

The Art of Adaption: The National Arts Festival's Strategic Response to the COVID-19 pandemic

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ABSTRACT

The National Arts Festival (NAF), an annual event held in South Africa, faced a significant challenge in 2020 due to the COVID-19 pandemic. The traditional in-person format of the festival was no longer feasible due to government restrictions. In response, the NAF's CEO, Monica Newton, led her team in a rapid transition to a virtual platform. This decision-making process and the creation of the first virtual NAF (vNAF) occurred within a remarkably short period of 100 days.

This teaching case study delves into the academic framework of crisis management, stakeholder theory, strategic thinking, strategic management, and business models, examining their application in the context of the NAF's transformation. To understand the decision-making process and challenges faced by the NAF, a qualitative research design was employed. Data collection involved two face-to-face interviews with Monica Newton, CEO of the NAF, and secondary sources.

The teaching case is accompanied by a comprehensive note for educators, offering guidance on its classroom use. The note includes a case synopsis, intended audience, suggested learning outcomes, theoretical connections, teaching strategies, potential discussion questions, evaluation methods, and additional resources. It supports a multi-faceted analysis of the NAF's transformation and encourages vibrant class discussion.

TABLE OF TERMINOLOGY

Business model	The mechanism through which a business creates value.
Crisis	An existential threat, or an unanticipated, threatening event that requires a rapid response.
Crisis management	The processes used by an organisation to handle a disruptive and unexpected event, including mitigating the impact of the crisis on the organisation or its stakeholders.
Mega-crisis	A crisis that occurs when multiple crises interact and cause added severity.
Organisational crisis	A material, undesirable, or unexpected event that negatively threatens an organisation or its stakeholders.
Stakeholder	Although definitions of the term vary, it can be defined as any person, entity, or group, that has an interest in an organisation, or to whom the organisation is responsible.
Stakeholder engagement	The process in terms of which an organisation interacts with its stakeholders in a positive, strategic, and pragmatic manner.
Stakeholder theory	A theory, made up of multiple interpretations, in which organisations have a social responsibility to provide value for all stakeholders.
Strategic management	The analysis of an organisation's internal and external environment to optimise management practices and meet the organisation's objectives.
Strategic planning	A direction chosen by an organisation by its leadership.
Strategic thinking	Strategic thinking is a cognitive process undertaken by an individual to navigate tasks, problems, decisions, or interactions.
vNAF	The virtual National Arts Festival, which was introduced in 2020.

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PREFACE

This Teaching Case Study Mini-Thesis is presented in fulfilment of the requirements for the degree of Master of Business Administration at Rhodes Business School, Makhanda. The research contained herein was completed under the supervision of Owen Skae in the Rhodes Business School and was conducted from January 2021 to December 2023.

This research is the original work of myself, Blake Benjamin Brody, except where reference has been made to other works. Neither this thesis nor any substantially similar work by myself has been submitted in fulfilment of any other higher degree, diploma, or the like. To my knowledge, none of the research contained herein has been published.

BB Brody

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Chapter 1: Introduction

1.1. Overview

This Teaching Case Study Mini-Thesis explores the role of crisis management, stakeholder theory, strategic thinking, strategic management, and business models in the context of the National Arts Festival (NAF), a leading arts festival in South Africa and the African continent, which was confronted in 2020 with the unprecedented challenge of a global pandemic.

Through the lens of the NAF as a case study, this Teaching Case Study Mini-Thesis aims to offer an in-depth understanding of how the interconnections and interdependencies among these concepts shaped the organisation's response to the mega-crisis, contributing to its continued survival. The research applies existing conceptual frameworks to the unique context of a mega-crisis faced by an arts festival, providing a practical example of how these concepts are applicable to a practical scenario.

The Teaching Case Study Mini-Thesis is structured into six chapters in total. In this first chapter, the research context and significance will be discussed, followed by the research goal and objectives.

In Chapter 2, a literature review is conducted of the concepts of crisis management, stakeholder theory, strategic thinking, strategic management, and business models. In the literature review, each concept is contextualised, and their interconnections and interdependencies are considered.

Chapter 3 considers the methodology of this Teaching Case Study Mini-Thesis, notably the research design, the use of a teaching case, the choice of protagonist, data collection, data analysis, and ethical considerations.

Chapter 4 contains the NAF teaching case. It is split into five main parts titled 'A Storm Brews', 'Facing the Tempest', 'Setting the Stage', 'The Curtain Raises', and 'The Reviews Are In'. These five parts canvas a brief history of the NAF and the protagonist's experience leading up to, and during, the NAF's pivot to a virtual model. The teaching case also covers a brief historical background of the NAF, the protagonist's experience of the concluding days of 2019, her

experience of the vNAF, and it concludes with the protagonist's analysis of the success of the vNAF.

Chapter 5 contains the teaching note, which is ancillary to the NAF teaching case in Chapter 4. The teaching note comprises a case synopsis, a description of the intended audience, the learning objectives, theoretical connections, a suggested teaching strategy, model discussion questions and answers, an epilogue to the teaching case, and additional resources.

Chapter 6 concludes this Teaching Case Study Mini-Thesis with a summary of each chapter, thereby serving as the conclusion. Additionally, chapter 6 offers insights into further research and the lessons learnt from this research.

1.2. Research Context and Significance

1.2.1. Global COVID-19 mega-crisis

The NAF's management dilemma can be contextualised as follows in the context of a global mega-crisis. In 2020, the world was severely affected by the COVID-19 pandemic, caused by an acute respiratory syndrome known as coronavirus 2 (SARS-CoV-2) (Roser et al., 2020). Parrott argues that the COVID-19 pandemic constitutes a mega-crisis (Parrott, 2020). A mega-crisis is created when multiple crises behave synergistically, each increasing the severity and fallout of the other (Yen and Salmon, 2017).

There are two key indicators that illustrate when a mega-crisis occurs. Firstly, a mega-crisis is more severe and complex than a crisis, having a global effect (Yen and Salmon, 2017). Secondly, a mega-crisis has a set of interacting crises that may have reciprocal effects on each other (Yen and Salmon, 2017). When applied to the COVID-19 pandemic, these indicators confirm that a mega-crisis occurred. The COVID-19 pandemic involved global health, political, social, and economic crises, each behaving collaboratively to create arguably the largest mega-crisis of our generation to date (Nicola et al., 2020), with global turbulence in societies, economies, and politics at levels unseen since 1939 (Gruszczynski, 2020).

1.2.2. NAF

The COVID-19 pandemic affected organisations globally, with the NAF being no exception. Held annually in Makhanda, Eastern Cape, since its inception in 1974, the NAF is Africa's largest festival of performing arts and usually runs from late June to early July (South African History Online, 2017; National Arts Festival, 2018).

The NAF is a non-profit organisation whose business model involves attracting audiences for a wide range of live performances, art exhibitions, and craft stalls (South African History Online, 2017). The NAF's target audience is generally individuals who appreciate the arts and are willing to travel to Makhanda for the experience. The NAF has the unique opportunity to pair, on an annual basis, a keen audience from across the country and the world with a wide array of live performances, and craft stalls.

In changing environments, managers often find themselves in a dilemma, where they are faced with a situation in which the business' existing approach is no longer viable for successful performance (Naidoo and Sutherland, 2016). The COVID-19 pandemic is one of the external factors that has hugely contributed to the occurrence of management dilemmas worldwide (Raj et al., 2022). As a result of the pandemic, the 2020 edition of the NAF could not continue using the in-person platform that had been used for 46 years (National Arts Festival, 2018). This was the management dilemma faced by Monica Newton, the newly appointed Chief Executive Officer (CEO) of the NAF. Monica, in the face of the COVID-19 pandemic, made the decision in consultation with her team to move from an in-person platform to a virtual platform. During this time, the NAF was forced into a difficult decision-making journey which involved crisis management, strategic thinking, strategic management, stakeholder engagement, and a review of its business model. The theories underpinning these concepts will be considered in more detail in the literature review in Chapter 2.

1.3. Research Goal and Objectives

The goal of this research is to analyse how the NAF pivoted its long-standing format as an adaption to the sudden and impactful crisis of the COVID-19 pandemic. The analysis is made using the theoretical lens of the concepts of crisis management, stakeholder theory, strategic thinking, strategic management, and business models.

The additional objectives of this research are outlined as follows:

1. To investigate how the NAF used strategic management to navigate the profound challenges presented by the COVID-19 pandemic.
2. To understand the role that strategic thinking played in the formation of the vNAF, allowing the NAF's continued survival in the face of a global mega-crisis.
3. To explore, with reference to stakeholder theory, the role that stakeholder engagement played in influencing and guiding NAF's decision-making processes and actions throughout the crisis.
4. To analyse how the NAF transformed its business model to ensure survival and ongoing operations in the face of a crisis.
5. To elucidate the interplay of crisis management, stakeholder engagement, strategic thinking, strategic management, and business model innovation within the specific context of NAF's response to the COVID-19 crisis.
6. To develop a comprehensive teaching note based on the NAF case. The purpose of the teaching note is to serve as an effective educational resource for students and professionals studying crisis management, stakeholder theory, strategic thinking, strategic management, and business model innovation.

Chapter 2: Literature Review

2.1. Introduction

The academic discipline of business and management is enriched by an array of theoretical constructs that collectively provide a comprehensive understanding of organisational dynamics. This literature review seeks to examine these theoretical underpinnings, offering insight into their development, application, and interrelation. The review encompasses several core concepts that are fundamental to the strategic operations of any contemporary organisation: crisis management, stakeholder theory, strategic thinking, strategic management, and business models.

The chapter begins by exploring the critical concept of crisis management. The literature is reviewed to reveal a structured methodology for anticipating, responding to, and learning from crises. Theoretical models are examined to understand the mechanisms by which organisations can cultivate resilience and the ability to withstand turbulent times.

Following this, stakeholder theory is reviewed, as stakeholder engagement proved to be crucial during the COVID-19 pandemic for the NAF, as it provided feedback on the position of internal and external stakeholders, as well as the innovation of the NAF's business model as a response to the mega-crisis. This included, for example, feedback regarding job security for internal stakeholders, such as employees, and repayment of debts to external stakeholders such as suppliers (Myeza et al., 2024). Additionally, in a more general sense, stakeholder engagement leads to long-term performance and a reflection of organisational purpose, responsibility, and environmental impact, which is important regardless of the existence of a crisis (Myeza et al., 2024). The literature offers a variety of perspectives on how organisations can and should interact with their diverse stakeholders, proposing models for ethical engagement and shared value creation.

The chapter then considers the concept of strategic thinking. In this section, the focus is on the cognitive processes that precede and inform strategic management. Strategic thinking is presented as a complex, continuous process that involves foresight, creativity, and the capability to anticipate future challenges and opportunities. This section aims to clarify the

nanced differences between strategic thinking and strategic planning, while emphasising the importance of integrating both in organisational decision-making.

Following this, strategic management is considered, which is a concept that is foundational to organisational success. This section discusses the definition, scope, and importance of strategic management in crafting and executing the overarching goals of an organisation. Delving into the literature, the multifaceted nature of strategic management is considered, which includes strategy formation, strategic planning, and the operation of these strategies.

Finally, the last section of this chapter covers the concept of business models. This section outlines the theoretical foundations of how organisations create, deliver, and capture value. The literature suggests that robust business models are critical for maintaining competitiveness and ensuring sustainability, particularly in a rapidly changing global landscape.

Through an examination of these theories, the literature review aims to provide a scholarly foundation that supports a comprehensive understanding of strategic organisational behaviour. It sets out to underscore the relevance of these theories in understanding the complexities of management practices and the continuous evolution of business strategies in response to internal and external factors.

2.2. Crisis Management

2.2.1. Introduction to Crisis Management

Crises and their management have existed since ancient civilisations (Zamoum and Gorpe, 2017). Crisis management, as a field of modern academic study and practice, arguably began in the 20th century. In the 1940s, scholars began producing case studies concerning managerial responses to natural disasters and similarly advancing theories concerning how a pre-existing status quo could impact a crisis response (Deverell, 2012). Later case studies then broadened to other types of crises, including political crises and industrial crises, before extending to organisational crises (Deverell, 2012). In more recent times, the study of crisis management has grown in a wide range of disciplines, such as economics, psychology, history, and political studies (Bundy et al., 2017).

2.2.2. Definitions

Defined broadly, 'crisis management' is the process by which an organisation handles a disruptive and unexpected event that threatens to harm the organisation or its stakeholders, including the processes designed to prevent or lessen the damage of a crisis on an organisation and its stakeholders (Pearson and Clair, 1998; Bundy et al., 2017). In other words, it is the orientation of an organisation towards having the ability to manage crises in a highly reliable manner where damage to the organisation is protected or diminished (Bundy et al., 2017; Zamoum and Gorpe, 2017). Once a crisis has been identified by an organisation, the management or leadership of that organisation is responsible for formulating an effective response (Myeza, Ecim and Maroun, 2023). In this way, leadership is fundamental for an organisation to survive a crisis (Myeza, Ecim and Maroun, 2023).

The word 'crisis' stems from the Greek *krisis* and *krinein* (Sellnow and Seeger, 2021). The former, *krisis*, was a medical term used to connote the turning point of a disease, whereas *krinein* means "to judge, separate, or decide" (Sellnow and Seeger, 2021). Bundy et al. (2017) note that there is a convergence of definitions of 'crisis', which is distinguishable from the definition of an 'organisational crisis'. Boin et al. (2010) define a 'crisis' as an existential threat whereas Sellnow and Seeger (2020) define it as a largely unanticipated, threatening event that requires a rapid response to mitigate harm. An 'organisational crisis' can be defined as a significant, undesirable, or unexpected threat to an organisation and its stakeholders that can have negative consequences, especially if not handled efficiently and effectively (Bundy et al., 2017). In the modern age of accountability, a crisis for an organisation can range from product defects to financial crises, pollution, pressure groups, employee disputes, sabotage, and information or technology breakdowns (Regester and Larkin, 2008).

2.2.3. Scope of Crisis Management

The literature on crisis management primarily concerns any of the three phases of crisis response and is informed by internal and external perspectives (Bundy et al., 2017). These three phases are the pre-crisis phase (or the preparation phase), the crisis phase (or the response phase), and the post-crisis phase (or the review phase) (Coombs and Laufer, 2018). Each phase needs to be handled effectively by individuals in management to minimise the negative effect on the organisation, and potentially create a positive outcome for the

organisation (Holla, Ristvej and Titko, 2018). By recognising and incorporating all three stages, organisations can manage crises more holistically and effectively, which has been described as collective managerial ‘mindfulness’ (Bundy et al., 2017).

Figure 2.1 below illustrates the three phases of a crisis:

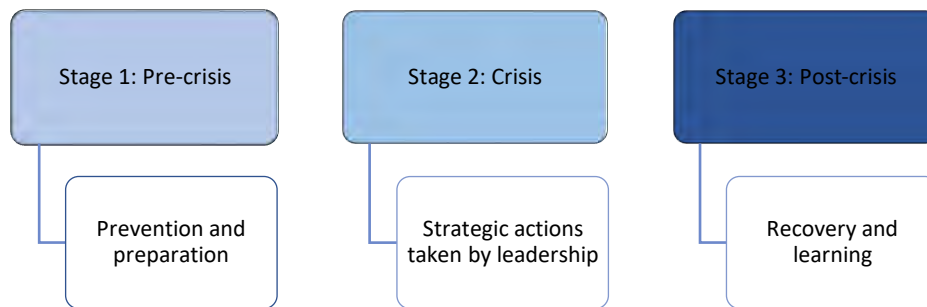


Figure 1.1: The three phases of a crisis (Bundy et al., 2017)

The first stage, the pre-crisis stage, involves prevention and preparation (Bundy et al., 2017). Prevention-related activities aim to reduce known risks that could lead to a crisis, while preparation activities ensure the organisation is ready to respond effectively when a crisis occurs by using managerial ‘mindfulness’ (Bundy et al., 2017). Bundy et al. (2017) noted that internal organisational culture, governance, as well as external stakeholder relationships contribute to the likelihood of crises occurring, and are, therefore, an important focus point.

The second stage, the crisis stage, involves taking strategic actions to mitigate the impact of the crisis and manage the situation effectively (Bundy et al., 2017). The quality of the organisation’s leadership is particularly critical at this stage, with effective organisation, adaptiveness, and communication being advantageous characteristics (Bundy et al., 2017).

The third stage, the post-crisis stage, revolves around recovery and learning by the organisation, assessing the ability to learn, assessing the effectiveness of the crisis management efforts employed, implementing necessary changes, and preparing for future crises (Bundy et al., 2017). This stage also includes social evaluation by external stakeholders, including the organisation’s crisis response compared to its responsibility for the crisis (Bundy et al., 2017).

The resilience of a business, or its ability to cope in the face of a crisis, is known as business resilience, and is considered to be integral to crisis management (Rao, Mackenzie and Subedi, 2023). A major factor of business resilience is known as dynamic capabilities (Rao, Mackenzie and Subedi, 2023). The theory of dynamic capabilities was developed by Teece, Pisano, and Shuen (1997) and emphasises that an organisation's capabilities to create, renew, or integrate its resources and capabilities allow the organisation to adapt or thrive to rapidly changing environments (Rao, Mackenzie and Subedi, 2023). These capabilities, known as dynamic capabilities, are essential for organisations to use its available resources to adapt or thrive in uncertain and volatile contexts, such as those presented by crises such as COVID-19, where its threat was difficult to predict and effectively respond to (Teece, Pisano and Shuen, 1997; Rao, Mackenzie and Subedi, 2023). Dynamic capabilities theory also allows for the seizing of opportunities and mitigation of threats by mobilising resources and developing operational responses (Yeow, Soh and Hansen, 2018). Furthermore, it allows for the transformation of existing resources and capabilities to align with the changing environment, ensuring long-term survival and success (Khurana, Dutta and Ghura, 2022).

2.2.4. Crisis Management in context

Crisis management is not just an organisational practice, but a field of academic study that intersects with various other domains including risk management, strategic management, organisational theory, and psychology (Bundy et al., 2017). In terms of its theoretical frameworks, crisis management research has drawn on various perspectives, including institutional theory, chaos theory, and Weick's sensemaking theory (Bundy et al., 2017).

