



**SOUTH AFRICAN
BOOK DEVELOPMENT
COUNCIL**

RESEARCH REPORT INTO BOOK DEVELOPMENT INTERNATIONALLY

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DRAFT 1

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CONTENTS

List of Acronyms	i
Definition of Key Terms	vi
1. Introduction	1
2. International Book Development Activities	5
A. AFRICAN COUNTRIES	5
2.1 EAST AFRICAN BOOK DEVELOPMENT ASSOCIATION	5
2.1.1 Aim	5
2.1.2 Objectives	5
2.1.3 Activities	6
2.1.4 Legislation	6
2.1.5 Funding	6
2.2 UGANDA	7
2.2.1 The National Book Trust of Uganda (NABOTU)	7
2.2.2 Aim	7
2.2.4 Legislation	11
2.2.5 Funding	11
2.3 TANZANIA	11
2.3.1 Book Development Council of Tanzania	12
2.3.2 Aim	12
2.3.3 Objectives	12
2.3.4 Activities	12
2.3.5 Legislation	13
2.3.6 Funding	13
2.4 KENYA	13
2.4.1 The National Book Development Council of Kenya (NBDC-K)	14
2.4.2 Aim	14
2.4.3 Objectives	15
2.4.4 Activities	15
2.4.5 Legislation	15
2.4.6 Funding	15
2.5 NIGERIA	15
2.5.1 Nigerian Educational Research and Development Council	16
2.5.2 Aim	16
2.5.3 Objectives	17
2.5.4 Activities	17
2.5.5 Legislation	18
2.5.6 Funding	18
2.5.7 Nigerian Book Foundation	18

B.	OTHER COUNTRIES	19
2.6	AUSTRALIA	19
2.6.1	Department of Communications, Information Technology and the Arts (DCITA) ⁵	21
2.6.2	Department of Industry, Tourism and Resources	23
2.6.3	National Centre for Culture and Recreation Statistics (NCCRS)	25
2.6.4	Australia Council of the Arts	27
2.6.5	Literature Board	29
2.6.6	Legislation	31
2.6.7	Funding	31
2.7	CANADA	31
2.7.1	Book Publishing Industry Development Programme (BPIDP)	33
2.7.2	Outcomes of the Book Development Plan	46
2.7.3	Legislative Framework	48
2.7.4	Funding	49
2.8	GREECE	49
2.8.1	The National Book Centre of Greece (EKEBI)	49
2.8.2	Aim	49
2.8.3	Objectives	49
2.8.4	Activities	50
2.8.5	Legislation	56
2.8.6	Funding	56
2.8.7	Growth in the Greek Book Industry	56
2.9	INDIA	57
2.9.1	National Book Trust (NBT)	58
2.9.2	Aim	58
2.9.3	Objectives	58
2.9.4	Activities	59
2.9.5	Legislation	71
2.9.6	Funding	71
2.10	THE PHILIPPINES	71
2.10.1	National Book Development Board (NBDB)	72
2.10.2	Aim	72
2.10.3	Objectives	73
2.10.4	Activities	73
2.10.5	Legislation	78
2.10.6	Funding	78
2.11	SINGAPORE	79
2.11.1	National Book Development Board	79
2.11.2	Aim	79
2.11.3	Objectives	79
2.11.4	Activities	79
2.11.5	Legislation	83
2.11.4	Funding	83
3.	Analysis and Summary of Interventions	85
4.	Best Practice Guidelines	112
4.1.1	Macro Level	112
4.1.2	Micro Level	114

5. Book Development in South Africa	120
6. Conclusion	123
7. References	124
8. Annexure 1	136

LIST OF FIGURES

Figure 1: New title production by 2005-2006 BPIDP Recipients - Canada	47
Figure 2: Book Title Published and Printed - The Philippines	76
Figure 3: Number of books read in the past six months - The Philippines	77

LIST OF TABLES

Table 1: Activities & projects of the EABDA for different groups – African Countries	6
Table 2: Breakdown of funding of Book Publishing Industry Development Programme – Canada	34
Table 3: Number of Titles produced – Greece	56
Table 4: Number of publishers – Greece	57
Table 5: NBT Publishing Series – India	59
Table 6: Book Fairs in India 2007	64
Table 7: Breakdown of Department of Education’s book development activities – India	67
Table 8: Interventions across countries – Singapore	85

LIST OF ACRONYMS

ABS	Australian Bureau of Statistics
AECB	Association for the Export of Canadian Books
BAKITA	National Kiswahili Council
BAMVITA	Book Development Council of Tanzania
BAN	Book Aid Nigeria
BASATA	National Arts Council
BDC	Book Development Centre
BEA	Book Expo America
BIFA	Buruburu Institute of Fine Arts and Design Association
BPIDP	Book Publishing Industry Development Plan
BSAT	Booksellers Association of Tanzania
CCHAUTA	Reading Association of Tanzania
CEAC	California Employer Advisory Council
CHAKITA	Chama cha Kiswahile cha Taifa
CLAP	Centre for Literary Arts and Publishing
COSOTA	Copyright Society of Tanzania
CRECHE	Early Child Education
CWS	Child Welfare Society
DBCDE	Department of Broadband, Communications and the Digital Economy
DCITA	Department of Communications, Information Technology and the Arts
DEWHA	Department of Environment, Water, Heritage and the Arts

DIISR	Department of Innovation, Industry, Science and Research
DIMP	Decentralisation of Instructional Materials
DoE	Department of Education
DRET	Department of Resources, Energy and Tourism
EABDA	East African Book Development Association
EDI	Electronic Data Interchange
EKEBI	National Book Centre of Greece
EKEMEL	European Center for the Translation of Literature and the Human Sciences
EKT	Engineering Knowledge Test
ELR	Educational Lending Rights
EMAP	Canada's Export Marketing Assistance Program
EMAP	Export Marketing Assistance Programme
EPICS	Enhanced Printing Industries Competitiveness Scheme
FEC	Federal Executive Council
FEMRITE	Uganda Woman Writers Association
FRMAP	Foreign Rights Marketing Assistance Program
GBT	Ghana Book Trust
GST	Goods and Services Tax
ISBN	International Standard Book Number
KBSA	Kenya Booksellers and Stationers Association
KEJA	Kenya Education Journalists Association
KIE	Kenya Institute of Education

KLA	Kenya Library Association
KNLS	Kenya National Library Services
KOWA	Kenya Organisation of Writers Association
KPA	Kenya Publishers Association
KPCA	Kenya Printing and Converting Association
LIFU	Literature Fraternity of Uganda
MDA	Media Development Authority
MICA	Ministry of Information, Communication and the Arts
MOEST	Ministry of Education, Science, and Technology
MYWO	Maendeleo ya Wanawake Organisation
NABOTU	National Book Trust of Uganda
NBC	National Bargaining Council
NBDB	National Book Development Board
NBDC-K	National Book Development Council of Kenya
NBDCS	National Book Development Council of Singapore
NBF	Nigeria International Book Fair
NBFT	Nigerian Book Fair Trust
NBP	National Book Policy
NBT	National Book Trust
NCCL	National Centre for Children's Literature
NCCRS	National Centre for Culture and Recreation Statistics
NERDC	Nigerian Educational Research and Development Council
NLU	National Library of Uganda

OZCO	Australian Council of Arts
PATA	Publishers Association of Tanzania
PICC	Print Industries Cluster Council
PLR	Public Lending Rights
PST	Private School Textbook
PWN	Publishers Writers Network
RAK	Reading Association of Kenya
RAU	Reading Association of Uganda
READ	Readership Enhancement and Advancement
SABDC	South African Book Development Council
SISF	Singapore International Storytelling Festival
TAPP	Tanzania Association of Printers and Paper Converters
TGNP	Tanzania Gender Networking Programme
TLA	Tanzania Library Association
TLSB	Tanzania Library Service Board
UBA	Uganda Booksellers Association
UCWIA	Writers and Illustrators Association
UGCLA	Uganda Community Libraries Association
UGIBF	Uganda International Book Fair
UK	United Kingdom
ULIA	Uganda Library & Information Association
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UPA	Uganda Publishers Association

US	United States
UWA	Uganda Writers Association
UWAVITA	Writers Association of Tanzania
VIP	Visiting International Publishers

DEFINITION OF KEY TERMS

Book: Adapted from the United Nations Educational Scientific and Cultural Organisation (UNESCO), a printed or electronic non-periodical publication published in the country and made available to the public.

Book Development: A condition not only for having more output but also for producing different kinds of output, as well as changing the technical and institutional arrangements to produce and distribute output

Book Development Plan: The integrated approach for fostering book development, consisting of the totality of the procedures and systems for attaining the balanced growth of the various components of book development and production, including preparation and distribution of books

Book Publishing: A process of choosing and making books dealing with everything known to the human spirit, philosophy, religious beliefs, intellectual ideas, the physical world, all the arts and the sciences

Book Sector: A term used to describe the holistic view of all aspects and activities that touch upon the writing, publishing, production and printing, distribution, sale, promotion and utilisation of books and other printed materials. The term emphasises the multiple use of books in a society and is thus a wider concept than the publishing sector, which focuses only on the business of publishing. The book sector comprises everyone and everything that is involved with books – be it in a big or small, public or private, commercial or non-commercial context.

Book Title: A particular book of which a number of copies are printed

Book Value Chain: The book chain refers to all the processes involved in bringing a book from the hands of its author to the end-user. It therefore draws attention to the writer, publisher, printer, distributor/bookseller and reader. The expression carries with it the connotation of how books link readers with one another irrespective of the distance between them, and cultural and circumstantial differences. Whereas a book chain always relates to a specific situation, the book sector in a given country encompasses an infinite number of different book chains.

Incentives: Financial or other support to individuals or groups of organisations in the book value chain

National Book Policy: This policy refers to a coherent set of regulations and indicators set by the national authority to govern the development, printing and dissemination of books and other printed materials with the aim of promoting a reading culture. The backing of the highest national authority is essential since it is not only a question of the allocation of sufficient resources but of giving status to a book policy to ensure that it will be implemented.

