiary level, with just over 40% of enrolling students being black and just under 40% achieving their qualifications.
- While at any one moment there are almost as many students in tertiary art schools as there are practicing artists in the industry, the attrition rate for students then actually entering the industry once they have graduated is very high. The need to for more professional development inputs, mentoring opportunities and platforms for networking for young and recently graduated artists is indicated as a key area of recommendation.
- The staffing and infrastructure requirements of art schools in tertiary institutions are often poorly understood in the administrative contexts that they occupy. The need for more focused attention on the recognition of creative work as a research output is indicated.
- FET colleges currently play a minimal role in the provision of vocational training in the visual arts, and there is presently little or no articulation between training at an FET level, tertiary institutions and the frameworks for work-based training established through the Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA).

Funding and Resources

Lack of access to funding is cited more frequently than any other issue as a major obstacle to career development for artists, and is the secondly most frequently cited obstacle for businesses and organisations.

The report notes that most of the funding mechanisms contemplated in the White Paper for Arts, Culture and Heritage have been realised, including the National Arts Council, Business Arts South Africa and the National Lottery Distribution Trust Fund. Components of this system are managing to issue increasingly significant numbers of grants to individual artists, projects and organisations. In the 2008/9 financial year, the National Arts Council distributed 91 grants with a total value of R5.6 million to the visual arts sector, many of these grants to individual artists.

Grant funding currently plays a relatively minor role in the economics of the sector, contributing less than a percentage of the total turnover of the sector. The total value of grants issued by all national funding agencies (principally, the National Arts Council and the Lottery) as well as grants made available through national and provincial government structures in the 2008/9 financial year is estimated at R12.3 million, with an additional R3.3 million being raised from international funding sources and half a million coming from Business and Arts South Africa and the Arts and Culture Trust.

The study has found that there are very significant unlocked public resources for the visual arts, the most significant of these being the National Lottery Distribution Trust Fund (NLDTF). The study notes the alarming accumulation of unspent funding reserves within the NLDTF, and the low level of disbursement of funds to the visual arts sector. Were the NLDTF to disburse 8% of the funding available in the 2008/9 financial year to the visual arts sector (equivalent to the 2008/9 proportion of total funding allocated to the visual arts by the National Arts Council), this would equate to approximately R76 million in *entirely new investment* for public art museums and collections and their outreach programmes, education and training programmes in the visual arts, visual arts-related community arts programming and infrastructure, artist-run initiatives and non-profit industry organisations. The report notes the need both a for a review of the grant administration system of the NLDTF, as well as concerted efforts to ensure that the sector engages more systematically in securing resources from the NLDTF.

While there are significant instances of corporate investment in the non-profit dimensions of the sector, and sponsorship of major events, projects and competitions such as the Joburg Art Fair, the Africa Art Centre and the Absa Atelier competition, by international standards, the sector enjoys very low levels of corporate investment and sponsorship. Total sponsorship is estimated at between R10 and R15 million – similar to levels of public funding in the visual arts. The report notes the need to create more awareness around the existing provisions for tax deductibility on donations, as well as the need to explore more substantial tax benefits for artists, organisations and institutions in dialogue with the Department of Finance and SARS.

Summary of Recommendations

The policy recommendations developed in this report have been informed by an overall analysis of the points of intersection between the visual arts and the world of public policy, institutions, legislation and programming. This report has sought to identify a set of key issues that the sector faces, and has drawn on a wide range of international precedents in developing recommendations that are appropriate and meaningful in the South African context. In doing so we have been mindful of four key considerations:

Firstly, the need to include substantial focus on growing the market for the visual arts, both domestically and internationally. The central concern of much arts advocacy revolves around supply-side interventions concerned with making available more public funding for the visual arts, whether through institutions or grants. This emphasis should not however obscure consideration for how the market and demand for the arts might be grown in a way that would mitigate the need for escalating public subsidy, and in ways which would help to transform the demographics of the sector. Indeed, this report has shown that the visual arts is in fact one of the more independent and resilient sectors of the arts in this respect, with much of the activity in the sector operating in the absence of public money. As the funding section of this report suggests, there is in fact very substantial funding available for the visual arts, principally through the Lottery, and principally targeted at the non-profit components of the sector. The need to consider ways in which these resources can be made more readily and widely available represents a key recommendation. The balance of this report has however been more concerned with both short and medium term interventions focused around market access and stimulating demand, as well as interventions aimed at growing the audience and consumption base for the visual arts in the long term, through a concerted strategy around visual arts education through schools, art museums and community arts centres. Cutting across all these interventions should be a concern for enabling greater access to the industry on the part of historically marginalised groups.

