



PRINT INDUSTRIES
CLUSTER COUNCIL

**PICC POSITION PAPER
TO THE
DRAFT FRAMEWORK FOR THE NATIONAL BOOK POLICY**

AUGUST 2005

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List of acronyms and abbreviations

| | |
|------------|--------------------------------------------------------------------------------------------|
| ANFASA | Academic and Non-Fiction Authors' Association of South Africa |
| BDCSA | Book Development Council of South Africa |
| BEE | Broad-Based Black Economic Empowerment |
| BPIDP | Book Publishing Industry Development Program |
| CFB | Centre for the Book |
| CIGS | Cultural Industries Growth Strategies |
| CNA | Central News Agency |
| DAC | National Department of Arts and Culture |
| DALRO | Dramatic, Artistic and Literary Rights Organisation |
| DoE | Department of Education |
| DST | Department of Science and Technology |
| DTI | Department of Trade and Industry |
| DoL | Department of Labour |
| GCIS | Government Communication and Information Services |
| GDP | Gross Domestic Product |
| ISBN | International Standard Book Number |
| IBBY | International Board on Books for Young Children |
| LIASA | Library and Information Association of South Africa |
| LTSM | Learning and Teaching Support Materials |
| MAPPP SETA | Media, Advertising, Publishing, Printing, Packaging Sector Education Training Authority |
| MDDA | Media Development and Diversity Agency |
| NASPERS | Nasionale Pers |
| NCLIS | National Council for Library and Information Services |
| NEF | National Empowerment Fund |
| NEPAD | New Partnership for Africa's Development |
| NFVF | National Film and Video Foundation |
| NP | National Party |
| NPO | Non-Profit Organisation |
| PAMSA | Paper Manufacturers' Association of South Africa |
| PANSALB | Pan South African Language Board |
| PASA | Publishers' Association of South Africa |
| PICC | Print Industries Cluster Council |
| PIFSA | Printing Industries Federation of South Africa |
| PPP | Public-Private Partnership |
| RDP | Reconstruction and Development Programme |

| | |
|--------|------------------------------------------------------------------|
| RIT | Reading Intervention Tool |
| SABA | South African Booksellers' Association |
| SABC | South African Broadcasting Corporation Ltd |
| SAWA | South African Writers' Association |
| SMME | Small Medium and Micro Enterprises |
| SPASA | Small Publishers' Association of South Africa |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation |
| WRSETA | Wholesale and Retail Sector Education Training Authority |

EXECUTIVE SUMMARY

The book publishing sector forms a strategically important part of the cultural industries, which can be defined as those industries that combine the creation, production and commercialisation of content which is intangible and cultural in nature and generates values for individuals and society. These industries are twofold in nature; on the one hand they have economic value through commercial activities, while, on the other hand, they offer a less tangible cultural value.

It is important that not only the economic but also the cultural diversity be recognised cultural importance of these industries be recognised to achieve the necessary diversity. Culture takes many forms and this cultural diversity highlights the uniqueness and multitude of identities across the groups and societies that make up humankind. Policies on culture should above all ensure the inclusion and active participation of all citizens to promote social cohesion.

Policy interventions in the cultural industries of South Africa include the National Film and Video Foundation (NFVF) and the Media Development and Diversity Agency (MDDA). The apartheid past denied many people the right to participate actively at either economic or cultural levels.

Book publishing as a cultural industry

Book publishing overlaps with both economic and cultural domains. This duality is entrenched through the complex chain of events that leads to the production, delivery and consumption of books, in which diverse groups of stakeholders, often with differing interests, are included. Furthermore, the majority of South Africans were formerly excluded as producers, managers and owners of content as a result of the discriminatory policies of the past, and this clearly needs redress.

Many challenges will have to be overcome to ensure long-term development and growth in the sector, necessitating a holistic, integrated plan. According to UNESCO 'a well-conceived, comprehensive and legally sound policy has proved to be the single most efficient and effective way to stimulate and further national book development and publishing'.¹

¹ Garzón, A. 1997. National book policy: A guide to users in the field. UNESCO Publishing, France.

Overview of the South African book sector

South Africa has a sophisticated book publishing sector, the largest on the African continent. However, the sector is not fully representative of the diversity of the country. Since the inception of the new democratic State, there have been many initiatives aimed at changing this, but greater intervention is required to address the inequalities that persist. Considerable concentration of ownership and control is still evident in the sector.

Commercial and economic factors also make diversity difficult to implement at industry level, and it will require a commitment and partnership between the State and the private sector to address many of these challenges. Challenges also exist within and between sectors where lack of information remains an obstacle across the different subsectors in the book publishing value chain.

Sector-specific challenges include lack of adequate writer organisation and support; inadequate copyright protection; lack of sufficient indigenous content; inadequate distribution channels; and lack of sound research on national reading activity.

Becoming globally competitive is an important factor in ensuring that the book publishing industry is able to compete effectively with other countries' book industries and increase the export markets for cultural products.

International strategic interventions in the book publishing sector

In many countries, dedicated plans and policies have been implemented to increase and develop the book publishing sector. These interventions have recognised books as unique products deserving different and exceptional approaches. The salient issues pertaining to book development include:

- investment in local authorship and translations;
- adequate copyright protection;
- financial assistance to the private sector through subsidies, incentives, etc. in various forms;
- identifying the factors influencing the cost of books and developing strategies to reduce these;
- securing the necessary political will so that the sector is afforded priority status;
- human resource development.



A South African policy would need to include the above issues, and to pay specific attention to those factors that would ensure the active participation of those previously marginalised.

PRINT INDUSTRIES CLUSTER COUNCIL

POSITION PAPER TO THE DRAFT FRAMEWORK FOR THE NATIONAL BOOK POLICY

August 2005

1. THE DRAFT FRAMEWORK TO THE NATIONAL BOOK POLICY

1.1. Preamble

The draft framework for a national book policy:

1. locates itself within the broader development agenda of the country. It addresses issues of culture and recognises the economic nature of the book publishing industry and of related industries;
2. assists in creating an enabling environment in which those previously marginalised can participate at both cultural and economic levels within the book publishing sector;
3. identifies priority policy areas across the book value chain for the growth and development of the sector as a whole;
4. recognises the social and economic context of South Africa, but does not address issues such as literacy rate, disposable incomes and poverty levels as they are not within the scope of this framework, especially since there are other dedicated policy interventions and agencies with the primary aim of addressing these challenges.

1.2 Background to the draft framework

The Book Development Council of South Africa (BDCSA) was established in 1994 to address book development in South Africa. It identified the need to formulate a national book development policy. Two phases were identified: a comprehensive situation analysis, and implementation.

After extensive research, a report was released in March 1997. Soon after its release the council became defunct for various reasons, lack of funding being the most frequently cited. Lack of support from stakeholders has also been cited as a reason.

In 1998, the National Department of Arts and Culture made another attempt at formulating a national book policy through the Cultural Industries Growth Strategy (study), which also highlighted a number of challenges to be addressed if a thriving book publishing sector were

to be created. This report was also comprehensive in nature, but the recommendations were again not implemented.

In 2002, the National Department of Arts and Culture (DAC) and the Print Industries Cluster Council (PICC) started preliminary discussions about a national book policy. At a stakeholder meeting in January 2003 and a PICC Council meeting in February 2003, it was decided to initiate the implementation of an Annual Industry Profile Study (AIPS).² This was because reliable statistics remained unavailable even though the need for such data had been identified as a priority as early as 1994. Through ongoing strategic planning sessions with associations across the book value chain and research into book development, the PICC developed an integrated strategy that included the formulation of a national book policy. In May 2004, the National Department of Arts and Culture requested that the PICC draft a national book policy, which they would use for broad stakeholder consultation. This important task was entrusted to the PICC Transformation Committee, which was established in May 2004.

The first draft of the framework was circulated to approximately 800 stakeholders across the book value chain in December 2004, including some in the academic sector. This position paper serves as a background document for the second draft.

In order to avoid duplicating the previous situation analyses, it was decided to move on to the next stage of policy development, namely identifying the priorities for each sector along the book value chain and making recommendations for strategic interventions. What was lacking in the two phases initially envisaged by the BDCSA was the identification of and agreement on the priorities emerging from Phase 1 and the formulation of a policy framework for adoption, before Phase 2 could be implemented.

A discussion at the National Book Policies for Africa Conference in 1996 in Zimbabwe, best sums up the approach that has been followed. In the words of Paul Brickhill (1996):

What concerns me most about national book policy is not so much its content, but the endless nature of discussion which precedes it. And although we mustn't underestimate the complexity of the issue, any policy which aspires to be only a comprehensive document, will fail. We must concentrate on results, not on the nature of the document.

A number of principles must be borne in mind. First of all, book policy is a *process*, not an event or a piece of paper. ...It is also true that all book industries need support and subsidy, and

² See the PICC website at www.picc.org for information on the study.

there is ample evidence from the developed world to demonstrate this. ... Books and information are regarded there as strategic industries; such thinking has rarely occurred in Africa.

Often, of course, we are told that this support is not forthcoming because of other claims on national resources. But what are needed are incentives, and these can be implemented without having a serious effect on the fiscus.

A national book policy must be sensitive to all of the links in the book sector, and must seek to balance and coordinate their activities. The critical question, however, since we cannot do everything at once, is to be clear about the priorities.

(Brickhill, 1966:64)

1.3 Related legislation and policy documents

The following quotations highlight some relevant legislation and government policy documents.

Everyone has the right to freedom of expression, which includes

- a. freedom of the press and other media;
- b. freedom to receive or impart information or ideas;
- c. freedom of artistic creativity; and
- d. academic freedom and freedom of scientific research.

(South African Constitution, Chapter Two, Section 16 (1))

The cultural diversity of our people is a major national asset. The RDP will support an arts and culture programme which will provide access to all and draw on the capacities of young and old in all communities to give creative expression to the diversity of our heritage and the promise of the future.

(White Paper on Reconstruction and Development, 1994)

Our literature, the written record of our many languages, embodies a richness which sets us apart from other nations. Unsurprisingly, our policy views literature as an important component of the arts, culture and heritage. The Ministry aims to promote, develop and make accessible the rich and diverse traditions of all South African literatures in written and oral forms.

(White Paper on Arts, Culture and Heritage, 1996)

The Convention noted that cultural goods and services have an economic value, as well as play a role in nation building, and government and private sector support is essential for the strengthening of the cultural industry sector. The Conference

acknowledges the challenges in asserting Intellectual Property Rights in respect of cultural goods and services. The Conference called for the harmonisation of policies relating to trade and development of cultural industries.

The Conference recommends that audits and inventories must be completed in the heritage and cultural related industries to facilitate efficient policy making.

(National Conference on the Convention for the Protection of the Diversity of Cultural Contents and Artistic Expressions and the Role of Culture in NEPAD. The South African National Commission for UNESCO and the Department of Arts and Culture, 2004)

2. INTRODUCTION

2.1. Background to and definition of the cultural industries

The term cultural industries applies to those industries that combine the creation, production and commercialisation of content which is intangible and cultural in nature. These industries generally include printing-, publishing-, multimedia-, audio-visual-, phonographic- and cinematographic productions, as well as crafts and designs. The visual and performing arts can also be included, depending on the country concerned.

The cultural industries add value to content and generate values for individuals and societies. They are knowledge and labour intensive, create employment and wealth, and nurture creativity. At the same time they are of central importance in promoting and maintaining cultural diversity and in ensuring democratic access to culture. This twofold nature – cultural and economic – builds up a distinctive profile for cultural industries. During the 1990s, the cultural industries grew exponentially internationally, both in terms of employment creation and in their contribution to GDP. Today globalisation offers new challenges and opportunities for their development (UNESCO Cultural Industries).

Four central premises underlie the economic growth of the cultural industries:

- their ability of the to create employment and wealth;
- the potential they have to create significant returns on investment;
- their ability to drive the economy by generating innovative and creative human capital;
- the necessity for a collaborative approach between the public and private sectors in order to develop these industries (Create SA, 1998).

Globally, the cultural industries have undergone a process of internationalisation, realignment and progressive concentration, resulting in the formation of a small number of big conglomerates. This has raised concerns about cultural diversity as well as fears of the creation of a new global oligopoly. Diversity within the cultural industries remains a challenge globally and efforts are currently under way to protect this diversity through the Convention on Cultural Diversity to be signed by member countries. The South African National Commission for UNESCO made their contribution to the drafting of this policy in November 2004.

In developing and ensuring diversity in the cultural industries, advocacy is needed with respect to both their economic and cultural importance – so that it could be recognised that ‘cultural goods and services (books, music, multimedia games, films and audio visuals) are different from other goods and services, and deserve different and/or exceptional treatment that sets them apart from standardised mass consumption’ (UNESCO <http://portal.unesco/culture>).

Culture takes diverse forms and this diversity highlights the uniqueness and multitude of identities across the groups and societies that make up humankind. Policies on culture should above all ensure the inclusion and active participation of all citizens, to attain social cohesion.

2.2 The cultural industries in South Africa

The colonial and apartheid past of South Africa has left the majority of South Africans marginalised from participation in all sectors of society. Increasing access and active participation for those previously marginalised, in all areas of society, has been a key issue in South African policy developments emerging post-1994. Initially the cultural industries did not enjoy the level of support for reform evident in other cultural sectors.

The government has, however, now recognised the importance of the cultural industries in the national agenda and has implemented some interventions in these industries. For the cultural industries specifically, three key areas of intervention have involved ownership, employment and content/product. The most significant interventions have been the National Film and Video Foundation (NFVF) and the Media Development and Diversity Agency (MDDA). These are now briefly discussed.

2.2.1 National Film and Video Foundation (NFVF)

Act 73 of 1997, the National Film and Video Foundation Act led to the establishment of the NFVF. Its objectives are:

- to develop and promote the film and video industry;
- to provide, and encourage the provision of opportunities for persons, **especially from the previously disadvantaged communities**, to get involved in the film and video industry;
- to encourage the **development and distribution** of local film and video products;
- to support the nurturing and development of and **access to** the film and video industry; and
- in respect of the film and video industry, to address **historical imbalances** in the **infrastructure and distribution** of skills and resources.