The evolution of crisis management as an academic study was significantly influenced by real-world events and crises. The major industrial and environmental disasters of the late 20th century, such as the Exxon Valdez oil spill and the Chernobyl nuclear accident, spurred a surge of interest in the nature of crises, including the role of human error in crises (Kouzmin, 2008). As globalisation increased in the 21st century, crises such as the 2008 global financial crisis led to an increased focus on the interconnectedness of global systems, and the potential for crises to spread rapidly (Boin et al., 2010). Most recently, the COVID-19 pandemic has shown the vulnerability of a highly connected world to the spreading of a crisis.

Within this broad field, scholars have examined various facets of crisis management, from a culture of error reporting (Kouzmin, 2008), the role of leadership (James and Wooten, 2005), and the importance of communication (Coombs, 2015), to the use of crisis simulations for training (Pauchant and Douville, 1993), crisis spill-overs between organisations (Bundy et al., 2017), and the process of learning and adaptation following a crisis (Starbuck, 2009). Kouzman (2008) points out that due to human fallibility, human error should be expected in every organisation's crisis management. A culture of timeously reporting errors is, therefore, crucial for crisis management (Kouzman, 2008). Accordingly, errors made by humans in any organisation, including recurrent error traps, should be seen as a consequence of a lack of countermeasures, rather than the pervasiveness of human nature itself (Kouzman, 2008). The correct approach in these instances should be an investigation into why a defence failed, not who caused the error (Kouzman, 2008). For instance, in the example of the Chernobyl nuclear disaster, the lack of error reporting directly contributed to the consequences of the crisis (Kouzman, 2008).

2.3. Stakeholder Theory

2.3.1. Introduction to Stakeholder Theory

Stakeholder theory is not, as the name suggests, one theory (Miles, 2017). Rather, it is a combination of multiple interpretations that span various disciplines, including business ethics, corporate governance, finance, corporate social responsibility (CSR), and strategic management (Miles, 2017). It fundamentally redefines the purpose of business, shifting it from an exclusive focus on limited stakeholders, such as shareholders for profit-making organisations, to a broader emphasis on stakeholders, being anyone who can be affected or is affected by the organisation's objectives and actions (Freeman, 1984). Stakeholder theory, therefore, provides a valuable lens to understand a business' ethics (Mahajan et al., 2023), and address the expectations of an increasingly diverse and vocal range of stakeholders, who may demand financial performance, social responsibility, and environmental sustainability.

2.3.2. Definitions

In terms of this theory, organisations have a social responsibility to provide value for all stakeholders, although there is no standard of prioritisation (Mahajan et al., 2023). This aligns

with a stakeholder-centric approach where the organisation, regardless of whether they are for-profit or not, is seen as integrated into society, not disjointed from it (Myeza et al, 2023). The definitions of a 'stakeholder' can vary (Miles, 2017). Definitions offered thus far have included the following: any natural person or entity; any person or entity which is owed a moral obligation by an organisation; any group that supports an organisation (Miles, 2017); any group to whom or organisation is responsible; any individual or group that can affect an organisation achieving its objectives; or any person or group that has a claim, interest, ownership, or right in an organisation, or its activities (Benn, Abratt and O'Leary, 2016).

'Stakeholder engagement' has been broadly defined as the application of stakeholder theory (Kujala et al., 2022). However, a more useful definition of stakeholder engagement may be when an organisation interacts with its stakeholders in a positive, strategic, and pragmatic manner (Kujala et al., 2022). In addition, several authors have proposed that stakeholder engagement occurs when the engagement is morally positive, pragmatic, and respectful, and that the aims, activities, and impacts of the stakeholder relations are a component of the definition (Kujala et al., 2022).

Stakeholders typically encompass a wide range of groups including employees, customers, suppliers, shareholders, government entities, non-profit organisations, and the broader community. The inclusion and categorisation of stakeholders may vary depending on the context of the organisation and its strategic objectives (Freeman et al., 2010). These varying categorisations illustrate the divergent ideas regarding the ordering of stakeholders (Miles, 2017). For example, stakeholders could be classified in a variety of manners, including regarding their identification as primary or secondary stakeholders (Benn, Abratt and O'Leary, 2016), active or passive stakeholders (Mahoney, 1994), internal or external stakeholders (Benn, Abratt and O'Leary, 2016), or regarding their attributes, such as their power and interest in an organisation (Kujala et al., 2022). Internal stakeholders include shareholders and owners, whereas external stakeholders include groups external to the organisation, such as customers, suppliers, the environment, and the affected community (Pinheiro, 2015).

With reference to the classification of stakeholders according to power and interest, although all stakeholders require consideration, each group has its own interests and must be prioritised, or considered, differently (Podnar and Jancic, 2006). This means that stakeholder groups need to be prioritised in a manner that best fulfils each group's interests and

maximises the organisation's access to time and resources (Podnar and Jancic, 2006). In this regard, many tools have been created to assist with stakeholder prioritisation. For example, a simple, powerful, and widespread matrix was created by Hovland (2005), and is shown in Figure 2.2 below.



Figure 2.2: Power-interest stakeholder matrix (Hovland, 2005)

Hovland's (2005) matrix categorises stakeholder groups under one of the four boxes shown above to decide which level of prioritisation is required. Hovland (2005) argued that stakeholders should be separated based on their power within the organisation, and their interest in the organisation. As such, stakeholders with high interest and high power are prioritised over stakeholders with low interest and low power (Hovland, 2005).

2.3.3. Scope of Stakeholder Theory

The origins of stakeholder theory can be attributed to the Stanford Research Institute, which coined the term 'stakeholder' in the 1960s (Mahajan et al., 2023). Freeman then published foundational work on stakeholder theory in the 1980s, in which he emphasised the ethical shift required to move from 'shareholder' to 'stakeholder' (Freeman and Reed, 1983; Freeman, 1984; Miles, 2017).

In the domain of strategic management, stakeholder theory guides organisations in identifying key stakeholders, understanding their interests and expectations, and devising strategies to align these with the organisation's goals (Freeman et al., 2010). In the context of CSR and business ethics, stakeholder theory is instrumental in promoting ethical conduct, sustainability, and social responsibility by integrating the needs and interests of diverse stakeholder groups into an organisation's decisions (Jones et al., 2007). In the area of corporate governance, the theory advocates for a balanced approach to governance that

respects and considers the rights and interests of all stakeholders, not just shareholders (Donaldson and Preston, 1995). In essence, stakeholder theory is, therefore, about creating value for all stakeholders, fostering mutual benefit and sustainability, and enhancing the overall societal impact of an organisation (de Freitas Langrafe et al., 2020).

2.3.4. Stakeholder Theory in context

The applicability of stakeholder theory has expanded considerably since Freeman first introduced it in the 1980s. Although stakeholder theory was initially positioned as a strategic management tool, the theory has evolved to inform decision-making processes across a broad spectrum of organisational contexts and industries (Donaldson & Preston, 1995). In South Africa, for example, stakeholder theory is incorporated into the King IV Report on Corporate Governance as the 'stakeholder-inclusive approach' (Rossouw, 2020). Moreover, the South African government has legislated the prioritisation of stakeholders through legislation such as the Broad-Based Black Economic Empowerment Act 53 of 2003 (Benn, Abratt and O'Leary, 2016).

Stakeholder theory is, therefore, in direct opposition to the Friedman doctrine, also referred to as the shareholder theory, which states that the only purpose of a business is to maximise profits for its shareholders (Friedman, 2007). The Friedman doctrine is a normative theory that pervades the world of business ethics today, with profits and increases in shareholder value being the metric to which businesses are compared and celebrated (Calhoun, 2015). It can be argued that the Friedman doctrine follows a profit-before-people approach to business ethics, while stakeholder theory follows a people-before-profit approach (Derber, 2003).

Stakeholder theory challenges the current Friedman doctrine paradigm by offering a more socially responsible approach to business ethics. This idea links with the ideas of Drucker (1954), who is considered to be one of the founders of strategic management in the commercial context, as he highlighted the importance of prioritising people over profits (Drucker, 1954). At a minimum, this illustrates that the socially responsible governance of organisations spans multiple disciplines and decades, even though these approaches may not have been widely adapted into mainstream practices.

Recent examples illustrate the growing trend towards the adoption of stakeholder theory that gives prominence to external stakeholders. For example, in 2019, the Business Roundtable, a

group of 181 executives, including the chief executive officer of JPMorgan Chase & Co. as the group's chairperson, redefined its Statement on the Purpose of Corporations to include fostering an economy where the interests of all citizens are served (Wingard, 2019). This is a deviation from every version of the document issued since 1997, which unanimously promoted the prioritisation of shareholders (Wingard, 2019).

Another example is illustrated by the clothing brand, Patagonia, which has declared that the Earth is its only shareholder (Patagonia, 2022). In 2022, the Chouinard family, who owned Patagonia, donated their ownership to a specially created trust and non-profit organisation with the aim to limit the pressure for creating short-term profits over long-term responsibility (Gautier and Bothello, 2022). The non-profit organisation, Holdfast Collective, is required to use all dividends received for protecting the natural environment, biodiversity, and communities, as well as to fight climate change (Patagonia, 2022). The projected annual dividend to Holdfast Collective is anticipated to be equivalent to approximately R1,816,310,000.00 (Patagonia, 2022).

This trend of change in ownership structure to foundational ownership is particularly common in Denmark, where one-quarter of the largest Danish firms are owned by foundations, including Maersk, a well-known logistics and container supply chain service (Gautier & Bothello, 2022). Danish researchers of Nordic corporate governance have found that foundational ownership of Danish entities results in organisational benefits, such as increased stability in ownership structure, reduced managerial turnover, increased survival rates for the entities, and reduced volatility (Thomsen, 2016). These trends signal the practical application of stakeholder theory (Thomsen, 2016) and decreasing regard for business norms associated with the prioritisation of shareholders.

2.4. Strategic Thinking

2.4.1. Introduction to Strategic Thinking

The world is dynamic, meaning that the sphere in which an organisation or an individual exists is constantly changing, and must be considered in the decision-making process. As a result, the timing of a decision could result in an advisable choice made at a specific time, which is no longer inadvisable at another point in time due to the dynamic nature of demands, needs,

and desires from stakeholders, as well as the surrounding world (Bremmer, 2023). This creates a situation where decisions must be made at a fast pace, with current knowledge of both the internal and external factors that impact the organisation, and often with no clear foresight due to the uniqueness of each situation in an ever-changing world. This poses a difficult challenge for managers who are constantly faced with decisions that require effective strategic thinking.

Kaufman offered the first clear definition of strategic thinking in 1991, and the frequency of publications and new definitions offered have increased annually since then (Shaik and Dhir, 2020). The reason for this may lie within the dynamic nature of strategic thinking (Bratianu, 2017). Increasingly, strategic thinking is being offered as a solution to turbulence, as it incorporates dynamic and fast evaluation of issues, and can result in a competitive advantage if implemented effectively (Bratianu, 2017).

2.4.2. Definitions

Strategic thinking is a cognitive process, or a way of thinking, that allows individuals to navigate problems, interactions, and decisions that are faced daily (Liedtka, 1998). Strategic thinking can be summarised as a thinking process undertaken by an individual to achieve a goal, or mentally manoeuvre through a task (Kapferer, 2012). Strategic thinking permeates most human interactions and decisions from the age at which children develop a 'theory of mind' by understanding that other individuals have autonomy and minds of their own (Crawford, Costa-Gomes and Iriberry, 2010). Strategic thinking is a mental skill that is inherent in certain individuals but, if lacking, can still be learnt (Kazmi, Naarananoja and Wartsila, 2016). It has become a focus of the work going into the field of strategy, possibly because it is a skill that has been found to be lacking in many managers (Bonn, 2001).

2.4.3. Scope of Strategic Thinking

Strategic thinking involves a forward-looking, holistic approach to an organisation and its environment, taking into consideration the intricate and evolving dynamics at play (Liedtka, 1998). It concerns an understanding of the present realities of the organisation, as well as anticipating potential future events and opportunities for growth (Heracleous, 1998). Importantly, strategic thinking is not a once-off activity, but a continuous process that enables organisations to adapt to changing circumstances and respond to emerging challenges and

opportunities (Miceli et al., 2021). This includes recognising changes in the broader environment, anticipating the impact of these changes on the organisation, and developing responses that turn potential challenges into opportunities (Bonn, 2001).

Strategic thinking can occur at either the state level, organisational level, or an individual level (Bremmer, 2023). Ultimately, however, the decisions at each level fall on individuals, meaning that all strategic thinking is essentially occurring at an individual level (Liedtka, 1998). Accordingly, effective strategic thinking employed by individuals within an organisation can impact the organisation's performance.

Strategic thinking is a constant process utilised by individuals in many daily tasks. Bremmer (2023) refers to strategic thinking as the process of meta-thinking, which is essentially 'thinking about thinking'. According to Bremmer (2023), when faced with a dilemma or decision that involves thought, it is often best to think about that dilemma or decision in a dispassionate manner. By removing personal emotion from a decision and attempting to view the decision objectively, Bremmer (2023) argues that a more reasonable decision is likely to be made.

In a commercial context, strategic thinking is key to navigating market complexities, competition, customer demands, and technological advancements. It assists with identifying new markets, creating novel products or services, and adapting business models in the face of change (Mintzberg, 1994). For non-profit organisations and the public sector, strategic thinking helps to optimise the allocation of scarce resources, facilitate stakeholder engagement, and address social, economic, and environmental challenges (Bryson, 2018).

Furthermore, strategic thinking takes on added significance in crises where traditional approaches may no longer apply, and rapid, innovative responses are required. It involves sensing threats and opportunities early, making sense of a novel situation, and making decisions in the face of risk and uncertainty (Horney, Pasmore and O'Shea, 2010).

2.4.4. Strategic Thinking in context

Bonn (2001) suggests that there is a lack of strategic thinking among individuals in management positions. This lack, which is difficult to address, has been identified as one of the key shortcomings of organisations (Bonn, 2001). In fact, Bremmer suggests that it may be

the skill that is most lacking (Bremmer, 2023). Strategic thinking cannot be fully taught theoretically, unlike many of the other skills required by managers such as strategic management and crisis management. Strategic thinking is, however, a core competence that all people develop to some level throughout their lives (Bonn, 2001). This is developed by making multiple decisions requiring strategic thinking daily (Bremmer, 2023). Bremmer (2023) suggests that people who display strategic thinking are often those who are willing to look at multiple world views, self-reflect, and critique their own way of thinking (Bremmer, 2023). Successful strategic thinkers are those who can identify important factors, weigh each in proportion to their importance, and formulate clear suggestions after mentally weighing up all relevant factors timeously (Bonn, 2001). Although strategic thinking cannot be taught, it is a skill that can be developed by every person (Bonn, 2001).

Strategic thinking goes hand-in-hand with strategic planning (Kapferer, 2012). These two concepts are entangled and cannot be viewed in a vacuum. Strategic planning can be explained as the direction chosen for an organisation by its leadership team, while strategic thinking is an activity constantly engaged in by members of the organisation in an attempt to help the organisation move closer to its goals and objectives decided through the strategic planning process (Nickols, 2016). In simple terms, good strategic planning cannot occur unless the individuals involved use effective strategic thinking (Nickols, 2016).

2.5. Strategic Management

2.5.1. Introduction to Strategic Management

The field of strategic management has expanded to accommodate a variety of contexts. Traditionally, strategic management was primarily associated with the commercial sector, particularly concerning larger entities (Baker, 2001). However, its relevance has since permeated to other sectors, including non-profit organisations and public sector organisations (Bryson, 2018). The adaptation and application of strategic management principles in these varied contexts is a testament to its inherent flexibility and widespread relevance.

2.5.2. Definitions

Strategic management, at its most fundamental definition, can be described as the analysis of the factors associated with customers and competitors, being the external environment, and the organisation itself as the internal environment, to provide the basis for maintaining optimal management practices (David and David, 2015). It has also been defined as the management of an organisation's resources to meet objectives and operational goals (Ansoff et al., 2018). According to Nickols (2016), strategic management is the creation and execution of major goals by an organisation's management team on behalf of its stakeholders. This is a broad definition that encompasses many aspects.

2.5.3. Scope of Strategic Management

Strategic management exists in the sphere of strategy, which is a concept that can be defined as making decisions to achieve a competitive advantage (Henry, 2021). Within strategic management exists strategy formation, strategic planning, and strategic deployment (Nickols, 2016). Figure 2.3 below shows the framework created by Nickols (2016) which helps visualise the connection between strategic thinking, strategic management, and the latter's sub-concepts, namely strategy formulation, strategic planning, and strategy deployment.



Figure 2.3: Nested concepts of strategy (Nickols, 2016)

This nested concept was similarly described by Sammut-Bonnici (2015), who defined strategic management as the process of evaluation, planning, and implementation by which competitive advantage is maintained or improved. The planning phase would include creating or adapting the organisation's business model, tactics, strategy, and acquisitions (Sammut-Bonnici, 2015). The implementation phase requires the organisation's leadership to structure

it appropriately, create a positive culture, and steer it in a positive direction using suitable corporate governance principles (Sammut-Bonnici, 2015). The evaluation phase relates to evaluating the organisation's strategy with reference to internal and external factors (Sammut-Bonnici, 2015).

Strategic management may involve the formulation and deployment of an organisation's strategic goals, but it is not achieved without the effective implementation of strategic planning and strategic thinking. The interlinked combination of strategic planning and strategic thinking must complement each other for effective strategic management (Graetz, 2002). Strategic management is an ongoing process that constantly loops on itself (Henry, 2021). The loop involves formulation, planning, and deployment, which in turn loops back to formulation as the deployment is actualised (Henry, 2021). The reason for the looping is that an organisation exists within a complex and fluid environment, meaning that plans are impossible to implement perfectly (Nickols, 2016). This means that strategy consists of two parts: one part is intended, and the other part is realised (Nickols, 2016). For this reason, the process is constantly being revisited in real-time as the plan is being realised, causing re-evaluations and adjustments to be made. As a result, the ability to be dynamic during this process is vital (Vogel and Güttel, 2013).

Strategic intent, a pivotal concept in strategic management, refers to an organisation's long-term aspirations and unwavering commitment to achieving a desired leadership position (Hamel and Prahalad, 2010). It goes beyond short-term goals and focuses on a clear vision of what the organisation wants to become in the future. Strategic intent acts as a guiding force, inspiring and motivating employees to strive towards ambitious objectives that may seem challenging or even irrational (Mburu and Thuo, 2015).

Strategic intent plays a crucial role in shaping an organisation's strategic direction and competitive advantage. By setting a clear and compelling vision, it can mobilise employees and align their efforts towards a common goal. It can also help to create a sense of urgency and inspire innovation, as organisations strive to overcome obstacles and achieve their ambitious objectives. Furthermore, strategic intent can serve as a powerful tool for differentiating an organisation from its competitors and establishing a unique identity in the marketplace.