Secondly, the need for any proposed measures to meet a basic standard of affordability. Internationally, the majority of public sector measures that have been developed around the arts in general and the visual arts in particular, have been generated in the context of the advanced economies of North America, Europe and Australasia. These economies enjoy a fiscal base which is greatly in excess of the resources that are available in South Africa. A basic principle that we have sought to adhere to in the making of specific recommendations is that any proposed intervention needs to be affordable, both in relation to the public and private resources that are available, and in relation to other pressing demands on these resources.

Thirdly, careful consideration has also been given to assessing the prospective costs and potentially negative consequences of implementing particular recommendations, weighed against the likely benefits and impact yielded through such interventions in social, economic and cultural terms. For example, implementing the Artist Resale Right assumes the establishment and sustainability of an administrative capacity to collect and distribute royalties to artists, which would need to be justified by a sufficient value and volume of transactions in the secondary market (costs). It is also a measure that is likely to be resisted by both local auction houses and international auction houses that have a presence in South Africa, as it directly impacts on the cost of doing business, and may result in business moving to other national contexts where these measures do not apply (a consequence). However, international experience suggests that such measures can yield significant revenue for artists

(or their families) where comparatively meagre returns have been achieved on the primary/first sale of their work (a benefit).

A final consideration in the development of the recommendations in this report is the recognition that many of the problems of the visual arts in South Africa are in fact problems of the arts in general – the funding system and arts education being two signal examples. This report has been mindful of the fact that these more generalised problems need to be addressed through measures that have a compass beyond just the visual arts sector. This study has confined itself to noting these wider issues on the one hand, and suggesting sector-specific responses and remedies on the other, where these do not seem to exceed the mandate of the present assignment.

The report proposes a variety of recommendations for policy-driven intervention aimed at promoting the growth and transformation of the visual arts sector, and a set of key framing objectives have been derived from the preceding analysis. These objectives are focused around six mutually reinforcing key areas of impact, defined as follows:

1. Stimulating domestic and international demand for South African visual arts
2. Widening access to the experience of and participation in the visual arts
3. Strengthening the organisational infrastructure that supports the visual arts
4. Enhancing the social and economic position of artists
5. Attracting more investment and resources into the sector
6. Promoting greater coherence and cohesion in the sector and in sector-government relations

In the articulation of the ensuing recommendations, the impact of particular actions relative to each of these key objectives is noted, together with:

- An assessment of the cost of undertaking the particular intervention, relative to the envisaged impact. Each recommendation is qualified by a very broad indication of the cost involved in implementing the recommendation, as follows:

Level of Investment	Cost range
Low	Less than R2 million
Medium	R2-R5 million
High	R5 million +

- An assessment of the immediacy of impact and how long it would take to realise the recommendation

Immediacy	Timeframe
Short term	Within a year
Medium term	Within 1 – 3 years
Long term	3 years +

- A consideration of whether actions and investments are **once-off** or **recurrent**. In the case of recurrent investments, the importance of clarifying and determining the locus of responsibility for these functions within government is emphasised.
- A consideration of key roleplayers that would need to be involved in the realisation of each recommendation.

Recommendation 1: Engage the sector and government in the review, consolidation and effecting of the findings and recommendations contained in this report.

Strategic Linkages: Promoting Coherence

It is recommended that a national task team – the Visual Arts Industry Task Team (VATT) – be constituted through the convening of a national conference/summit of stakeholders in the visual arts industry, where the findings and recommendations contained in this report can be subjected to wider interrogation and scrutiny as a basis for taking them forward.