The film industry has received substantial incentives and investment from the Government to ensure the growth of the sector, as well as to address issues of diversity.

Incentives to the film industry and other kinds of support from the NFVF have already delivered successes with regard to increasing access, one of the major challenges to the cultural industries. An NFVF-funded film, *U-Carmen eKhayelitsha*, won the Golden Bear award for the best film at the Berlin Film Festival in February 2005. This film was entirely shot on location in Khayelitsha, produced in Xhosa and most of the cast had never performed before. Other NFVF-co-funded projects include Oscar-nominated *Yesterday* and the internationally recognised *Hotel Rwanda*.

A mutual commitment and partnership between the Government and the private sector has ensured that the South African film industry has at last received worldwide recognition. At least four South Africans, including NFVF members, serve as associate members of the Board of the International Academy of Television, Arts and Sciences which hosts the prestigious Emmy Awards.

2.2.2 Media Development and Diversity Agency (MDDA)

The Media Development and Diversity Agency (MDDA) was established through the MDDA Act, Act No. 14 of 2002, and is probably the closest in its policy process to the current Draft Framework for the National Book Policy process.

The MDDA was created specifically to help create an enabling environment for media development and diversity that is conducive to public discourse and that reflects the needs and aspirations of all South Africans. It was also realised that ‘market forces alone would not achieve sufficient diversity. Indeed, the evidence is that the market on its own tends towards increased concentration, which can inhibit freedom of expression and a diversity of views’ (MDDA Position Paper, 2000:6).

CTP Limited (Caxton), e.tv, Independent Newspapers Pty Ltd, Johnnic Publishing Ltd, Kagiso Broadcasting Pty Ltd, Media 24 Ltd, M-Net, Primedia Broadcasting Pty Ltd, and the South African Broadcasting Corporation Ltd (SABC), have all made commitments to together provide at least R10 million a year for five years to the MDDA. This gives concrete expression to a partnership between the Government and major media players in South Africa and to their commitment to develop media diversity together.

The MDDA was established to find ways of overcoming obstacles to development and diversity within the media sector. Its purpose, as outlined in the Act, is to:

- encourage **ownership** and **control** of, and **access to**, media by **historically disadvantaged communities**, as well as by historically diminished indigenous language and cultural groups;
- encourage the development of **human resources and training**, and capacity-building within the media industry, especially amongst **previously disadvantaged groups**;
- encourage the **channelling of resources** to community media and small commercial media sectors;
- raise public awareness of media development and diversity issues;
- support initiatives which promote **literacy and a reading culture**;
- encourage **research** regarding media development and diversity.

The MDDA makes grants available to small commercial and community media projects with the aim of increasing access to this sector as well as planning for long-term sustainability. Additional support also includes capacity-building, improving business and management skills, etc.

2.3 Book publishing as a cultural industry and the need for a national book policy

Like the other cultural industries, book publishing overlaps two domains:

- cultural – the expression of culture and identity through text and image, in the educational, social and cultural context of the country;

- economic – the trade imperative of the production, packaging, distribution and sale of these products of cultural expression.

Countries across the world, both developing and developed, face the complexity of finding a balance between the cultural and economic aspects of their sector. Overemphasising the business focus can dilute the cultural mandate, while too much emphasis on cultural results can slow down economic growth and business opportunities in the sector. The Book Publishing Industry Development Program (BPIDP) in Canada identified this as a key issue in developing its own book development strategy:

Culture and Business. Business and Culture. It is axiomatic to say that the two have, on occasion, competing priorities. It is the mandate of the Book Publishing Industry Development Program (BPIDP) to make this partnership successful. The program supports the development of a strong Canadian book industry in order to give Canadians better access to the stories, ideas and knowledge that reflect the richness and diversity of our culture.

(Canadian BPIDP, 2003–4).

For South Africa, this challenge is further exacerbated by the discriminatory policies of the past:

- i. culturally – many South Africans did not have access to the full diversity of books as a source of information, education and entertainment, which also meant marginalisation of African languages in mainstream activities;
- ii. economically – many South Africans were excluded as owners, managers and producers of content.

In the book publishing sector, a complex chain of events leads to the production, delivery and selling of books. This sector includes diverse groups of stakeholders, often with divergent interests, who must agree on common objectives. For the book to take its rightful place, it is necessary to formulate an integrated, holistic strategy to ensure that the country has a healthy, efficient, indigenous book industry capable of serving the needs of all its people. Equally important is that government and all others concerned must demonstrate a serious commitment to the implementation of such a strategy or policy.

The primary objective of such a policy would be to increase access, which for the purpose of the policy process, could be defined in the following way:

- the right **content** (for South Africa, greater indigenous publishing in terms of both content and language);
- at the right **place** (accessibility of bookshops, libraries and other distribution channels);

- at the right **price** (an affordable price, given the socio-economic conditions that exist in South Africa);
- through the right **promotion** (effective, targeted and well-researched reading promotion activities, which can also include marketing at company level).

The publishing output (product) of South Africa currently does not come anywhere near reflecting the demographic profile of the country. An underdeveloped reading culture creates further problems, as publishing to new markets is financially risky. The reading interests of the population need to be stimulated (reading promotion). As this is achieved, the right material (indigenous publishing amongst others), needs to be made available at the right place (access – to both bookshops and libraries) and at the right price (issues of access, and perception of value).

Addressing these issues requires a series of parallel processes across the book value chain.

To increase cultural diversity, transformation in this sector needs to take place in a broader framework of development that ensures the active participation of those previously marginalised by apartheid laws. Given the challenge of increasing and developing the sector, the National Book Policy has been seen as an important mechanism for addressing a range of issues that will lead to a viable, sustainable book publishing sector with the active participation of a nation from diverse cultures.

Based on this premise, development and diversity need to be addressed at the following three levels to increase access:

Ownership and control

An enabling environment has to be created to assist marginalised groups to participate in the book publishing sector, as owners, managers and producers of content. Strategies have therefore to be put in place to diversify ownership and control.

Employment

This environment must also assist marginalised groups to manage and produce within the sector, through sufficient diversity in employment at all levels. Skills development is imperative to support this change, as is change management to ensure a corporate culture that fosters the development of diversity.

Product

All sectors of the South African population should have access to an affordable range of publications, relevant to their needs, reflecting the diversity of our society. Diversity here refers

to diverse content in terms of culture, gender, language, range of perspectives and opinion. Access here also extends to the distribution channels and library sector of the book value chain.

Multiple layers of challenges thus underlie the growth and development of the South African book publishing sector. According to UNESCO, 'a well-conceived, comprehensive and legally sound policy has proved to be the single, most efficient and effective way to stimulate and further national book development and publishing. "On the basis of high-level political commitment and constructive public/private-sector dialogue, national literary creation can be stimulated"' (Garzón, 1997).

3. OVERVIEW OF THE SOUTH AFRICAN BOOK SECTOR

The preceding discussion on access in the cultural and book industries of South Africa provides a basis for the identification of priorities for the Draft Framework for the National Book Policy.

A brief discussion on each sector in the book value chain is outlined here. The sectors are discussed under the following headings: 1) Creation, 2) Book publishing, 3) Bookselling, 4) Paper, 5) Printing, 6) Libraries, 7) Development initiatives, and 8) the National Book Development Forum.

3.1. Creation

This sector is made up predominantly of writers, but also incorporates illustrators, translators, graphic designers, photographers, etc., all contributing to the creation process. While the discussion below will focus on writers, the arguments put forward apply equally to other content creators.

South Africa has many successful writers who have published both locally and overseas, primarily in Britain and the United States. In 2003, the number of authors within mainstream publishing receiving royalties amounted to 12 073 (PASA, 2005). The Writers' Network and Women-in-Writing databases respectively contain details of 856 and 350 writers, most of whom are creative writers. It is assumed that there is some duplication in these figures.

Reliable statistics on the number, gender, racial and cultural profiles of the writing community in South Africa are not readily available, but this is valuable information that should be collected. Although these profiles do not form part of the current data collection, Women-in-

Writing has a very large contingent of black female writers. The compilation of this type of data is imperative in order to target the support provided by writers' organisations, and it is also important to the BEE strategies currently under discussion in the book publishing sector. Black women remain one of the most marginalised in the sector as a whole, as well as in the writing community. Targeted interventions are required to address these issues.

There are two main writers' associations in South Africa at present, viz. the South African Writers' Association (SAWA) and the Academic and Non-Fiction Authors' Association of South Africa (ANFASA). However, neither of these associations has been able to become fully functional as yet, for a variety of reasons. There are, in addition, a number of smaller writer organisations that provide various kinds of support to writers.

Literary creation has not received adequate support or sufficient incentives to encourage a diverse writing cadre. The historical context of the country means that content is still not representative of the diversity of the people, with too few black writers and very little, underdeveloped African-language writing and publishing. Training in this sector is primarily limited to creative writing departments at university level and ad hoc training sessions by development organisations. Moreover, training as well as support for writers in the business of earning a living as writers is almost completely neglected – including assistance in matters such as finances, copyright, contracts, and subsidiary rights.

Copyright infringement remains a barrier to writer development. The creators of cultural goods and services have the right to have their work protected, whether they be authors, musicians, crafters or film-makers. The basis of copyright is to secure a just reward for the creator of a piece of work in return for his or her labour. If this right is not protected, the situation can serve as a disincentive to writers, which will in turn affect the diversity of writing that is required to meet the various needs of the nation.

Copyright infringement in the educational sector is so rife that many leaders in the field today do not view illegal copying as a violation of property.

(Oliphant, 2000:124)

This once again highlights the need for strong writers' or authors' associations that campaign for the interests of their members, addressing issues such as copyright protection, contracts and business management.

Recommendations

1. Expand the data collected by associations and other organisations to include important demographic indicators such as race, gender, language and genre of writing and to ensure ongoing research.
2. Build a generation of new writers through adequate support and training. Quality training should be available beyond just that supplied by the universities. This will require a degree of capacity-building and evaluation of those already fulfilling this role.
3. Establish recognised book fairs and festivals to promote indigenous writing.
4. Increase the number of literary prizes and other incentives, with an emphasis on indigenous and emerging authors.
5. Establish adequate 'writers-in-residence' programmes to increase the output of quality writing in the country.
6. Foster a copyright regime that supports and protects writers in the country, while ensuring a balance and increasing access.
7. Strengthen the existing authors' associations through adequate provision of financial and other resources.
8. Develop and deliver capacity-building programmes to increase the participation of black women specifically, and develop BEE strategies for mainstream educational, academic, creative and other forms of writing.
9. Explore new ways of publishing through multimedia-, electronic- and self-publishing opportunities.

3.2 The book publishing industry

The book publishing industry forms the heart of the book sector and is core to its development and growth. Many book development initiatives since 1994 have taken place primarily on the periphery of mainstream commercial book publishing. This might be one of the reasons for the lack of significant change within the book sector in South Africa.

The ownership of South Africa's mainstream commercial book publishers has, through its history, largely been in the hands of foreign, mostly British, international owners and local ownership by the white minority, or in a combination of the two. In the nineteenth century, with the establishment of the National Party (NP), in line with a similar trend as in the print media sector, several Afrikaans publishers were established, as part of either the Nasionale Pers (Naspers) or Perskor groups. From the 1960s onwards, alternative publishers were also established, as part of the anti-apartheid struggle, for example David Phillip, Ravan Press, Ad Donker and Skotaville. A strong local publishing industry currently exists in South Africa.

The sector is organised through the Publishers' Association of South Africa (PASA).

3.2.1. Turnover in the South African book publishing³

The estimated total net turnover for 2003 of the 54 companies targeted by the PASA industry survey is R1.645 billion. These 54 companies included 15 larger publishers (with an annual turnover of R5 million and above) and 39 smaller publishers (with an annual turnover of less than 5 million a year). All 15 larger publishers participated in the survey and 10 of the smaller publishers – their combined net turnover is R1.609 billion. The potential turnover of the 29 smaller publishers that did not participate, based on the PASA turnover bands, is estimated at R36 million. The larger publishers account for approximately R1.6 billion of net turnover for book sales in the South African market. This means that the 15 larger publishers account for approximately 97% of the net turnover, while the 39 smaller publishers account for approximately only 3%.

The MAPPP SETA skills development research on the publishing sector identifies four large publishers in South Africa. These publishers are most likely to account for the greater part of the 97% of the net turnover discussed above. Two of the larger publishers are local branches of large multinationals, with some local ownership – Maskew Miller Longman, which is recognised as the largest educational publisher, and Macmillan. Naspers, the largest locally owned publishing group, includes Nasou Via Afrika, NB Books and Jonathan Ball. Struik New Holland is locally owned as part of the Johncom Group and has other offshore business. Three of the four largest publishers are educational (MAPP SETA, 2004c).

A list of the mainstream commercial book publishers and their imprints and agencies in South Africa and abroad is attached as Annexure 1. This list gives some indication of the concentration of ownership in this sector.

Educational publishing (also known as school-book publishing) includes books used in the primary and secondary education sector, being Grades 1 to 12. Educational publishing currently makes up 69.8% of the country's net turnover of locally produced ISBNs and approximately 49.8% of the total net turnover.

³ The statistics reflected in this section are based on the Industry Statistics survey initiative between the Print Industries Cluster Council (PICC), the Publishers' Association of South Africa (PASA), the South African Booksellers' Association (SABA) and the National Department of Arts and Culture (DAC) and refer to mainstream commercial publishers that are members of PASA and SABA. These are the most recent and reliable statistics available. Only members of PASA participated in the survey, but the market representation is estimated at 97%, which makes it statistically representative within these parameters.

As in all other developing countries, educational publishing remains the most secure and viable long-term investment for publishing in South Africa. The dependence on educational publishing was demonstrated during the period 1996 to 2000, when government-spending on learning and teaching support materials (LTSM) was reduced by almost 50%, resulting in job losses and the closure of many publishing houses. The industry has since recovered from this crisis, with government budgets increasing to R1 billion in 2002. However, should government-spending be cut again, the situation will reoccur, as this dependency still exists.

One of the major challenges for educational publishing, apart from that of diversity, is uncoordinated procurement. Decentralised procurement takes place across the nine provinces. This means uncoordinated submissions to publishers, tight implementation deadlines and even under-capacity across the book value chain.