National Book Development Council: A forum for representatives of all interested parties to coordinate and stimulate the activities of government and private-sector agencies with a view to making more and better books available at the lowest possible cost to readers of all ages throughout the country

National Development: In the most general sense it refers to the country's progress as well as to the processes or measures that contribute to such progress.

Textbook/LTSM: A book which is an exposition of generally accepted principles in one (1) subject, intended primarily as a basis for instruction in a classroom or pupil-book-teacher situation

1. INTRODUCTION

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 in the cultural industries remains a challenge globally, and efforts are currently underway to protect this diversity through the Convention on Cultural Diversity to be signed by member countries (PICC, 2005).

The cultural industries, which include publishing, music, cinema, crafts and design, continue to grow and their global reach presents many opportunities such as a greater exchange of ideas and the exploitation of new technologies. These opportunities, however, also bring forth renewed challenges. The United States of America (USA) and the United Kingdom (UK) have for a very long time dominated book publishing in the world. These countries have publishing houses, agents or publishing services throughout the world, in both developed and developing countries.

This inequality challenges the cultural exchange between North and South, cultural diversity and the local development of the book sector. Africa for example imports close to 70% of its book needs and exports less than 5% of its total output (Darko-Ampem, 2000). To beneficially use the opportunities presented by the globalisation of exchange, local capacities need to be strengthened to bring about greater equality and close the gap between North and South.

In many countries, dedicated plans and policies have been implemented to increase and develop the book publishing sector. In these interventions, books have been recognised as unique products deserving different and exceptional interventions.

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 (PICC, 2005).

In 2005, the Print Industries Cluster Council (PICC), now the South African Book Development Council (SABDC), submitted a Draft National Book Policy to the National Department of Arts

and Culture (DAC). This policy identified key priority areas across all sectors of the book value chain. Recommended interventions to strengthen the local sector were also identified in the policy document.

This report aims to identify and elaborate on the initiatives employed internationally to assist the SABDC in the development of an implementation plan for the Draft National Book Policy. The report furthermore aims to identifying best practice guidelines that can be implemented in South Africa.

It is important to start with a definition for book development. The term was coined by UNESCO to cover the enormous range of people, processes and skills which go into the making and reading of a book. Book development can therefore be defined as:

- A condition not only for having more output,
- but also for different kinds of output of what were previously produced,
- Through changes in the technical and institutional arrangements by which output is produced and distributed. (NBDB; 1999).

The report includes book development across ten countries. Book development primarily takes place in developing countries, where strong, financially viable indigenous book publishing does not exist. There are, however, some developed countries that also need to grow their indigenous book sectors, as strong influences of the US and UK are present there.

The following countries were included in the study;

African countries

- Kenya
- Nigeria
- Uganda and
- Tanzania

Other countries

- Australia

- Canada
- Greece
- India
- Philippines and
- Singapore.

The choice of countries was determined as follows:

- Book development as an integrated activity across the value chain, coordinated by an implementing agency (in the form of book development council/trust/board). Stakeholders across the value chain form part of this body, and/or
- Has a dedicated policy or plan for the book sector such as a National Book Policy, Book Industry Development Plan etc. and/or
- Has been set up by the government to address challenges in the book sector, and/or
- Adequate information about the activities and organisation was available.

The study does therefore not include individual organisations doing isolated activities within sub-sectors of the value chain. These include national arts councils (unless it is tasked with implementing a dedicated plan/policy), associations; reading promotion projects; book fairs, etc.

It became apparent during the research process that there is no uniformity in book development as implemented by the countries under investigation. Different approaches to book development were followed and the research aims to draw out the salient issues as well as showcase some of the interventions used by various countries.

The report has four distinct sections. The first section details book development in each of the countries. African countries are detailed first. In an attempt to synchronise the information across countries, the following structure was followed:

- Brief background to the book sector where available
- Implementing agency
- Members

- Book development aims and objectives
- Activities and projects
- Legislation
- Funding

Copyright and Book Deposit Acts are standard for the book sector across countries and as such will not be discussed under 'Legislation'.

The second section analyses and summarises the interventions across countries and salient issues are identified. Where applicable, book policy priorities as detailed in the Draft National Book Policy 2005, are included.

The third section outlines best practice guidelines based on the previous two sections.

In the fourth section, a brief comparison is made between the best practice guidelines and book development in South Africa.

2. INTERNATIONAL BOOK DEVELOPMENT ACTIVITIES

This section details book development initiatives and activities in the countries used for the study.

Book development activities in the African countries are discussed first. Discussions on the other countries then follow in alphabetical order.

A. AFRICAN COUNTRIES

2.1. EAST AFRICAN BOOK DEVELOPMENT ASSOCIATION

The National Book Trust of Uganda, the National Book Development Council of Kenya (NBDC-K) and BAMVITA, Tanzania falls under the umbrella of East African Book Development Association (EABDA).

2.1.1 Aim

The EABDA aims to facilitate development of all aspects of the book sector in East Africa so that it effectively produces and disseminates relevant, adequate and affordable information to the citizenry. (EABDA, 2008a)

This aim is achieved through the following objectives:

- To lobby for formulation of enabling policy towards book sector development and trade,
- To improve skills across the industry by organising training workshops for the various book professions
- To promote the reading culture through book donations to schools and communities for the establishment of libraries and by organising outdoor reading and cultural activities such as children's reading tents.

2.1.2 Objectives

The EABDA supports book development in the three countries through playing a strong advocacy role;

- raise donor funds for capacity building programmes that will strengthen the national councils, specifically in the areas of advocacy and fundraising
- Creating partnerships with educational and cultural developmental Regional Economic Communities

- Pursuing a partnership with the African Union to ensure expansion beyond Pan-African level.
- Convincing the three governments to adopt some of the critical activities for the promotion of reading such as library development in schools.
- Harmonisation of education curricula of the three countries to enable usage of textbooks across borders and expand book markets
- Formulation of local language policies to enhance literacy especially among the rural communities
- Removal of all prohibitive fiscal policies on book production in order to lower prices
- Enactment of more comprehensive national book policies to address all areas of the book industry- from authorship to publishing, through to bookselling and readership.

2.1.3 Activities

The EABDA focuses their activities around three stakeholder groups, being community, industry and external players. Table 1 summarises the different activities across these groups.

Table 1: Activities & projects of the EABDA for different groups

Community Beneficiaries	Industry beneficiaries	External players
Reading tents	Book Fairs	Advocacy
Book donations	Book donations	Media campaigns
Teacher training seminars in librarianship	Literary Awards	Seminars
Upcountry (rural) book weeks exhibitions	Seminars & workshops	Book marches
	Secretariat support	Book weeks
	Organisational support	
	Book week	
	Planning workshops	

(Source: EABDA, 2008b)

2.1.4 Legislation

Legislation pertaining to the individual countries is discussed below.

2.1.5 Funding

The activities of EABDA have largely depended on donor funding. Recent changes in funding priorities by most donors have hampered fundraising efforts. It is understood that many funding agencies are reducing their support towards NGOs and more specifically those in culture, including the book sector, in favour of humanitarian projects such as refugees, HIV/Aids, etc.

The countries are discussed independently below.

2.2 UGANDA

In Uganda, book developmental matters reside with the *Ministry of Education and Sport*.

The National Book Trust of Uganda undertakes the book developmental activities.

2.2.1 The National Book Trust of Uganda (NABOTU)

NABOTU was established in 1997 and is an umbrella organisation made up of member associations and institutions of authors, publishers, booksellers, printers, librarians, literature teachers, and all those committed to the promotion of a reading culture.

2.2.2 Aim

The NABOTU aims to promote a reading culture by organising and bringing together all members of the book chain.

Membership

Uganda Publishers Association (UPA),
Uganda Booksellers Association (UBA),
Uganda Library & Information Association (ULIA),
Uganda Community Libraries Association (UgCLA)
Reading Association of Uganda (RAU),
National Library of Uganda (NLU),
Uganda Women Writers Association (FEMRITE),
Literature Fraternity of Uganda (LIFU),
Uganda Printers Association (UPA),
Uganda Writers Association (UWA) and Uganda Children
Writers and Illustrators Association (UCWIA).

2.2.3 NABOTU's main activities include

- **hosting annual book festivals;**
- **training stakeholders through seminars and workshops;**
- **library development, which involves donating books to schools and training of librarians;**
- **And policy advocacy on book development matters.**

2.2.3.1 Industry

One of NABOTU's biggest successes has been the Decentralisation of Instructional Materials Procurement (DIMP) project. The organisation has lobbied the Minister of Education to buy textbooks from local booksellers in the districts as opposed to buying in bulk from one provider. (Africa Files, 2007)

The policy encourages schools to procure their textbooks and supplementary reading materials directly from local bookshops in the different districts. As a policy requirement, each district is expected to have a bookshop(s) that is able to satisfy their book needs. The new policy dismantled the previous centralised procurement policy which discouraged the participation of local bookshops in supplying learning materials to schools.

This policy has seen bookshops grow from 20 in 1997 to over 200 in 2005. (NLU, 2005). The Ugandan Booksellers' Association currently has a registered membership of more than 500 bookshops.

2.2.3.2 Reading Promotion

The National Book Week Festival is major reading promotion event in Uganda and a number of activities take place during this week.

i) National Book Week Festival

The National Book Week Festival is a premier reading promotion event in Uganda. It is a celebration of books as instruments of culture, civilization and economic progress. Several activities happen during the week in different parts of Uganda. High ranking political and cultural leaders and ambassadors are present at the activities and local leaders from the different districts preside over the official ceremonies in their localities.