The task team would be composed *inter alia* of nominated representatives from the following groupings:

- Artists
- Galleries and Auction houses
- Independent platforms for the visual arts
- Visual Arts Development organisations
- Artist Associations and Industry bodies
- Tertiary institutions
- Government departments at a national, provincial and local level with a stake in or regulatory mandate over the visual arts sector

The functions of the Task Team would be to:

- Review the recommendations contained in this report
- Agree on a consolidated set of recommendations
- Provide leadership and oversight with regard to the implementation of these recommendations
- Ensure consultation and communication with the widest possible cross-section of the visual arts sector with regard to the implementation of these recommendations

The DAC would convene the proposed conference with partners, and provide secretariat support to the work of the proposed Task Team.

Key roleplayers: DAC, other government departments, industry stakeholders

Timeframe: Short-Medium

Cost: Low

Recommendation 2: Support regional market development initiatives that grow the local and regional consumption base for the visual arts

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative local and regional initiatives across urban and rural contexts - and differentiated for the contemporary and commercial segments - that encourage new buyers, create buzz, make the industry and the market more visible through for example art maps, art tours, open studio projects, art nights, new approaches to marketing and the like.

Key Roleplayers: DAC, provincial departments of Arts and Culture and Economic Development, Business and Arts South Africa, tourism agencies, gallery networks, entrepreneurs, dti
Timeframe: Short-Medium
Cost: Low

Recommendation 3: Invest in innovative buyer education and development initiatives

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative projects aimed at attracting particularly entry-level buyers into the market through print, on-line resources and events that promote the benefits of buying art and provide advice and guidance on how to go about it.

Key roleplayers: DAC, Business and Arts South Africa, industry organisations, art publishers.
Timeframe: Short
Cost: Low

Recommendation 4: Investigate the development of the Joburg Art Bank as a national scheme

Strategic Linkages: Stimulating Demand; Enhancing the Position of Artists

Working with the City of Johannesburg and the National Arts Council, commission an assessment of the position of the Joburg Art Bank and a business plan for the development of the agency as a scheme with national reach, and with a core focus on cultivating demand for innovative work from particularly younger artists entering the market among both private and public sector entities, as well as in the cultivation of entry-level buyers among the employees of these entities. Such a plan should involve consultation with the commercial gallery system in order to address potential concerns regarding the impact of such a scheme on the commercial market. The future of such an agency will be contingent on there being sustained investment in acquisitions on the one hand, and a professional and informed acquisitions programme, marketing strategy and general leadership and management on the other.

Key roleplayers: City of Johannesburg, National Arts Council
Timeframe: Short (review and business plan) Medium-Long (institutional development)
Cost: Low (review and business plan); High (institutional development)

Recommendation 5: Investigate the feasibility of instituting a zero percent art purchasing scheme

Strategic Linkages: Stimulating Demand

As previously noted, interest free art purchase schemes for the visual arts for entry level buyers and middle income earners can play a significant role in making the buying of the visual arts more accessible to more people. It is recommended that the Department develop this concept through engagement with Business and Arts South Africa and commission more detailed research on models internationally.

Key roleplayers: DAC, BASA, Joburg Art Fair, Joburg Art Bank, local financing institution.

Timeframe: Short (feasibility) Medium (implementation)

Cost: Low

Recommendation 6: Facilitate access to dti incentives and subsidies for the promotion of South African visual arts at trade fairs internationally

Strategic Linkages: Stimulating Demand

The DAC should play a role in facilitating access to Department of Trade and Industry financing, incentive and rebate schemes associated with addressing the cost of taking South African artists and their work to international trade events, aimed at galleries operating both at the contemporary and commercial/decorative arts end of the visual arts spectrum. The DAC should engage the dti and its linked agencies (e.g. TISA) on rendering these schemes more accessible to the visual arts sector, and packaging information on these schemes, and the export of artwork more generally, should be developed. Develop with reference to lessons learnt from similar endeavours in the craft sector.

Key roleplayers: DAC, dti

Timeframe: Short to medium term

Cost: Low-Medium

Recommendation 7: Promote the more widespread commissioning of public art, particularly through local government

Strategic Linkages: Widening Access; Enhancing the Position of Artists; Attracting Investment

The experience of public art commissioning in Johannesburg in particular has demonstrated the impact of public art not only on the public realm, but also the important economic benefits derived by artists. It is recommended that the DAC should play a role in promoting a more policy-driven approach to the commissioning of public art in other contexts, using the example of Johannesburg as a case study, together with reference to initiatives that have been undertaken in the Nelson Mandela Bay Municipality, Cape Town and Durban.