It is also estimated that copyright infringement at school level is increasing, which impacts on the economies of scale.

The Department of Education has recognised this and other challenges in educational publishing and has established a Learning and Teaching Support Materials Forum, an advisory forum to the minister of education. Members of the PICC, including libraries, are represented on this forum.

Academic and professional publishing includes books for all forms of tertiary education and for the legal, accounting and similar professions, and is distinct from publishing for schools. Books are mainly produced for universities, universities of technology, private colleges and the professions. Academic and professional publishing accounts for only 6.6% net turnover of locally produced ISBNs and approximately 4.7% of the total net turnover.

Initially, a greater portion of the local market share for academic books was made up of imported academic texts. Professional publishing is, however, predominantly local, and the most recent figures show that there has been considerable growth of local texts in this sector. Incentives to this sector would assist in further harnessing the growth opportunities that exist.

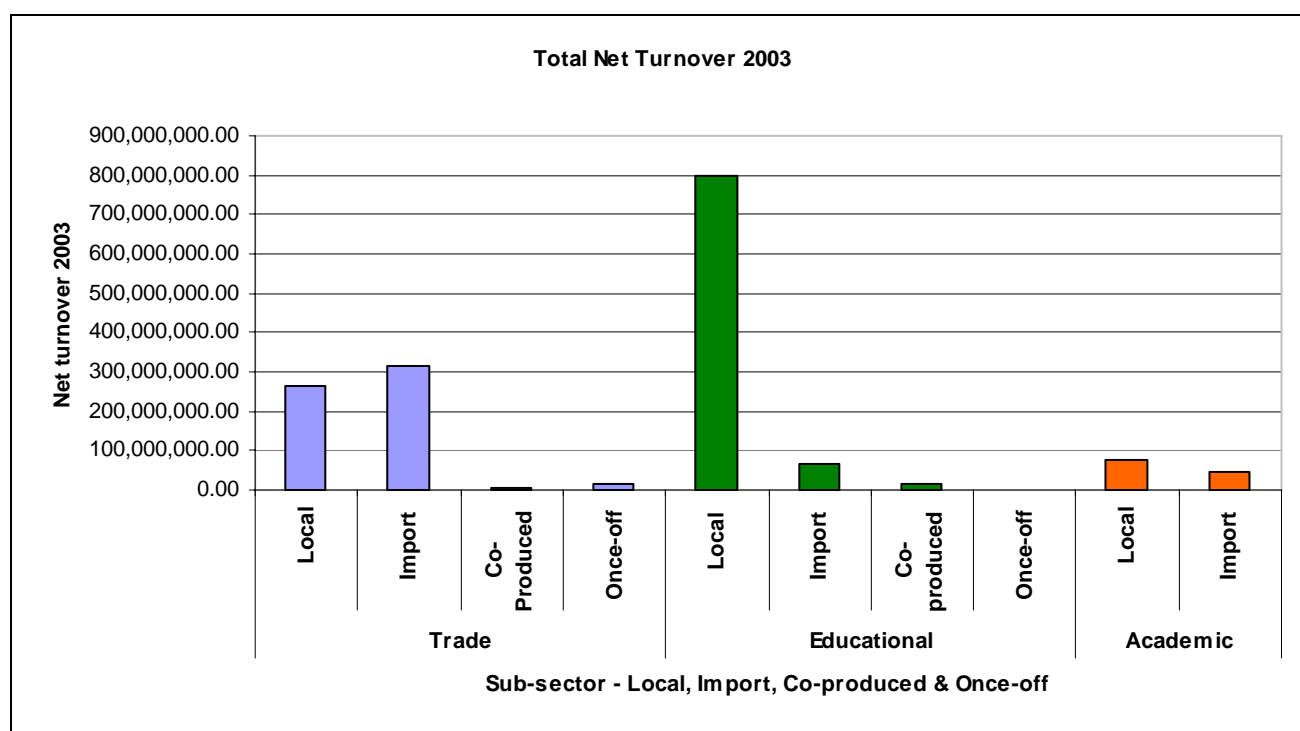
Copyright infringement has been an ongoing problem in this sector and agreement cannot be reached between the rights owners and rights users on the necessary legislative changes. Submissions from each side should allow government to make the necessary strategic interventions to ensure a balance between the rights of creators and the Government's

responsibility to increase access. An industry report on intellectual property rights, with recommendations, has been submitted to the Department of Arts and Culture.

Trade publishing is a diverse subsector, made up of both fiction and non-fiction books and includes novels, biographies and histories, business books, travel books and natural history, children’s books, personal advancement books, maps, manuals etc. Net turnover of 23.6% locally produced ISBNs makes up this category, while approximately 16.8% accounts for the total net turnover in this category.

It is generally accepted that South Africa has low levels of reading activity. Stimulating reading through targeted intervention is vital to increasing the reading activity and harnessing the growth opportunities for this sector.

Graph 1: Net Turnover 2003



3.2.2 Ownership profile

Of the 15 larger publishers that participated in the survey, five are wholly internationally owned and five wholly South African. Two are internationally owned by 50-99%, while three are South African-owned by 75-99%.

The smaller publishers are 100% South African-owned. The present classification of larger and smaller publishers needs to be revised as it is very likely that there are great disparities in the larger publisher classification, given that larger publishers are those with net turnover exceeding R5 million. This will allow for a more realistic picture.

The larger publishing houses in South Africa are multinationals with local ownership or part of large locally owned conglomerates. South Africa does have a well-developed, strong local publishing presence, unlike many other developing countries.

PASA has decided to implement BEE through the Codes of Good Practice at company level, to lead to the development of an industry charter.

3.2.2.1 Black-owned book publishing houses

Actual ownership profiles that include black ownership could not be sourced, but these profiles will be collected in the third industry survey to be implemented later in 2005. Since the advent of a democratic government there have been many initiatives to diversify the ownership of book publishing houses in South Africa. This, however, has not been effective enough and sufficient diversity in ownership still has to be achieved.

Unfortunately, the number of black-owned, mainstream book publishing houses is lower in 2005 than it was about eight years ago. The factors leading to the decline of black businesses within the new democratic State need to be explored to ensure that current policy initiatives such as the BEE Act and the National Book Policy improve the environment for the sustainability of black businesses in this sector and ensure long-term diversity.

3.2.3 EMPLOYMENT PROFILE

Based on the PASA Snapshot Industry Survey 2003, the total number of **employees** employed by participating larger publishers is **2893**. This figure does not include 260 freelancers of one company that was excluded from the analysis because it was unable to provide a breakdown according to race, gender and job categories.

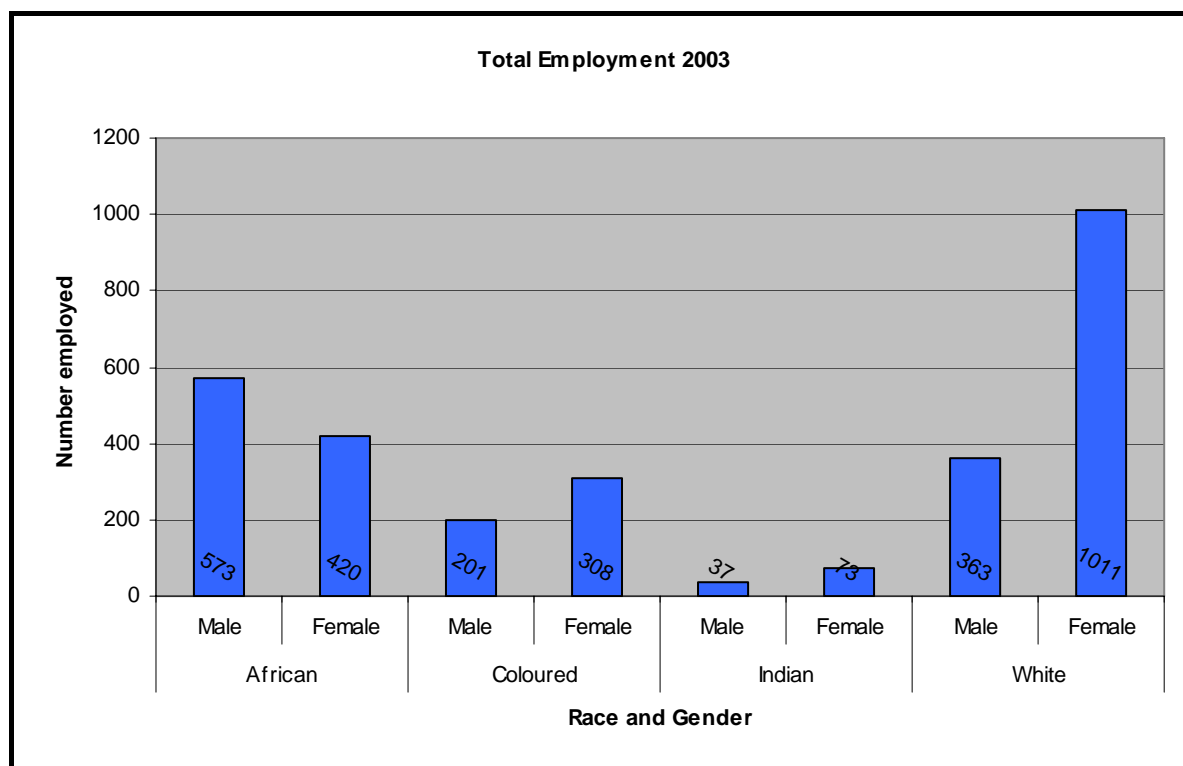
The total number of **employees** employed by participating smaller publishers is **93**. The combined total number of **employees** employed by participating larger and smaller publishers is **3246**.

The total number of permanent employees in the participating larger and smaller publishers is **1739**, while the temporary and freelance employees are **1507**. Temporary and freelance employment accounts for 46% of the total employed within this sample.

The figures do not include the above-mentioned 260 freelancers and combine employees in both larger and smaller publishers.

As can be seen from the following graph, the book publishing sector employs a significant number of white females, amounting to well over 1011 or 34% of the total figures indicated above. This is followed by approximately 573 or 19% African males. The total number of black employees amount to 1612 or 54% of the combined total of 2986.

Graph 2: Total employment 2003



The figures according to job category reflect a different picture. White males and females make up the greater percentage of the senior- and middle-management-, editorial- and the design- and production job categories.

On the other hand, a greater percentage of black males and females make up the marketing, promotion and sales and support services such as finance, administration etc.

See Annexure 2 for job category profiles.

3.2.4 Skills development

PASA and the MAPP SETA currently have an internship programme for entry-level skills development with an investment of R2 million. Individual companies also have on-the-job training, but no comprehensive skills plan is currently being implemented at industry level. PASA has a Skills Development and Training Committee, whose task is to develop an industry-wide strategy.

3.2.5 Author profile

The number of authors within mainstream publishing receiving royalties amounted to 11 546 in 2003, and the total number of other parties receiving royalties were 527, with the average percentage royalty being 10.12% of total net turnover. Race, gender and the publishing subsector in which authors participate do not form part of the data collection at present, but the current indicators will be expanded to include other critical data for transformation and for monitoring the National Book Policy implementation.

Recommendations

1. The diversity of the publishing industry can play a key role in increasing access to books. Its capacity to make indigenous material available will be influenced by its diversity, at ownership-, employment- and product levels. Sufficient diversity in ownership and employment still remains a challenge. One way of diversifying ownership is through investment in smaller publishers, in much the same way as the support that the Media Development and Diversity Agency (MDDA) gives through the MDDA Act. Return on investment takes a long time to be realised, meaning that these small companies entering the market will need to finance themselves for at least five years before showing a profit. Financial incentives are required to ensure diversity at these three levels.
2. Notwithstanding the above, transformation on its own will not solve the problem of diverse and indigenous content. Economics also play a role in publishing to a diverse market where the current reading levels are low. Publishers presently carry the full financial risk of publishing to new markets. Should a title not be successful (i.e. not sell well), the publisher loses the financial investment required to produce the book. This is a constraint faced by countries all over the world. Internationally, incentives to industry,

in various forms, have meant that the financial risks of strategic industry expansion have been shared.

3. The BEE initiatives and diversity in general at the level of ownership, employment and product will require increased capacity-building and training support. Continuing education and the empowerment of previously disadvantaged individuals will require a comprehensive skills plan to ensure the effective implementation of BEE and other equity interventions.
4. As in all other developing countries, educational publishing remains the most secure and viable long-term investment for publishers in South Africa. One of the major challenges for educational publishing, other than diversity, is coordinated procurement. The Department of Education has recognised this challenge and has established a Learning and Teaching Support Materials (LTSM) Forum, an advisory forum to the minister of education. Members of the PICC, including libraries, are represented on this forum.
5. South Africa has a well-established, organised publishing industry that is probably the most sophisticated on the African continent, but is still dominated by educational publishing. However, significant growth opportunities lie within trade publishing. It is estimated (Kantey, 1991:103) that only 5% of the South African population buys books, or that only 0.007% of household expenditure (Bureau of Market Research, 1999) is spent on books. The vastly underdeveloped reading culture in South Africa presents huge opportunities for growth and development in this industry. Greater investment in this sector is required to harness these growth opportunities.
6. Within the development context of the above, the rights of authors and publishers are to be protected. It is generally believed that there are high levels of copyright infringement in South Africa. This infringement takes place primarily in the educational and academic sectors. Growth and development should take place in an environment where creative products earn rewards and copyright infringement is minimised. This would mean greater economies of scale that should lead to lower prices. It is, however, necessary to ensure that a balance exists between authors' and publishers' rights and that access to books is increased.
7. A comprehensive study of the factors that contribute to the cost of books is required to identify factors that can be changed in order to reduce the cost of books. This study

would include all trade and tariff issues, at both micro and macro level, across the book value chain.

8. Ongoing research should be conducted within the framework of the PICC's Annual Industry Profile Study, and the current indicators should be expanded.