Activities at the book festival include:

- the Uganda International Book Fair,
- Children's Reading Tents¹, Book Donations,
- Cultural Activities,

¹ The children's reading tents project aims to acquaint children with books at an early age and contribute to the development of a reading culture as they grow. <http://www.africafiles.org/article.asp?ID=16111>

- A Literary Awards Ceremony and conferences.
- Activities are not only restricted to urban areas but include rural areas through the up-country outreach programme and Children's Reading Tent projects. (NLU, 2005).

ii) Reading Tents

Children's Reading Tent

The programme aims to encourage children and young adults to view reading as a source of pleasure.

It is organised by specialized volunteer librarians, children's writers, illustrators, educators and adult readers.

The reading tents provide an informal setting where children enjoy traditional storytelling, private reading, read-aloud marathons, writing, face-painting and drama. Schools are also encouraged to participate and they receive a book box containing interesting children's storybooks.

Reading tents are also part of the National Book Week Festival.

Community Reading Tent

The programme targets adult learners, women groups, farmers groups, small-scale business entrepreneurs, students and other adults interested in reading.

It is organized at different community libraries found in different parts of Uganda. Community libraries receive a donation of books on farming, entrepreneurship, basic primary healthcare and local language books.

2.2.3.3 School Library Development Programme

Once every year, the Trust donates locally published children's storybooks to 50 primary schools from one district. This allows schools to establish school libraries for children to read on a sustainable basis. Teachers from the benefiting schools are trained in basic skills to manage book collections, promote and teach reading.

2.2.3.4 Advocacy and Networking Programme

This programme aims to promote the following:

- freedom to publish and freedom to read,
- taxation policies in respect of books and printing papers,
- local language development,
- inclusion of local writers on school curriculum,
- copyright,
- expansion of book distribution infrastructure which includes bookshops and libraries
- Cross border book trade.

2.2.3.5 Training Programme

NABOTU develops a training programme for professionals in the book sector based on needs analysis with their members. Some training that has been offered includes:

- Governance and financial issues for voluntary boards t
- Writing in local languages for writers and upcoming writers
- Writing and Illustrating Children's Books

2.2.3.6 NABOTU Literary Awards

This is an annual event where authors of published works in fiction, poetry, prose, drama and short stories are invited to submit them for the award. A literary awards ceremony is held during the National Book Week Festival at which winners receive certificates and cash prizes.

2.2.3.7 Uganda International Book Fair

The Uganda International Book Fair (UGIBF) is another annual event and organised during the National Book Week Festival. Local and international publishers, bookshops, libraries, government and international organisations mount exhibitions of books, magazines, journals, e-books and other reading materials for a period of six days.

During the week, business deals and contracts are entered into by companies represented at the exhibition.

Books can be bought at special discounts.

2.2.3.8 Regional Visitation Programme

The regional visitation programme aims at strengthening regional ties and cross boarder book trade. Book sector professionals from Kenya and Tanzania participate in the different activities held during the National Book Week Festival. Likewise book sector professionals from Uganda attend National Book Week Festivities in Kenya and Tanzania. During the visits, the Uganda Publishers Association showcases Ugandan publications at the Nairobi International Book Fair and the Tanzania International Book Fair.

2.2.4 Legislation

2.2.4.1 Decentralisation of Instructional Materials Procurement (DIMP).

NABOTU has lobbied the Minister of Education to buy textbooks from local booksellers in the districts as opposed to buying in bulk from one supplier. (Africa Files, 2007) This has led to unprecedented growth of booksellers in Uganda. In 1997, there were 20 bookshops, while in 2005, over 200 was recorded.

The policy encourages schools to procure their textbooks and supplementary reading materials directly from local bookshops in the different districts. As a policy requirement, each district is expected to have a bookshop(s) that is able to satisfy their book needs. The new policy dismantled the previous centralised procurement policy which discouraged the participation of local bookshops in supplying learning materials to schools.

2.2.5 Funding

NABOTU is primarily funded through donor agencies.

2.3 TANZANIA

In Tanzania book-related activities fall under the auspices of the *Department of Education and Culture*. The Book Development Council of Tanzania (BAMVITA) implements book development strategies there.

2.3.1 Book Development Council of Tanzania (BAMVITA - Bazara La Maendeleo Ya Vitabu Tanzania)

Membership

- Publishers Association of Tanzania (PATA)
- Booksellers Association of Tanzania (BSAT)
- Writers Association of Tanzania (UWAVITA)
- Tanzania Association of Printers and paper converters (TAPP)
- Tanzania Library Association (TLA)
- Association of Editors
- Association of illustrators and Book Designers
- National Commission for UNESCO
- Tanzania Library Service Board (TLSB)
- Ministry of Science and Technology
- Ministry of Information, Culture and Sports
- Ministry of Industry, Trade and Marketing
- Ministry of Education Training
- Copyright Society of Tanzania (COSOTA)
- National Arts Council (BASATA)
- National Kiswahili Council (BAKITA)
- Institute of Kiswahili Research
- Tanzania Gender Networking Programme(TGNP)
- Reading Association of Tanzania (CCHAUTA)

2.3.2 Aim

The BAMVITA was established in 1999 as a non-profit making organisation. The aim of BAMVITA is to coordinate and stimulate the activities of public and private sector agencies in the book industry. They also aim to ensure that “more and better books” are available throughout Tanzania.

2.3.3 Objectives

Following this, their two main objectives are:

- The creation of a forum for all interest groups, public and private, in the book industry to address common problems through coordination, joint planning and cooperative ventures and initiatives,
- Support, encourage and liaise with associations involved in the development of books and reading culture and learning, and urge the formation of such associations where there is a need.

(BAMVITA, 2006a)

2.3.4 Activities

BAMVITA also has the National Book Week and reading tents as NABUTO. As they are part of EABDA, they have similar book development programmes as Uganda and Kenya.

On their website reference is made to a book policy, but the document was not available. They also however commit them to the following in their constitution:

- Coordination of the various activities of the Council member associations, institutions and organisations, and lobbying government for action and support,
- Promotion of books through fairs, book and library weeks, literacy and literary awards, advertising and other activities,

- Collection of information and data on all aspects of the book sector through research, consultations and periodic surveys and processing and dissemination of such information,
- Regulation of practices in the book sector by standardizing ethics of member associations, institutions and organisations by publicizing transgression and seeking legal action, when necessary and possible, against violation of copyright and other laws relating to the book sector,
- Improvement of professional skills by encouraging the establishment of training facilities, courses and seminars to upgrade the personnel in all facets of the book sector,
- Supporting the development of suitable infrastructures in order to encourage indigenous authorship, editing, illustrating, printing and publishing and to provide opportunities for local book production,
- Undertaking any such activities as will ensure the full and dynamic development and utilization of the book industry.

(BAMVITA, 2006b)

2.3.5 Legislation

Although a book policy is mentioned, no evidence of one could be found. No legislation could be found.

2.3.6 Funding

BAMVITA is funded through donor agencies.

2.4 KENYA

Book publishing in Kenya is the responsibility of the *Ministry of Gender and Children*, under the *Department of Culture*.²

² Following the appointment of the new cabinet for the grand coalition government, the ministry's name was changed to Ministry of Gender and Children Affairs. The Department of Culture was moved to another ministry namely the Ministry of State for Heritage and Culture. 25 April 2008.

2.4.1 The National Book Development Council of Kenya (NBDC-K)

The National Book Development Council of Kenya (NBDC-K) was formed in 1997.

2.4.2 Aim

The key aim of the NBCK is to promote a reading culture and enhance literacy for poverty alleviation in Kenya.

Membership

- Kenya Publishers Association (KPA)
- Kenya Library Association (KLA)
- Kenya National Library Services (KNLS)
- Kenya Institute of Education (KIE)
- Kenya Booksellers and Stationers Association (KBSA)
- Directorate of Adult and Continuing Education
- Department of Culture
- City Education Department
- Kenya Organization of Writers Association (KOWA)
- Reading Association of Kenya (RAK)
- Department of Quality Assurance & Standards
- Kenya Printing and Converting Association (KPCA)
- Kenya Education Journalists Association (KEJA)
- Child Welfare Society (CWS)
- Kenya Episcopal Catholic Secretariat
- Buruuru Institute of Fine Arts and Design Association (BIFA)
- FAWE - Kenya Chapter
- Chama cha Kiswahili cha Taifa (CHAKITA)
- Maendeleo ya Wanawake Organisation (MYWO)
- Center for Research Communication and Gender in - Early Child Education (CRECHE)
- Ministry of Education, Science, and Technology (MOEST)

2.4.3 Objectives

- To provide a forum for communication and cooperation between different organisations involved or interested in book development.
- To promote the development of the book industry including the publishing, printing, distribution and use of books in Kenya.
- To promote the development and sustenance of a strong reading culture.
- To promote the attainment of higher literacy levels throughout the Republic of Kenya.
- To promote and encourage the

authorship of books for learning and pleasure.

- To promote and encourage the development of more extensive library facilities throughout the Republic of Kenya.
- To organize book fairs, lectures, seminars, symposia, conferences and workshops for the encouragement and promotion of the objectives of the Council.
- To serve as a clearing house for information and matters pertaining to book development in Kenya and set up a statistical data bank on all aspects of book development.
- To develop strategies and policies in partnership with government agencies and other organisations to enhance the book industry.

2.4.4 Activities

The NBDC-K has the same programmes as Uganda and Tanzania, which includes National Book Week, reading tents, literary awards, library development etc.

2.4.5 Legislation

2.4.5.1 National Textbook Publishing Policy

The National Textbook Publishing Policy is the liberization of the school textbook market in Kenya. It enabled growth in publishing as the publishers could compete in the primary and secondary school market. These markets were previously largely controlled by state publishing.

The Kenya School Equipment Scheme (KSES), impacted negatively on the growth of the book industry. This scheme bought books centrally and distributed them to Kenya's primary schools. The abolition of KSES marked an increase in the number of bookshops coming into operation. It is however necessary that the government terminate the practice of ordering directly from publishers. (Rotich, 2000).

2.4.6 Funding

The council is funded through donor funding.

2.5 NIGERIA

Book matters in Nigeria are the responsibility of the *Federal Ministry of Education*.