The scope of strategic management also includes a pivotal framework under its umbrella, known as the resource-based view of the firm, which gained attention in the 1990s (Barney, 2001). It was first described by Wernerfelt in 1984, but attracted interest after Barney's 1991 research on the subject (Wernerfelt, 1984; Barney, 1991). The resource-based view of the firm became a dominant paradigm in the field of strategic planning during the 1990s, and it still holds that status (Wright, Dunford and Snell, 2001; Desing et al., 2020). The concept of the resource-based view of the firm involves identifying the organisation's key potential resources and utilising these to gain a sustainable competitive advantage (Lin and Wu, 2014). The attributes lending to a potential key resource are the rarity of the resource, the high value of the resource, and the fact that it cannot be imitated or substituted (Lin and Wu, 2014). These attributes are then used to assist with gaining the competitive advantage.

2.5.4. Strategic Management in context

Understanding the importance of context in strategic management is crucial, as the strategies that succeed in one context may fail in another due, for example, to different environmental factors, industry dynamics, organisational capabilities, and stakeholders' expectations (Monib et al., 2021). As set out below, the nature and implications of strategic management can vary greatly according to the environment in which it is applied.

In the commercial sector, for example, strategic management often revolves around gaining a competitive advantage in the marketplace (Porter, 1991). Companies operating in highly competitive industries often deploy strategic management principles to differentiate their products or services, enter new markets, or streamline their operations for cost-efficiency (Barney, 1991). While strategic decisions are often made at the highest levels of the organisation, the principles of strategic management can be applied at the executive, departmental, or individual levels to align all actions with the overall strategic objectives (Josefy et al., 2015).

In contrast, the focus of strategic management in non-profit organisations may be directed towards maximising the impact of their programmes, securing sustainable funding, or managing their relationships with various stakeholders (Bryson, 2018). Non-profits often use strategic management to navigate complex environments, align their resources with their mission, and build strong partnerships (Hudson, 1999).

Similarly, public sector organisations utilise strategic management principles to improve their effectiveness and efficiency, adapt to policy changes, and meet public expectations (Poister, 2010). These could include, for example, police forces and correctional services (Poister, 2010). These organisations often need to balance various competing objectives and serve diverse groups of stakeholders, making strategic management a complex but essential task (Boyne and Walker, 2004). They may also be required to engage in strategic management due to legislative or executive mandates, or be constrained from acting strategically due to budgetary constraints or conflicts between role-players in their governing structure (Poister, 2010).

Moreover, the relevance of strategic management extends beyond commercial entities, non-profit organisations, and public sector organisations as it also operates at the levels of industries, national, and international. At the industry level, strategic management involves analysing industry structure, assessing competitive forces, and predicting industry trends (Porter, 2008). At the national level, strategic management principles can guide the formulation and implementation of national policies, economic development strategies, and public sector reforms (Braun and Warner, 2002). At the international level, strategic management is evident from international co-operation through initiatives such as BRICS, comprising Brazil, Russia, India, China, and South Africa (Jain, 2006), where emerging economies are developing strategies to increase their political and economic power (Braun and Warner, 2002).

In the context of financial crises and strategic management, Flammer and Ioannou (2021) considered how organisations use their resources, including capital, innovative capability, and stakeholders, to maintain a competitive advantage during a financial crisis. They found that during the financial crisis of 2007-2009, organisations that fared better competitively after the crisis followed a two-pronged approach: they reduced their workforce and capital expenditures but maintained their levels of research and development, as well as CSR (Flammer and Ioannou, 2021). This indicates that, in that specific crisis context, innovation and stakeholder relationships were crucial for a post-crisis competitive advantage, however, particular sensitivity to research and development and CSR should be considered (Flammer and Ioannou, 2021).

Wenzel, Stranske and Lieberman (2021) performed a meta-analysis considering strategic crisis responses by managers and found that there tended to be four strategies: retrenchment, perseverance, innovation, and exit. Concerning retrenchments, it was theorised that retrenchments may allow short-term gains, however, the long-term viability is unlikely, especially in longer crises, as retrenchments can lead to a reduction in capacity, resources, and culture (Wenzel, Stanske and Lieberman, 2021). The second strategy, perseverance, or the preservation of the status quo, was found to be viable in the medium term but less so in the long term (Wenzel, Stanske and Lieberman, 2021). Innovation, the third crisis strategy, is the strategic renewal of an organisation in the face of that crisis (Wenzel, Stanske and Lieberman, 2021). Innovation was found to be an effective and valuable response to a long-term crisis, however, liquidity and excess capacity for strategic renewal were important (Wenzel, Stanske and Lieberman, 2021). The fourth strategy, exit, refers to the discontinuation of business in response to the crisis (Wenzel, Stanske and Lieberman, 2021). This strategy may be a strategic decision from the beginning, for instance, in war-afflicted places or as a means to release resources, or it may be unavoidable as a last resort if the remaining strategies fail (Wenzel, Stanske and Lieberman, 2021). Wenzel, Stanske, and Lieberman (2020) found that various factors impacted the effectiveness of this final crisis strategy, including the type of disaster, the host government's response to the disaster, and the likelihood of strategic renewal arising from an exit.

While competitive advantage is a crucial aspect of strategic management, it's important to recognise that the field encompasses much more. Strategic management involves a holistic approach to organisational success, encompassing various dimensions such as vision, mission, goals, strategy formulation, planning, and implementation. It's about aligning an organisation's resources and capabilities to achieve its objectives in a complex and dynamic environment.

2.6. Business Models

2.6.1. Introduction to Business Models

Business models stem from the earliest iterations of organisations since they are fundamental to the nature of business interactions (Baden-Fuller and Morgan, 2010). Even though the

concept of a business model was not defined throughout much of human history, any person who devised a plan for creating value commercially was engaging in the formulation and implementation of a business model.

2.6.2. Definitions

At an elementary level, a business model forms the backbone of any enterprise since it guides an organisation's operational approach to achieving its goals, which could include profitability, revenue generation, strategic outlook, and social impact (Massa, Tucci and Afuah, 2017). In this context, a business model is defined as a structure that guides how an organisation utilises, creates, and holds onto value, where the value can be financial, social, or environmental (Osterwalder and Pigneur, 2010). Business models are, therefore, vital to the successful functioning of an organisation. Their benefits include: being a strategic tool for competitiveness, especially in a globalised, technology-driven environment; being an added innovation to create value that complements traditional concepts of innovation, such as the organisation's product and processes; and a tool to re-align an organisation's goals for social and environmental impact (Massa, Tucci and Afuah, 2017).

2.6.3. Scope of Business Models

The concept of a business model has even been interpreted as Weick's sensemaking theory operating at an organisational level, rather than an individual level (Massa, Tucci and Afuah, 2017). Weick's sensemaking theory was briefly discussed in section 2.2.4 above in the contextualisation of crisis management. The fundamental components of a business model were identified by Osterwalder, Pigneur, and Tucci (2005) as being value proposition, targeting customers, distribution channels, relationships with customers, value configuration, core capabilities, partner network, cost structure, and revenue models. Each of these components interacts in a complex manner, contributing to the overall functioning and success of the business. The scope of a business model thus encompasses the whole operational, strategic, and financial blueprint of an organisation.

Business models have greatly increased in complexity and become more sophisticated as the financial world has developed (Baden-Fuller and Morgan, 2010). That being said, the range of complexity of business models varies across organisations, with some of the largest organisations operating with simple business models (Bashir and Verma, 2017). What these

business models may lack in complexity, they may still gain in innovation (Bashir and Verma, 2017).

Business models are a vital aspect of any successful enterprise as they act as a blueprint for how organisations generate value. In the broader literature, the concept of the business model has evolved, particularly with the advent of the digital age. This shift to the digital world has changed how businesses approach their models, with an emphasis now being placed on digital capabilities and sustainability (Zott and Amit, 2010).

Examples of simple business models that are incredibly innovative include organisations such as Alibaba, Airbnb, and Uber. These organisations have caused major disruptions in their respective industries, which have largely been driven by their innovative business models (Bashir and Verma, 2016; Bashir, Yousaf and Verma, 2016; Schmuck and Benke, 2020). Business models are a vital aspect of any successful enterprise as they act as a blueprint for how organisations generate value. In the broader literature, the concept of the business model has evolved, particularly with the advent of the digital age. This shift to the digital world has changed how businesses approach their models, with an emphasis now being placed on digital capabilities and sustainability (Zott and Amit, 2010).

2.6.4. Business Models in context

Successful business models should not be static entities; they should evolve and change in response to internal and external pressures, technological advances, and market trends (Birchall and Ketilson, 2009). Rapid digitalisation, for example, has significantly impacted traditional business models across industries, forcing them to adapt and innovate, and a failure to adapt can cause an inability to compete, causing the downfall of an organisation (Rodríguez, Molina-Castillo and Svensson, 2020).

For example, Airbnb's business model created major disruptions within the hospitality industry, forcing many established hospitality organisations to undergo major changes to their business models to survive the rivalry, and even causing some organisations to cease operations due to their lack of competitiveness (Bashir and Verma, 2016). The disruption was caused by Airbnb's innovative business model which reinvented the hospitality industry by incorporating technology, allowing Airbnb to become the largest hospitality organisation globally, without needing to own a single hotel bed (Bashir and Verma, 2016). Airbnb gained

its competitive advantage by forming a partnership with members of the public with rentable rooms, flats, or houses, at an extremely low cost to Airbnb. Competition with this business model was, therefore, very difficult (Bashir and Verma, 2016). Airbnb's business model has arguably not only disrupted the industry; it has profoundly impacted the way that society functions (Massa, Tucci and Afuah, 2017). This profound level of disruption is also apparent in the business models of other organisations, such as Google, Meta (Massa, Tucci and Afuah, 2017), and Spotify.

Polaroid is an example of the need for innovation and adaptation, and how this was executed. Polaroid's first instant-photo camera was launched in 1948. Its products remained popular until digital competitors such as Kodak began outcompeting it, resulting in Polaroid filing for bankruptcy in 2001 (Prenatt et al., 2015). In the late 2000s, however, a technology design company took over Polaroid's products and focused on improving Polaroid's products through the introduction of innovation and technology into the business model, while still retaining the core essence of the original brand (Prenatt et al., 2015). The result is a recent surge of interest in Polaroid products amongst a young generation of users, as indicated, for example, by the use in 2015 of the hashtag '#polaroid' in over one million posts on Instagram (Prenatt et al., 2015).

The importance of adaptive business models is not limited to profit-making businesses alone. It extends to non-profit and hybrid organisations, such as the NAF, which need to assess continuously how the organisation will continue to create and deliver value for its beneficiaries, stakeholders, and society at large (Santos, Pache and Birkholz, 2015). This value creation becomes even more critical when these organisations face unprecedented challenges, much like the circumstances faced by the NAF in 2020.

Businesses are not the only ones adapting their models. As mentioned previously, academic interpretations of the business model concept have been evolving. For instance, Spieth, Schneckenberg, & Ricart (2014) stress the importance of integrating stakeholder theory into business model research. These types of intersections can provide significant insights for adaptation, especially for organisations like the NAF, which operate in complex environments with diverse stakeholders (Spieth, Schneckenberg and Ricart, 2014). Decision-makers in an organisation, therefore, have the responsibility of continuously considering an organisation's

business model, and adapting it, if necessary. As seen by the Polaroid example, this decision alone can decide the fate of an organisation.

2.7. Interconnections and Interdependencies

2.7.1. Introduction to Interconnections and Interdependencies

The previous sections discussed the literature of crisis management, stakeholder theory, strategic thinking, strategic management, and business models, and illustrated each concept in context. It is important to note that these concepts do not operate in isolation. Their interconnections and interdependencies form a complex web that shapes strategic decision-making in dynamic and multifaceted contexts.

In real-world scenarios, and particularly in times of crisis, strategic decisions are rarely influenced by a single theoretical concept or theory. Rather, the decision-making process is usually a result of a multitude of overlapping concepts and theories, leading to outcomes that can be explained and understood from various viewpoints. This section aims to explore further the overlapping nature of these concepts, drawing out the interconnections and interdependencies that exist among the discussed concepts.

2.7.2. Interconnections between Strategic Management and Strategic Thinking

Strategic management and strategic thinking are fundamentally interconnected fields, with the latter often providing the philosophical foundation for the former. Strategic management, as outlined in section 2.5 above, primarily involves the formulation and implementation of the major goals and initiatives taken by an organisation's top management, based on considerations of its resources and an assessment of the internal and external environments in which the organisation operates. Strategic thinking, on the other hand, is a more holistic, unstructured approach that encourages open-minded exploration of strategic issues (Heracleous, 2003).

Strategic thinking often precedes strategic management, as the creation of strategy involves an element of innovation and creativity that comes from thinking strategically (Liedtka, 1998). It focuses on finding novel, imaginative strategies, which can lend a competitive edge to the

organisation. Strategic management then takes these innovative ideas and puts them into a structured format that can be implemented and followed by the organisation.

The connection between strategic management and strategic thinking was evident in the NAF case. As the organisation navigated through the unprecedented crisis, strategic thinking led to the development of a unique strategy of shifting to a virtual platform. This thinking resulted from an understanding that a conventional approach would not suffice in this extraordinary circumstance. Following this, strategic management principles were employed to execute this strategy successfully. The NAF's leadership had to align their resources, both human and technological, reassess their goals, and adapt their operations in line with this new strategy.

2.7.3. Interplay of Crisis Management and Stakeholder Theory

In general, crisis management and stakeholder theory intersect significantly in several areas, making their interplay vital to any organisation's crisis management strategy. As discussed in section 2.2 above, crisis management involves an organisation's preparation for, response to, and recovery from a potentially damaging event. Stakeholder theory, on the other hand, highlights the importance of considering all stakeholders, being those who can affect, or who are affected by, the organisation's actions in decision-making processes (Freeman, 1984).

During a crisis, an organisation must not only manage the immediate issues arising from the crisis itself but also manage the perceptions, concerns, and responses of its stakeholders. This is where the principles of stakeholder theory come into play. Understanding the identity of stakeholders, their interests, and how they might respond to different actions or outcomes, is crucial for managing a crisis effectively (Savage et al., 1991).

2.7.4. Role of Business Models in Crisis Management

The concept of business models encapsulates how an organisation creates, delivers, and captures value (Osterwalder & Pigneur, 2010). While this concept is generally applied in a steady-state context, it becomes especially relevant during times of crisis. The way an organisation generates value can be severely disrupted during a crisis, requiring a reconfiguration of the business model to ensure survival and resilience (Bock et al., 2011).

Crisis management is fundamentally about managing disruption and change, and this includes changes to an organisation's business model. In a crisis, the traditional ways of creating and

delivering value may no longer be viable, requiring organisations to innovate and adapt their business models rapidly. The ability to do this effectively is a significant aspect of crisis management (Linnenluecke, 2017).

Figure 2.4 below illustrates the interconnections and interdependencies between the theoretical concepts discussed above:



Figure 2.4: Interconnections and interdependencies between theoretical concepts

2.8. Conclusion

Decision-makers can be more strategic, resulting in the sustainability of the organisation and its stakeholders, if most, if not all, of the theoretical concepts discussed in this chapter, are drawn upon. During a crisis, an organisation needs to undergo effective crisis management to prevent or lessen the damage of a crisis to an organisation and its stakeholders. Additionally, when the organisation is socially responsible and considers all stakeholders throughout the process, including a crisis, stakeholder theory is applied. Strategic thinking must be the lens through which the decision-makers view the full process. The strategic management process – which involves formulation, planning, and deployment – must be conducted effectively.

Finally, business model adaption is often required during a crisis, which means that decision-makers must also engage in crisis management through the business model process. All these interlinked concepts are, therefore, being simultaneously applied, either unconsciously or consciously. As highlighted earlier by Nickols (2016), the process will be one part intended, and another part realised.

Chapter 3: Methodology

3.1. Introduction

This chapter sets out the research methodology used in this study, by expanding on the research design and data collection, the format of the teaching case, the identity and role of the protagonist, the rationale for the protagonist's selection, data analysis, and, lastly, ethical considerations.

3.2. Research Design and Data Collection

A research design outlines the plan or framework that the researcher follows to answer the research questions posed (Sileyew, Hadid and Mouatasim, 2020). It provides the framework for data collection and data analysis, and guiding the researcher in gathering the most relevant information (Sileyew, Hadid and Mouatasim, 2020). This study followed a qualitative research design, offering a valuable first-hand perspective on the challenges faced and the strategies employed by the protagonist.

The data collection for the teaching case was sourced from a primary data source, namely two face-to-face interviews with the protagonist. The first, a semi-structured interview, was designed to unearth the intricate dynamics of managing the NAF, including the strategic, crisis management, and stakeholder aspects. Semi-structured interviews have shown to be useful for understanding the interviewee's real experiences (Myeza et al., 2024). The second interview consisted of twenty pre-determined questions, designed to probe deeper into specific areas of interest. The semi-structured nature of the first interview allowed for a broad, exploratory discussion and provided the flexibility to pursue various threads of conversation that arose spontaneously. This form of data collection facilitated a rich, contextually nuanced understanding of the management processes and strategies at the NAF.

The second interview was designed to be more structured, involving twenty pre-determined questions. These questions were created based on the insights from the first interview, providing an opportunity to dig deeper into specific areas of interest. The precise and targeted

nature of the second interview complemented the broad, exploratory approach of the first, allowing for a comprehensive and rounded understanding of the research area.

Both interviews were audio-recorded with the consent of the protagonist. The audio recordings were subsequently transcribed. The combination of semi-structured and structured interviews was strategic. It aimed to strike a balance between breadth and depth of data collection, ultimately providing a comprehensive dataset to inform the understanding of the NAF's strategic management and its interconnections with other theories.

In addition to the interviews, secondary data for the teaching case was gathered from publicly available sources, such as the NAF's official documents, press releases, and general media coverage. This additional data relating to the NAF served to enrich the reader's understanding of the festival's context, corroborate the interview data, and fill in any potential gaps in the information obtained from the interviews.

In relation to the data collection for the literature review and additional chapters, information from secondary sources was used, such as scholarly articles, books, and websites.