3.3 The South African bookselling industry

Distribution remains a huge challenge to increasing access to books across the world. The general trend of bookshops being concentrated primarily in urban areas, leaves those situated in peripheral and rural areas with limited access. The Group Areas Act in South Africa determined the geographical landscape according to race and therefore we find bookshops located mainly in white middle- and upper-class suburbs.⁴ Lack of access thus exists at both urban and rural level as very few bookshops exist in African, Coloured and Indian communities. Creative ways of increasing access through the distribution networks need to be explored.

Electronic bookselling, for example through kalahari.net has taken off, but has not really expanded access beyond the middle- and upper class. Although great strides have been made to improve access to the Internet, this form of bookselling is still a long way from increasing access in the underserved areas.

The bookselling sector is organised through the South African Booksellers' Association (SABA). SABA has identified four bookselling categories:

General bookselling

This includes trade or general books, discussed above under book publishing. Exclusive Books and the Central News Agency (CNA) are the largest bookselling chains in this category and are found throughout urban South Africa. Exclusive Books has 38 branches and the CNA 194. There are also smaller chains within metropolitan areas or provinces such as Wordsworths, which has 8 stores in greater Cape Town.

Catalogue bookselling through Leserskring/Leisure Books and electronic selling through kalahari.net, both part of the Naspers Group, have not managed to increase access significantly, but are alternative ways of reaching a wider audience.

⁴ Statistics quoted in this section are based on the SABA register. Representative figures for this sector are not available and the association is currently the most reliable source of mainstream bookselling activities.

Educational booksellers

As in book publishing, it is estimated that educational booksellers remain a dominant subsector on the bookselling landscape. The long-term investment in and stability of this subsector has meant that it has been the most viable for booksellers.

The implementation of the tender system in a democratic South Africa has brought about many opportunities for BEE, as well as an increase in distribution channels to rural and under-served areas. It has brought many black individuals and consortiums into mainstream bookselling. However, many who have harnessed these opportunities see educational provisioning as a seasonal activity and are therefore unable to add to the long-term growth of the sector, specifically at a human resource level.

Academic bookselling

Academic booksellers are normally found at or near tertiary institutions around the country. There are approximately 9 mainstream academic booksellers in the country. Van Schaik, as part of the Naspers Group, has a near monopoly at the moment, with 31 bookshops around the country. Juta has recently closed most of its bookshops and now has only 4 – in Gauteng and Cape Town. The remaining 7 independent booksellers are mainly individual concerns.

Library supplies

These booksellers primarily supply public-, school- and academic libraries with a wide range of books and other services. There are approximately 13 library suppliers in South Africa.

3.3.1 Ownership profiles

The biggest challenge in this sector remains lack of information. Attempts through the PASA/SABA Snapshot survey to collect relevant data on turnover, ownership, employment and distribution have been unsuccessful. The implementation of electronic data tracking through the Book Scan system in the trade publishing and bookselling subsector is, however, now producing comprehensive and reliable data on trade book turnover, but detailed information analysis from this system is available only to subscribers to the system, i.e. to publishers and booksellers.

Transformation has taken place primarily within the educational sector, where opportunities have been created through the educational procurement system. Many black-owned booksellers have participated in mainstream bookselling because of these opportunities. SABA has 134 members, of which 73 are black-owned. However this does not reflect the

actual lack of diversity, nor does it give an indication of market share, as major players still monopolise the bookselling sector.

SABA has decided to develop and implement a BEE Charter and has appointed a consultant in this regard.

3.3.2 Skills development

The bookselling sector falls within the Wholesale and Retail SETA (WRSETA). The implementation of BEE initiatives and diversity in general at the level of ownership and employment will require increased capacity-building- and training support.

SABA has identified training as a priority and has been working closely with the WRSETA to develop and implement a skills development plan and specific qualifications for professional bookselling have been negotiated within the retail sector.

SABA and the WRSETA have also already offered training in financial management since many of the new black entrants identified lack of financial management skills as a key constraint in doing business.

Recommendations

1. Impetus needs to be given to the current BEE Charter process being initiated by SABA. Sufficient diversity in ownership and employment remains a challenge to this sector.
2. Alternative models of bookselling are to be explored, to increase access in previously marginalised areas. Approximately 0.007% of household expenditure is spent on books, thus the book-buying population has to increase for sustainable bookselling operations to be established in these areas. This requires multiple interventions, once again highlighting the need for a coherent plan in the book sector. One model to be explored is the DAC's Community Arts Centres initiative. A Community Arts Centre is defined as a 'local facility that provides opportunities for communities to participate in arts activities, education and training, and production, at minimal cost to the user and with user involvement in management. Art in this context can refer to all forms and traditions of performing and visual art, film, literature as well as craft and other disciplines'.

3. BEE initiatives and diversity in general at the level of ownership, employment and production will require increased capacity-building and training support. Current initiatives for the development and implementation of the Sector Skills Plan should receive greater attention.
4. Booksellers have identified uncoordinated procurement and the current tender system in the educational sector as key challenges. SABA is presently represented on the LTSM Forum where some of these challenges will be addressed.
5. Research should receive urgent attention. There is currently a lack of reliable data for this sector.

3.4 Libraries

3.4.1 Public libraries

Public libraries and bookshops play a fundamental role in getting books to the people. Public and community libraries fall under the competency of the National Department of Arts and Culture (DAC), and school libraries fall under the National Department of Education (DoE).

As with bookshops, there is an uneven distribution of libraries, which leaves the majority of the country's citizens with inadequate access to books. The PaClisa Report 2002 (Van Helden & Lor, 2002) indicated the total number of public and community libraries in South Africa as 1249. It is estimated that some libraries have been added since the report and some closed down, but this figure will be used as the most recent and most reliable.

Table 1: Library statistics across some developed and developing countries

| Country | Year | Library books per capita | Percentage of population holding library membership | Loans per capita | Loans per book |
|---------------------|-------------|--------------------------|-----------------------------------------------------|------------------|----------------|
| Finland | 1997 | 7.2 | 48.9 | 19.8 | 2.8 |
| Hungary | 1997 | 4.3 | 13.2 | 3.6 | 0.8 |
| Iran | 1995 | 0.3 | 49.2 | 0.3 | 1.0 |
| Malaysia | 1995 | 0.5 | 9.3 | 0.3 | 0.6 |
| South Africa | 2000 | 0.6 | 10.8 | 1.9 | 3.1 |
| Tunisia | 1995 | 0.3 | – | 0.2 | 0.7 |

| | | | | | |
|----------------|------|-----|------|-----|-----|
| Turkey | 1995 | 0.2 | 1.8 | 0.1 | 0.4 |
| United Kingdom | 1999 | 2.0 | 58.0 | 7.2 | 3.5 |

These South African figures compare favourably with those of other developing countries, but there is clearly a big gap when South African figures calculated per head of population are compared with those shown here for Finland and the United Kingdom. The level of library budgets has been identified as a key challenge in this sector. A recent report from the PICC, the PICC Report on the Funding and Governance of Public Libraries in South Africa, however, indicates that this is not the only factor that would increase access to books. There are fundamental problems relating to the governance of libraries, and budgets for libraries across the three tiers of government are not clear. It has also become evident that book budgets for libraries need clarification, and there is no conclusive evidence that these budgets are being spent on books. The report also highlights the lack of book selection or procurement policies for libraries across the three tiers of government. The report recommends that revision of governance structures, monitoring of budgets, the level of book budgets in relation to actual expenditure, and selection procedures and policies all receive urgent attention.

3.4.2 School libraries

Books procured for school libraries fall within the domain of learning and teaching support materials, are bought from this budget and follow the same procurement procedures as textbooks.

It is not known how many school libraries exist, but it is generally accepted that for the majority of South African schools they are non-existent, particularly within the historically disadvantaged areas.

School libraries can play a pivotal role in increasing access to books and contributing towards an active reading culture. Addressing the shortage of school libraries falls within the ambit of the Learning and Teaching Support Materials (LTSM) Advisory Forum of the Department of Education. The library sector is represented on this forum.

3.4.3 Academic libraries

Academic libraries exist at all the tertiary institutions in South Africa. One of the major challenges this sector raised regarding books is the issue of copyright protection. Local booksellers have also identified procurement from international vendors as a challenge.

3.4.4. Training and development

Professional training for librarians is offered at various tertiary institutions throughout the country. Concerns have been raised in the PICC library report about the level of qualification of some of the librarians in public libraries.

The Library and Information Science Association of South Africa (LIASA) is running a professional development project for librarians in the country. The primary and distinct goal of the project is to develop leadership qualities and increase continuing education for librarians at all types of libraries. Librarians are informed about best practices, future trends, and learn, among other things, about change management and organisational structures.

The National Council on Library and Information Science (NCLIS) was established to advise the ministers of arts and culture and education on all issues pertaining to the LIS sector in South Africa.

Recommendations

1. Increased transformation is a key recommendation across all sectors. Previously disadvantaged individuals need to participate actively at management and decision-making levels across the book value chain.
2. Increased capacity-building and training support is required to accompany transformation.
3. Urgent government intervention is required for the governance problems of public libraries.
4. The above interventions should bring about some conformity with regard to library- and book budgets. It is recommended that book budgets be reserved for that purpose only.
5. Within budgetary planning, attention to the establishment of new libraries in underserved areas should be a priority. It is further recommended that a financial model similar to that of the Department of Education be adopted, to address the equitable distribution of resources.
6. Procurement and selection policies are to be developed where they are absent. Furthermore, there needs to be some form of conformity and coordinated procurement within the sector.

7. Copyright protection and infringement need to be addressed by the Government to ensure a balance between the development of writers and an increase in access to books.

3.5. The paper industry of South Africa

This industry is a major contributor to the manufacturing sector in South Africa. South Africa is ranked the 14th largest producer of pulp in the world and 24th in terms of paper- and paperboard production. Since 1970, the industry growth rate has consistently been higher than the international average.

Pulp and paper exports totalled R2.8 billion in 2003, while pulp and paper production in 2003 was in excess of R14 billion.

The printing and publishing sector accounts for about 25% of the domestic demand for paper. However, this cannot be attributed to books alone as many other products form part of printing output. Mondi and Sappi exclusively undertake pulp and paper production.

The various pulp and paper mills employ 13 200 people, making this industry a key provider of employment in deep rural areas.

More than half of the country's pulp and paper mills are now BEE operations. In 2003, Mondi South Africa initiated two major transactions to bring BEE partners into its mainstream paper and packaging business. In June 2004, Shanduka, through Cyril Ramaphosa, acquired a 42% shareholding in Mondi's integrated newsprint business, forming a new company, Mondi Shanduka Newsprint. Despite this, further transformation is still required in this industry as a whole. This sector is currently part of the Forestry Transformation Charter.

The paper industry is organised through the Paper Manufacturers' Association of South Africa (PAMSA). Training in this sector has received a boost through the opening of a dedicated paper school, working in close contact with the MAPPP SETA.

Recommendations

1. It is difficult, if not impossible, to isolate the relevant paper consumption statistics specifically for the book publishing industry – the PICC and PAMSA have attempted this previously. The most important issue under consideration is how the paper industry affects the price of books. This will be investigated through the pending Cost of Books Study to be

implemented by the PICC. This study will be relevant to the entire book value chain and the factors identified will form part of the resulting strategies that industry and government will implement together.

2. Two of the major factors of concern regarding this industry and its impact on the cost of books have been the import tariff on imported paper, and import parity pricing of local papers. The Printing Industries Federation of South Africa (PIFSA) has pursued this issue, which will also be picked up by the Cost of Books Study, as all trade and tariff issues affecting the cost of books will be investigated across the book value chain.

3.6. The printing industry of South Africa

It is estimated that approximately five to ten dedicated book printers exist in South Africa, primarily in Durban and Cape Town. Both PIFSA and the PICC have attempted to collect data in this industry sector but have not been successful. Alternative strategies are currently being explored.

Two of the largest book printers in South Africa, Caxton CTP and Media24, are part of conglomerates. Caxton CTP owns newspaper and magazine titles, as well as various printing and packaging facilities, has a shareholding in book publishing (50% of Maskew Miller Longman), and manufactures a number of stationery products. This group is the largest commercial printer in South Africa.

Paarl Print forms part of Paarl Media Holdings, of which Media24 owns 70%. Paarl Media Holdings is one of Media24's seven business units and is the holding company for Media24's magazine-, commercial- and book-printing interests. Media24 also has newspaper-, book-publishing-, bookselling- and private education interests.

Printing is a capital-intensive enterprise, which means that set-up and running costs are high. This can be a challenge for SMME development as well as for BEE in this sector. Import taxes are paid on raw materials such as inks, paper, plates, blankets, etc., which add to the cost of printing. One of the biggest threats to this sector is the competitiveness of countries such as India, China and Singapore.

This industry sector is organised through the Printing Industries Federation of South Africa (PIFSA). The Cross Media Training Centre is owned by PIFSA and offers training in all printing and packaging areas. Skills programmes are delivered as short courses, designed to form essential components of a complete qualification. The centre is accredited by the

MAPPP SETA and also has international accreditation from City and Guilds of London. It is the only college of its kind in the southern hemisphere. The centre trains 200 students annually in four different trades, and achieves a student job placement rate of 75%. The college also boasts a newly established business school that offers a variety of training programmes.⁵

Recommendations

1. Increase access to book printing enterprises through BEE initiatives.
2. Make incentives available to emerging and existing printers for investment in capital equipment.
3. Create tax incentives for the importation of raw materials used for the production of books.
4. Build capacity in binding and printing techniques, specifically for book printing.

3.7 Development initiatives

Reading promotion is the most common and agreed-upon objective across the book value chain. It is also a strategy that will impact on all other interventions across all sectors. An underdeveloped reading culture impacts on the economies of scale for cost-effective print runs, which in turn inflates the cost of books. Thus developing a reading culture would increase reading and buying books, which would in turn lead to greater economies of scale in the production of books and would ultimately result in lower prices.

The best-known projects and initiatives are highlighted below. It is assumed that there may be many more community-specific projects active in the book sector.

3.7.1 Development projects and initiatives in the book publishing sector

1. Centre for the Book

The Centre for the Book (CFB) is a special project of the National Library. The long-term vision of the Centre is to participate in establishing a broadly based culture of readers and reading in South Africa. The Centre is working towards this goal through projects, networking and lobbying in order to encourage the development of recognisably South African literature through the promotion of writing in all South African languages. It also acts as an advice and information source on matters relating to books. Most importantly, the Centre is working

⁵ Cross Media Training Centre Information brochure

towards a future where all South Africans will have easy access to well-stocked libraries.