In 1988 the government founded the Nigerian Educational Research and Development Council (NERDC). This council was tasked to formulate and implement a national policy on book development. The Book Development Centre resides within the NERDC.

With the aim of increasing indigenous publishing in Nigeria, the government implemented the Nigerian Enterprises Promotion Decree in 1978 which included book publishing. At least 60% equity participation must be by Nigerian nationals. Foreign publishers at that stage reduced foreign equity participation to 40% or less and some took on new names.

2.5.1 Nigerian Educational Research and Development Council

Previous attempts by government to establish a book development council has failed. Currently the Nigerian Educational Research and Development Council, which is stated to be “the Think Tank of Education” undertakes book development activities. The Nigerian Educational Research and Development Council (NERDC) were established in 1988 through Act No. 53 of 1988.

2.5.2 Aim

- To establish a Book Development Centre,
 - To undertake and promote book development and authorship, ensuring the provision of adequate infrastructural facilities for book manufacture,
 - Encourage the expansion of local printing and publishing industry in order to facilitate book production,
 - Develop an effective book distribution sector so as to ensure nationwide circulation,
 - Encourage the establishment of and strengthen professional association of the book industry in Nigeria,
 - Encourage and promote a reading culture through a continuous research into the needs of Nigerian readers,
 - Produce syllabus and instructional materials
 - Develop and encourage the development of core-books on Nigerian languages in co-operation with any other institution or organisation concerned with book development.
- (NERDC, 2007a)

The Nigerian Educational Research and Development Council (NERDC) are mandated to play a key role in book development through the Book Development Centre (BDC).

2.5.3 Objectives

The objectives of the Book Development Centre include:

- Formulating and implementing a national book policy,
- Undertaking and promoting book development and local authorship,
- Encouraging the expansion of local printing and publishing industry,

- Encouraging a reading culture through research and other relevant activities as well as effective book distribution and strengthening of professional associations of the book industry in Nigeria and,
- Serving as a centre for the exchange of information on books and related issues.

2.5.4 Activities

2.5.4.1 National Book Policy (NBP)

The Book Development Centre (BDC) organized a workshop to review the NBP in 2006 with the aim of improving quality of books and educational materials. This policy was presented to the Nigerian government in 2006.

2.5.4.2 Quality Control and Assessment of Books and Educational Materials

The NERDC has a statutory role of quality control of books used at all levels of education. The Book Development Centre therefore assesses books to upgrade their quality and promote standardisation through workshops and in-house assessment.

The Centre regularly holds workshops on *Quality Control, Assessment of Books and Educational Materials*.

2.5.4.3 Organisation of National Book Fairs in the Six Geo-Political Zones

Zonal Book Fairs are organized by the Book Development Centre in the six geo-political zones of Nigeria. The book fairs are annual events. The fair aims to increase access to good quality books at affordable prices.

2.5.4.4 Revision of Basic Education Texts.

NERDC and the Centre was also responsible for the Revision of Basic Education texts where they had to work out modalities for the Revision/ Production of Basic Education texts, especially in core subjects.

The process included meetings with publishers to revise and produce new texts in line with the reviewed Curricula in core subjects such as English Studies, Mathematics, Basic Science and Technology, Basic Science, Social Studies, Civic Education and Basic Technology.

This is an on-going exercise that is completed once texts are revised and renewed.

2.5.4.5 Assessment, Recommendation and Procurement of Supplementary Reading Materials for Selected Basic Education Schools

In a bid to further promote good reading habits and access to good quality books, the NERDC, through the Book Development Centre, reviewed some Supplementary/General Reading materials for procurement and distribution to schools in all the States in the Federation.

Titles are recommended and in 2007 for example, 32 different titles were found suitable and recommended. About 13,700 copies of the recommended books/titles were procured for distribution to selected schools.

2.5.5 Legislation

2.5.5.1 Nigerian Enterprises Promotion Decree

With the aim of increasing indigenous publishing in Nigeria, the government implemented the Nigerian Enterprises Promotion Decree in 1978 in book publishing as well. At least 60% equity participation must be by Nigerian nationals. Foreign publishers at that stage reduced foreign equity participation to 40% or less and some took on new names.

2.5.6 Funding

The Book Development Centre is funded by the Federal Government of Nigeria.

2.5.7 Nigerian Book Foundation

Membership

The Nigerian Book Foundation's council reflects the membership of the organisation:

-The Presidents of the five major professional associations in the book industry--Authors, Publishers, Printers, Booksellers, and Librarians--are members of the Council ex officio. So are the National Librarian and the President of the Foundation.

-The two Honourable Ministers who's Ministries relate closely to book development--Culture and Education--each nominate a representative to the Council.

-Four organisations relevant to book development, as may be determined by the Board of Trustees, also nominate a representative each to the Council. The current members are the Raw Materials Research & Development Council, the Nigerian Educational Research & Development Council, the Academic Staff Union of Universities, and the Nigeria Union of Teachers

2.5.7.1 Activities

The Nigerian Book Foundation was founded in 1991 with a strong focus on indigenous book development. Activities include:

a) Nigeria International Book Fair: the NBF is a founding Trustee of the Nigerian Book Fair Trust (NBFT), and organises it with other partners.

- (b) Book Data Centre: the NBF Book Data Centre was established in 1995 to serve as a data bank on book related matters.
- (c) Promotion of Reading: Pilot reading promotion projects were launched in three regions.
- (d) Book Aid Nigeria (BAN) Project: the NBF launched a Book Aid Nigeria (BAN) Project which gave free donations of a wide range of new books for distribution to public, institutional, community, and other libraries and organisations to facilitate access to books.
- (e) Sourcing and Dissemination of Indigenous Knowledge: Through organized interviews with identified experts (literate and illiterate) in indigenous knowledge, the NBF has sourced hitherto unpublished information, which it transformed into reading materials for the reading public. Seven Igbo language booklets have been produced.

The foundation faces a serious lack of funding which is prohibiting the undertaking innovative activities. (Sabre Foundation, N.D)

B. OTHER COUNTRIES

2.6. AUSTRALIA

The precise location of all book-related activities in Australia is unclear. Instead it seems that a range of organisations and government departments are tasked with different aspects relating to book development. There is however a dedicated Book Industry Assistance Plan (BIAP).

In August 1998 the Prime Minister announced a proposal whereby the wholesale sales tax and nine State and Territory Government taxes will be replaced with a uniform Goods and Services Tax (GST) of 10% on a broad base of goods and services. This included books that have not been subject to the wholesale sales tax in the past. To compensate for this, the Book Industry Assistance Plan was implemented. (DBCDE, 2008)

The different players in book development are:

- The then Department of Communications, Information Technology and the Arts³ funded the Books Alive campaign. This campaign was part of the Book Industry Assistance Plan which was coordinated by the Australia Council for the Arts.
- Department of Industry, Tourism and Resources⁴: the printing industry falls under this department. Most of the Department of Industry, Tourism and Resources' projects are executed by AusIndustry. (DIISR, 2004)
- The National Centre for Culture and Recreation Statistics resides within the Australian Bureau of Statistics. The centre provides statistical publications on book publishers and book retailers in Australia. (ABS, 2007c)
- The Australia Council of the Arts is the government's arts funding and advisory body. The Council supports authors and writers, develop cultural policy, promote the Australian Arts and advocate with government on the importance of art. (OZCO, 2007a). This organisation has been tasked with implementing the Book Industry Assistance Plan.
- The Australian Literature Board (established by the Australian Arts Councils) provides financial support and professional development opportunities to literary authors. The Board specifically also engages in promotional activities for books in Australia and abroad. (OZCO, 2007b).

³ In December 2007 the Department of Communications, Information Technology and the Arts (DCITA) became the Department of Broadband, Communications and the Digital Economy (DBCDE). Responsibility for Arts transferred to the [Department of Environment, Water, Heritage and the Arts](#) (DEWHA) on 3 December, 2007. References will be to DBCDE and DEWHA although information for the report was obtained while still the DCITA

⁴ Name was changed to Department of Innovation, Industry, Science and research after this report was compiled

2.6.1 Department of Communications, Information Technology and the Arts (DCITA)⁵

2.6.1.1 Lending Rights Schemes

a) Public Lending Rights

Eligibility criteria for PLR & ELR

- Eligible creators must be citizens or permanent residents of Australia;
- Eligible creators (maximum of five per book) may include authors, editors, illustrators, translators or compilers; and
- Eligible publishers may include publishers whose business consists wholly or substantially of the publication of books and who regularly* publish in Australia, self-publishing creators and non-profit organisations that publish to further their aims and objectives (*at least once in the preceding two-year period). (DCITA, 2007)

The Public Lending Right Scheme: The Public Lending Right (PLR) scheme, governed by the Public Lending Right Act 1985, makes payments to eligible Australian creators and publishers whose books are held in public lending libraries. (DCITA, 2007). Registered claimers can access Lending Rights online to register, view lending rights payment history and update personal information. This scheme has been in operation

since 1974. The annual report provides the detail of how the scheme works:

Australian creators and publishers are invited to submit claims for their books to the Department. PLR payments to eligible creators and publishers are determined by the number of copies of their books estimated to be held in public lending libraries in Australia.

This information is extrapolated from an annual survey of the books held in a sample of public lending libraries selected by the ABS. If the survey results indicate that 50 or more copies of an eligible book are held in public libraries across Australia, a payment may be made.

Books are surveyed annually for three consecutive financial years following their year of publication. If, in the third year, a book is still held in sufficient numbers in public lending libraries, it will be resurveyed every three years. Books scoring less than 50 copies in the third or subsequent surveys are dropped from the survey cycle. (DCITA, 2007:4)

Financial parametres for PLR

The PLR rates of payment under the current PLR scheme are \$1.40 (R8,87⁶) per copy of each eligible book for creators and 35 cents (R2.22) per copy of each eligible book for publishers. If

⁵ See footnote 3

there is more than one eligible creator of a book, the PLR payment for each one will be determined by taking into account the share of royalty entitlements of each creator.