3.3. Teaching Case format

A central aspect of this Teaching Case Study Mini-Thesis is a teaching case. A teaching case is a narrative that includes individuals and a protagonist who are forced into making a decision or solving a problem (Ambrosini, Bowman and Collier, 2010). A teaching case differs from a traditional case study in that it neither offers analysis nor a conclusion (Ambrosini, Bowman and Collier, 2010). The purpose is to be used in an educational environment, where the rich narrative leaves room for discussion, guided by an educator. The teaching case is accompanied by a teaching note, which is only seen by the educator, and contains questions that can be asked by the educator and thereafter discussed (EmeraldPublishing, 2020). The base of the teaching case in this research revolves around crisis management, stakeholder theory, strategic thinking, strategic management, and business models, and how these concepts were applied by the protagonist.

A teaching case is a narrative that presents real-life scenarios faced by individuals, teams, or organisations, which is used as an educational tool to provoke discussion, analysis, and

learning about complex issues typically encountered in a professional context (Herreid, 1994). The primary purpose of a teaching case is not to advocate for the 'right' answer but rather to engage students in a process of critical thinking, allowing them to apply theoretical concepts to practical situations (Barnes, Christensen and Hansen, 1994).

A teaching case typically includes a background of the problem, details on the context in which the decision-makers operate, and a description of the challenges and opportunities they face (Ellet, 2007). It leaves the issues unresolved to stimulate class discussion and exploration of various strategic approaches and solutions. Students are encouraged to step into the shoes of the protagonist and consider different perspectives, while drawing on relevant theories and frameworks to inform their analysis (Herreid, 1994).

Teaching cases are often used in business schools to mimic the complexities of the real world, encouraging students to practice decision-making in a risk-free environment (McNair, 1954; Garvin, 2003). They are particularly valuable for their ability to illustrate the application of abstract concepts in concrete situations, thereby enhancing learning retention and practical skills (Kolb, 1984).

A well-crafted teaching case is more than just a narrative; it's a springboard for critical thinking and discussion in the classroom (Herreid, 1994). Effective cases present a realistic scenario with a central protagonist facing a complex decision or challenge (Ambrosini, Bowman & Collier, 2010). They typically avoid providing a clear-cut answer, instead leaving the issues unresolved to stimulate student engagement and exploration of various approaches (Ellet, 2007). The ideal case offers rich detail about the context, challenges, and opportunities faced by the protagonist, allowing students to step into their shoes and analyse the situation from multiple perspectives (Barnes, Christensen & Hansen, 1994). By drawing on relevant theories and frameworks, students can then grapple with the potential solutions and their associated implications (Herreid, 1994). Ultimately, a good teaching case fosters a dynamic learning environment where students can hone their critical thinking and decision-making skills in a safe, simulated environment (McNair, 1954; Garvin, 2003).

This teaching case mini-thesis employed several methods to achieve the characteristics of a strong teaching case. Firstly, by focusing on Monica Newton, the CEO of the NAF, the study gained a comprehensive perspective on the festival's strategic approach and its response to

the COVID-19 crisis. Monica's firsthand experiences and insights provided a rich narrative base for the case. Secondly, the data collection methods, including semi-structured and structured interviews, allowed for a nuanced understanding of the challenges faced and the strategies employed by the NAF. The semi-structured format facilitated a broad, exploratory discussion, while the structured interview provided a deeper dive into specific areas of interest. Finally, by incorporating secondary data from publicly available sources, the case is further enriched with contextual details that enhance the reader's understanding. Through this combination of a well-chosen protagonist, diverse data collection methods, and a focus on the complexities faced by the NAF, this teaching case mini-thesis has laid the groundwork for a compelling teaching case that can stimulate critical discussion and learning.

3.4. Protagonist

3.4.1. The identity and role of the protagonist

The protagonist in this study was Monica Newton, the CEO of the NAF. Monica was chosen as the protagonist due to her position of authority and responsibility as the head of the organisation. As Monica is the CEO, she has an extensive understanding of the festival's strategies, operations, and context, making her a valuable source of information for this case study. Monica's role involves overseeing and managing the diverse and complex aspects of the festival, including strategic planning, stakeholder relations, and crisis management. She is directly involved in the decision-making processes, influencing the organisation's business model, as well as the evolution of its strategies. As such, Monica's insights provide a comprehensive and authoritative perspective on the NAF and its strategic approach.

It is important to note that the study's findings are largely based on Monica's viewpoints, reflecting her experiences, understanding, and interpretation of the festival's strategies and operations. Although these insights offer in-depth knowledge about the NAF, they represent one perspective within the broader context. Other stakeholders, such as artists, audience members, sponsors, and employees may hold differing perspectives that were not captured in this study.

3.4.2. The rationale for selecting Monica Newton as the protagonist

As the CEO of the NAF, Newton held a key leadership role in the NAF during the COVID-19 mega-crisis, which gave her a comprehensive overview of the festival's functioning, as well as an in-depth understanding of its strategic decisions, stakeholder interactions, and crisis management strategies. This position allowed Monica to provide the researcher with first-hand information, experiences, and insights that could not be gleaned from secondary sources. Monica's extensive experience in the arts and culture sector made her a rich source of information. Additionally, her diverse experiences across different roles and organisations added depth to her understanding of the complexities of managing a cultural institution like the NAF. This breadth of experience brought invaluable perspective to the study. Monica's role required her to be involved in the strategic planning and operational execution of the festival, making her privy to the intricacies of decision-making, stakeholder management, crisis management, and the application of different business models within the context of the NAF. Monica showed a high level of openness and willingness to participate in this research. Her readiness to share her experiences and insights, and her commitment to contributing to academic knowledge in the field, were instrumental.

3.5. Data Analysis

The process of data analysis in this research was systematic and followed an inductive approach to glean insights from the interviews with Monica. This approach allowed for the exploration of significant themes that emerged from the data and assisted in drawing meaningful interpretations. The data analysis process was conducted in the following manner:

1. **Transcription:** The first step in the data analysis was to transcribe the interviews. Both the semi-structured interview and the 20-question interview were recorded with the consent of Monica. The audio recordings were digitally transcribed using Otter.ai, and the reliability of the transcription was checked by the researcher.
2. **Familiarisation:** Once transcribed, time was spent reading and re-reading the transcriptions to become familiarised with the narrative. This step allowed for the

understanding of the details and context of the responses. The researcher also made use of the audio recordings for further familiarity.

3. Interpretation: The final step in the data analysis process was interpretation. At this stage, the interviews were linked back to the literature and theories explored in this research, allowing for the determination of their significance to the context of the NAF.

Through this detailed and methodical approach to data analysis, the researcher was able to ensure that the findings were accurate, reliable, and reflective of Monica's insights and experiences. Furthermore, the interpretative nature of the analysis provided a deeper understanding of the relevance of the theoretical concepts' application to the NAF's situation.

3.6. Ethical Considerations

Undertaking qualitative research necessitates a keen awareness of the ethical dimensions of the research process, as the study involves the collection and analysis of NAF data, interactions with the protagonist, and the potential influence of the research on the protagonist. This study was conscientiously designed and implemented to adhere to the ethical standard required, as outlined below.

Before any primary data was collected, the researcher obtained ethical approval from Rhodes University's Human Research Ethics Committee, whose requirements were adhered to during data collection. Throughout the data collection process, ethical considerations were observed, including informed consent, the right to review material, and knowledge of the right to withdraw. The protagonist was made aware of the study's purpose, methods, potential benefits, and risks, and her participation was entirely voluntary. Before the initiation of the interviews, the protagonist was given a thorough explanation of the purpose of the research, the nature of her participation, and how the data would be used. She was also informed about her right to withdraw from the study at any point without repercussions. Written informed consent was obtained from her, demonstrating her voluntary agreement to participate in the study.

Furthermore, the research process was carried out in a transparent manner. The protagonist was kept informed about the progress of the study and was provided with an opportunity to review and comment on the findings.

In conclusion, by adhering to these ethical principles, this study ensured that the research was conducted in a manner that respects the dignity, rights, and welfare of the protagonist, while also maintaining the integrity of the research process.

Chapter 4: Teaching Case: “The Art of Adaption: The National Arts Festival’s Strategic Response to the COVID-19 pandemic”

“The curious thing about being new is that everything is theoretical.”

- Monica Newton (2023)



**Author’s note: All names in this teaching case have been changed, except for Monica Newton’s name. Primary information was collected through semi-structured interviews with Monica Newton across 2022 and 2023 (Newton, 2022; 2023).*

4.1. A Storm Brews

On the 2nd of January 2020, Monica Newton (she) was experiencing the longest period of leave that she’d ever taken. Monica had moved to Makhanda in the Eastern Cape that very day. Everything felt unfamiliar to her, from the town itself to the summer rains that signalled the breaking of one of the worst droughts on record, a drought that had gripped the Eastern Cape since 2015.

The migration to Makhanda had left Monica with an overwhelming sense of emptiness, accentuated by the desolate town, her empty house, and the new-found absence of her beloved furry companion. Monica’s move was precipitated by her formal appointment as Chief Executive Officer (CEO) of the National Arts Festival (NAF), effective January 2020. Her immediate objective as CEO was to sail the NAF away from proverbial stormy waters arising from a cash-flow crisis. Unbeknownst to Monica, an even greater storm was brewing.

4.1.1. The NAF ship

The NAF was founded during the era of apartheid in 1973 in Grahamstown (now Makhanda), with the inaugural arts festival holding 64 events, including live performances, art exhibitions, lectures, and more (South African History Online, 2017). More than 40 years later in the 2010s, the NAF had grown to host over 350 events per festival, involving more than 1200 performances in each annual festival (South African History Online, 2017). The festival has been traditionally held towards the end of June, in the depths of the Makhanda winter, where the temperatures can plummet into the negatives on particularly chilly nights. In past decades, gluhwein, heavy coats, and hot soup were always a staple feature at NAF venues, as audiences engaged with shows late into the wintery nights.

Additionally, the NAF has a political history. During apartheid, grassroots political movements in South Africa used art and culture as an expression of anger, pain, and their values. The Afrikaans ruling party, the National Party, used censorship as a foundational strategy to control society, including in literature and the arts (McDonald, 2010). The government's censors would determine, for example, what literary and artistic works were permitted or banned (Peffer, 2009). During this time, any literature, pictures, plays, paintings, or poems could be banned if they threatened the government's agenda (Peffer, 2009). In this context, the NAF began as an English liberal response to the National Party, focusing heavily on historical English literature, mainly Shakespeare (Snowball and Willis, 2006). At the turn of the decade, heading into the 1980s, the NAF began morphing into an anti-apartheid meeting of artists focusing on freedom of expression (Snowball and Willis, 2006). The festival created a space for artists to show their disdain for the brutal apartheid regime through art, and for visitors to engage with powerful messaging and discourse (Sizemore-Barber, 2013).

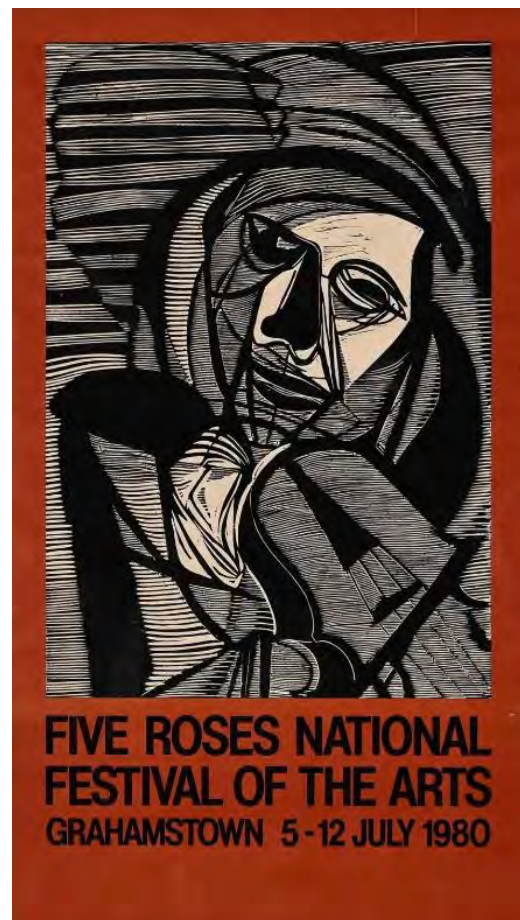


Figure 4.2: The 1980 programme cover of the NAF (Skotnes, 1980)

Figure 4.1 shows the 1980 programme cover of the annual NAF festival (Skotnes, 1980). The artwork was a sharp departure from the 1970s artwork, which largely consisted of traditional depictions of William Shakespeare. The creator of this cover, Cecil Skotnes (he), is an artist who has had a long association with the NAF, particularly during apartheid (Weaver-Hightower and Weaver-Hightower, 2022). Skotnes spent his career producing art alongside black communities that were excluded from participating in the arts and culture sector of South Africa by the apartheid government (Godby, 1997).

Skotnes' art often had strong anti-apartheid themes, as seen in Figure 4.2, which is his artwork

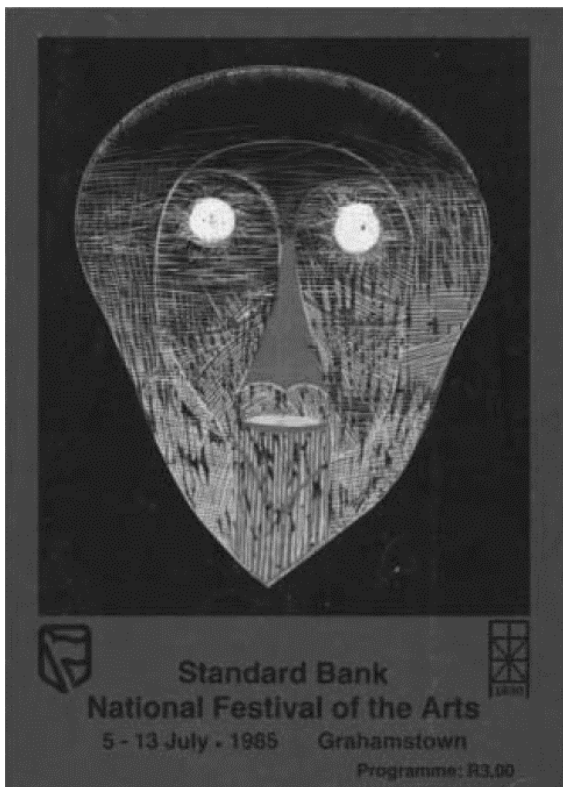


Figure 4.3: The 1985 programme cover of the NAF (Snowball and Willis, 2006)

for the NAF's 1985 programme cover (Snowball and Willis, 2006). This cover, which depicts an African mask, indicates the use of art by the NAF to further its stance against apartheid during a time when censorship was rife, and defiance could have serious, life-changing consequences for the persons involved (Snowball and Willis, 2006). This central artwork, which would have been seen by most festivalgoers in 1985, was a subtle but strong message to the apartheid government.

In post-apartheid South Africa, the NAF is no longer bound by censorship constraints (Snowball and Willis, 2006). It actively encourages participation from artists from very

diverse backgrounds, and some of its core values include diversity and inclusion.

4.1.2. Monica takes the helm of the NAF ship

Monica's inaugural day as CEO unfolded in early January 2020, poignantly in the ship-like structure of the 1820s Settlers' Monument, a dominant edifice overlooking Makhanda. Similarly to the town itself at the time, the Monument's mammoth structure echoed with

silence. Its corridors were eerily quiet as the management team was in the United Arab Emirates (UAE) orchestrating the first ever Sharjah Fringe Festival.

The NAF's cash-flow crisis had reached such significant proportions that, when Monica took to the helm, some of the debts from the 2019 festival had not been paid. This had resulted in built-up anger within the NAF, especially from long-standing team members who felt that they were witnessing the slow decline of the festival. That anger was mirrored by unpaid creditors, who were demanding to be paid. These financial issues resulted in members of the NAF team being confronted in public while, for example, shopping at the supermarket. It would have been a difficult start for any captain.

Even before Monica's tenure had officially commenced, worrying stories had begun reaching her from the NAF's team members in the UAE. These stories conveyed on-the-ground experiences confirming that, due to a novel flu-like virus rising in East Asia, their temperatures were being checked while travelling, and they noticed that the commercial planes were being sanitised.

These stories were not extremely surprising to Monica, especially due to the valuable insights she had already gleaned from NAF board members who were involved in tourism. In the month before, conversations had already started in South Africa regarding the existence of a novel virus, known as COVID-19. Without any recorded cases in South Africa, however, many citizens, including Monica, noted the news of COVID-19 with concern, but without forecasting with certainty the extent of its forthcoming rippling effect across the globe. Monica, like many other South Africans, was mindful of earlier instances of severe, infectious viruses that had been effectively contained, such as acute respiratory syndrome (SARS), Middle Eastern respiratory syndrome (MERS), and swine flu, all of which did not profoundly affect South Africa at the time of their outbreaks.

In light of the increasing seriousness of the situation, the NAF team convened to discuss the impact of the virus, with insights from NAF strategists on the NAF board, such as Ben (he), who in particular was sounding the alarm of a global disruption. The NAF team realised fairly quickly that COVID-19 would, at the very least, cause concerns for the upcoming festival, such as the absence of international attendees, frightened travellers, a smaller programme, and the wearing of masks. Monica was acutely aware that this would cause an additional strain on

her immediate objective to navigate the NAF in its existing economic storm. However, due to the anchoring nature of the 2020 festival's contractual obligations, for example, the NAF ship had to continue sailing.

As the COVID-19 pandemic cast a long shadow over the world, Monica found herself steering the NAF into uncharted waters. The once-vibrant festival, a beacon of creativity and expression, was now faced with a daunting dilemma: cancel the 2020 edition and risk the festival's demise, or forge ahead into the unknown, defying government restrictions and potentially endangering the lives of attendees and performers. The weight of this decision hung heavy on Monica's shoulders, as she grappled with the consequences of both paths. The NAF, a cultural cornerstone of Makhanda, teetered on the brink of extinction, and Monica's leadership would determine its fate.

4.2. Facing the Tempest



In South Africa, the signs of the impending mega-storm, with its unprecedented swells, were becoming glaringly apparent. From hushed governmental meetings to palpable tension in public spaces, the country was on the precipice, and comparisons to SARS and MERS were fading quickly. A tangible shift in the NAF's concerns had also occurred. Its concerns had evolved from the plausible absence of international attendees to the shocking realisation that hosting a live event might be entirely impossible. The essence of the festival, a vibrant testament to South Africa's resilient spirit, seemed to be hanging by a thread, its legacy threatened to be wiped out not just for the year but potentially forever, given the NAF's existing cash crisis. The gravity of the situation sunk in further as Monica listened to President

Ramaphosa's (he) address on 15th March 2020, a profound call echoing through the country, urging unity and resilience in the face of an impending lockdown (Ramaphosa, 2020).