It is suggested that this should be achieved through convening a national summit on public art which would serve both to advocate the commissioning of public art more widely across the country, based on best practice examples both locally and internationally. The summit would also involve the sharing of best practice with regard to local government policy in this regard (e.g. the percent for art policy of the City of Johannesburg), the role of government and external specialists in the management of commissioning processes, municipal financial management systems and the resourcing of public art projects through municipalities securing resources through existing mechanisms such as the National Lottery Distribution Trust Fund.

Role players: DAC, municipalities, South African Local Government Association, key local government stakeholders and other departments and agencies that may have an interest in the commissioning of public art (e.g. the Roads Agency, the department of Public Works), the National Lotteries Distribution Trust Fund, industry organisations that have been involved in the commissioning of public art.

Timeframe: Short

Cost: Medium-High

Recommendation 8: Provide targeted support for the representation of South African art in contemporary art events on the continent and internationally

Strategic Linkages: Stimulating Demand

Biennales and a variety of other similar international platforms provide important opportunities for growing the profile of South African artists internationally and impact on their value and selling power. A particular emphasis should be placed on synergy with the increasing number of innovative new platforms developing across the African continent, and the encouragement of market linkages. The department should establish a high profile curatorial team through a process of public nomination which would advise the department on an ongoing basis with regard to the identification of platforms and the selection of artists. The department should facilitate linkage with the strategies and programmes of adjacent departments and agencies which have a complementary interest in the positive representation of South Africa internationally.

Key roleplayers: DAC, Department of Tourism, Department of International Relations and Cooperation, International Marketing Council of South Africa (Government Communication and Information System)

Timeframe: Short-Medium

Cost: Medium

Recommendation 9: Conduct a feasibility study for the development of a major contemporary art museum for the country

Strategic Linkages: Strengthening Infrastructure; Widening Access

While the majority of art museums and collections in the country have significant collections of contemporary South African art and associated exhibitions programming focusing on contemporary practice, the country does not have a major national institution dedicated to the presentation of contemporary art practice and the fostering of new domestic and tourist audiences along the lines of institutions such as the Tate Modern, the various Guggenheim museums and so on. While the development of such an institution has at various moments been contemplated by role-players in the public and private sector in both Cape Town and Johannesburg, these proposals have remained at a concept stage. While this study remains agnostic on the desirability and affordability of such an institution in the South African context and proposes that any such initiative would need to be predicated on major corporate investment, it is recommended that a scoping study be commissioned that draws on both local and international experience and expertise and international precedents and expertise. Such a study would need to consider:

- The rationale for developing such an institution in the South African context
- The role and functions of such an institution
- Options for the location/s of such an institution giving due consideration to the need to generate significant audiences and revenue, and whether such an institution should consist of a single substantial piece of infrastructure in one location, or be dispersed in more modest form across a number of locations.
- whether such an entity should be a stand-alone entity, or an extension of an existing institution/s
- Infrastructural and recurrent costs
- Financing and partnership models and approaches to sustainability.

Such a study should have as an explicit part of its brief the development of an informed framework for attracting and incentivising major corporate investment/s in such an initiative.

Key roleplayers: DAC (commissioning of scoping study)

Timeframe: Short (scoping), Long (Institutional development)

Cost: Low (scoping), High (institutional development)

Recommendation 10: Invest in joint/touring exhibitions and outreach programming, and strengthen the institutional network that supports such programming

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report has noted that touring exhibitions and outreach programming represent a cost-effective way in which such programming – which involves substantial research and development costs – can impact beyond individual institutions and their audiences.

It is recommended that national funding be made available for developing joint exhibitions and outreach programmes which builds on and strengthens the existing co-operative relationships between art museums and collections across the country. Such programming should be aimed not only at enabling exhibitions to travel, but should also be linked to innovative outreach programmes and resources to travel with them, linking into schools and community arts centres.