The amount of a PLR payment for a book is calculated by multiplying the relevant PLR rate of payment by the estimated number of copies of the book. For example, if the current estimated number of copies of a book was 200, the creator's PLR payment would be \$280 and the publisher's PLR payment would be \$70.

PLR payments are not subject to GST. However, claimants need to declare their PLR payments for income tax purposes.

Which books are not eligible for PLR?

- books with no ISBN;
 - books with more than five creators;
 - books without identifiable creators;
 - magazines and other serial publications;
 - books not offered for sale; and
 - non-book material including talking books, computer disks, CDs and audio-visual kits.
- (DEWHA, 2007a)

b) Educational Lending Rights

In 1999, another scheme was introduced called the Educational Lending Rights scheme. The Education Lending Right (ELR) scheme makes similar payments for books held in educational libraries (DCITA, 2007).

Financial parameters of ELR

Separate rates of payment are determined each year for creators and publishers. These are multiplied by the estimated number of book copies obtained by the library survey to determine the ELR payment.

⁶ Exchange rates for all foreign currencies were sourced on 7 and 9 October 2008. Approximate rand values are given in brackets throughout the document. These values are estimates for the purpose of the research only. History has not been taken into account.

A limit may be placed on the number of copies of a book that will be counted at individual libraries. A minimum total number of copies of an eligible book may be required to generate a payment, and minimum and maximum payments may also be set. If there is more than one creator of a book, each receives an ELR payment in proportion to their share of the royalty payments.

Amounts of less than \$50 (R314.53) are not payable. ELR payments are not subject to GST. However, claimants need to declare their ELR payments for income tax purposes. (Department of the Environment, Water, Heritage and the Arts, 2007b)

Which books are eligible for ELR?

Eligible books are those that have:

- been allocated an International Standard Book Number (ISBN);
- been published and offered for sale;
- an identifiable creator or creators;
- a total number of eligible creators not exceeding five; and
- a catalogue record in a national bibliographic database.
- ELR does not encompass audio-visual kits, compact discs, computer disks, electronic books, magazines or other serial publications, or talking books.(DEWHA, 2007b)

Libraries surveyed are in primary and secondary schools; technical and further education (TAFE) institutions; and universities

The Book Industry Assistance Plan

The Book Industry Assistance Plan is funded by the DCITA⁷ is coordinated by the Australia Council for the Arts. (See Australia Council for the Arts section on details about the programme)

2.6.2. Department of Industry, Tourism and Resources

Print21 is a partnership between the Commonwealth Government and the Australian Printing Industries.

⁷ See footnote 3

The **PRINT21** package of initiatives consists of:

- The Printing Industries' Action Agenda;
- The Printing Industry Competitiveness Scheme;
- The Book Production EPICS Grants including Business Diagnostic Tools and a Client Manager Service;
- A component of the Value Chain Management Programme; and
- Other government sponsored support programmes

(DRET, 2001)

Printing Industries association of Australia, Graphic Arts Merchant Association of Australia Inc, the National Paper Council of Australia, Australian Paper and the Department of Industry Sciences of Resources, Manufacturing, Engineering and Construction division are the funding partners of Print21. (DRET, 2001)

The Printing Industries Action Agenda was announced by the Minister for Industry, Science and Resources in March 1999. In essence the findings reveal that the Australian printing industry profitability was declining. The funding was for new approaches and innovative strategies to develop and grow the industry.

Criteria for PICS:

Australian book printers can participate in the scheme. It will cover paper used in the production of eligible books completed on or after 1 January 1999 but before 1 July 2003.

All paper used in the production of eligible books, whether actually imported or not, and whether duty was actually paid or not, is eligible under the scheme.

The Action Agenda was implemented as follow:

- PICS: The importation of books into Australia attracts no import duties. Australian book printers are thus placed in a non-competitive position when they pay a duty on the raw materials used in the manufacture of the book. Through PICS, Australian book printers

received a four per cent rebate for paper and paperboard used in book production, other raw materials used in the manufacture and production of books continued to attract the import duty.

The scheme was introduced on 1 January 1999.

EPICS: The Enhanced Printing Industries Competitiveness Scheme (EPICS) commenced on 1 July 2000 and

Criteria for EPICS:

Australian book printers can participate in the scheme.

was intended to operate until 30 June 2004. EPICS was introduced to make book printers more competitive and help partly offset the negative impact that the GST (Goods and Service Tax) had on the demand for books. EPICS was jointly administered by Australian Industry and the Printing Industries Association of Australia. (DIISR, Australia, 2004)

In 2002 the Ministry for Industry, Tourism and Resources announced the early closure of both the PICS and EPICS programme. The PICS programme hasn't attracted much attention and has struggled to allocate the apportioned \$14 million (R88,106 million). PICS closed in June 2003.

2.6.3 National Centre for Culture and Recreation Statistics (NCCRS)

In recognition of the importance of culture, sport and other recreation to both Australia's development and progress, and the social and physical wellbeing of its population, the Australian Bureau of Statistics (ABS) has established the National Centre for Culture and Recreation Statistics (NCCRS) in 1991, in partnership with the Cultural Ministers Council. The ABS fulfils a similar role as Stats SA.

Statistical publications include Book Publishers, Australia and Book Retailers, Australia. The Book Publisher report provides sales figures of books, number of books sold for different periods, sales of Australian books and sales of imported books. On the book retailers' side book sales figures and the number of business operating in the sector is provided (ABS, 2007b).

Book publishers data

Data is collected from businesses that have book publishing as their main activity or those generating \$2 million (R12,586 million) or more in income from book publishing, although it is not their main activity. Data collected includes:

- Income and expenditures – for example, aggregated sales figures are released and total expenditure figures are broken down into major components. Major components include salaries, landed costs of imported books, capital and other expenditure
- Operating profit before tax, profit margin
- Cost of printing, both in Australia and overseas
- Royalties and fees paid
- Export of Australian books, by country or region of destination
- Employment, with breakdown of gender, full-time vs. part-time

- Method of sale, e.g. retailers, bookshops, Internet etc.
- Sales by category of books, i.e. education, general fiction, general non-fiction and general children,
- Sales by category and origin, i.e. Australian or imported
- New Australian titles

Book Retailers data

Data is collected from businesses involved in the retail sale of books. This includes supermarket and grocery stores, department stores, newspaper, book and stationery retailers as well as other retailers. Only larger retail businesses (those with 200 or more employees) were classified as supermarkets or grocery stores; department stores and retailers as smaller retailing activity were negligible.

Businesses classified in the newspaper, book and stationery retailing was further categorised into bookshops and newsagents based on the bookselling activity.

Data collected includes:

- Value of new books sold
- Income, components of income, i.e. new, second-hand books etc.
- Operating profit before tax, profit margin
- Expenses, components of expenses
- Employment, gender, full-time vs. part-time
- Use of technology, i.e. electronic point of sale, barcode-scanning systems, security tags, website, use of Internet for sales, etc.
- Educational textbook subsidy scheme
- Australian vs. overseas suppliers

The survey is conducted by the Australian Bureau of Statistics (ABS) with funding provided by the Department of Communications, Information Technology and the Arts as part of the Book Industry Assistance Plan.

2.6.4 Australia Council of the Arts

The Australia Council of the Arts is responsible for the implementation of the Book Industry Assistance Plan.

The Appropriation (Supplementary Measures) Bill (No. 1) 1999 provides for the appropriation of money from the Consolidated Revenue Fund for the Book Industry Assistance Plan.

In August 1998 the Prime Minister announced a proposal to replace the wholesale sales tax and nine State and Territory Government taxes with a uniform Goods and Services Tax (GST) of 10% on a broad base of goods and services. This included books that had not been subject to the wholesale sales tax in the past (DBCDE, 2008).

The Plan was developed in response to concerns by the Australian Democrats that the GST would adversely affect the Australian book industry. The main objectives of the Plan are to:

- provide a subsidy to retail booksellers to reduce the retail book price to students studying at an Australian institution;
- provide financial assistance to book printers and publishers to revitalise the industry; and
- Provide assistance to Australian creators of books.

The Book Industry Assistance Plan is a plan to compensate for the GST on books. Its primary focus is on compensation for the increase in the cost of books used specifically for educational purposes, but it also provides some direct support to the book industry. It commits \$240 million over four years commencing in 2000-2001, i.e. \$60 million (RR378,174 million) per annum (DBCDE, 2008). Programme included under the plan are briefly discussed below:

a) Educational Textbook Subsidy Scheme

The aim of this scheme is to compensate for the GST on books as per the above explanation. The subsidy is paid to educational booksellers and is set at 8% of the retail price of textbooks.

Criteria

- All books on a dedicated list from educational institutions qualify.
- Booksellers need to register for the scheme with the Department.
- The scheme is not applicable to second-hand books.
- Primary, secondary and tertiary education are included.

This scheme is applicable to all textbooks, from primary school to tertiary education. It is directly beneficial to the consumer as parents buy textbooks for their children in Australia.

Parents buy the textbooks at the discounted price and then the bookseller claims the discount based on the books sold.

b) Grants to primary school libraries

Criteria

- All primary schools are eligible for the funding.
- The funding can only be used to purchase books by Australian authors or produced in Australia.
- Braille, audio and E-books can also be purchased.

The objective of this grant is to offer financial assistance to primary school libraries to assist them in the acquisition of books written by Australian authors or produced in Australia.

\$27 million (R170,114 million) was allocated to the programme over 4 years, from 2001 to 2004 and funding is provided as block grants calculated on a per student basis.

c) Books Alive Campaign

The Books Alive project forms part of the Book Industry Assistance Plan. This is a six-week campaign that highlights “great reads”, and encourages people to buy these books from local bookshops. Over one million books were sold over four years due to the exposure through a guide that is developed by the campaign. The Council distributes 2,5 million of the guide through booksellers and in a women’s magazine. The campaign is backed by television advertising and in-store promotions.