As the storm approached, a radical transformation was brewing. As the tight-knit, entirely female management team congregated, a heavy realisation settled amidst them: the conventional, scaled-down festival that had been envisioned, could not proceed. Later, within the confines of the office, sitting alone on the phone with Andrew (he), a former colleague and friend with a wealth of experience as an arts administrator, Monica vocalised a fledgling idea. "Should we just host a virtual festival?" she mused aloud, her words hanging in the air (Newton, 2023). After some silence, Monica heard Andrew respond through the phone with "Well, what else are you going to do?" (Newton, 2023).

Monica knew that the craziness of such an idea needed to be assessed by Penny (she), the Technical Director of the NAF. Penny's main objective for each festival is to make sure that all technical aspects of the festival run as smoothly as possible. Penny is the technical mastermind behind the NAF, and she knows its capabilities better than anyone. As Penny walked past Monica's office, Monica hesitantly threw out the idea to Penny, anticipating a potential tongue-lashing about the 'newbie' not understanding the complexities of a virtual festival. Penny stayed silent for some time and then, to Monica's surprise, responded with a simple "okay". Monica also ran the idea past the board, who approved it. The idea for the virtual National Arts Festival (vNAF) had been born, and now needed to be executed.

4.3. Setting the Stage

Amidst the encroaching novelty, a new vision for the NAF was conceived, one that promised to transcend boundaries and embrace a digital reality. It was a commitment not only to sustain the tradition of the festival but to reimagine it in a form that could resonate globally. Thus, in the eye of the storm, with just under 100 days to go, the 2020 vNAF was born, a virtual phoenix rising from ashes, ready to offer a spectacle that attempted to live up to its tagline, "11 days of Amazing" (Kelleher, 2020).

"Never had there been in my career an event that so clearly matched the legal definition of a force majeure. That was our 'get out of jail free' card."

-Monica Newton (2023)

Even if the option of *force majeure* was used as a 'get out of jail free' card for its 2020 edition, Monica knew that the NAF, as an organisation, may not have survived the cancellation. *Force majeure* is a principle found in South African contract law which allows contracting parties in certain circumstances to escape fulfilment of their contractual obligations without incurring liability (Van Schalkwyk, 2018). Monica and her team knew how many stakeholders besides the NAF organisation depended on the festival. They understood that failing to host the event would be disastrous for so many stakeholders. Firstly, the festival is the largest event in South Africa's annual arts and culture calendar, meaning that many artists heavily rely on it for annual income. Secondly, the community of Makhanda benefits greatly each year from the visitors, as well as the financial injection brought into the small town. Thirdly, some sponsors have supported the festival for decades, and their continued trust and reliability are vital to the funding of the NAF. Fourthly, many NAF employees may have lost their jobs had the 2020 edition been cancelled. Fifthly, visitors come from all over South Africa and the globe, and greatly value the experience. Finally, Monica had to honour the long, illustrious history that this singular festival had created through decades of continued editions.

The difficulty with making such a drastic change, 100 days before the 2020 festival was set to begin, is rooted in the planning. The planning cycle of a single festival begins before the previous event has even finished. The earliest stage of planning involves open calls for proposals from artists interested in presenting work at the festival. Along with this, sponsors need securing, venues require booking, schedules must be created, and meetings with the local municipality need to occur. This process, which usually takes more than a year, had to be abandoned very close to the beginning of the 2020 edition.

4.3.1. Fortifying the NAF ship

Monica and her team needed to start making crucial decisions very quickly to fortify the NAF to ensure its survival through the pandemic. They decided that, in the context of the virtual platform, it would be best to adapt their existing website. The main issue with this decision

was, however, that the website only had a couple of pages, and now it had to be expanded to a platform that could stream in real time for the traffic of large audiences. In response, the NAF team largely relied on the abilities of its long-term IT development collaborator, and his ability to expand his team as required. The NAF team also acquired significant new skills in web development and streaming over the same period. Additionally, the ticketing system also had to be adjusted to the new vNAF format. These changes to the ticketing system proved to serve the NAF well after the vNAF, as the existing ticketing system in 2024 is built on the 2020 changes. During these adaptations, Monica trusted the advice of the in-house IT team, and acted rapidly on that advice. The newly expanded team was able to create the requisite platform within 100 days – an incredibly impressive feat considering the amount of work involved.

A further issue that Monica had to consider was the ‘magic’ that is lost when an audience experiences a performance virtually. In real-time performances, a connection between the audience and the artist can easily occur, audience engagement is easier, and the event is not at the mercy of internet speeds. Audiences can see each imperfection without the opportunity for editing, along with the amazing talent needed to perform without the option of retakes. Monica understood that if the NAF decided to stream pre-recorded and edited performances, the NAF was moving too far from its historical value proposition, and venturing into the already saturated market of streaming services, such as Netflix. The decision was, therefore, made to have as many performances as possible performed and streamed live, in real-time, however some had to be moved to a pre-recorded format due to logistics constraints. This added complexity as, instead of being able to build a digital performance library over the preceding months leading up to the vNAF, every performance would need to be filmed in real time – and, in many cases, multiple times for each performance of that show – over the 11-day period. These performances then needed to be edited into a format capable of being streamed, taking into account factors such as file sizes, server capacity, streaming services, and the uniqueness of individual browsers.

For real-time performances, another logistical issue that arose was venue capacity. Multiple venues were needed, with multiple crews capable of capturing the live performances for artists that were situated all around the country due to travel restrictions. The NAF’s solution was to contact venues across South Africa to request permission to use their venues, and in

many cases, their staff and equipment. Given the NAF's position within the South African art scene, and its relationship with other organisations that have been built up over the years, Monica was met with overwhelmingly positive responses. The result was that the vNAF would be held across six venues, many of which are the most prestigious theatres across South Africa.

"Every organisation contacted leapt at the opportunity to help the National Arts Festival due to its good standing in South Africa."

– Monica Newton (2023)

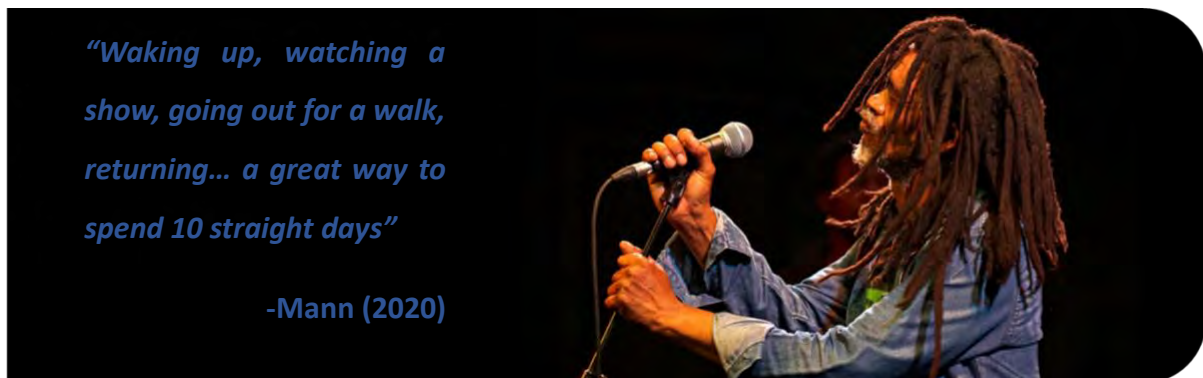
The decision to hold these performances outside of Makhanda had a direct impact on one of the NAF's important stakeholders: the Makhanda community. Monica understood that the vNAF would mean a complete re-evaluation of each stakeholder group and the weight given to their interests. Unfortunately, the interests of the Makhanda community had to be put aside for 2020. Monica admits that the decision was difficult, but it was the only real solution to the existing travel restrictions, and the decision was made with the interests of other stakeholders being taken into account. That being said, the NAF team tried to maintain benefits for the local community by incorporating virtual tours of the city's cultural heritage, and including local artists and initiatives into the vNAF programme.

Next, Monica had to consider the wishes of artists, as a further stakeholder group. "Filming live performances completely alters the performance", Monica (2023) admits. Crowd interaction disappears, pauses for laughter and clapping feel misplaced, and the performance is directed at a lifeless camera. For this reason, the NAF team contacted each artist individually and had a discussion about their willingness to perform in front of a camera only. Since the NAF attracts a wide array of artists, it meant that hundreds of artists needed to be contacted. Some withdrew from the vNAF in response. This was largely because these artists felt that a virtual format would either not honour their art, or they could not convert it to the new format, which the NAF team completely appreciated and understood. Many artists, however, were grateful for the vNAF initiative, were excited by the idea, and were willing to adapt their performance for the camera.

In this regard, large orchestras provided a particularly unique challenge. At the time, the government had imposed a limitation of twenty people per room. This meant that the orchestras had to be positioned carefully, or had to be split into multiple, completely separate rooms within the same venue. Since the orchestra's streams were performed live, the audio of the different sections of the orchestras had to be spliced together in real-time – a highly technical feat. Thanks to the expertise of the technical crews working at each venue, this was possible, but it still proved to be a mammoth task.

Additionally, Monica had to engage with sponsors, a further stakeholder group. Without sponsors' financial backing, the vNAF would be impossible. Many of the sponsors had been with the NAF for years and had built a strong relationship with the NAF. As Monica approached each sponsor, she explained the plan and asked for their support. Without exception, every sponsor agreed to support the vNAF financially, highlighting the great relationship that had been fostered by the NAF, and the ability of Monica to manage this stakeholder group effectively.

4.4. The Curtain Rises



On the first day of the vNAF, the servers crashed. Monica and her team had chosen to use Amazon Cloud Services in the United States of America to host the vNAF, as they offered the best pricing and assisted with great customer care. The issue, however, was that the NAF team underestimated how popular the vNAF would be, as well as the impact of the size of streamed files for streaming capacity. As a result, the amount of traffic received caused the site to crash. The NAF team immediately jumped on a call with Amazon to instruct them to increase the bandwidth capacity drastically, allowing for larger viewing numbers.

Halfway through the 11-day festival, during a time where every member of NAF was feeling overwhelming stress, Monica received a troubling message. One of the members of the eight-person management team, Linda (she), said that she had reached her breaking point and could not continue to be involved in the NAF. Each member of the management team is crucial to the functioning of the festival, and reducing the number to seven would be holding on by a thread. Monica thought about how to respond for some time, and then made up her mind. She asked Linda to take 24 hours off to give Linda some time to think about her decision. After the 24-hour period was complete, Linda would need to inform Monica whether she was 100% invested in the NAF, or completely out and cutting all ties with the NAF. The choice was Linda's alone. At the virtual meeting the following day, Linda informed the team that she would continue with her role in the 2020 vNAF by giving it her all, but after its completion, she would be stepping down. Every single member was brought to tears by Linda's news. Monica said that this was not the first, nor the last time, that the team's virtual meeting had resulted in tears. The team then continued working hard for the remaining days to see the vNAF to completion.

4.5. The Reviews Are In

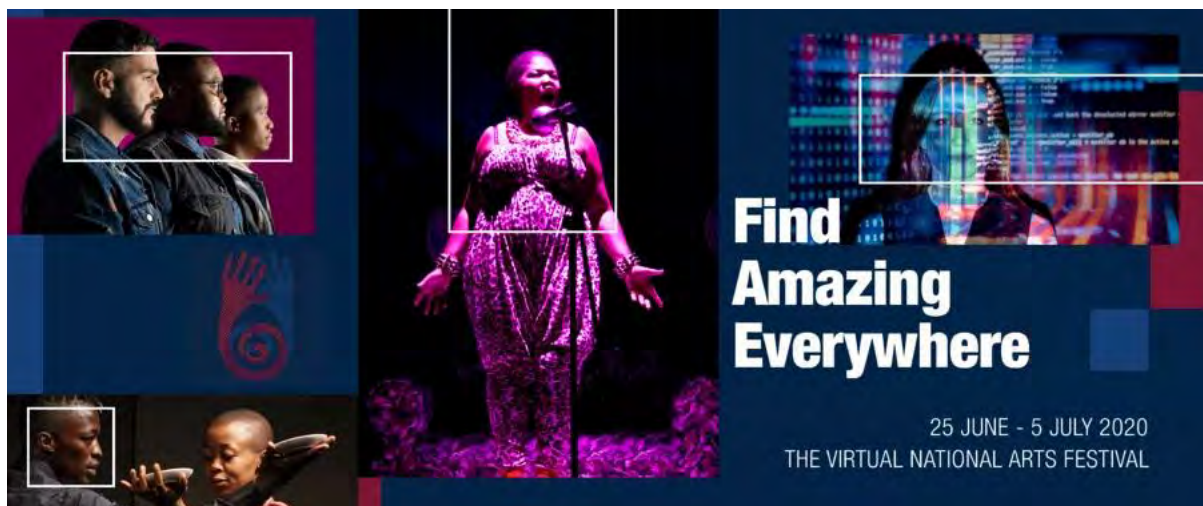


Figure 4.3: Promotional image for the 2020 vNAF (Kelleher, 2020)

There are many metrics to which the success of festivals, such as the vNAF, can be measured (Mann, 2020). In Monica's eyes, the festival was a success. As she says, "Just attempting the vNAF was a victory in itself" (Newton, 2023). Having now gone through the experience, Monica admits that if her team knew the full extent of the work that lay ahead, they may not

have chosen to produce the vNAF. Speaking from the experience, Monica (2023) notes that working with virtual platforms “always seems simpler than it is”.

Regardless of one’s perspective on the success of the 2020 vNAF, the response of the NAF to the global pandemic – being a complete pivot of a business model in under 100 days in unchartered waters – is a testament to the NAF’s ability to adapt and survive in the face of a crisis. This adaptability gives rise to optimism that the NAF’s team and its captain, Monica, will steer the NAF forward in a direction that allows it not only to remain, but also to thrive, as an essential pillar of the nation's cultural heritage and dynamic arts scene. As put so elegantly by Keith Bain (2020), “Times change, technology evolves, humans adapt along with that technology. And we take our art and our rituals and our stories with us” (Bain, 2020).

Chapter 5: Teaching Note

5.1. Introduction

The teaching note is an integral, ancillary part of the teaching case, *The Art of Adaption: The National Arts Festival's Strategic Response to the COVID-19 pandemic*, as it is a comprehensive guide to be used by educators when utilising the teaching case in a classroom. The teaching case follows Monica Newton, the CEO of the NAF, as she navigates the transformation of the festival from a physical event to a virtual one in under 100 days during the COVID-19 pandemic. This teaching note is designed to support a multi-faceted analysis and encourage vibrant class discussion.

The teaching note is structured into eleven sections, including this introduction. Following this introduction, a brief case synopsis is presented to provide context. The intended audience is discussed next, identifying the learners who would most benefit from studying the teaching case. Suggested learning outcomes are then provided, elaborating on the skills and knowledge that students can acquire through the teaching case. Thereafter, a section on theoretical connections links the case study's events to relevant academic theories discussed in Chapter 2, namely crisis management, stakeholder theory, strategic thinking, strategic management, and business models. Following this, suggested teaching strategies are provided to encourage active learning and student engagement. Thereafter, a list of potential discussion questions, along with suggested answers, is provided to stimulate classroom dialogue and deepen students' understanding. Evaluation and feedback methods are also included to guide the assessment process. Finally, the teaching note concludes with an epilogue and additional resources that can be utilised for further learning.

5.2. Case Synopsis

The National Arts Festival (NAF), which has been a beacon of cultural expression and artistic endeavour, has been entrenched in the South African arts landscape as a cultural icon since its inception in 1973. Held annually in Makhanda, the festival has evolved from being an

English liberal response to apartheid, to its modern representation, being a celebration of diversity and inclusion. The NAF has traditionally brought together diverse artists, stakeholders, and attendees, converging for a rich display of arts and culture amidst the wintry backdrop of the Eastern Cape.

As the NAF approached its 2020 iteration, Monica Newton (she), the newly appointed CEO of the NAF, faced the herculean task of steering the festival through choppy financial waters due to a liquidity crisis. However, a far graver challenge loomed on the horizon with the emergence of the COVID-19 pandemic. The pandemic not only threatened the 2020 iteration of the festival, but the festival's continued existence itself.

Faced with unprecedented circumstances, Monica and her all-female management team made the brave decision to transform the traditionally vibrant, in-person festival into a virtual experience in less than 100 days. This decision gave rise to the 2020 vNAF, the first virtual festival in the NAF's history.

The pivot to a virtual platform required monumental shifts in strategy, execution, and stakeholder engagement. The vNAF posed both technological and artistic challenges, including overhauling the festival's website to accommodate advanced live streaming capabilities. The management team's decisions, adaptability, and innovative thinking during the crisis allowed for a transformation that serves as a historic moment in the festival's legacy.

The vNAF journey was met with both technical glitches and unexpected demand, affirming the festival's challenges and impact. Despite the emotional toll and operational hurdles, the festival concluded successfully, showcasing resilience, passion, adaptability, and unyielding spirit. The case of the 2020 vNAF serves as a testament to the power of strategic leadership and innovation in navigating through crises and ensuring the survival and evolution of cultural institutions.

5.3. Intended Audience

This teaching case is designed for students enrolled in undergraduate and postgraduate management and business programmes, including in business schools and executive education programmes. It would be particularly relevant for courses covering crisis

management, stakeholder theory, strategic thinking, strategic management, and business models, and leadership. Additionally, it could be beneficial to students studying events management, arts management, and digital transformation courses. The teaching case's content and lessons also make it a useful resource for existing managers and leaders, especially those transitioning from in-person to virtual spaces. Specifically, those working in the arts, entertainment, and events management could draw on the experiences and strategies depicted. Furthermore, given the universal implications of the pandemic, the teaching case could serve as a guide for managers across industries on how to navigate crises.

5.4. Suggested Learning Outcomes

Suggested learning outcomes have been provided below concern the theoretical concepts of crisis management, stakeholder theory, strategic thinking, strategic management, and business models, as well as their application to practical scenarios.