This funding should ideally be made available either through an additional allocation to the National Arts Council for this purpose, or be directly funded by the national Department. Complementary finance for touring exhibitions and outreach programming should be secured from provincial departments responsible for arts and culture, and partnership with independent arts organisations and galleries encouraged in the development of such projects. The funding should include provision for enabling a Forum or Network of Art Museums and Collections composed of representatives from institutions which would meet on a quarterly basis to:

- Develop a workable model for the joint management of such a programme, and the allocation of resources between institutions
- Develop a 3 year programme for touring exhibitions and outreach programmes
- Develop detailed 3 year plans and budgets for joint exhibition and outreach programmes
- Secure complementary resources from provincial and local government
- Monitor and evaluate

The membership of such a forum or network would also include representatives from provincial departments. Ancillary purposes would include the development of best practice with regard to outreach programming, a bank of educational resources, and a shared network for the dissemination of these resources.

Key Roleplayers: DAC, National Arts Council, provincial departments

Timeframe: Medium and ongoing/recurrent

Cost: Medium/recurrent

Recommendation 11: Strengthen the acquisitions capacity of public art museums and collections through matching grant scheme

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

Consideration should be given to the development of a nationally financed matching grant scheme to support new acquisitions. This would involve corporate investment in new acquisitions for public art museums and collections being matched by an acquisitions grant from national government, which could be administered through Business and Arts South Africa – which already has a similar scheme in operation for grant funding on this basis.

Key roleplayers: DAC, Business and Arts South Africa, funding bodies.

Timeframe: Medium and ongoing/recurrent

Cost: Low once-off (development of policy); Medium, recurrent (matching grant scheme)

Recommendation 12: Strengthen the capacity of municipal museums and collections to attract external funding and earned income

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

This report has noted some of the difficulties that municipal museums and collections experience as entities of local government with regard to attracting funding and resources for programming and the reinvestment of earned income. The DAC should engage with museums and collections, as well as local government structures, around developing workable and effective models for museums and collections to attract and utilise external resources. Consideration should be given to the implications of the Municipal Finance Management Act, and the use of associated 'Friends Of' organisations and Trusts as vehicles for generating substantial additional income for art museums and collections.

Role-players: DAC, South African Local Government Association, Local government officials responsible for art museums and collections

Timeframe: Short

Cost: Low, once-off

Recommendation 13: Action national strategy for community art centres

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report notes the existence of a national policy and strategy for the development of community arts centres. The findings of this report support the progressive implementation of this policy and strategy and proposes that a mechanism should be established for ensuring the strategy is implemented in such a way that:

- The visual arts are accorded a priority in the development of the strategy alongside other disciplines
- Particular attention is given to the creation of employment and training opportunities for artists and project funding opportunities for visual arts development organisations in the implementation of the proposed strategy
- Resources are made available to ensure that the touring exhibitions and outreach programming of public museums and collections is integrated into such a strategy (recommendation 10)

Roleplayers: DAC, provincial and local government, arts development organisations, National Federation of Community Arts Centres

Timeframe: Medium

Resources: Medium

Recommendation 14: Invest in professional development and mentoring programmes and resources for visual arts practitioners

Strategic Linkages: Enhancing the Position of Artists

Financial support should be provided for the development of courses, resources and workshops focused on preparing artists more effectively for dealing with the demands of professional practice (including legal and financial skills and knowledge), understanding the market for the visual arts, and the development of entrepreneurial skills. Advisory resources and guidelines for the conduct of commercial relationships between artists, gallerists and dealers should be developed in consultation with the industry.

Targeted funding should be made available to initiatives aimed at supporting market access and development for young, emerging and recently graduated artists, assisting them with accessing industry networks, exhibition opportunities and space to work.

There are a number of existing initiatives in this area, so the focus of the strategy should be on enhancing the capacity of these initiatives to deliver quality training to a wider cross-section of the visual arts community. The Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA) should be actively engaged by the Department as a financing partner, and to ensure that – where appropriate – these existing initiatives are drawn into an accredited framework for training.