The objectives of the campaign survey are the following:

- To encourage participation in, appreciation, value and enjoyment of reading
- Develop new readership (while maintaining current readership), particularly among those groups identified through research as reluctant readers
- Promote the value of literacy, particularly to children and young people
- Increase the appreciation of Australian writers and writing
- Encourage the growth of the Australian book sector
- Explore opportunities for self-funding beyond the four-year campaign (OZCO, 2007c)

d) Research

The campaign also had a research component to it. This research was used to inform the development of the campaign. There were four separate phases of research:

Phase 1: A review of recent Australian research concerning patterns of buying and reading books

Phase 2: Qualitative research based on in-depth interviews with a range of stakeholders

Phase 3: Qualitative research with consumers to explore patterns of reading, buying and borrowing books for leisure

Phase 4: A national telephone survey to establish patterns of reading, buying and borrowing.

The Books Alive Campaign has an annual budget of \$2 million (R12,982).

e) Other programmes of the Book Industry Plan

The other programmes of the plan were discussed in the previous section and are therefore only listed here.

- \$48 million (R311,581 million) to enhance the Printing Industry Competitiveness Scheme which includes an Innovation, Infrastructure and Development Fund and a Skills Development Programme (PICS and EPICS discussed under Department of Industry Tourism and Resources).
- \$38 million (R246,947 million) for a scheme to provide further support to Australian authors – the Educational Lending Rights scheme (ELR) – which will extend the libraries' lending rights scheme currently applying to Australian books kept in public libraries, to those held in educational libraries (discussed above under Department of Communications, Information Technology and the Arts).
- \$1.2 million (R7,790 million) to enable the Australian Bureau of Statistics to collect data on book publishing and retail sales annually (discussed above under National Centre for Culture and Recreation Statistics (NCCRS)).

(DBCDE, 2008)

2.6.5 Literature Board

The Literature Board provides direct financial support to outstanding literary creators, and grants to organisations that offer infrastructure support to the literature sector and income-generating opportunities for writers. Professional development opportunities for individual writers, including

Australian and overseas residents, are also supported. Its main focus is the creation of literary works.

Activities exclude: textbooks and other works created for primary, secondary and tertiary educational purposes; newsletters; books which are primarily works on interviews; local and oral histories; military studies; instruction manuals; how-to books; academic theses or course work; bibliographies; dictionaries; encyclopaedias; professional reference titles; guide books; catalogues; personal-growth, lifestyle and hobby books; or works on physical or natural sciences, theology, psychology, cooking, medicine or law

(OZCO, 2007b)

Activities include festivals, promotional activities and presenting an annual award. Book

Grants to overseas book publishers:

Overseas book publishers may apply to the literature board of the Australia Council for assistance to translate and publish the work of living Australian writers. An overseas book publisher may apply for up to AUD\$10,000 (R64,906) per title to assist with writers' and translators' fees, and publication costs. If the work is published in English, a publisher can apply for up to AUD\$4,000 (R25,944) per title (OZCO, 2007b).

development activities include:

Overseas promotional activities:

- Grants to overseas book publishers to publish Australian literature (presentation and promotion grants). Applications from overseas publishers who are establishing an Australian list is encouraged. The Literature Board supports the following genres: fiction, literary non-fiction

(defined as autobiography, biography, essays, histories, literary criticism or analytical prose), poetry, drama, books for children and young people, anthologies of Australian creative writing, along with books of general cultural significance that are substantially by, or about, living Australian writers.

- Community partnerships and market development: Literature programmes managed by community partnerships and market development focus on the export and rights sales of Australian literary titles overseas, and on providing professional development and networking opportunities for the Australian publishing industry and for literary agents.
- The Visiting International Publishers (VIP) programme aims to promote rights sales of Australian titles to overseas markets and to strengthen the links between Australian and overseas publishing houses and literary agencies.

- Literature International Market Development Programme 2007-2008: The literature international market development programme aims to establish a market presence in key overseas markets such as the USA and Europe, and to build international market development skills and experience. Activities supported include attendance at key international book fairs such as the London Book Fair, Frankfurt Book Fair, Bologna Children's Book Fair, and Book Expo America (BEA), extension visits coinciding with attendance at an international book fair specifically designed to sell rights and pursue

Criteria to participate in the Literature International Market Development programme:

Australian publishers and literary agents is supported

In 2006-2006 the programme provided \$135 000 (R880,946) to assist 29 Australian publishers and literary agents to pursue opportunities to sell Australian titles through various activities (OZCO, 2007b)

market contacts, and the production of catalogues and promotional materials to use at international book fairs or overseas promotional events.

(OZCO, 2007b)

2.6.6 Legislation

The Public Lending Right (PLR) scheme, governed by the Public Lending Right Act 1985, makes payments to eligible Australian creators and publishers whose books are held in public lending libraries.

In 1999, another scheme was introduced called the Educational Lending Rights scheme. The Education Lending Right (ELR) scheme makes similar payments for books held in educational libraries.

2.6.7 Funding

The Book Industry Assistance Plan is funded by the Australian Government. The Appropriation (Supplementary Measures) Bill (No. 1) 1999 provides for the appropriation of money from the Consolidated Revenue Fund for the Book Industry Assistance Plan.

2.7. CANADA

Cultural Affairs resides with the Department of Canadian Heritage. Canada's book sector was to a large extent dominated by big, foreign-owned publishing houses. The Canadian government implemented the Book Publishing Industry Development Plan (BPIDP) to develop indigenous publishing in Canada. The Department of Canadian Heritage implements this programme.

The aim of the programme is to increase Canadian-owned publishing houses and Canadian-authored books. A number of direct assistance programmes are available and have been implemented since 1979.

The dedicated Book Publishing Industry Development Plan (BPIDP) and the Foreign Investment Policy have been implemented by the government to support the establishment of a strong Canadian-owned and -controlled book publishing sector.

The main driving force of the Canadian book industry is the creation and accessibility of Canadian-authored books to audiences across the country. Major investments are made in small, independent Canadian-owned publishers, with additional incentives for Aboriginal publishers.

Foreign Investment Policy

This policy supports a Canadian-owned and -controlled book publishing industry. The Investment Canada Act requires that foreign investment in the book publishing and distribution sector be compatible with national cultural policies.

The following policy guidelines are strictly enforced:

- foreign investment in new business enterprises is limited to Canadian-controlled joint ventures;
- acquisition of an existing Canadian-controlled business by a non-Canadian is not permitted. Under extraordinary circumstances, the government may consider an exception to this guideline;
- if a non-Canadian wishes to sell an existing Canadian business independent of any other transaction, the vendor is expected to ensure that potential Canadian investors have full and fair opportunity to purchase; and
- indirect acquisitions are reviewed to determine whether they are likely to be of net benefit to Canada and to the Canadian-controlled sector and are assessed on their merits by reference to the regulations set out in the Act.

The following definitions are applied to the government support such as the Foreign Investment Policy and the BPIDP.

Canadian

1. A citizen within the meaning of the Citizenship Act who is ordinarily resident in Canada;
2. A permanent resident within the meaning of the Immigration and Refugee Protection Act;
3. Canadian corporation or;
4. A non-profit organisation comprised of 75% of its members being persons referred to in paragraphs 1) or 2);
5. A partnership, trust or joint venture comprised of a person or any combination of persons referred in paragraphs 1), 2), 3), or 4) who beneficially owns or controls, directly or indirectly, interests representing in value at least 75% of the total value of the assets of the partnership, trust or joint venture, as the case may be.

Canadian-owned and -controlled

A firm

- that is a sole proprietorship, partnership, cooperative or a corporation (for profit or not for profit) established under the laws of Canada or a province;
- whose activities are based primarily in Canada;
- whose chairperson or presiding officer and at least 75% of whose directors and other similar officers are Canadian citizens or permanent residents within the meaning of the Immigration and Refugee Protection Act;
- if a corporation with share capital, of which Canadians beneficially own or control, other than by way of shares held only as security, directly or indirectly, in the aggregate at least 75% of all the issued and outstanding voting shares representing at least 75% of the paid-up capital;
- if a corporation without share capital, of which Canadians beneficially own or control, directly or indirectly, interests representing in value at least 75% of the total value of the assets;
- If at any time one or more persons that are not described in any of the paragraphs of the definition "Canadian" have any direct or indirect influence through a trust, an agreement, an arrangement or otherwise that, if exercised, would result in control in fact of the publishing firm, the firm is deemed not to be Canadian-owned.

2.7.1 Book Publishing Industry Development Programme (BPIDP)

The Book Publishing Industry Development Programme (BPIDP) is funded by Federal Government and is the main tool in supporting and growing the Canadian book publishing sector (Department of Canadian Heritage, 2007b).

In essence the programme is underpinned by a philosophy that a “viable Canadian-owned publishing sector is the best vehicle to deliver Canadian books to readers everywhere” (Department of Canadian Heritage, 2007b). Financial support is therefore in all instances only allocated to Canadian-owned and Canadian-controlled companies in the book sector.

The Development Plan funding is divided between four components of which “Aid to publishers” is allocated the biggest chunk. Table 5 provides the breakdown of funding between the four programmes.

Table 2: Breakdown of funding of the Book Publishing Industry Development Programme

Development Plan Initiatives	Funding for 2005-2006
1. Aid to Publishers	\$26.7 million (R214million)
2. Collective Initiatives	\$4.0 million (R32 million)
3. Supply-Chain Initiative	\$2.6 million (R20 million)
4. International Marketing Assistance	\$4.8. million (R35 million)
TOTAL	\$38.1 million (R306 million)

(Source: Department of Canadian Heritage, 2007b:6)

2.7.1.1 The Aid to Publishers

Criteria for Aid to Publishers programme:
 Applicants must be 75% Canadian-owned and -controlled publishers who have been in business for at least 36 months and whose principal activity is book publishing (Department of Canadian Heritage, 2007c)

Aid to Publishers aims to support the ongoing production and promotion of Canadian-authored books. The programme is informed by a philosophy that publishers are in the best position to create and market Canadian books.

i) Eligibility rules for publishers

Only book publishing firms are eligible for Aid to Publishers. At the time of application, the applicant must have completed at least 36 months of operation as a book publisher.