Learning outcomes are statements describing the outcome or skill that a student should be able to do after the completion of the learning and teaching period (Shabatura, 2022). Learning outcomes usually range in difficulty from lower-order skills to higher-order skills ranging from remembering to understanding, application, analysis, evaluation, and eventually creation (Shabatura, 2022). In South Africa, undergraduate and postgraduate courses should align with the level descriptors contained in the South African National Qualifications Framework (NQF) to ensure consistency throughout qualifications (Government Gazette, 2009). To this extent, when utilising this teaching note, the educator should be cognisant of selecting, changing, adapting, or creating new learning outcomes depending on the level at which the course is pegged. The suggested learning outcomes have been developed taking into account a variety of lower-order and higher-order verbs contained in the updated Bloom's Taxonomy (Shabatura, 2022).

5.4.1. Crisis Management

The suggested learning outcomes for crisis management emphasise the nuances of crisis management, particularly its relevance during unexpected and rapid shifts in circumstances such as the one presented in the teaching case. In terms of the suggested learning outcomes, students should be able to:

- Outline the essence and various components of crisis management, including the three phases of crisis management.
- Explain the relevance of a well-constructed crisis management plan in dealing with sudden disruptions and mitigating potential risks.
- Demonstrate the value of leadership, communication, and decision-making during a crisis and how these elements can influence the outcome of the crisis management efforts.
- Analyse how crisis management strategies can help organisations adapt quickly to changes, maintain operational continuity, and minimise damage.
- Develop a crisis-management plan that can be implemented for an organisation that wishes to pivot from an in-person format to a virtual format due to a crisis.

5.4.2. Stakeholder Theory

Stakeholder engagement is a central concept in organisational management and decision-making. By investigating the NAF case, students have the opportunity to understand and apply stakeholder theory in practice. In terms of the suggested learning outcomes, students should be able to:

- Identify key stakeholders in an organisational context.
- Discuss the importance of stakeholder engagement and management in crises.
- Illustrate how stakeholder engagement can guide strategic decisions and actions.
- Classify stakeholders in the organisational context, such as the NAF.
- Define and explore the relationship between stakeholder theory, crisis management, and business models.
- Evaluate the impact of stakeholder engagement during a crisis.

5.4.3. Strategic Thinking

Strategic thinking plays a pivotal role in guiding organisations through crises. The NAF case offers an excellent opportunity for students to practice and sharpen their strategic thinking skills. The suggested learning outcomes for this section include:

- Identify the critical elements of strategic thinking, including its various models and frameworks.

- Contrast strategic thinking with other theoretical models, such as crisis management, stakeholder theory, strategic management, or business models.
- Demonstrate how strategic thinking applies in real-world situations, such as in the NAF teaching case.
- Illustrate the role and value of strategic thinking in decision-making, innovative solutions, and problem-solving processes.
- Create a comparison showing how the student would make similar or different strategic decisions to an organisation's leadership, such as in the NAF case.

5.4.4. Strategic Management

Students should be challenged to delve into the core concept of strategic management, where the focus is to comprehend how strategic management is pivotal to an organisation's success. In terms of the suggested learning outcomes, students should be able to:

- Outline the importance of strategic management for maintaining or improving competitive advantage during a crisis.
- Discuss the role of leadership in shaping the strategic direction of an organisation. Apply the theoretical concept of strategic management to an organisation, for example, the NAF.
- Analyse the success of the NAF's strategic management in the face of the COVID-19 crisis.
- Compare the NAF's strategic management process to that of a different organisation in the COVID-19 crisis.
- Develop a strategic management plan to provide a competitive edge for an organisation in the context of either a crisis or the necessity of making a digital shift.

5.4.5. Business Models

A crucial aspect of this case study revolves around the adaptability of a business model in the face of crises. In this section, the suggested learning outcomes are:

- Outline the fundamental components of a business model.
- Describe the potential long-term implications and sustainability of adaptive business models.

- Investigate the influence of a crisis on an organisation's value proposition, customer segments, revenue streams, and other business model components.
- Evaluate whether, in the context of the NAF teaching case, the vNAF represents an innovative business model adaptation to a crisis.
- Create a plan for business model adaptation in an organisational crisis, such as the NAF case.

5.5. Theoretical Connections

This section of the chapter delves further into the theoretical connections between the theoretical frameworks of crisis management, stakeholder theory, strategic thinking, strategic management, and business models, and the actual actions taken by the protagonist and her team during the COVID-19 mega-crisis. In this way, insight can be gained into the practical application of the theoretical frameworks.

Each sub-section below explores a key theoretical concept discussed in Chapter 2, namely crisis management, stakeholder theory, strategic thinking, strategic management, and business models. Within these areas, normative perspectives are outlined, providing a baseline of what is traditionally expected or theorised in academic and professional settings. Following this, positive realities are listed, recounting the NAF's actual strategies and responses.

5.5.1. Crisis Management

5.5.1.1. **Normative Perspectives**

The normative perspectives of crisis management include:

- Crisis management is typically segmented into three phases: pre-crisis (prevention and preparation), crisis (response), and post-crisis (recovery and learning) (Bundy et al., 2017).
- Effective crisis management requires leadership that formulates an effective response to the crisis (Myeza, Ecim and Maroun, 2023).

- Effective crisis management requires an organisation to develop managerial 'mindfulness', a culture of preparedness, engagement in thorough risk assessment, and ensuring clear communication channels (Bundy et al., 2017).
- Crisis management theory delineates a structured approach to handling an unexpected and disruptive event that threatens an organisation or its stakeholders (Bundy et al., 2017). It involves not just addressing the immediate threat, but also learning from the event to improve future responses (Bundy et al., 2017).

5.5.1.2. Positive Realities

The positive realities of crisis management as illustrated by the teaching case include:

- The NAF team had a relatively short time in phase one of crisis management since the impact of the pandemic was largely unexpected or unconfirmed until the government announced its lockdown measures. The NAF had under 100 days in phase two, being the crisis response. The NAF has learnt from the crisis, as the virtual format, for example, remained a feature in the 2021 festival. The post-crisis phase, while not detailed in the case study, would involve the NAF evaluating the effectiveness of the virtual event, implementing necessary changes, and preparing for future disruptions. The virtual festival itself can be viewed as a learning opportunity, providing the NAF with valuable insights into digital event management and stakeholder flexibility.
- The fact that a completely virtual festival was formulated, developed, and implemented in a very short space of time, with subsequent audience demand for it, illustrates that the leadership of the NAF minimised the impact of the crisis, created a historical outcome for the organisation, which resulted in a positive outcome for its stakeholders, such as artists who could still receive an income.
- The culture of the organisation includes communication and consultation with internal and external stakeholders (for example, artists, sponsors, and employees), which positively contributed to the likelihood of the success of the crisis response since the leadership were continually asking for, and receiving, feedback on their decision-making.

5.5.2. Stakeholder Theory and Stakeholder Engagement

5.5.2.1. **Normative Perspectives**

The normative perspectives of stakeholder theory and stakeholder engagement include:

- Stakeholder theory posits that organisations should consider the interests and impacts of all stakeholders (Mahajan et al., 2023). This theory challenges the traditional profit-driven focus of businesses by advocating for a broader perspective that includes customers, employees, suppliers, community members, and the environment (Freeman, 1984). Although this traditional focus is less apparent in non-profit organisations such as the NAF, the emphasis on the importance of broad stakeholder engagement is still relevant for the NAF.
- Normative stakeholder theory suggests that ethical management involves understanding stakeholders' interests and expectations and integrating them into the organisation's strategic decision-making process, although stakeholders can be prioritised differently (Mahajan et al., 2023).
- Stakeholder groups can be prioritised to fulfil each group's interests in the best manner possible, taking into account a maximisation of the organisation's resources and time (Podnar and Jancic, 2006).
- Stakeholder theory emphasises the value of inclusive and ethical practices that cater to a wider societal impact, promoting the idea of creating shared value for all involved parties (Jones, Felps and Bigley, 2007).
- Stakeholder engagement occurs when the organisation engages with stakeholders in a manner that is morally positive, pragmatic, and respectful (Kujala et al., 2022).

5.5.2.2 **Positive Realities**

The positive realities of stakeholder theory and stakeholder engagement as illustrated by the teaching case include:

- The NAF's leadership team were highly aware of the positive impact of the festival for its stakeholders, including artists, sponsors, technical teams, the Makhanda community, and audiences. As a result, from the outset, the leadership team engaged with stakeholders to ensure, for example, that the vNAF's technical details would

maximise the audience's and the artists' experiences. If the NAF had chosen not to engage with its stakeholders, the vNAF may have been based on a different but simpler business model, such as a pre-recorded streaming service, that may have achieved less audience engagement. In addition, Monica was confronting the increasingly real possibility that the organisation's long-term sustainability was in serious jeopardy. The easier decision may have been not to proceed with the 2020 vNAF and make use of the concept of *force majeure*, where available, to ignore contractual obligations. The leadership's perseverance and resilience, by avoiding this route, may be the reason why the festival has continued to date, and its legacy continues as a result. This reflects the essence of stakeholder engagement as the NAF's stakeholder engagement appeared morally positive, respectful, strategic, and pragmatic.

- The decision to engage with venues across South Africa, including Monica's connections in other provinces, to facilitate the live streaming of performances showed the prioritisation of stakeholder interests and the maximisation of resources. This decision allowed the NAF to fulfil as many groups' interests as possible, in the best manner possible. While this decision meant that, for example, the direct benefits to the Makhanda community were significantly reduced, it resulted in a wider social impact and greater shared value.

5.5.3. Strategic Thinking

5.5.3.1. **Normative Perspectives**

The normative perspectives of strategic thinking include:

- Strategic thinking is characterised as a cognitive process that underpins the ability to anticipate, envision, maintain flexibility, and create options for future directions that enhance an organisation's capacity to tap into new opportunities (Liedtka, 1998).
- Strategic thinking is the process of meta-thinking, which is essentially 'thinking about thinking' (Bremmer, 2023).

- Strategic thinking is posited as a precursor to strategic management, emphasising a forward-looking, holistic approach that contemplates intricate and evolving dynamics (Liedtka, 1998).
- Strategic thinking is a continuous process that allows an organisation to adapt to challenges, and turn these challenges into opportunities (Bonn, 2001).
- Non-profit organisations can use strategic thinking to optimise the allocation of scarce resources, facilitate stakeholder engagement, as well as address social, economic, and environmental challenges (Bryson, 2018).
- In the context of crises, strategic thinking can be used to sense threats and opportunities early, making sense of a novel situation, and make decisions in the face of risk and uncertainty (Horney, Pasmore and O’Shea, 2010).

5.5.3.2. Positive Realities

The positive realities of strategic thinking as illustrated by the teaching case include:

- The practical application of strategic thinking at the NAF under Monica's leadership mirrored the theoretical constructs. Monica demonstrated an ability to perceive the emerging crisis holistically, considering the impact of the pandemic not just on the festival's operations but also on its artists, audience, and the broader community. Her decision-making process included a forward-looking approach, where she envisioned the potential of a virtual festival to maintain the NAF's continuity and significance in the arts community. In under 100 days, the NAF team tapped into a completely new opportunity – a virtual platform – during unprecedented dynamics arising from the COVID-19 pandemic. The team allocated scarce resources such as venues, liquidity, and staff, engaged numerous stakeholders, and addressed challenges such as social restrictions. This illustrates that the NAF’s leadership, including Monica, were using the principles of strategic thinking in practice.
- Furthermore, Monica's openness to reimagining the festival's delivery model indicated a high level of strategic thinking. Instead of being constrained by traditional methods or an exit strategy, she fostered an environment that welcomed new, creative solutions, such as live-streaming performances and collaborating with venues

nationwide. This flexibility and adaptability are hallmarks of effective strategic thinking.

5.5.4. Strategic Management

5.5.4.1. **Normative Perspectives**

The normative perspectives of strategic management include:

- Strategic management encompasses the formulation, planning, and deployment of an organisation's strategic goals, considering both the internal and external environments (Ansoff et al., 2018).
- Strategic management is a continuous, dynamic process that loops back on itself, requiring constant re-evaluation and adjustment in response to the changing circumstances of the organisation's environment (Henry, 2021).
- The strategic management process is constantly being revisited in real-time as the plan is being realised, causing re-evaluations and adjustments to be made (Nickols, 2016), requiring dynamism in the process (Vogel and Güttel, 2013). For this reason, strategies often consist of both intended elements and realised elements (Nickols, 2016).
- Effective strategic management should anticipate environmental changes and adapt strategies accordingly, while balancing various stakeholder interests (Ketchen and Craighead, 2020).

5.5.4.2. **Positive Realities**

The positive realities of strategic management as illustrated by the teaching case include:

- When confronted with the COVID-19 pandemic, the NAF's management team, led by Monica, undertook a swift reassessment of the situation. They recognised that their original plan for the festival was no longer viable, formulated a new plan, and deployed it. This real-time recalibration of strategy from a physical festival to a virtual one, within a drastically reduced timeframe, illustrates a practical application of strategic management.

- Monica's decision to shift to a virtual platform was a strategic move that involved rethinking the organisation's value proposition, target audience, and delivery channels. The practical steps taken by the NAF, including rapid expansion of the IT team and infrastructure, reconfiguration of the website for streaming, and widespread engagement with stakeholders, are aligned with strategic management literature, which calls for agility and responsiveness to external shocks.
- Moreover, the decision to maintain live performances, despite the complexity it introduced, reflected the realisation of strategic goals that were adjusted to preserve the festival's core values.
- The NAF's strategy during the crisis was a blend of intended plans, shaped by the festival's history and values, and realised strategies that emerged from proactive and creative responses to the crisis. Monica's approach to strategic management was brought to life through innovative thinking and decisive action, illustrating effective strategic management in practice.

5.5.5. Business Models

5.5.5.1. **Normative Perspectives**

The normative perspectives of business models include:

- A 'business model' can be defined as the mechanism through which an organisation creates, delivers, and captures value (Osterwalder and Pigneur, 2010).
- Business models should clearly articulate the process of value creation, and identify the target customers, mechanisms of value delivery, revenue generation, strategic outlook, and social impact (Osterwalder and Pigneur, 2010; Massa, Tucci and Afuah, 2017).
- Business models must be adaptable to changes in the organisation's internal and external environments (Birchall and Ketilson, 2009).
- A well-conceived business model considers innovative approaches to maintaining competitiveness, especially in a globalised, technology-driven marketplace (Massa, Tucci and Afuah, 2017).

- Non-profit organisations, such as the NAF, should use their business model to assess, on a continuous basis, how the organisation will continue to create and deliver value to their beneficiaries, stakeholders, and society (Santos, Pache and Birkholz, 2015).

5.5.5.2. Positive Realities

The positive realities of business models as illustrated by the teaching case include:

- The NAF's transition to a virtual format in response to the COVID-19 pandemic is a practical demonstration of the flexibility and adaptability of the NAF's business model. Under Monica's leadership, the NAF's business model was reconfigured, shifting from a physical in-person model to a digital one. This shift required a complete re-evaluation of the festival's operational approach, including the utilisation of technology, redefining value proposition for artists and audiences, and securing the necessary technical capabilities and infrastructure within a 100-day period.
- This transformation of the NAF's digital access for audiences aligned it with the new digital reality, ensuring value creation. The NAF's decision to keep performances live, rather than pre-recorded, illustrates its commitment to its value proposition, namely preserving the interactive and immersive experience of the arts for audiences.
- The festival's engagement with national venues and technical staff across South Africa not only served to address the practical issues imposed by travel restrictions but also expanded the festival's partner network, reflecting a strategic and innovative adaptation of its business model in crisis conditions.
- The successful execution of the vNAF, despite some technical challenges and initial setbacks, is a testament to the organisation's ability to adapt its business model rapidly. This adaptation, although fast-tracked as a reaction to the crisis, was a reimagination of the festival's approach to value creation and delivery in the digital age.
- Considering the above, the NAF provides a compelling case study of how an organisation can dynamically evolve its business model in response to unprecedented external shocks.

5.6. Teaching Strategies

5.6.1. Introduction to Teaching Strategies

To teach this case effectively, a combination of active engagement, discussion, theory exploration, and reflective thinking is recommended. The NAF case presents a unique opportunity for students, especially in South Africa, to understand how different management theories can be applied in practice. It provides practical examples of crisis management, stakeholder engagement, strategic thinking, strategic management, and business models in a South African context, making it an ideal case for South African students in particular.

Engagement is the first and foremost strategy. The case's narrative around Monica's leadership, the unprecedented crisis, and the subsequent transformation of a well-established festival into a virtual format is an engaging storyline.

Encouraging active participation is also key. Students should be encouraged not only to read and understand the case, but also to interact with it. The concepts presented in the case are complicated to understand without engagement, particularly because the different theories are open to interpretation, intertwined, and influential on each other. By taking an active role in analysing the case, students can get a deeper understanding of these complexities and how they play out in real-life scenarios.

The next aspect of the teaching strategy revolves around discussion. Discussion allows for the cross-pollination of ideas and helps students develop critical thinking and communication skills. It provides a platform for students to express their views, argue their perspectives, and build on each other's thoughts. A lively discussion is likely to bring out different interpretations of the case, thereby enriching the learning experience and challenging the students' own perspectives.

Finally, theory exploration forms a crucial part of the teaching strategy. The case's real-world context provides a suitable backdrop to delve into crisis management, stakeholder theory, strategic thinking, strategic management, and business models. It provides an opportunity to see these theories come to life.

During the class in which the teaching case is to be considered, it is recommended that the educator follows the format of a case study analysis, then by a group discussion. Both these formats will be discussed below.

5.6.2. Case Study Analysis

Case study analysis allows students to scrutinise real-world scenarios and apply theoretical knowledge to practice (University of Southern California, n.d.). For this teaching case, it is suggested that students analyse the transformation of the NAF using the theories discussed above, namely, crisis management, stakeholder theory, strategic thinking, strategic management, and business models.

The case study analysis should begin with a comprehensive understanding of the case's context. Once students should have a clear understanding of the case, they should be encouraged to use different theoretical lenses to analyse the situation. For example, the educator can guide students to focus on some or all of the normative aspects and positive realities discussed above. Then, the educator should guide students to the analysis phase. The analysis phase involves not only identifying the theories at play in the case but also understanding how these theories interact and influence each other. At this stage, students should be encouraged to think critically, question assumptions, and challenge not only their views, but the views of their peers and conventional wisdom. Students should be urged to reflect on what they may have done similarly or differently in Monica's shoes. As a final step in the case study analysis, students should be asked to relate their findings to the broader context of managing any organisation during a crisis.

5.6.3. Group Discussions

If a group discussion format is used by the educator, the group discussion can form an integral part of the teaching strategy. Group discussions provide a platform for students to engage in collaborative learning, where they can exchange ideas, challenge each other's viewpoints, and learn from diverse perspectives.