Some of its core projects include:

Community Publishing Project

The project aims to empower people to develop the necessary skills and capacities to enable them to have their books published – books that are normally of interest to a particular community and would not be considered for publication by a commercial publisher.

First Words in Print

This project aims to encourage the production of appropriate South African literature for children aged 0-6 years. Such books are distributed to communities to encourage a culture of reading and the early literacy development of very young children. Between 2001 and 2003, 10 000 children in the Western Cape, Eastern Cape, Free State and Mpumalanga received four books each. Through the Isiqalo Book Competition, new books will be distributed to these and surrounding areas. The project won the IBBY-Asahi Reading Promotion Award 2004 and was also a finalist in the Arts and Culture Trust awards.

Writers' Network

The Writers' Network serves as a hub of information and guidance to all writers on issues regarding the various stages of the writing process. It also offers a range of support services and resources for writers. The Network has established and maintains a database of South African writers and writers' organisations. An interactive website has also been developed. Regional workshops with writers form part of the Network's activities.

Other activities of the CFB include the coordination of World Book Day activities around the country, book launches and seminars, advice and information on matters relating to books as well as distributing an e-newsletter and holding discussion groups.

2. International Board on Books for Young Children (IBBY)

The IBBY encourages the publication and distribution of quality children's books, especially in developing countries. It aims to create an opportunity for children to have access to books with high literary and artistic standards. It also provides support and training and stimulates research and scholarly works in the field of children's literature.

3. Masifunde Sonke

This Department of Education initiative aims to create national awareness of the value and benefits of reading. It aims to engage all stakeholders in the book and reading chain and the private sector, civil society, as well as religious and community-based organisations to support and participate actively in the campaign.

4. New readers' publishers

This initiative aims to increase adult literacy and promote a culture of reading through the publication of easy-to-read books in all official languages. Reading-promotion training workshops are run with teachers, librarians and policy-makers.

5. READ

This South African-based educational project aims to assist and empower people to develop their reading-, writing-, learning-, information- and communication skills so that they can become independent lifelong learners. Working closely with the Ministry of Education, READ is committed to supporting the country's educational system and policies. A number of projects are co-ordinated by this non-profit professional organisation.

Rally to READ

This is a joint venture of the Financial Mail, McCarthy Motor Holdings, READ Educational Trust and the Financial Times of London. It highlights the desperate plight of the many geographically isolated schools in South Africa. Rally to READ provides rural schools with books and teacher development training, focusing on teaching effective reading and writing skills.

Readathon

Coordinated by the READ organisation, this is an annual literacy event aiming to focus the public's attention on the need to develop a culture of reading in South Africa. The campaign generates activities at many levels and works in support of the Government's goal to foster a literate nation. It provides a much-anticipated social focus in rural communities.

The Business Trust Learning for Living

The READ/Business Trust Learning for Living project was launched in all nine provinces of South Africa under the auspices of the National and Provincial Departments of Education. It is a primary-school language development programme which focuses on in-service teacher training and the provision of classroom resources.

READING Matters

Affiliated to READ Educational Trust, this publishing company supplies a variety of educational products and services to African schools and acts as an agent for publishers Sunshine South Africa Ltd, Scholastic Ltd, African Reading Matters and READ.

Festival of Books

This is an annual motivational event. Its aim is to build an element of fun into the teaching of reading and to create a forum where parents and the broader community can become involved with the life of the school. Children dramatise their favourite stories and educators are trained to turn these stories into scripts, in this way enhancing their professional skills.

Banyan Tree Project

The project's objective is to improve the quality of teaching and learning in the learning area of literacy, language and communication. READ provides teacher training and resources at selected schools, backed up by classroom-based support and monitoring visits.

6. Tree

Tree promotes and supports quality, sustainable, holistic early childhood development for children in disadvantaged communities up to the age of seven. It establishes partnerships with communities, the Government and NGOs in order to provide access to low-cost resources for improving the conditions in which young children can develop. Books form part of the resources to which Tree provides access.

7. Women-in-Writing

This organisation aims to empower and support aspiring indigenous women writers from disadvantaged backgrounds socially, economically and culturally so as to improve their quality of life through writing and publishing. Women-in-Writing has assisted a number of women to self-publish and also interacts with women's writing groups across the African continent. The organisation advocates reading, writing and book buying in the communities in which they operate, effectively changing the perception of books. Women-in-writing has a key role to play in the transformation of the book sector.

Recommendations

1. Interventions in this sector remain fragmented, which can dilute their impact. Coordinated reading promotion is required for systematic, significant impact. A

Reading Association was launched early in 2004, but not much has been heard of it since then. The Association could have a valuable role to play in coordinating reading promotion activities.

2. No national data is available on reading activities and habits in South Africa. Since it is such a diverse country, targeted reading promotion is required. The national reading survey will form the basis for a Reading Intervention Tool (RIT). This tool could be used every two to three years to track changes in reading activities and habits. It is envisaged that the impact and success of various strategies across reading promotion initiatives, libraries, government and industry could be measured. The survey will also form an invaluable component in tracking the implementation of a National Book Policy, as the ultimate goal of such a policy is to ensure that the educational, cultural and social contexts of the reading needs of ordinary people are met through increased access. The survey will form part of a broader monitoring and evaluation framework that is being developed by the PICC for the book sector.
3. A national reading campaign is to be developed, based on sound information. The campaign should be a series of targeted interventions, but should also have a central, unifying message.
4. Transformation is a key recommendation across the sectors. The previously disadvantaged are to participate actively at management and decision-making levels across the book value chain.
5. Increased capacity-building as well as training in this sector is also required to achieve the transformation mentioned above.

3.8 National forum bringing together private and public sector stakeholders

3.8.1 Print Industries Cluster Council (PICC)

The Print Industries Cluster Council (PICC) is a Non-Profit Organisation (NPO) driving book development at a broad national, policy and strategic level. It is representative of the book value chain in South Africa and also operates as a Public-Private Partnership (PPP).

The following members serve on the Council:

Full Members

The Paper Manufacturers' Association of South Africa (PAMSA)

The Printing Industries' Federation of South Africa (PIFSA)

The Publishers' Association of South Africa (PASA)

The South African Booksellers' Association (SABA)

These are all voluntary industry members who pay an annual subscription fee to belong to the PICC.

Observer Members

The National Department of Arts and Culture (DAC)

The National Department of Education (DoE)

The National Department of Trade and Industry (DTI)

These government departments are key to book development and are invaluable in ensuring a balance between the economic and cultural imperatives at this PPP level.

Associate Members

The Library and Information Science Association of South Africa (LIASA)

The Centre for the Book (CFB)

The PICC recognises the fundamental role that libraries play in increasing access to books and information.

See the PICC website at www.picc.org.za for more detailed information.

4 INTERNATIONAL STRATEGIC INTERVENTIONS IN THE BOOK PUBLISHING SECTOR

For a thriving, viable book industry, many countries or regions have employed a dedicated, national policy or plan which has enlisted broad-ranging strategies such as subsidies to industry sectors, investment in local authorship, coordinated reading promotion activities, library infrastructure investment, human capital development, and so on.

Examples of what these policies or plans set out to achieve can be instructive in formulating a policy for South Africa, helping to determine the core challenges and barriers faced both internationally and in this country.

4.1 UNESCO's National book policy: A guide to users in the field

The UNESCO Guidelines of 1997 form the basis of many countries' policy processes and include the following objectives:

- encouraging literary creation;
- establishing an appropriate legal framework for the protection of authors' rights;
- providing fiscal, credit and administrative incentives for the publishing industry;
- facilitating nationwide library networks;
- introducing new methods for the teaching of reading;
- training people in the different skills involved in the book sector.

4.2 The South Asia regional consultations on national book policies

In South Asia, consultations in 1993 on national book policies identified the following priorities for their own regional process in developing national book policies and book councils:

- recognising book publishing as a priority sector so that books receive preferential treatment in fiscal policies, credit facilities, import regulations and export incentives, the supply of raw materials and the provision of training opportunities;
- enforcing strict copyright protection at both national and international levels;
- encouraging indigenous authorship and providing adequate translation facilities;
- assigning a national status to the book policy, with the approval of the highest authority of the country, and appointing an appropriate agency to oversee and monitor its implementation and to evaluate and review it periodically;
- establishing book councils, where feasible, as autonomous bodies or registered societies, with adequate financial and professional resources and their own permanent secretariat.

4.3 National book policies for Africa: the key to long-term development

The conference on national book policies for Africa held in Zimbabwe in 1996, highlighted a number of challenges faced by the countries, inter alia:

- **Freedom to publish:** This freedom is a prerequisite for creating an atmosphere beneficial to publishing. The restriction of any kind of right – human or legal – would adversely affect the growth of the commercial sector.

- **Government policy:** The sector needs more than statements of good intention. Sound intentions must be backed by policies such as tax relief and other incentives to fuel growth.
- **Textbooks:** Because of the size of the textbook market, any local publishers that might be excluded from it have little room for profitability. It is not enough for parastatals to be privatised. Governments need to work out with publishers how they can practically and profitably have access to the market.
- **Finance:** Lack of financing is undoubtedly one of the most frustrating problems faced by publishers. They should receive assistance, just as other industries do, through special credit schemes.
- **Libraries:** The creation of public and specialised library networks should be encouraged.
- **Research:** Further research into reading interests and needs must be conducted.
- **Government support:** Governments, through tax and other incentives, must encourage investment in new technology so that the book sector and particularly the printing industry, can maintain costs at their lowest levels, as well as take advantage of multimedia technologies.

4.4 The Book Publishing Industry Development Programme (BPIDP) in Canada

In Canada, the Book Publishing Industry Development Program was developed in 1979 and is still being implemented today. The programme was designed specifically around the principle that a viable Canadian-owned publishing sector is the best vehicle to deliver Canadian books to Canadian readers. The publishing sector in Canada had been represented largely through foreign-owned companies. 'In essence, BPIDP employs industrial means to help achieve cultural objectives.' (BPIDP, Annual Report 2003-4). The Department of Heritage has a range of portfolios to oversee the process. Specific attention is given to small and independent publishers. The objectives of this programme include fostering a strong and viable Canadian book industry that publishes and promotes Canadian-authored books through:

- **Aid to publishers** – to ensure the ongoing production and marketing of Canadian-authored books in Canada and abroad;
- **Supply chain initiative** – to provide funding to the Canadian book industry for projects and activities that seek to strengthen and modernise the supply chain for books in Canada, including the improvement of the quality accessibility of bibliographic data, the promotion of standards-driven electronic document interchange and the promotion of access to data on book sales;

- **Aid to industry and associations** – to provide the Canadian book industry with the necessary tools to expand the presence and profile of work by Canadian authors; and
- **International marketing assistance** – to market the Canadian book industry internationally.

4.5 National Book Policy in the Philippines in 1995

The Philippines instituted a National Book Policy in 1995 with the following aims:

- to create conditions conducive to the development, production and distribution of books, especially the acquisition and adoption of state-of-the-art technology, equipment and machineries on book publishing;
- to obtain priority status for the book publishing industry;
- to ensure an adequate, affordable and accessible supply of books to all segments of the population;
- to promote book readership, especially among the young and neo-literates, through programmes promoting literacy and good reading habits, book fairs and exhibits, and by providing an efficient nationwide system of libraries and reading centres, especially in rural areas;
- to promote the development of indigenous authorship and of translations among various language groups in the country;
- to promote the translation and publication of scientific and technical books and classic works in literature and the arts;
- to promote the effective distribution of books in the domestic and international markets through an efficient and reliable postal and transport delivery system;
- to promote the concept of intellectual property ownership and protect the rights of authors and publishers by strictly enforcing copyright laws and providing legal assistance to authors and publishers in lawsuits related to these;
- to promote, whenever appropriate, the use of recycled or waste paper and other inexpensive local materials in the manufacture of books to reduce the cost of these locally produced books;

- to ensure the country's commitment to the UNESCO principle of free flow of information and other related provisions as embodied in the Florence Agreement and other similar agreements.

4.6 Salient issues

The salient issues that emerge can be summarised as follows:

- investing in local authorship and translations;
- adequate copyright protection;
- financial assistance to the private sector through subsidies, incentives etc.;
- identifying the factors influencing the cost of books and developing strategies to reduce these;
- developing supply chain initiatives to strengthen and modernise the supply chain and to improve access to data on book sales;
- securing the necessary political will so that the book sector is afforded priority status;
- human resource development.

The challenges that many other countries face are relatively similar to South Africa's, except for the challenges of a colonial and an apartheid past. It is therefore necessary that any policy development in the book sector locate itself within the broader national development agenda, where policies such as the Broad-Based Black Economic Empowerment Act of 2003, the Employment Equity Act of 1998 and the Skills Development Act of 1998 are incorporated to ensure cultural diversity.

5. CONCLUSION

The dichotomous nature (both cultural and economic) of South Africa's book publishing sector requires commitment from both the Government and the private sector to address the challenges of increasing access.

Increasing access will benefit both the cultural and economic requirements of the book publishing sector. By ensuring that the diverse cultures of the country are recorded, transmitted, preserved and interacted with through books, the intellectual, social and cultural needs of the nation can be adequately met, aiding social cohesion – an important aspect for the survival of our new democracy.

In this process, new markets can be accessed and tapped into, resulting in an increase in reading and buying books. With more books being sold, all the industrial links across the book value chain can realise growth opportunities, leading to greater turnover.

Many of the countries we are being (unfairly) compared to, have had dedicated strategies to expand their book publishing sectors. In this sector, where economies of scale are so important, bigger markets mean bigger print runs, making book publication in these countries much more competitive than in South Africa.

Achieving this will require a dedicated plan or policy, with a strong commitment from the Government and the private sector. Securing political will at the highest level is required to provide the resources needed for implementing such an ambitious policy.