From the time of application to the end of the term of any contribution agreement between BPIDP and a publisher, the publisher must

- be at least 75% Canadian-owned and -controlled,
- have its headquarters and at least 75% of its employees based in Canada,
- be a private-sector firm or university press,
- be financially viable,
- have fulfilled all contractual obligations with respect to author royalty payments or other methods of payment to authors.

The programme will determine financial viability based on the publisher's application form and supporting documentation, business plan and other information, as needed.

A publisher is not eligible if net sales of its own titles were \$20 million (R160 million) or greater in the reference year and the average profit margin for the three financial years ending with the reference year was 15% or greater.

Unincorporated divisions of larger organisations are not eligible.

Aid to Publishers recipients in the current or previous programme year must immediately inform the programme of any change of ownership. The programme will review a change of ownership to ensure the recommended funding is consistent with the eligibility requirements and objectives of the programme.

ii) Publication minimum

The publisher must have an active and ongoing publishing programme and

- by the end of its reference year, have published a minimum of 15 new Canadian-authored trade books or 10 new Canadian-authored educational or scholarly books;
- during the three financial years ending with the reference year, have published a minimum of 12 new Canadian-authored trade books or 6 new Canadian-authored educational or scholarly books;
- during the reference year, have published at least 1 new Canadian-authored book.

New editions and reprints are not considered new titles.

iii) Sales minimum

In the reference year, the publisher must have:

- eligible sales of own of at least \$200,000 (R1,613 million) or \$130,000 (R1,048 million) for official-language minority publishers and Aboriginal publishers.

iv) Sources of Revenue

In the publisher's reference year

- at least 65% of the publisher's net revenue, including grants and contributions, must be from the publication and sale of books, including distribution, printing and the sale of rights and permissions;
- revenue derived from the sale of vanity titles must not exceed 25% of net revenue;
- the number of self-published books must not exceed 75% of the total number of new titles.

v) Eligibility rules for books

A printed book that is

- either written by a Canadian author or adapted or translated by a Canadian;
- at least 48 pages in length, except for children's books, which can be fewer than 48 pages;
- clearly and publicly attributed to the author(s) or translator(s);
- the publisher's own title and bears an ISBN assigned to or acquired by the publisher;
- published under the publisher's imprint or under an imprint for which it has acquired publishing, management and marketing rights;
- printed in Canada, except for co-published books or books with an acceptable justification.

Notes on eligible books

A book with more than one author is considered Canadian-authored if at least one of the authors is Canadian. The editor of a collective work is considered the author if the book is clearly and publicly attributed to the editor. The editing regularly done by a publisher in order to bring a manuscript to publishable form is not considered authorship. For children's picture books only, an illustrator is considered an author.

The author or translator is always the person the book is publicly attributed to. The name of the author(s) or translator(s) must appear on the outside of the cover, the spine or the copyright page.

2.7.1.2 The Collective Initiatives (formerly Aid of Industry and Associations)

This initiative provides funding to support and grow the infrastructure of the book industry. Publishers who receive this type of funding would typically use it to better marketing and promotion campaigns, undertake industry-related research or to offer publishing internships. In 2005-2006 the initiative sponsored 162 Canadian book industry projects. Five projects fall within the scope of the Collective Initiatives: i) Marketing and promotion, ii) professional development, iii) industry research, iv) business planning and v) internships (Department of Canadian Heritage, 2007b:9).

a) Marketing and promotion

Criteria for Collective Initiative Marketing & Promotion:

Eligible candidates are Canadian-owned and -controlled organisations, professional associations and firms involved in the book publishing, distribution, wholesale and retail sectors or representing Canadian authors. Individual book publishers, authors or retailers are not eligible (Department of Canadian Heritage, 2007d).

BPIDP provides funding for collective marketing and promotion projects that develop market opportunities for Canadian books and give a higher profile to Canadian authors. This includes projects, such as author events or promotions and promotional campaigns with a collective approach and impact.

The level of support is based on the scope of the project, the anticipated benefits for the industry and the overall funding designated to Collective Initiatives. The level of funding is generally less than 50 per cent of the eligible expenses of the project. The maximum annual contribution per project is generally \$250,000 (R2,016 million) (Department of Canadian Heritage, 2007d).

Criteria for Collective Initiative Professional Development:

Canadian-owned and -controlled organisations, professional associations and firms involved in the book publishing, distribution, wholesale and retail sectors. Organisations representing Canadian authors and Canadian teaching institutions with a specialisation in the book industry are also eligible (Department of Canadian Heritage, 2007d).

b) Professional Development

BPIDP offers funding for professional development projects that provide book industry professionals with up-to-date skills and knowledge related to the publishing, marketing and promotion of Canadian books, and to the management of businesses and

organisations in the book industry. This includes formal training projects, mentoring and other innovative, information-sharing opportunities.

The level of funding is generally 50 per cent of a project's eligible expenses, or less. When a project includes the subsidisation of the expenses for participants, a maximum of two employees from a given firm or organisation may receive a financial contribution to attend the same professional development event.

c)Industry Research

Criteria for Collective Initiative Industry Research:

Eligible candidates are Canadian-owned and -controlled organisations, professional associations and firms involved in the book publishing, distribution, wholesale and retail sectors. Organisations representing Canadian authors and Canadian research centres with a specialisation in the book industry are also eligible (Department of Canadian Heritage, 2007d).

The BPIDP provides funding for industry research projects and feasibility studies that increase knowledge of the Canadian book industry, and projects that produce a better understanding of tools and strategies that will strengthen the industry's capacity to publish and promote Canadian-authored books.

The level of funding is generally 50 per cent of the eligible expenses of a project, or less. The maximum annual contribution per project is generally \$100,000 (R809,444). Funding for the project will be paid in instalments according to a schedule established by the Programme, taking into account the cash flow requirements of the project, total contribution amount, and duration (Department of Canadian Heritage, 2007d).

Criteria for Collective Initiative Business Planning

Only publishers eligible for Aid to Publishers or of the Canada Council for the Arts programmes are eligible to apply for funding. National and regional associations representing the book industry are also eligible. Interns should be registered in or be recent graduates of post-secondary educational programmes in a field relevant to the book publishing industry or have related work experience. Publishing firms with total sales of own titles greater than \$1 million (R8,231 million) are not eligible.

d)Business Planning

BPIDP provides funding for business planning projects that assist recipients in adopting strategic approaches to key challenges to improve their capacity to manage business activities and ensure the competitiveness of their organisations.

The level of funding is generally 50 per cent of

the eligible expenses of the project, or less. The maximum annual contribution per project is \$50,000 (R381,002).

e) Publishing Internships

BPIDP provides funding for internships that help to develop the next generation of Canadian book industry professionals by providing valuable training for new industry professionals, who in turn accomplish useful tasks that the firm might not otherwise have the resources to carry out.

Applicants should contact BPIDP for details concerning acceptable intern salaries, which should reflect industry norms. The level of funding is generally 50 per cent of the eligible expenses of a project.

The maximum annual contribution per project is \$10,500 (R80,972). However, for interns from Aboriginal, visible minority or official-language minority communities, the maximum BPIDP contribution is generally 75 per cent of a project's eligible expenses, up to a maximum of \$16,000 (R127,670) for the intern's salary.

2.7.1.3 The Supply-Chain Initiative

Criteria for Supply-Chain Initiative Publishers:

Publishing firms currently participating in the Aid to Publishers component of the BPIDP are eligible to apply for funding through the Supply-Chain Initiative

This programme is concerned with the application of technology to each link in the book chain. The goal is to not only to reach a stage of maximum productivity within the different components (publishing, production, distribution etc.) but to construct an overall effective book industry that will

in turn enhance access of Canadian books to readers.

a) Book Publishing

Funding is available to book publishers who make a significant investment in the development and maintenance of national and international bibliographic standards.

b) Distribution

Project funding is provided for Canadian-owned and -controlled firms in the distribution and wholesale sector to adopt functions complementary to the implementation and integration of standard electronic documents.

c) Retail

Project funding is provided to associations representing the interests of the Canadian book industry, and third-party providers of services and utilities primarily for the book sector, to facilitate access to electronic communication, inventory management technology and bibliographic data.

d) Other Projects

Funding is provided for collective initiatives involving more than one sector of the industry, or for projects that involve the development of utilities and resources, or the provision of services that will have an impact on the Canadian book industry as a whole.

i) Eligibility Criteria

Eligibility criteria and funding conditions for applicants of these four projects are provided below:

a) Publishers

To receive funding, publishers must commit to developing and maintaining high-quality bibliographic databases and to exchange data with industry partners. Specifically, publishers need to take the following actions:

b) Distributors

Criteria for Supply-Chain Initiative Distributors

Canadian-owned and -controlled companies in the book distribution and wholesale sectors. Priority for applicants who demonstrate that their project has the potential to make a wide-scale impact on the availability of Canadian books. Priority for applicants who distribute the books of a significant number of Canadian publishers that are recipients of funds through the BPIDP or the Canada Council for the Arts.

To increase the volume of Electronic Data Interchange (EDI) to ensure improved supplier and retailer performance, more informed management decisions, and cost savings for both suppliers and retailers.

The maximum level of funding will be determined by

the applicant's net sales of its BPIDP-recipient publishers in its most recently completed financial year.

c) Retailers

Criteria for Supply-Chain Initiative Retailers:

Canadian-owned and -controlled organisations, associations and companies primarily representing or providing services to the book retail sector.

To ensure reliable access to information on price, books for sale in the Canadian market and to have standard electronic documents to maintain effective inventory management and customer

service processes.

The maximum annual contribution cannot exceed \$500,000 (R4,038 million).

d) Other projects

These are, in addition to book publishing, distribution and retail projects, projects that are likely to have an impact on the Canadian book industry as a whole or involve more than one sector of the industry are eligible for funding.