The NAF case presents a multitude of theoretical concepts and decisions. As such, assigning students to smaller discussion groups may facilitate a more nuanced exploration of these elements. For example, each group could be tasked with analysing different aspects of the

case, with a focus on different theoretical lenses, before coming together to discuss their insights with the rest of the class. Once the groups have conducted their analysis, a class-wide discussion could be facilitated. Each group could present their findings, and open the floor to questions and debates. This step is critical as it encourages students to defend their viewpoints, consider alternatives, and evaluate the merits and drawbacks of different approaches. Furthermore, group work encourages critical skills such as teamwork, leadership, negotiation, and persuasion.

5.7. Discussion Questions

To stimulate in-depth class conversations and promote students' critical thinking, it is recommended that the educator creates a thought-provoking set of discussion questions. These discussion questions should encourage students to consider the issues presented in the NAF case critically and improve their comprehensive understanding of the theoretical concepts. A list of six possible discussion questions is set out below for use by the educator.

1. How did NAF manage to maintain its relevance and sustainability amidst the COVID-19 crisis? What strategic decisions were pivotal in transforming a traditionally physical event into a virtual one?
2. How did Monica Newton's leadership style influence the festival's transition to the virtual platform? What leadership qualities and strategic thinking were used to manage this change?
3. How did the NAF manage its various stakeholders during the transition to vNAF? How were their needs and concerns addressed?
4. What aspects of the NAF's crisis management strategy were effective? Were there areas that could have been improved?
5. How did the NAF modify its business model for the virtual platform? What were the key elements of the new model, and how did it align with the festival's core objectives and values?
6. If you were in Monica Newton's position, what future strategies would you implement to ensure the continued success and relevance of the NAF? How would you manage potential crises in the future?

Finally, it is important to note that the list of potential thought-provoking questions is endless, and educators can create different questions to focus on alternative theories. Below is a list of questions that can be asked by educators to stimulate discussion in the classroom. These questions encourage students to delve deeper into the complexities of the NAF's transformation and consider the broader implications of its decisions. By engaging in thoughtful discussions around these controversial topics, students can gain a more nuanced understanding of the challenges and opportunities faced by organizations during crises.

- **Ethical Considerations:**

Given the significant challenges faced by the NAF during the COVID-19 crisis, were there any ethical dilemmas or trade-offs that Monica Newton and her team had to consider? For example, did they prioritise the financial sustainability of the festival over the needs of certain stakeholders?

How did the NAF balance the desire to maintain its cultural heritage with the need to adapt to the changing circumstances of the pandemic? Were there any instances where tradition conflicted with innovation?

- **Power Dynamics:**

How did power dynamics within the NAF organization influence decision-making during the crisis? Were there any instances where the voices of certain stakeholders were marginalised or overlooked?

How did Monica Newton navigate the potential power imbalances between the NAF and its various stakeholders, such as artists, sponsors, and the local community?

- **Cultural Implications:**

How did the transition to a virtual format impact the cultural significance and experience of the NAF? Did the virtual platform preserve the essence of the festival, or were there aspects of the in-person experience that were lost?

How did the NAF address the potential exclusion of audiences who lacked access to technology or internet connectivity? What measures were taken to ensure inclusivity in the virtual format?

- **Future Directions:**

Given the success of the vNAF, should the NAF continue to offer a virtual component even after the pandemic subsides? How can the NAF balance the appeal of in-person events with the benefits of online platforms?

What are the long-term implications of the NAF's pivot to a virtual format? How might this impact the festival's sustainability, relevance, and future growth?

5.8. Suggested Answers

The following section provides possible answers to the discussion questions posed. These are not definitive answers but rather serve as a guide for the educator.

5.8.1. Answer to Question 1

“How did the NAF manage to maintain its relevance and sustainability amidst the COVID-19 crisis? What strategic decisions were pivotal in transforming a traditionally physical event into a virtual one?”

The first discussion question involves examining the key strategic decisions that Monica took when facing the crisis and transforming NAF into vNAF. In particular, the significant strategic decision made by Monica was the swift pivot from a physical to a digital event platform due to the COVID-19 pandemic. This decision was made and implemented incredibly swiftly.

This decision was made with several considerations in mind. Primarily, Monica was aware that a traditional festival could not take place due to public health restrictions, but she was determined to preserve the festival's spirit and continue to support the artists and the communities involved. The switch to a digital platform not only allowed the festival to continue to be held in the circumstances, but it also opened up opportunities for wider audience engagement and increased accessibility.

Monica also recognised that this digital shift would require innovative marketing and communication strategies to educate and attract the audience to the new format. She reached out to the existing network of festival-goers, while also leveraging social media and other digital channels, to extend the reach of the festival. However, each decision also came

with its challenges. For instance, the shift to the digital platform required grappling with issues such as digital practicalities, digital equity, technological capabilities, and reimagining the 'festival experience' in an online context.

From a strategic management perspective, this highlights the importance of adaptability, innovativeness, and customer-centric decision-making in crises. Monica's ability to balance the festival's traditional values with innovative solutions is a key learning point from this case.

5.8.2. Answer to Question 2

“How did Monica Newton's leadership style influence the festival's transition to the virtual platform? What leadership qualities and strategic thinking were crucial in managing this change?”

Question 2 asks students to consider how strategic thinking influenced the transformation of the NAF into a virtual event. Strategic thinking is a method of problem-solving that involves creating the right strategy to achieve specific goals, and it is key to the success of the NAF transformation.

When the pandemic hit, Monica had to think strategically about how to keep the festival alive while ensuring the safety and health of all involved. She envisioned the festival's future and created a detailed roadmap to achieve this vision, demonstrating her strategic thinking skills.

To begin, Monica had to consider the various resources available to her, including the technology platforms that could host a virtual festival. She also had to consider the financial implications of the shift, ensuring that the organisation could bear the costs while still delivering a quality event. Moreover, she had to navigate the complex challenge of moving an inherently physical and communal experience into an online space. This required a deep understanding of what makes the NAF special, and how those elements could be translated or reimagined in a virtual format. For example, Monica kept the engagement of the audience as a core element of the festival, creating various interactive opportunities for the virtual audience.

Strategic thinking also played a role in the marketing and communication of vNAF. Monica and her team had to communicate the change to their audience and stakeholders effectively to manage expectations and promote the event.

Therefore, the transformation of NAF into vNAF was not just a series of reactive measures in response to the pandemic, but rather a testament to Monica's strategic thinking abilities. It involved making key decisions to leverage resources, adapt to changes, and ensure the festival's successful continuation in a new and unfamiliar format.

5.8.3. Answer to Question 3

“How did the NAF manage its various stakeholders during the transition to vNAF? How were their needs and concerns addressed?”

Question 3 examines how Monica managed the various stakeholders involved in the NAF and how these relationships influenced the creation of the vNAF.

Monica adeptly managed stakeholder relationships during this critical transition period. Stakeholders in the NAF encompass a broad range, from the artists and performers to the sponsors, the local community, the audience, and the employees working behind the scenes. The shift to a virtual format posed potential risks and benefits for each of these groups, and Monica's approach reflected a deep understanding of these dynamics.

Firstly, Monica made sure to communicate transparently with all stakeholders. She clarified the reasons behind the transformation and outlined the new format's potential benefits. This clear communication helped manage expectations and eased any apprehensions about the changes.

For artists and performers, Monica ensured that they would still have a platform to showcase their work. She worked closely with them to understand their needs and concerns in the virtual format and implemented measures to address these. For the sponsors, Monica presented the transformation as an opportunity to reach a larger, potentially global audience. This framing helped maintain the financial support crucial for the festival's success. For the audience, Monica and her team devised ways to make the virtual experience as engaging as possible. This included interactive elements, live chats with performers, and various online activities. For the employees and the team working behind the scenes, Monica provided the necessary training and support to handle the new technology and processes involved in running a virtual festival. Finally, for the local community of Makhanda, Monica tried to maintain the festival's benefits despite the lack of physical visitors. She incorporated local

artists and initiatives into the programme, and promoted the city's cultural heritage through virtual tours and features.

In summary, Monica's stakeholder management was characterised by clear communication, sensitivity to individual stakeholder needs, and a drive to turn the challenges of the transformation into opportunities. Her skilful handling of these relationships was key to the successful creation of the vNAF.

5.8.4. Answer to Question 4

“What aspects of the NAF's crisis management strategy were effective? Were there areas that could have been improved?”

Question 6 challenges students to consider the effectiveness of the transformation of the NAF to a virtual format and its implications for the festival's business model.

To evaluate the effectiveness of the transformation, it's necessary to consider the goals that the NAF set for the virtual format. The vNAF aimed to preserve the core elements of the NAF, including showcasing diverse artworks, supporting artists, and providing cultural enrichment to audiences, in a manner that was safe and feasible during the COVID-19 pandemic.

As for the business model, the vNAF represented a significant shift. The festival had to reconfigure its value proposition, customer relationships, channels, and revenue streams, among other things. The experience likely generated valuable insights about the possibilities and limitations of a virtual arts festival, which can inform future business model decisions. For example, the NAF might consider maintaining a hybrid model that combines physical and virtual elements post-pandemic, potentially expanding its reach and impact.

To determine the long-term effectiveness and viability of the virtual format, further analysis is necessary. This could include detailed financial analysis, feedback from artists and audiences, analysis of audience reach and engagement, and comparison with other festivals that have undergone virtual formats or used a hybrid model.

In conclusion, while the transformation to a virtual format appears to have achieved many of its goals, its effectiveness and implications for the NAF's business model are complex issues that require in-depth exploration and critical thinking.

5.8.5. Answer to Question 5

“How did the NAF modify its business model for the virtual platform? What were the key elements of the new model, and how did it align with the festival's core objectives and values?”

Question 5 delves into the strategic importance of the pivot to a virtual platform and the potential long-term implications for the NAF.

Monica's decision to transform the NAF into a virtual format was a strategic response to the unprecedented situation created by the COVID-19 pandemic. Recognising the impossibility of conducting a physical festival amidst the restrictions, Monica turned a crisis into an opportunity, embracing a format that could actually expand the festival's reach and influence.

The vNAF allowed the festival to reach a global audience, thus increasing the exposure for the artists involved. This in itself presents an opportunity for the festival to evolve from being a primarily local and national event to having a more international footprint. Furthermore, it increased accessibility for those who might not have been able to travel to Makhanda for the physical festival.

In terms of long-term implications, the successful implementation of the vNAF presents a strong case for the continuation of a virtual component even after physical restrictions are lifted. This could mean a hybrid model in future editions – as occurred in the 2021 edition – combining the traditional on-the-ground experience with virtual elements that enable wider participation. This format would allow the NAF to maintain its local roots while also broadening its global appeal. On the other hand, it is essential to recognise that a virtual format may not fully replace the physical festival experience. The direct engagement with art, the energy of live performances, and the sense of community that a physical festival brings are challenging to replicate virtually. It will be critical, therefore, to strike a balance that maximises the benefits of both formats while minimising their limitations. Additionally, the shift to a virtual format has also probably accelerated the digital transformation of the organisation, a direction that many businesses and institutions are heading. This could mean new skills, new roles, and new ways of working within the NAF, and the ability to adapt quickly to future disruptions.

In summary, the pivot to a virtual platform was a strategic move that could have far-reaching implications for the NAF, influencing its reach, format, audience, and operational structure for future editions.

5.8.6. Answer to Question 6

“If you were in Monica Newton's position, what future strategies would you implement to ensure the continued success and relevance of the NAF? How would you manage potential crises in the future?”

If I were in Monica Newton's position, I would focus on several key strategies to ensure the continued success and relevance of the NAF:

Hybrid Format: Building on the success of the vNAF, I would explore a hybrid format that combines in-person and virtual elements. This would allow the NAF to cater to a wider audience, including those who may not be able to attend in person or who prefer the convenience of virtual participation.

International Expansion: I would aim to expand the NAF's international reach by partnering with arts organisations and festivals in other countries. This could involve co-productions, artist exchanges, and international touring opportunities.

Community Engagement: Strengthening the NAF's connection with the local community is crucial for its long-term sustainability. I would focus on initiatives that benefit the community, such as educational programs, job creation, and social upliftment.

Technological Innovation: Investing in technology and innovation is essential for staying relevant in the digital age. I would explore new technologies that can enhance the audience experience, improve accessibility, and streamline operations.

Crisis Preparedness: Learning from the COVID-19 crisis, I would develop a robust crisis management plan that includes regular risk assessments, contingency planning, and clear communication protocols. This would help the NAF to be better prepared for future challenges and disruptions.

Diversification of Revenue Streams: To reduce reliance on a single source of funding, I would explore additional revenue streams such as merchandise sales, corporate sponsorships, and government grants. This would enhance the NAF's financial stability and resilience.

Continuous Evaluation and Adaptation: Regularly evaluating the NAF's performance and adapting strategies as needed is crucial for long-term success. I would implement a system for monitoring key metrics, gathering feedback from stakeholders, and making data-driven decisions.

By implementing these strategies, the NAF can position itself for continued success and relevance in the evolving landscape of arts and culture.

5.9. Evaluation and Feedback Methods

Evaluation is crucial as it not only enhances students' learning, but it also allows the educator to reflect on their own teaching and become a better educator. Although evaluation can comprise many aspects, in this section, only suggested assessment types and educator feedback will be considered.

5.9.1. Suggested Assessment Types

Various types of assessments may be appropriate, depending on the institution's teaching and learning policy, the assessment strategy, learning outcomes, and whether a formative or summative assessment(s) is applicable. Examples of assessment formats could include a class discussion, case study analysis, research essay, business simulation, project, or examination. The evaluation methods of class discussion and case study analysis highlighted above are particularly recommended. The role of feedback in a class discussion and a case study analysis paper will be briefly discussed.

5.9.2. Educator Feedback

Educator feedback plays a pivotal role in student learning. Feedback is integral to the teaching-learning process as it provides students with an understanding of their ability to meet the learning outcomes. It highlights the areas of the student's strengths and pinpoints where improvement is needed.

By providing timely and targeted feedback, the educator can guide students to reflect on their learning, understand their mistakes, and develop strategies to improve. The sections below will detail the specifics of educator feedback if the format of a class discussion and case study analysis paper is used.

5.9.2.1. Feedback for the Class Discussion

In class discussions, the educator plays a crucial role as a facilitator, steering conversations, fostering an environment conducive to collaborative learning, and providing instantaneous feedback. The feedback during the discussion can primarily aim at:

1. Clarifying and elaborating on concepts, explaining the nuances, and relating them back to the theoretical frameworks.
2. Guiding students' thought processes by asking leading questions, challenging assumptions, and encouraging them to delve deeper into the case study. This feedback can help students expand their perspectives, understand the multifaceted nature of the case, and appreciate the interconnectedness of different theories.
3. Encouraging participation by acknowledging inputs and constructively critiquing arguments.

This real-time feedback helps students to adjust their understanding immediately, enhancing their learning experience. It also creates a learning environment where students can safely experiment with their ideas, challenge their peers, and learn from their mistakes.

5.9.2.2. Feedback for the Case Study Analysis Paper

If a case study analysis is used, it is suggested that the educator's feedback focuses on the following:

1. Content analysis, particularly depth of understanding, application, quality of argument, and the strength of the conclusion.
2. Structuring of the paper, logical flow, and clarity and coherence of the argument.
3. Written communication skills, including grammar, syntax, punctuation, and the use of professional language.
4. Academic integrity in the form of acknowledgement of sources and following the correct referencing style.

5.10. Epilogue

The following epilogue has been included if the educator or students seek to understand the NAF’s circumstances following the 2020 mega-crisis and its lingering impact.

National Arts Festival		<i>Designed for:</i> National Arts Festival	<i>Designed by:</i> Blake Brody	<i>Date:</i> 2024/08/26	<i>Version:</i> 1
Key Partners <ul style="list-style-type: none"> □ Artists and performers: Collaborations with artists from various disciplines. □ Sponsors: Partnerships with corporations and organisations. □ Government agencies: Collaboration with local and national government bodies. □ Venues: Partnerships with venues across South Africa. □ Technical providers: Partnerships with technology companies for streaming and production. 	Key Activities <ul style="list-style-type: none"> □ Event planning and organisation: Curating a diverse program of performances and events. □ Venue management: Securing and managing venues for performances. □ Marketing and promotion: Promoting the festival through various channels. □ Artist and stakeholder engagement: Building relationships and facilitating collaboration. □ Technical production: Ensuring high-quality production of performances and events. Key Resources <ul style="list-style-type: none"> □ Artistic talent: A network of talented artists and performers. □ Venues: Access to suitable venues for performances and events. □ Technical infrastructure: Equipment and expertise for production and streaming. □ Financial resources: Funding from sponsors, government grants, and ticket sales. □ Human capital: A skilled and dedicated team of staff and volunteers. 	Value Propositions <ul style="list-style-type: none"> □ Diverse and high-quality artistic performances: A wide range of genres and styles catering to different tastes. □ Unique cultural experiences: A celebration of South African arts and culture, fostering diversity and inclusion. □ Economic benefits for the local community: Job creation, tourism revenue, and community development. □ Networking opportunities: Platform for artists, industry professionals, and audiences to connect. 	Customer Relationships <ul style="list-style-type: none"> □ Personalised engagement: Tailored experiences for different customer segments. □ Community building: Fostering a sense of belonging and connection among attendees. □ Partnerships: Strong relationships with artists, sponsors, and local businesses. Channels <ul style="list-style-type: none"> □ In-person events: Live performances, exhibitions, workshops, and other activities. □ Virtual platform: Online streaming of performances, virtual workshops, and digital content. □ Social media: Online presence for promotion, engagement, and community building. □ Partnerships: Collaborations with local businesses, organisations, and government agencies. 	Customer Segments <ul style="list-style-type: none"> □ Artists: Local, national, and international artists seeking exposure and performance opportunities. □ Audiences: Arts enthusiasts, tourists, and local residents seeking cultural experiences. □ Sponsors: Corporations and organisations looking for brand exposure, community engagement, and tax benefits. □ Government: Local and national governments interested in promoting arts and culture. 	
Cost Structure <ul style="list-style-type: none"> □ Venue rental: Costs associated with venue hire. □ Production costs: Expenses for technical equipment, staff, and production services. □ Marketing and promotion: Costs for advertising, public relations, and digital marketing. □ Artist fees: Payments to artists and performers. □ Operational expenses: Costs for staff salaries, office rent, and utilities. 		Revenue Streams <ul style="list-style-type: none"> □ Ticket sales: Income from ticket purchases for performances and events. □ Sponsorships: Funding from corporations and organisations. □ Government grants: Support from local and national governments. □ Merchandise sales: Sales of NAF-branded merchandise. 			