Annexure 1: Holding companies with local and international imprints for local ISBN-based book publishing

| HOLDING COMPANY | LOCAL IMPRINTS/AGENCIES | INTERNATIONAL IMPRINTS/AGENCIES |
|-----------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Aardvark Press | None | None |
| Anansi | None | None |
| Briza Publications | None | None |
| Brenthurst Press | None | None |
| Cambridge University Press | Roedurico 3 | None |
| Creative Learning | None | None |
| Jacana Media | None | None |
| Junior Student Publishers | None | None |
| Juta and Company | Ace, Juta, Gariiep, Double Storey, UCT Press, Idem | None |
| Lectio Publishers | Solidarity Publications | None |
| Let's Look | None | None |
| Macmillan Boleswa | Nolwazi Educational Publishers, Macmillan, Ravan Press, Guidelines Educational Publishers, Clever Books | Macmillan Nelson Thornes (New Way Only) |
| Maskew Miller Longman | Pearson Education, Sached, Kagiso, De Jager-Haum, Proilit, Phumelela, Perskor | AWL, Allen & Bacon, Annick Press, Cisko Press, Financial Times, Ladybird, Longman, New Riders, Orion, Peachpit Press, Prentice Hall, Que, Ravette, Reuters, SAMS, York Notes, Disney, Barbie |
| Maths Centre | None | None |
| New Africa Publishing | New Africa Education, David Philip, Spearhead, Songololo | ZED, One World, James Currey |
| New Holland Publishing SA | Struik, Struik Christian Books, Map Studio, Zebra, Oshun, New Holland, Globetrotter | Nelson Books, Nelson Bibles, W Publishing, Bethany House, Waterbrook, Kingsway Books, Broadman & Holman, Broadman Lifeway, Lion Publishing, Bantam Doubleday, Christian Focus, Monarch, Whitaker House, Destiny Image, Harrison House, Servant Publications, Warner Faith, CWR |
| Oxford University Press SA | None | Pease International, World Bank, APP |
| Palm Publishers | None | None |
| Pan Macmillan SA | Pan Macmillan, Picador Africa, Giraffe Books | Macmillan, Pan, Picador, Sidgwick & Jackson, Macmillan Children, Campbell, Walker, Frances, Lincoln, Palgrave, Priddy Books, Hodder Wayland, Hodder Arnold, Consumer Education, St Martins Press, Farrar Straus & Giroux, Rodale, Wisden |
| Penguin SA | Viking | Penguin UK & New Zealand & Australia, Hamish Hamilton, Viking, Michael Joseph, Warne, Rough Guides, Puffin, Penguin USA, Atlantic Books, Canongate, Constable and Robinson, Egmont, Faber and Faber, Nelson Thornes, Octopus, Piatkus, Sanctuary, Times Warner Books, Virgin Books |
| PSD Promotions | None | None |
| Random House SA | Random House SA | Anchor Books, Andersen Press, Arrow, Ballantine, Bantam, Bantam Press, Black Swan, Bodley Head, Broadway, Cedar, Century, Chatto & Windus, Clakson |

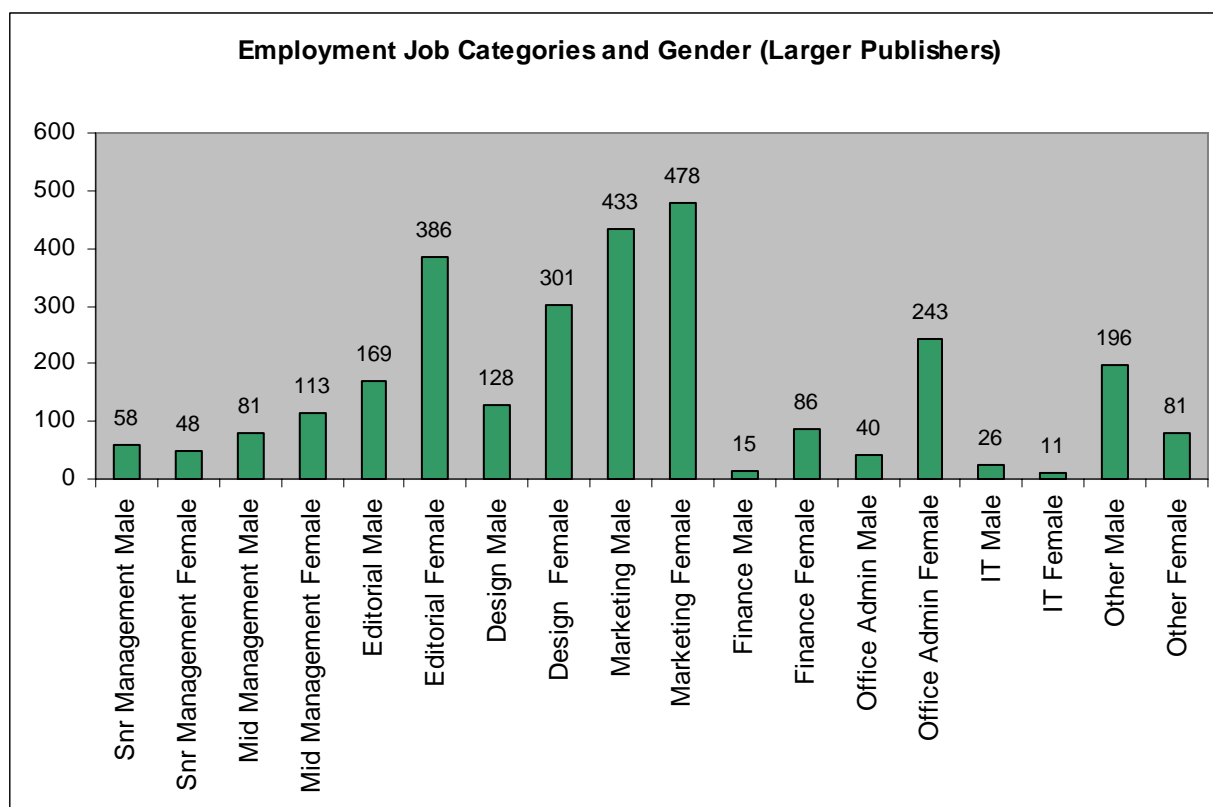
| HOLDING COMPANY | LOCAL IMPRINTS/AGENCIES | INTERNATIONAL IMPRINTS/AGENCIES |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | Potter, Corgi, Del Rey, Doubleday, Ebury Press, Everyman's Library, Fawcett, Gramercy, Harmony, Harvill Press, Heinemann, Hutchinson, Ivy, Jonathan Cape, Knopf, Living Language, Modern Library, Pantheon, Pimlico, Random House, Red Fox, Rider, Schocken, Secker & Warburg, Shambala, Sierra Arts, Tellastory, Three Rivers, Times Books, Vermillion, Villard Books, Vintage, Yellow Jersey Press |
| Reed Elsevier SA (Heinemann) | Heinemann, Isando Books, Centaur, Lexicon | Ann Arbor, Academic Press, Architectural Press, Aspen, Butterworth-Heinemann, Christopher Helm, CIMA Publishing, Digital Press, Elsevier, Excerpta Medica, Focal Press, Ginn, Greenwood, Gulf Professional, Guathier-Villars, Heinemann, Inkata Press, JAI Press, Morgan Kaufmann, Michael Wiese, Newnes, North-Holland, Pergamon Press, Poyser, Rigby, Royal Netherlands Academy of Arts and Sciences, Syngress Media, Surrey University Press |
| Shuter & Shooter | None | None |
| Solo Collective | None | None |
| Troupant | Rollerbird Press | None |
| Via Afrika | NB Publishers (Human & Rousseau, Tafelberg, Jasmyn, Hartklop, Satyn, Mirre, Melodie, Kwela, Pharos, Best Books), Nasou Via Afrika (Nasou, Via Afrika, Nasou/Via Afrika, Action, Afro, Collegium, Atlas, Afritech, KZNBooks, Acacia), Van Schaik (JL van Schaik, Academica, Van Schaik, Jacana), Jonathan Ball (Johathan Ball, Ad Donker, Sunbird Delta), Leksikons Book Promotions (Ampersand Press, Avian Demography Unit, Carmel Art, Catholic Institute of Education, Editors Inc., Francolin Publishers, George Poulos, Greenhouse, International Motoring Products, Investor Education, Roberts Birds, Joint Education Trust, K53, Mutual & Federal Cricket Annual, National Publishing, Oceans of Africa, Rainbird Publishers, SARFU Rugby Annual, Sederberg Uitgewers, Stonewall Books, Stormberg Publishers, Triple T, Winelands, Wits University Press, Woodbay Books and Guides), Lux Verbi NG Kerk Uitgewers, Lux Verbi.BM, Hugenote Uitgewers, Protea, Bybelkor, Waterkant, Mema Media, Nehemia Bible Institute, Hugenote Bybelinstituut) | Jonathan Ball Publishers (Harper Collins, Hodder Headline, Orion, Octopus, Mira, Bloomsbury, Simon & Schuster, Time Warner USA, Watts, Scholastic, John Murray, Texere, AA Publishing UK, Granta, Pavillion, Profile, Sutton, Taschen, Eerdmans, Zondervan) |
| Wild Dog Press | None | None |
| Witwatersrand University Press | None | None |

Annexure 2: Race and gender profiles as per job categories⁶

This section is an extract of the PASA 2003 Snapshot Survey. The full report will be available by the end of August 2005. This extract was compiled by the PICC Office.

Employment profile according to job categories and gender

LARGER PUBLISHERS

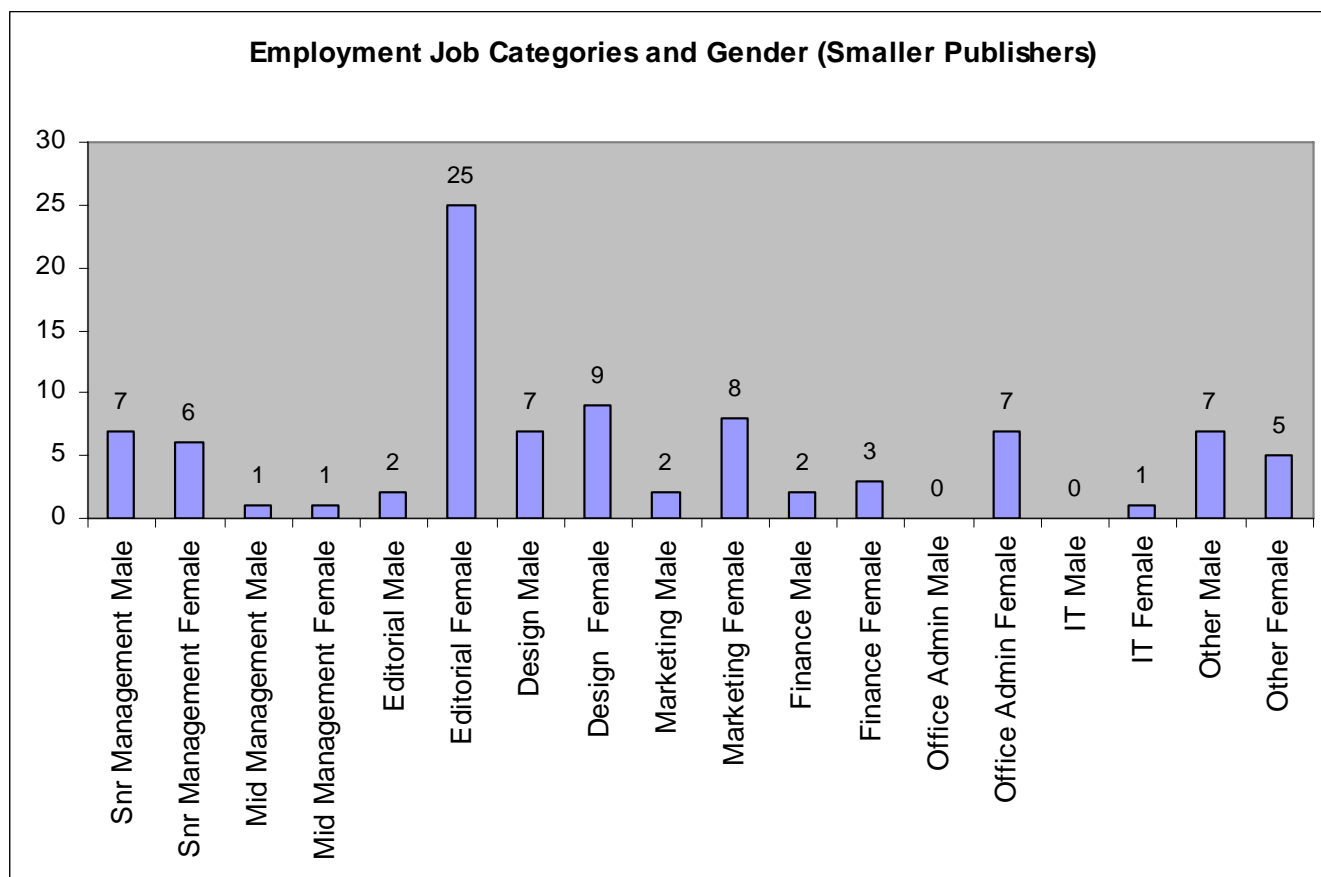


Notes

- These figures include permanent, temporary and freelance employees.
- These figures do not include the above-mentioned 260 freelancers.
- **Total number** of employees employed by participating larger publishers: $2893 + 260 = 3153$