Roleplayers: DAC, National Arts Council, MAPPP SETA, tertiary institutions, industry-training organisations and development initiatives

Timeframe: Short

Cost: Low

Recommendation 15: Investigate the feasibility of instituting artist resale rights – and the collective management of other creative rights for artists - in the South African context

Strategic Linkages: Enhancing the Position of Artists

The report has found that artist resale rights, copyright collection and exhibition payment schemes all represent significant mechanisms for artists to generate ongoing income from their creative work, and have now been instituted in a very wide range of national contexts. The report also notes that there are currently inadequate mechanisms in place to address any form of collective rights management for visual artists. It is proposed that the DAC should commission an inquiry into the feasibility of instituting these rights in the South African context.

Such an inquiry should involve a detailed examination of the likely revenue base for the institution of these rights, which would include an analysis of the selling patterns of auction houses (and where possible) dealers, as well as the variety of contexts in which copyright collection and exhibition payments might apply. The inquiry would review international models in each of these areas and bring together legal, financial and industry expertise, with a view to determining:

- The likely scale of financial benefit to artists generally versus the cost of administering such rights, with a particular focus on the scale of benefit to low and middle-earning artists, and to artists from historically disadvantaged communities
- The consideration of different approaches to the institution of such schemes, including consideration of an institutional framework, a model for sustainability and the extent to which all of these rights related payments might be managed by a single entity
- The likely impact (positive and negative) of such schemes on the visual arts market and the industry as a whole
- Recommendations and plans for a model for implementation

Roleplayers: DAC, Department of Trade and Industry, auction houses, dealers, publishers, industry organisations

Timeframe: Short (report and business plan) Medium (implementation)

Cost: Low (report and business plan) Medium (implementation)

Recommendation 16: Establish protocols, guidelines, standards and minimum rates for the employment, contracting or commissioning of creative work from artists

Strategic Linkages: Enhancing the Position of Artists; Promoting Cohesion

It is proposed that the Department should – with the oversight of the proposed Visual Arts Task Team – commission the development of a set of guidelines and protocols, standards and minimum rates for the commissioning, contracting and employment of artists to do creative work. In the first instance, such protocols and guidelines should focus on providing guidance and a set of minimum standards for public institutions, departments and agencies in their interaction with visual artists. The development of such a resource should also however include proposals for a code of conduct for the industry more generally, addressing in particular the more professional articulation and management of commercial relationships between artists and gallerists.

The development of such a resource should involve both consideration of international examples of such guidelines and protocols, as well as the widest possible consultation with industry organisations, artist associations, public institutions and local and provincial government in the development of the proposed framework. An additional purpose of such consultation would be concerned with educating both public officials and artists about the variety of issues that should be addressed in the negotiation of these working relationships, in the interests of ensuring that both parties are adequately protected. Such education should extend to particular consideration of the moral and intellectual rights artists have over their creative work, and the need for these to be addressed and protected in agreements that artists may enter into with both private and public sector entities.

Roleplayers: DAC, local and provincial government, artist associations, industry organisations
Timeframe: short
Cost: low

Recommendation 17: Develop and implement nationwide artists-in-schools scheme

Strategic Linkages: Widening Access; Enhancing the Position of Artists

This report has noted the dearth of available skills in the majority of schools in South Africa for the effective implementation of the arts and culture and visual arts curricula in primary and high schools. Practicing artists have the potential to make a major contribution in addressing this gap, as evidenced by pilot programmes undertaken in the Free State, Gauteng, Limpopo and Kwazulu-Natal. Such programmes also create alternative income streams for artists and have the potential to promote linkage and resource sharing between schools and community arts centres. They also have the potential to achieve significant impact in schools in the most disadvantaged areas of the country.

Working with provincial departments of education, provincial departments of arts and culture, tertiary institutions and arts development organisations, a nationwide artists-in-schools programme should be developed which involves the training, placement and supervision of artists in schools in support of both curricular and extra-curricular activities. Such a scheme should extend beyond the visual arts into other arts disciplines, and it should operate at both a General and Further Education level. Linkage between such programmes and the service learning requirements of university art schools should be developed. Universities and arts development organisations would be involved in the training, placement and supervision of artists working in schools. Finance should be secured both nationally and provincially on a matching grant basis, with the DAC and DoE playing an overall coordination and programme development role. The programme should also involve the organised sharing of best practices and the development of guidelines and resources for the effective implementation of the scheme.