Figure 5. 1: National Arts Festival Business Model Canvas

This Business Model Canvas provides a comprehensive overview of the National Arts Festival's key components and their interrelationships. It can be used as a tool for educators or learners to better understand the current National Arts Festival’s business model. Educators should be aware that the NAF significantly altered their business model when facing the mega-crisis and creating the vNAF.

The 47th National Arts Festival, taking place the following year in 2021, initially took the form of a hybrid event (National Arts Festival, 2021). The in-person aspect of the festival was, however, disrupted by the introduction of a level four lockdown by the government banning all gatherings (National Arts Festival, 2021). This required the entire festival to be held online, which had to be arranged within a record of ten days (National Arts Festival, 2021). However, before the ban was introduced, a new aspect of the festival designed for small audiences was

able to proceed in Cape Town and Durban, called the “Standard Bank Presents” platform (The National Arts Festival, 2021). The platform in Johannesburg could not have audiences (The National Arts Festival, 2021). A physical pop-up shop was hosted in the Bay West Mall in Gqeberha (previously Port Elizabeth) to support local craftspeople (The National Arts Festival, 2021). One of the driving forces for the 2021 edition was the impact on stakeholders, including income for artists and employees, and continuity for the arts sector (The National Arts Festival, 2021). The number of online visitors during the 2021 edition was lower than 2020, which Monica attributed to factors including the tight NAF deadline and online fatigue in South Africa (The National Arts Festival, 2021). The audience included international visitors, which illustrated the broader reach of an online component of the festival (The National Arts Festival, 2021).

In 2022, after two years of online festivals, the 48th festival was able to return to Makhanda with a planned capacity of 50% and a return to the basics (Khan, 2022). The programme was streamlined to include fewer performances with an emphasis on maintaining quality, and the central market was also significantly scaled down (Khan, 2022). On the night before the festival was due to begin, the government announced increased capacity to 100%, however the festival continued at 50% due to its original planning (Khan, 2022). The effect of the pandemic was, however, apparent, with many local businesses having closed down. In addition, municipal challenges continued and the festival had to operate, for the first time, at level six load-shedding of electricity (Khan, 2022).

The 49th edition of the NAF, held in 2023, saw an uptick in visitors, with ticket sales increasing by more than 50% from the 2022 edition (Wessels, 2023). The lower level of load shedding eased financial constraints and allowed for better planning for the NAF team, who did not need to source expensive generators to accommodate the programme (Wessels, 2023).

Going forward, the 2024 edition, which is the 50th edition, is set to be held from 20th to 30th June 2024 in Makhanda. Monica, who remains at the helm of the NAF, describes being part of this 50th edition as a “rare privilege” (Wessels, 2023). Given the external challenges of the 2021 and 2022 editions in particular, and without a mega-crisis at play, the 50th edition will provide further insights into the lessons learnt from 2020, as well as the continuing application of concepts such as strategic thinking, strategic management, and stakeholder theory.

5.11. Additional Resources

The resources listed below are intended to offer readers a deeper understanding of the topics discussed in the teaching case and teaching note. These can be utilised for additional reading and further research.

5.11.1. Related Academic Articles and Books

“Elevate: The Three Disciplines of Advances Strategic Thinking”

Rich Horwath introduces three core disciplines essential for effective strategic thinking: Coalesce, which involves unifying insights from various sources to form a cohesive strategy; Compete, which focuses on developing competitive advantages through understanding market dynamics and competitors; and Champion, which emphasises leading and communicating the strategy with commitment to ensure successful implementation. Horwath offers practical tools and frameworks to help leaders apply these principles, aiming to enhance strategic planning and execution for sustained organisational success. Here is the source:

Horwath, R., 2014. *Elevate: the three disciplines of advanced strategic thinking*. John Wiley & Sons.

“Learning to Think Strategically”

Julia Sloan explores the process of developing strategic thinking skills, emphasising that it is a learned capability rather than an innate talent. The book delves into the cognitive, social, and emotional aspects of strategic thinking, providing insights into how individuals can cultivate this skill through reflective practice and experiential learning. Sloan outlines methods for enhancing strategic thinking, such as leveraging diverse perspectives, fostering creative problem-solving, and integrating analytical and intuitive approaches. The book serves as a comprehensive guide for professionals aiming to improve their strategic thinking abilities to navigate complex organisational challenges effectively. Here is the source:

Sloan, J., 2019. *Learning to think strategically*. Routledge.

“Strategy Safari: A Guided Tour Through the Wilds of Strategic Management”

Henry Mintzberg, Bruce Ahlstrand, and Joseph Lampel offer a comprehensive overview of the diverse schools of thought in strategic management. The authors categorise strategic

management theories into ten distinct schools, each providing a unique perspective on how strategies are formulated and implemented. These schools range from the Design and Planning schools, which emphasise formal, systematic approaches, to the Learning and Cultural schools, which focus on more adaptive and emergent strategies. By exploring the strengths and weaknesses of each school, the book provides readers with a holistic understanding of the strategic management landscape, enabling them to apply a more balanced and informed approach to strategy formulation and execution.

Ahlstrand, B., Lampel, J. and Mintzberg, H., 2001. *Strategy safari: A guided tour through the wilds of strategic management*. Simon and Schuster.

“The Crisis Management Cycle”

Christer Pursiainen presents a detailed analysis of the processes and stages involved in managing crises effectively. The book outlines the cyclical nature of crisis management, comprising prevention, preparedness, response, and recovery phases. Pursiainen emphasises the importance of integrating these phases to build a resilient organisational framework capable of addressing various types of crises. Through theoretical insights and practical case studies, the book provides a comprehensive guide for policymakers, managers, and practitioners to develop robust strategies for anticipating, mitigating, and responding to crises, ensuring organisational continuity and resilience. Here is the source:

Pursiainen, C., 2017. *The crisis management cycle*. Routledge.

5.11.2. News Articles

“A New Stage for the National Arts Festival”

Rod Amner discusses how the festival, returning to Makhanda after a two-year pandemic hiatus, has adapted by downsizing its program and integrating digital elements. Led by Monica Newton and a team of women, the festival focuses on resilience and innovation, incorporating artist residencies and fostering local and international engagement. Despite financial challenges and the ongoing impact of COVID-19, the festival aims to rejuvenate the arts community and attract audiences back to support the arts. Here is the source:

Amner, R., 2022. *A new stage for the National Arts Festival*. Available at: <https://grocotts.ru.ac.za/2022/06/24/a-new-stage-for-the-national-arts-festival/>.

Chapter 6: Conclusion

This Teaching Case Study Mini-Thesis has considered the role of crisis management, stakeholder theory and engagement, strategic thinking, strategic management, and business models in the context of a move from an in-person format to a virtual format in the 2020 edition of the National Arts Festival (NAF). This was in response to the unprecedented challenge of a global COVID-19 pandemic, which had to be implemented in under 100 days with extensive stakeholder engagement.

Through the lens of the NAF as a case study, this Teaching Case Study Mini-Thesis has aimed to offer an in-depth understanding of how these concepts, including their interconnections and interdependencies, shaped the organisation's response to the mega-crisis. The research applies existing conceptual frameworks to the unique context of a mega-crisis faced by the NAF in 2020, providing an example of how these concepts can be simultaneously applied in one practical scenario. Each chapter is summarised below, followed by suggestions for further research, lessons learnt, and concluding remarks.

6.1. Chapter 1

In Chapter 1, the introduction, the research context and significance were considered, followed by the research goal and objectives. This included an introduction to the COVID-19 mega-crisis and the NAF. The main research goal was to analyse how the NAF pivoted its long-standing format as an adaption to the sudden and impactful crisis of the COVID-19 pandemic. The additional objectives related to the role played by the concepts of strategic management, strategic thinking, stakeholder theory and engagement, and the adaption of the NAF's business model, in the NAF's circumstances in 2020. Additionally, the objectives included understanding the connection between these concepts in the NAF's circumstances, as well as developing a comprehensive teaching note.

6.2. Chapter 2

Chapter 2 contained a literature review regarding the concepts of crisis management, stakeholder theory, strategic thinking, strategic management, and business models. Each concept was introduced, defined, given scope, and then contextualised. Following this, their interconnections and interdependencies were introduced and considered. Each discussed concept will be briefly summarised below.

The first concept, crisis management, is described in Chapter 2 as referring to how an organisation handles unexpected events that threaten its reputation or its stakeholders. It involves pre-crisis preparation, taking action during the crisis, and learning from the experience afterwards. The field of crisis management emerged in the 20th century, and was originally influenced by major disasters. It now incorporates various disciplines to understand how to best respond to crises and minimise the negative consequences of a crisis.

The second concept, stakeholder theory, postulates that organisations should consider the well-being of all parties affected by their actions, rather than focusing on profits. This contrasts with the traditional commercial view that prioritises the maximisation of shareholder value for for-profit companies. Stakeholder theory emphasises the need to understand the interests of various groups of stakeholders, such as employees, customers, and communities. The theory posits for incorporating stakeholders' interests into decision-making, albeit in varying priorities. Ethical business practices and social responsibility are similarly emphasised. The theory has gained traction in recent years, with examples including Patagonia prioritising the environment over personal profit. This signifies a potential shift away from shareholder-centric models towards a more sustainable and socially conscious approach to business.

The third concept, strategic thinking, can be summarised as being a crucial, cognitive skill for navigating an ever-changing world by allowing an individual to process tasks strategically. Strategic thinking is a way of thinking that allows individuals and organisations to analyse situations, anticipate future possibilities, and make sound decisions. Effective strategic thinking requires a comprehensive understanding of current realities, the ability to foresee potential challenges and opportunities, and the flexibility to adapt to dynamic circumstances.

This ongoing process is essential for individuals to make well-informed decisions, organisations to stay competitive, and for non-profits to optimise their resources.

Strategic management, the fourth concept, is the process of analysing internal and external factors to set goals, make decisions, and gain a competitive advantage. It involves the planning, implementation, and evaluation of strategic thinking to achieve success in the long term. In the commercial sector, strategic management focuses on gaining an edge over competitors. This might involve differentiating products, entering new markets, or optimising operations for cost-effectiveness. Non-profit organisations, such as the NAF, can leverage strategic management in various ways, including to maximise the impact of their initiatives, secure funding, and manage stakeholder relationships.

Strategic management also plays a role at industry, national, and international levels. Industry leaders use it to analyse industry structure, assess competition, and predict trends. National governments use strategic principles to formulate economic development strategies and public sector reforms. Internationally, strategic management is evident in cooperative efforts like BRICS nations working together to strengthen their economic and political influence.

The fifth concept, business models, relates to the strategic tool used by an organisation to create, deliver, and capture value. Successful business models need to be adaptable frameworks that can evolve alongside internal and external changes. This is especially crucial in today's dynamic world, where digitalisation and innovation are constantly reshaping industries, and disruptive business models can completely change a sector. Many organisations, including non-profits, can benefit from integrating stakeholder engagement into their business model when reflexively considering the need to adapt its model.

The last area for discussion in Chapter 2 was the interconnection and interdependencies between crisis management, stakeholder theory, strategic thinking, strategic management, and business models. Although these concepts are intertwined in many nuanced ways, some of the major interconnections and interdependencies are summarised below.

Strategic thinking feeds into strategic management by providing creative approaches to challenges. Strategic management then takes these ideas and implements them in a structured way. For instance, the NAF's shift to a virtual platform during a crisis stemmed

from strategic thinking, while strategic management principles were used to execute this plan.

Crisis management and stakeholder theory are also interconnected. During a crisis, it is important to consider the needs and concerns of all stakeholders, not just address the immediate issues. Understanding stakeholders' perspectives is crucial for effective crisis communication and management.

Finally, business models are also relevant during crises. A crisis can disrupt an organisation's value chain, requiring them to adapt their business model to survive. Crisis management involves managing disruptions and changes, including the ability to innovate and adapt a business model.

6.3. Chapter 3

Chapter 3 dealt with the methodology of the Teaching Case Study Mini-Thesis, including its research design, data collection, the teaching case format, the identity, role, and rationale of the protagonist, data analysis, and ethical considerations.

The research used a qualitative approach to understand Monica's experience and decision-making leading up to, and during, the 2020 edition of the NAF. Data collection was sourced from two sources, namely, primary and secondary data for the teaching case, and secondary data for the remaining chapters. The use of a teaching case was explained, being a practical narrative is not intended to offer a conclusion for the reader. The identity and role of the protagonist, along with the rationale for selection, were discussed. In essence, Monica, as the CEO of the NAF, was chosen due to her position as the head of the organisation, and, therefore, is at the forefront of its strategic approach.

The data analysis process involved transcribing the interviews, familiarising the researcher with the content, and finally interpreting the data concerning the theories explored in the research. Thereafter, ethical considerations were examined. Ethical approval was obtained before data collection. Monica provided informed consent, being fully aware of the study's purpose, methods, and her rights throughout the process. Transparency was maintained by

keeping Monica informed about the research progress and offering her the opportunity to review the findings.

6.4. Chapter 4

Chapter 4 contained the NAF teaching case, which draws on the ship-like structure of the 1820s Settlers' Monument by using the metaphor of a ship, namely, the NAF, before and during the storm of the COVID-19 pandemic. The five parts of this chapter set out Monica's experience in the concluding days of 2019 and the beginning of 2020, before canvassing a brief history of the NAF from its commencement during the apartheid era. The teaching case contextualised Monica's early days in the position of CEO, including her first experiences of hearing about COVID-19, and her experience leading up to, and during, the NAF's pivot to a virtual model. The teaching case concludes with Monica's opinion of the success of the vNAF, which is, in essence, that the very existence of the vNAF in the circumstances as proof of success.

6.5. Chapter 5

Chapter 5 contains the teaching note, which is intended to accompany the teaching case of Chapter 4. The teaching note included a case synopsis contextualising the NAF and the teaching case, a description of the intended audience, suggested learning outcomes, theoretical connections, teaching strategies, discussion questions, evaluations and feedback methods, an epilogue, and additional resources.

The intended audience was identified as being most suitably, although not limited to, undergraduate and postgraduate management and business programmes that teach the theoretical concepts addressed in Chapter 2. Following this, suggested learning outcomes for each theoretical concept were identified relating to each theoretical concept.

This chapter also discussed connections between the theoretical framework and practical application to the NAF, particularly the normative perspectives and positive realities of each concept. This aimed to bridge the gap between theoretical concepts and practice. The normative perspectives are generally accepted ideas related to the concept, and the positive

realities used aspects of the NAF case to illustrate how the theories can be applied to a real-life situation.

Concerning the recommended teaching strategies, key takeaways included the importance of engagement, active participation, discussion, and the application of theory to practice. The recommended teaching approach was a two-step process, namely case study analysis and group discussion.

Discussion questions and model answers were included in Chapter 5 which linked to the theoretical concepts discussed in Chapter 2. This section of Chapter 5 provided a list of thought-provoking questions and sample answers to guide educators in facilitating class discussions about the NAF case study.

The following section in the chapter, namely Evaluation and Feedback Methods, considered assessment methods and the role of feedback in student learning. Although various assessment methods can be used, the format of a class discussion and a case study analysis paper were particularly recommended. Feedback for the class discussion is intended to clarify concepts, guide students, and encourage participation. Educator feedback for the case study analysis paper focused on content analysis, paper structure, written communication skills, and academic integrity.

The epilogue in Chapter 5 provided an update to the educator and students regarding the NAF's circumstances following the vNAF. In essence, the 2021 edition was planned to be a hybrid event, but it had to be held online. The 2020 edition was initially limited by government regulations and severely impacted by loadshedding, but went ahead at reduced capacity despite last-minute regulatory changes. The 2023 festival was held in person on a much-reduced scale. The upcoming festival in 2024 will be an opportunity to see how the NAF has adapted and learnt since 2020.

Lastly, additional resources were provided. These were intended to provide a deeper understanding of concepts discussed in the teaching case and teaching note.

6.6. Further areas for research

The research in this Teaching Case Study Mini-Thesis relied on a qualitative methodology. Further areas for research could include quantitative aspects to investigate the impact of the pandemic on the festival's overall audience, artists, and financial health. This data could include, for example, financial analysis of ticket sales, number of visitors in person, online in South Africa, and online globally, as well as surveys from stakeholders. In particular, the reasons for lower attendance in the 2021 edition could be investigated more thoroughly. This type of research could indicate whether the NAF's business model should be a hybrid model to add enhanced value going forward, and if there are ways to reduce the exclusionary nature of limited internet access or technological skills.

The teaching case illustrated the relevance of stakeholder engagement for the NAF, and the prioritisation of certain interests over others. As a result, additional research could include an analysis of stakeholder prioritisation in NAF decision-making, and whether any lessons can be learnt from the existing arrangement.

Finally, further research could investigate the lessons learnt by the NAF from the 2020 edition, and how these played out in later editions, including the upcoming 50th edition.

6.7. Lessons learnt

The lessons learnt from the NAF case include the following. Firstly, effective business model innovation in a crisis can be largely dependent on technology. Organisations can be proactive by constantly investigating the introduction of new technology before a crisis hits. This also requires the leadership of organisations to be open to the use of technology.

Secondly, crises can be growth opportunities. Organisations should view disruptions as catalysts for potential positive change. Fostering this mindset should be important to an organisation's leadership.

Thirdly, in the NAF's case, Monica's strategic decision-making involved diverse perspectives, a dedicated team, and shared knowledge. Even the best strategic plans require effective

execution, hence a dedicated team is crucial for translating strategy into action and ensuring everyone is working towards the same goal.

6.8. Concluding remarks

Navigating a crisis is a test of leadership and the ability to steer an organisation strategically through uncharted waters. When the COVID-19 pandemic struck, the NAF, under Monica Newton's leadership, found itself in such a trial. What unfolded was a masterclass in crisis management, stakeholder engagement, strategic thinking, strategic management, and an adaptive business model. The transition of the NAF into a virtual format in the face of the COVID-19 crisis has far-reaching implications for its future trajectory. It forced the organisation to re-evaluate its model and value, and unlocked a new frontier of possibilities, diversity, and inclusion. Perhaps, it may be the beginning of a new chapter in the NAF's relevance as a leading cultural institution for artistic expression in South Africa.

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