⁶ As per the PASA Snapshot Survey 2003

SMALLER PUBLISHERS



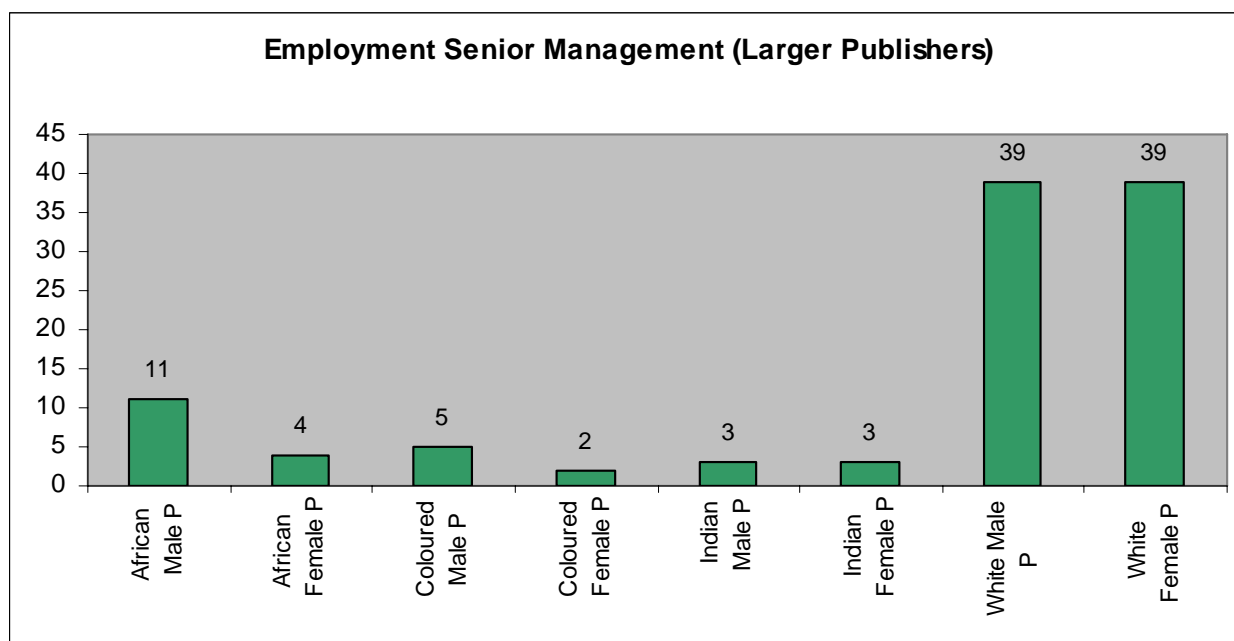
Notes

- These figures include permanent, temporary and freelance employees.
- **Total number** of employees employed by participating smaller publishers: **93**
- **Combined total number** of employees employed by participating larger and smaller publishers: **3246**

Employment profile according to job categories

Senior Management

LARGER PUBLISHERS



Notes

- Total number of Permanent **black** employees in Senior Management: **28**
- Total number of Permanent **white** employees in Senior Management: **78**
- **Total number** of employees in Senior Management for larger publishers: **106**

SMALLER PUBLISHERS

Senior Management African Female Permanent – 1

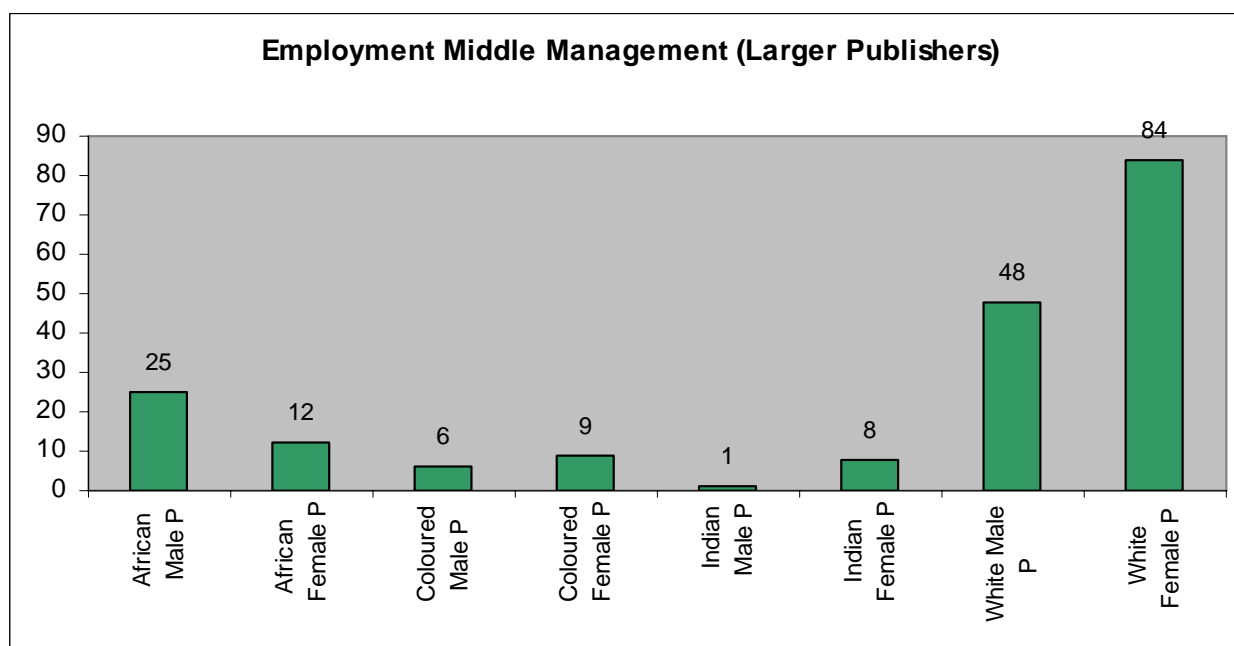
Senior Management White Male Permanent – 7

Senior Management White Female Permanent – 5

- **Total number** of employees in Senior Management for smaller publishers: **13**
- **Combined total number** of employees in Senior Management for participating larger and smaller publishers: **119**

Middle Management

LARGER PUBLISHERS



Notes

- The graph does not include 1 Temporary white male.
- Total number of Permanent **black** employees in Middle Management: **61**
- Total number of Permanent **white** employees in Middle Management: 132 + 1 = **133**
- **Total number** of employees in Middle Management for larger publishers: **194**

SMALLER PUBLISHERS

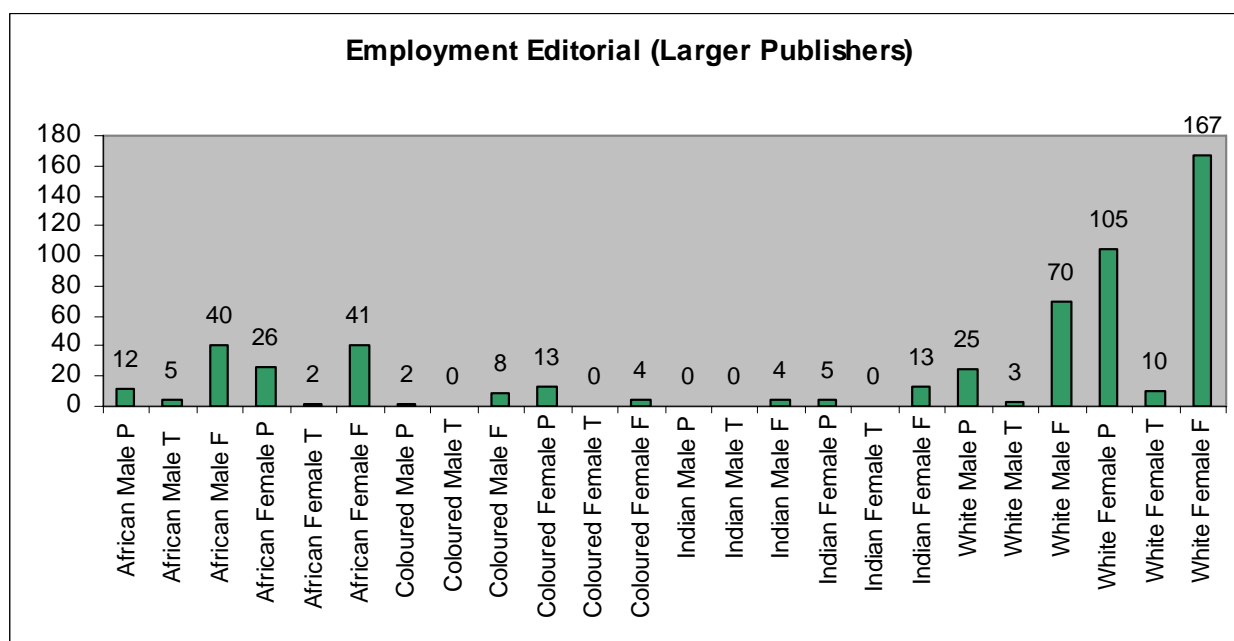
Middle Management African Male Permanent – 1

Middle Management White Female Permanent – 1

- **Total number** of employees in Middle Management for smaller publishers: **2**
- **Combined total number** of employees in Middle Management for participating larger and smaller publishers in Middle Management: **196**

Editorial

LARGER PUBLISHERS



Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Editorial: **175**
- Total number of **white** employees in Editorial: **380**
- **Total number** of employees in Editorial for larger publishers: **555**

SMALLER PUBLISHERS

Editorial African Female Freelance – 3

Editorial White Male Freelance – 2

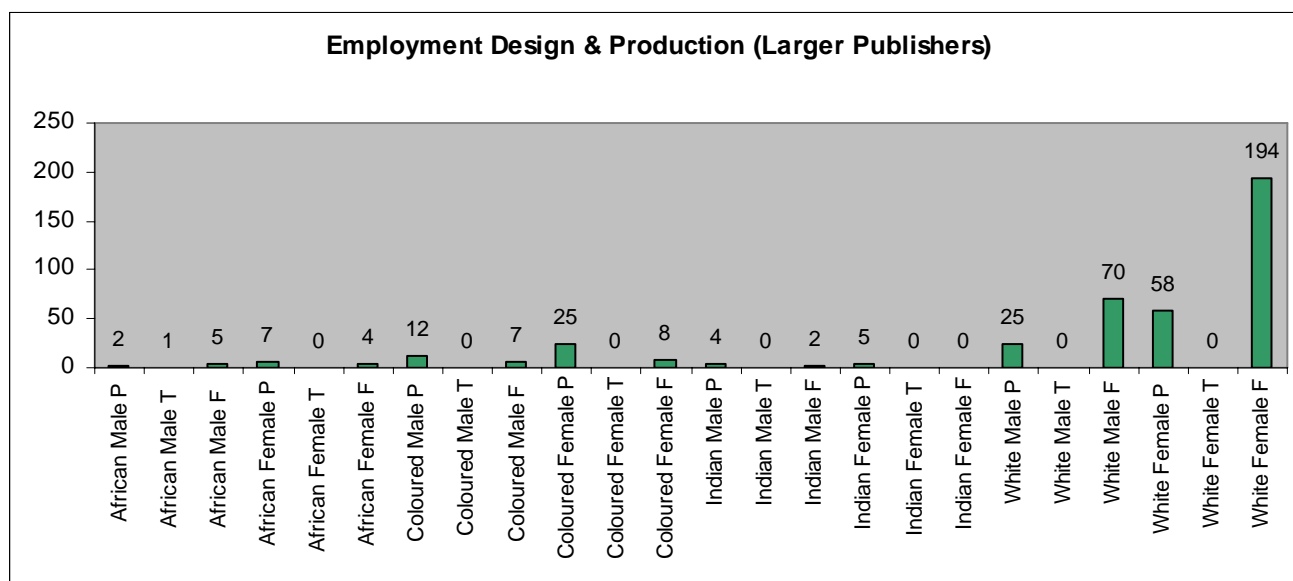
Editorial White Female Permanent – 5

Editorial White Female Freelance – 17

- **Total number** of employees in Editorial for smaller publishers: **27**
- **Combined total number** of employees in Editorial for participating larger and smaller publishers: **582**

Design and Production

LARGER PUBLISHERS



Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Design and Production: **82**
- Total number of **white** employees in Design and Production: **347**
- **Total number** of employees in Design and Production for larger publishers: **429**

SMALLER PUBLISHERS

Design Coloured Male Freelance – 1

Design White Male Temporary – 1

Design White Male Freelance – 5

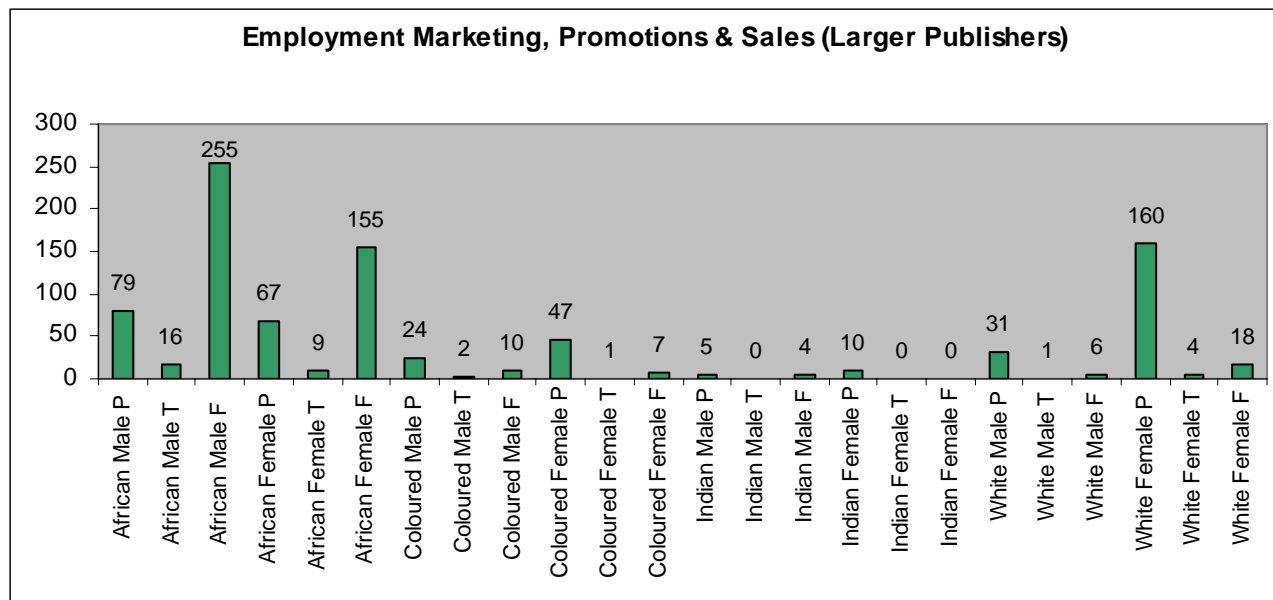
Design White Female Permanent – 2

Design White Female Freelance – 7

- **Total number** of employees in Design and Production for smaller publishers: **16**
- **Combined total number** of employees in Design and Production for participating larger and smaller publishers: **445**
- Combined total number of employees in Design and Production in 2002: 346