The potential for such a scheme to catalyse the creation of a coordinating body for the promotion of extra-curricular/school enrichment programmes along the lines of USSASA (the United Schools Sports Association of South Africa) should also be explored.

Key roleplayers: DAC, Departments of Basic and Higher Education, provincial departments (education, arts and culture), tertiary institutions, and arts development organisations.
Timeframe: Medium-Long
Cost: High

Recommendation 18: Review the position of FET colleges in the training of artists

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted that FET colleges have historically played a marginal role in the training of professional artists – yet international experience suggests that they have the potential to provide an important and affordable alternative point of access into the industry, particularly for artists operating at the more ‘commercial’ end of visual arts practice. It is proposed that the DAC should engage the Department of Higher Education and FET colleges offering courses in the visual arts in a review of these programmes, with a view to identifying needs in respect of curriculum development, infrastructure and more effective industry linkage.

Key roleplayers: DAC, Department of Higher Education, FET colleges.

Timeframe: Short

Cost: Low

Recommendation 19: Review the position of art schools at historically disadvantaged institutions

Strategic linkages: Widening Access, Strengthening the Infrastructure

The report suggests that the history of underinvestment in art schools attached to historically black universities has been sustained (and in certain cases deepened) in the post-1994 period. The future development of art schools at historically black universities should be the subject of detailed investigation, focusing on the strategic position of these entities, and their needs with respect to:

- The development of a strategic vision and distinct offer
- Infrastructure development
- Curriculum development
- External partnerships and International linkage
- Diversifying and increasing the revenue/funding base

Key Roleplayers: DAC, Department of Higher Education, tertiary institutions

Timeframe: Short

Cost: Low

Recommendation 20: Promote transformation and equity in the sector through targeted support for creative, leadership and management training

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted in various places problems associated with black people accessing the visual arts sector, both within the realm of professional practice as artists, as well as in the leadership and management of institutions, businesses and organisations. The inclusion of equity criteria in the process of appointments for public institutions is clearly inadequate in the absence of programmes which ensure that there is a supply of skilled and experienced black professionals in a position to take up these positions.

The DAC should on the one hand consider additional funding for the National Arts Council's existing bursary programme scheme targeted specifically at young black artists and curators at both an undergraduate and postgraduate level. Consideration should also be given to the provision of 'art leadership grants' for tertiary institutions, public art museums, galleries and non-profit organisations to enable study, international travel and experience targeted specifically at black middle and senior managers, academics, entrepreneurs and curators.

A comprehensive approach to addressing this issue should be developed in consultation with the National Arts Council and tertiary institutions as the primary providers of the high level skills-sets under consideration.

Key Roleplayers: DAC, National Arts Council, tertiary institutions, public museums and collections.

Timeframe: Short-Medium

Recommendation 21: Promote greater coherence, articulation and efficiency in the funding system for the visual arts

Strategic Linkages: Strengthening Infrastructure; Attracting Investment; Promoting Coherence

It is proposed that a focused series of meetings be convened by the DAC with the full spectrum of institutions, bodies and agencies involved in the funding of the visual arts in South Africa – this should be done on the back of the national conference/Summit proposed in Recommendation 1, and should be informed by the consolidated findings regarding key industry needs and proposed interventions. This engagement would be aimed at addressing duplication of efforts and developing a more co-operative and targeted approach to funding within the current funding landscape. Such a process of engagement would seek to produce:

- A clearer articulation between funding bodies of roles, areas of responsibility and priority, and target groups in relation to areas of identified need within the industry
- The development of more efficient mechanisms for information and data sharing between funders, and with the visual arts sector
- In the case of governmental agencies, investigating options around the development of integrated grant management systems able to speak to one another, and addressing the specialised training needs of funding officers and administrators
- The development of a funding map and advisory resources that would serve as a guide for individuals and organisations within the sector as to who to approach for what kind of funding.

Such meetings should include membership drawn from the proposed Visual Arts Task Team (see recommendation 1). Notably, such an approach could serve as a template for engagement with other parts of the arts/creative industries.

Roleplayers: DAC, funding agencies

Timeframe: Short

Cost: Low

Recommendation 22: Review the role and position of the NLDTF in resourcing the arts sector.

Strategic Linkages: Attracting Investment; Strengthening Infrastructure

The implementation of many of the recommendations contained in this report relies on resources which are not foreseeably available within the national department or its counterparts at a provincial and local level. The report has also noted the accumulation of substantial unspent monies vested in the National Lottery Distribution Trust Fund (NLDTF), and the fact that the overall grant funding for arts, culture and heritage available through the NLDTF substantially exceeds the **combined** value of all other grant funding sources.

It is proposed that a high level engagement with the National Lotteries Board and the Ministry of Trade and Industry should be undertaken, aimed at promoting the position of the NLDTF as the single most significant funder of the non-profit arts sector in the country, and ensuring that these resources are deployed in a manner which synergises with an overall industry development strategy for the visual arts. Consideration should also be given to how to ensure that the grant management systems and capacity of the NLDTF/NLB correlates with the scale of finance vested in the body. The potential complementary role of other statutory funding agencies in acting as intermediary agents for the distribution of Lottery funding, should be carefully examined, drawing on international precedents such as the partnership between the UK Lottery and the Arts Council of England.

This would involve briefing the dti, NLB and NLDTF on key sector needs noted elsewhere in this report, and establishing an ongoing mechanism for communication and cooperation between the department and the NLB/NLDTF in this regard, as contemplated within the governing legislation for the NLB/NLDTF. Specific priorities to be promoted in relation to the needs of the visual arts sector include:

- Exhibitions and outreach funding for art museums and collections and community arts centres
- Core running and project costs for independent visual arts development organisations and spaces, industry bodies and associations, particularly those focused on providing opportunities for young artists entering the industry
- Major projects which promote the visibility and impact of the visual arts in public life, including public art projects
- Funding for visual arts education and training programmes in schools, including artists-in-schools programmes
- Funding for professional development programmes for artists, particularly those entering the industry

Key roleplayers: DAC, NLDTF/NLB, dti

Timeframe: Short

Cost: Low

Recommendation 23: Establish a joint task team with the Department of Finance and SARS to investigate arts-specific tax benefits and incentives aimed at stimulating entrepreneurship and encouraging corporate investment

Strategic Linkages: Attracting Investment

This report has noted a variety of limitations that attach to existing tax benefits that accrue on donations from corporate bodies to arts organisations and institutions under Section 18(A) of the income Tax Act. It has also noted a variety of schemes that pertain internationally with regard to tax benefits for artists, creative businesses and organisations. It is proposed that the DAC should initiate the formation of a joint working group or similar mechanism with the Department of Finance and the South African Revenue Services that would be aimed at:

- Reviewing the existing provisions for benefits to the arts under the Income Tax Act
- Commissioning detailed research into the variety of benefits and incentives that exist internationally in relation to the tax deductibility of donations on the one hand, and the taxation of artists, creative businesses and organisations on the other, together with an assessment of the feasibility of instituting similar measures in the South African context.

The working group should also include industry representatives drawn from the proposed Visual Arts Industry Task Team.

It is additionally recommended that a promotional booklet be developed around the existing tax benefits so as to encourage wider usage of these provisions by visual arts organisations and the corporate sector.

Key Roleplayers: DAC, Department of Finance, SARS

Timeframe: Short-Medium

Cost: Low-Medium

Recommendation 24: Commission research on an ongoing basis that provides up-to-date industry data as a basis for monitoring and evaluating the impact of proposed interventions, and identifying new areas of need

Strategic Linkages: Promoting Coherence

The present research project has represented a significant first step in developing a knowledge base around the visual arts that can begin to provide both the industry and government with an informed basis for industry development strategies at a micro and macro-level. It is proposed that a standardised framework for this research be generated drawing on methodological insights gained through the present project, to be implemented every three years through a partnership between one or more tertiary institutions, industry organisations and the department. A successful precedent for this kind of programme has been established within the publishing sector, where a survey of the industry is conducted on an annual basis through a partnership between the DAC, the Publishers Association of South Africa (PASA) and the University of Pretoria.

Key roleplayers: DAC, tertiary institutions, industry organisations

Timeframe: Medium, recurrent

Cost: Low