Marketing, Promotion and Sales

LARGER PUBLISHERS



Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Marketing, Promotions and Sales: **691**
- Total number of **white** employees in Marketing, Promotions and Sales: **220**
- **Total number** of employees in Marketing, Promotions and Sales for larger publishers: **911**

SMALLER PUBLISHERS

Marketing African Male Permanent – 1

Marketing Coloured Female Freelance – 2

Marketing White Male Freelance – 1

Marketing White Female Permanent – 1

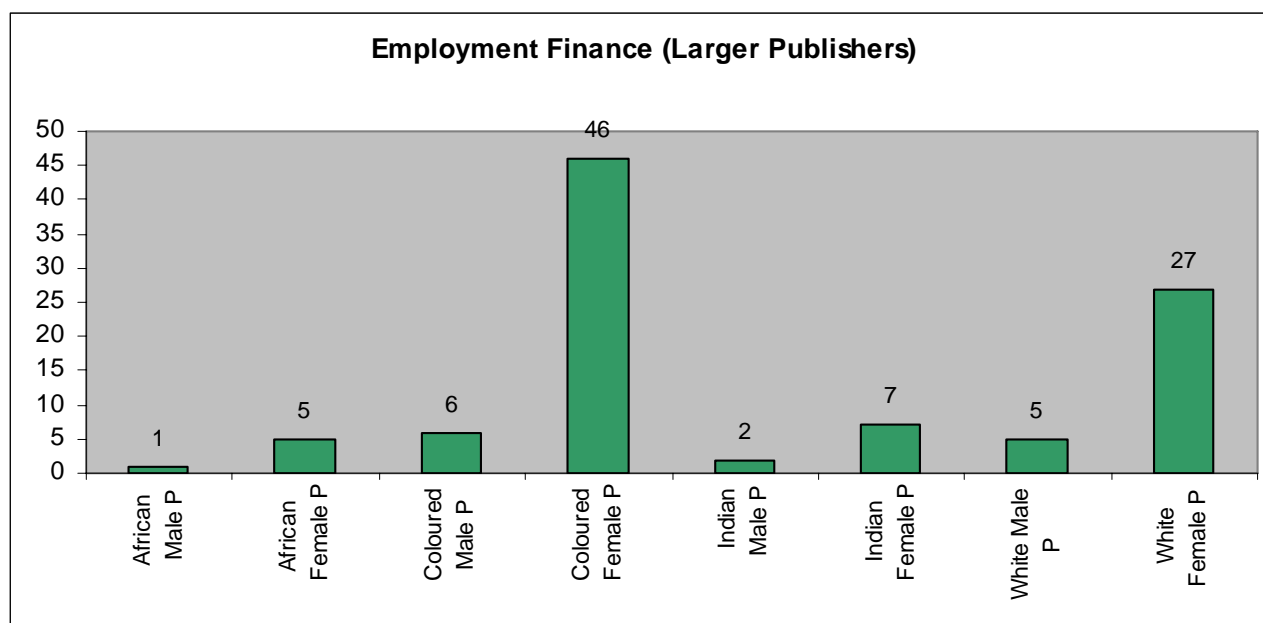
Marketing White Female Temporary – 1

Marketing White Female Freelance – 4

- **Total number** of employees in Marketing, Promotions and Sales for smaller publishers: **10**
- **Combined total number** of employees in Marketing, Promotions and Sales for participating larger and smaller publishers: **921**

Finance

LARGER PUBLISHERS



Notes

- The graph does not include 1 Temporary African male and 1 Freelance white female.
- Total number of Permanent **black** employees in Finance: **68**
- Total number of Permanent **white** employees in Finance: **33**
- **Total number** of employees in Finance for larger publishers: **101**

SMALLER PUBLISHERS

Finance White Male Permanent – 1

Finance White Male Freelance – 1

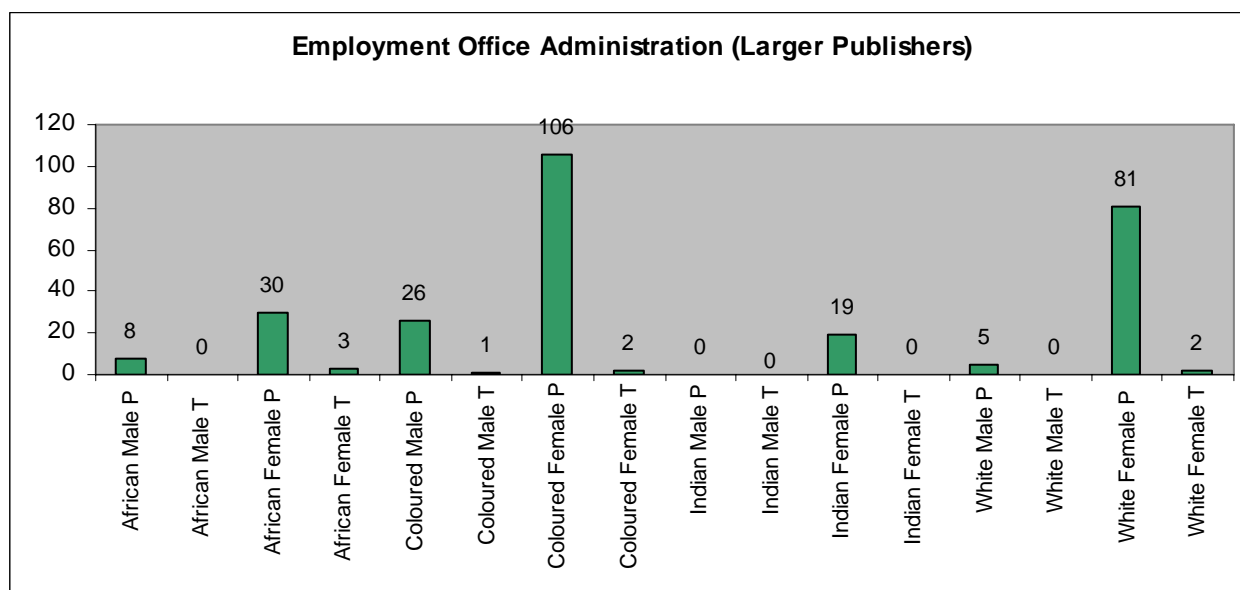
Finance White Female Permanent – 2

Finance White Female Freelance – 1

- **Total number** of employees in Finance for smaller publishers: **5**
- **Combined total number** of employees in Finance for participating larger and smaller publishers: **106**

Office Administration

LARGER PUBLISHERS



Notes

- These figures include permanent (P) and temporary (T) employees.
- Total number of **black** employees in Office Administration: **195**
- Total number of **white** employees in Office Administration: **88**
- **Total number** of employees in Office Administration for larger publishers: **283**

SMALLER PUBLISHERS

Administration African Female Permanent – 2

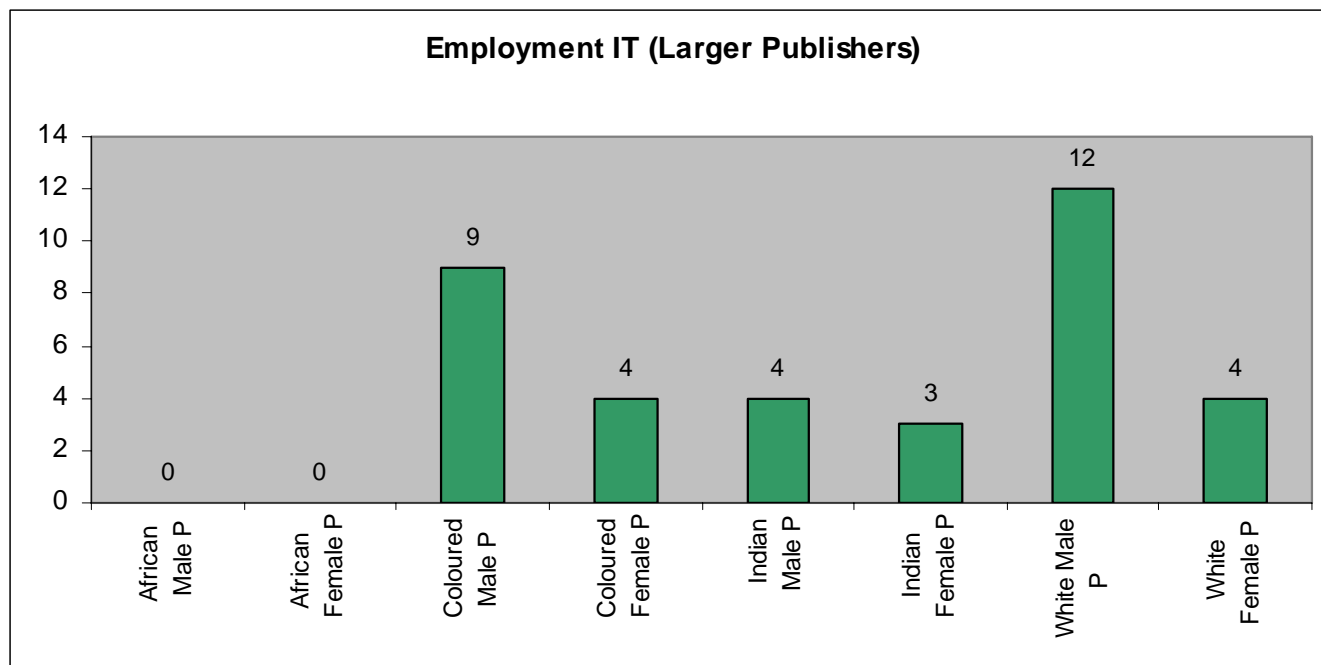
Administration White Female Permanent – 4

Administration White Female Temporary – 1

- **Total number** of employees in Office Administration for smaller publishers: **7**
- **Combined** total number of employees in Office Administration for participating larger and smaller publishers in 2003: **290**
- Combined total number of employees in Finance and Office Administration in 2003: **396**
- Combined total number of employees in Finance and Office Administration in 2002: **377**

Information Technology

LARGER PUBLISHERS



Notes

- The graph does not include 1 Freelance Coloured male.
- Total number of **black** employees in IT: **21**
- Total number of **white** employees in IT: **16**
- **Total number** of employees in IT for larger publishers: **37**

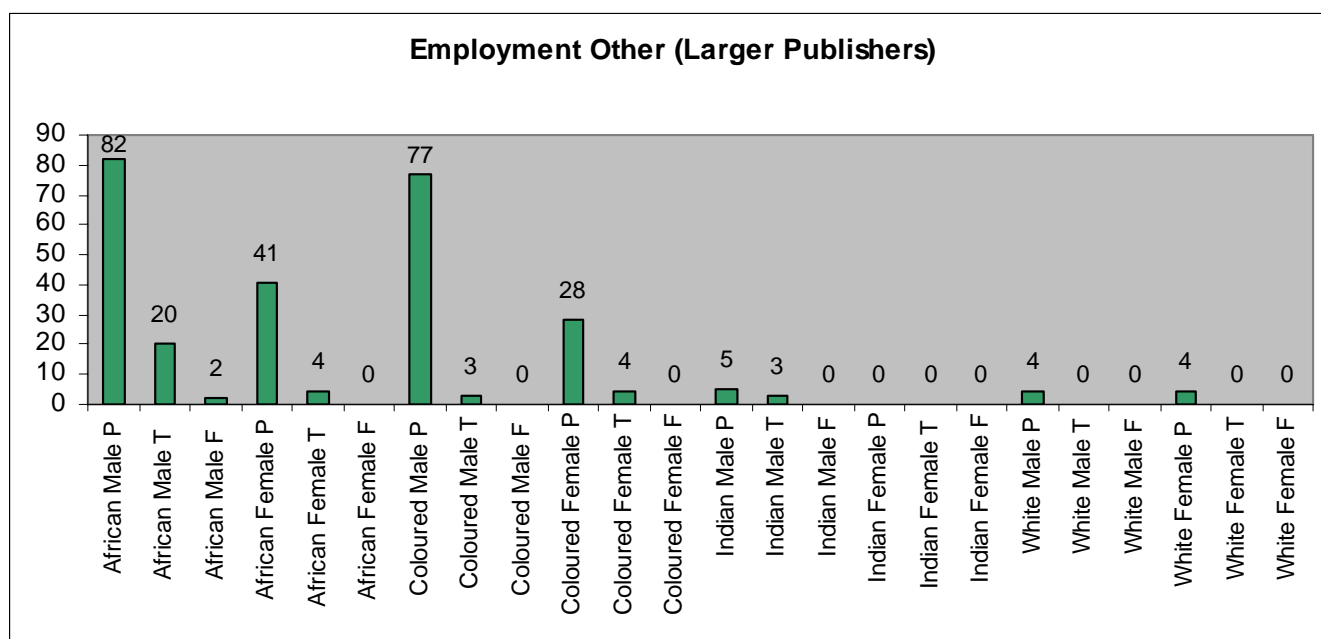
SMALLER PUBLISHERS

IT White Female Permanent – 1

- **Total number** of employees in IT for smaller publishers: **1**
- **Combined** total number of employees in IT for participating larger and smaller publishers in 2003: **38**
- Combined total number of employees in IT in 2002: 43

Other Positions

LARGER PUBLISHERS



Notes

- These figures include permanent (P), temporary (T) and freelance (F) employees.
- Total number of **black** employees in Other positions: **269**
- Total number of **white** employees in Other positions: **8**
- **Total number** of employees in Other positions for larger publishers: **277**

SMALLER PUBLISHERS

Other Positions African Male Temporary – 6

Other Positions African Female Permanent – 4

Other Positions Coloured Male Permanent – 1

Other Positions White Female Permanent – 1

- Total number of employees in Other positions for smaller publishers: **12**
- **Combined** total number of employees in Other positions in 2003: **289**

The PASA 2003 Snapshot Survey was implemented by Francis Galloway, Theo Bothma and Colette du Plessis and Rudi MR Venter of the University of Pretoria.

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