Criteria for Supply-Chain Initiative Other projects:

Canadian-owned and -controlled organisations, associations and companies primarily involved in the book publishing, distribution, wholesale and retail sectors. Applicants must demonstrate that they have the capacity to undertake the proposed project (Department of Canadian Heritage, 2007e).

In 2007-2008, the Supply-Chain Initiative will invest in projects that contribute to establishing an efficient Canadian book industry communications network: Priority will be given to projects that facilitate the adoption of common practices and standards for bibliographic data and electronic communication

(Department of Canadian Heritage, 2007e).

Projects must be undertaken on a collective basis on behalf of more than one sector, or demonstrate their capacity to have benefits for the Canadian book industry as a whole. Funding must be invested in one or more of the following:

- Development and deployment of communication and distribution infrastructure
- Improvement of data collection, use, and dissemination
- Training and development of resources required to adapt to infrastructure changes

All eligible projects must

- meet the objectives of the SCI; and
- include an Evaluation Framework with their application which states clear and attainable objectives, indicators, and expected results against which the success of the project will be measured.

Priority will be given to projects that

- are national in scope; and
- facilitate the adoption of common communication and distribution network practices and standards across one or more sectors of the industry.

The same level of assistance applies as for retailers above.

In 2005-2006, the Supply-Chain Initiative had three priorities:

- Bibliographic data – improving the accuracy and comprehensiveness of bibliographic data on books for sale in the Canadian market
- Electronic data interchange – promoting standards-driven electronic communication between all sectors of the industry
- Sales data analysis – increasing access to accurate and timely data on book sales in the Canadian market

2.7.1.4 The International Marketing Assistance programme aims to grow export development activities of Canadian-owned book publishers. To realise this initiative's goals the BPIDP collaborated with a range of government and non-government institutions. These include:

- The Association for the Export of Canadian Books (AECB)
- Department of Foreign Affairs and international Trade

**Criteria for Collective Initiative
International Marketing Assistance
programme**

Publishers receiving funding from Aid to Publishers in the previous year may be eligible for additional support for their export sales, including funding, promotional and logistical assistance, and market intelligence.

- Canadian embassies
- Canada Council for the Arts

(Department of Canadian Heritage, 2007f)

The AECB administers the initiative on behalf of the BPIDP. This association allocated the \$4.1 million (R32,842 million) to Canadian publishers and members of the publishing industry through three programmes: i) Export Marketing Assistance Programme, ii) the Export Expertise Development Fund and iii) the Foreign Rights Marketing Assistance Programme. The Export Expertise Development Fund is suspended for 2007/2008

The detail for the above two programmes are found on the AECB website.

a) Export Marketing Assistance Programme (EMAP)

The objective of the Export Marketing Assistance Programme (EMAP) is to assist Canadian publishers in their efforts to develop and strengthen their sales to foreign markets (rights and finished products) and to expand foreign markets for their Canadian titles (AECB, 2007).

i) Eligible books

To be eligible, titles must meet the following criteria:

- either written by a Canadian author or adapted or translated by a Canadian
- at least 48 pages in length, except for children's books, which can be fewer than 48 pages
- clearly and publicly attributed to the author(s) or translator(s)
- the publisher's own title and bears an ISBN assigned to or acquired by the publisher
- published under the publisher's imprint or under an imprint for which it has acquired publishing, management and marketing rights
- printed in Canada, except for co-published books or books with an acceptable justification
- written by a foreign author and adapted or translated by a Canadian author
- written by a Canadian or foreign author co-published by a Canadian publisher

Criteria for Collective Initiative EMAP

To be eligible for EMAP in 2007-2008, the applicant must have been confirmed eligible for the Aid to Publishers component in 2006-2007. The applicant's eligibility status must remain valid in 2007-2008.

The applicant must have achieved a minimum Eligible Export Sales level of \$15,000 (R121,212) for eligible titles in its most recently completed financial period or an average of \$15,000 (R121,212) of Eligible Export Sales of eligible titles over the company's last three most recently completed financial periods. National publishers associations whose activities are aimed at expanding Canadian book exports are eligible for assistance under this programme. An amount equal to the maximum contribution allocated to a publisher in 2007-2008 will be set aside for this purpose to be split between Anglophone and Francophone associations. Applications are submitted to the AECB's secretariat for review and recommendation to the AECB Board (Association for the Export of Canadian Books, 2007).

- written by a foreign author and published for the first time, in book format, by a Canadian publisher

Notes on eligible books

- A book with more than one author is considered Canadian-authored if at least one of the authors is Canadian. The editor of a collective work is considered the author if the book is clearly and publicly attributed to the editor. The editing regularly done by a publisher in order to bring a manuscript to publishable form is not considered authorship.
- For children's books only, an illustrator is considered an author.
- The author or translator is always the person the book is publicly attributed to. The name of the author(s) or translator(s) must appear on the outside of the cover, the spine or the copyright page.

Also eligible

- Non-print material clearly derived from an eligible Canadian-authored, printed book, such as an audio tape, audio CD, CD-ROM or e-book
- Learning kits
- Book packs

ii) Eligible export sales

The total of the following:

- Revenue from the sale of eligible titles net of trade discounts and credits for returns and allowances
- Revenue from the sale of rights and permissions of eligible books
- Amounts withheld by distributors for the sale of eligible titles. If the amount withheld by distributors is not already included in net sales, this amount may be added. The adjustment is for distribution fees only and must not include the trade discount.

iii) Funding Formula

The EMAP contribution is based on the expenses incurred by eligible publishers for their export and international marketing activities.

iv) Cost Sharing

Financial assistance is allocated on a cost-sharing basis, as follows:

EMAP Eligible Export Expenses*	AECB	Applicant
Below \$12,000 (R97,034)	70%	30%
\$12,000-\$40,000 (R97,034-R323,205)	60%	40%
Over \$40,000 (R323,205)	50%	50%

*In this table, the expenses and cost-sharing levels are those of 2006-2007 and are used for purposes of illustration only.

The cost-sharing level for financial assistance provided to national publishers associations is indicated below:

AECB	National Publishers Associations
75%	25%

(AECB, 2007)

Criteria for Collective Initiative FRMAP

To be eligible for FRMAP, the applicant must have been confirmed eligible for one of the following federal programmes:

- Aid to Publishers component of the Book Publishing Industry Development Programme (BPIDP) in 2006-2007
- Block Grants 2006, Canada Council for the Arts, Book Publishing Support

The applicant's eligibility status must remain valid in 2007-2008. (Association for the Export of Canadian Books, 2007)

b) Foreign Rights Marketing Assistance Programme (FRMAP)

The FRMAP assists publishers with the costs of expert sales trips and travel to international trade fairs.

Eligible events

i) International trade events

An international trade event is understood to mean a foreign trade event at which the possibility exists for the participating company to sell rights or finished products or to negotiate distribution agreements (e.g., book fairs, *salons du livre*, specialised book-related conventions, etc.).

ii) Export sales trips

An export sales trip is understood to mean a trip to an export market not connected to participation in an international trade event for the purpose of supporting distribution and making rights sales for eligible titles (e.g., sales conferences, scouting missions, etc.).

2.7.2 OUTCOMES OF THE BOOK DEVELOPMENT PLAN

2.7.2.1 Number of new Canadian writers being developed has increased

Data collected during 2006 and 2007 indicate that BPIDP publishers have published nearly 1000 titles written by first-time authors in the previous year and 6738 titles in total over the same

Publishers in Canada divided into 5 categories according to total net revenue:
Very small: \$0-\$149 999 (R1,212 million)
Small: \$150 000-\$499 999 (R3,993 million)
Medium: \$500 000-\$999 999 (R7,982 million)
Large: \$1000 000-\$2 999 999 (R23,951 million)
Very Large: total net revenue > \$3000 000 (R24,290 million)(Department of Canadian Heritage, 2007b)

period. This means that 15% of publications were produced by new authors. The figures also show that very small and small publishers produce a higher percentage of new writers than the large and very large publishers (Department of Canadian Heritage, 2007b).

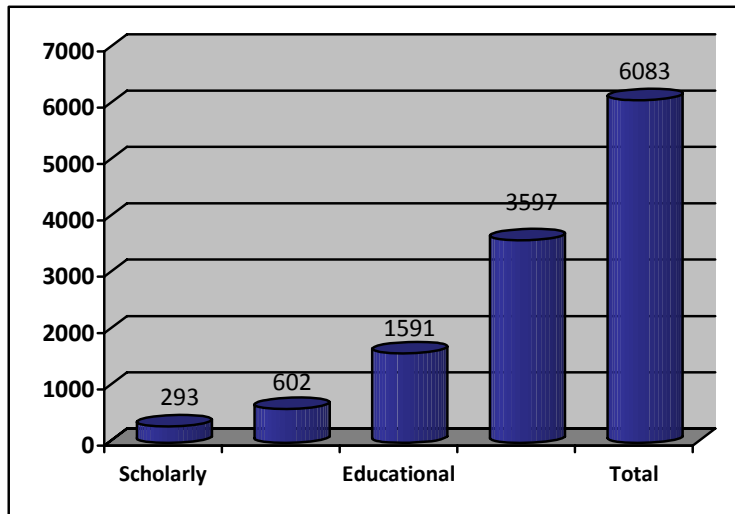
2.7.2.2 Language minority groups targeted through internships

Priority is given to people from Aboriginal visible minority or official-language minority communities. The outcome of this initiative has been extremely positive with approximately 70% of interns being offered permanent positions (Department of Canadian Heritage, 2007b).

2.7.2.3 New title production increasing threefold

When the BPIDP programme started, the industry produced 2162 titles. By 2005-2006 the number of titles produced has amounted to 6083. The figure below reveals that trade books make up the largest portion of the book industry (Department of Canadian Heritage, 2007b).

Figure 1: New title production by 2005-2006 BPIDP Recipients



Source: (Department of Canadian Heritage, 2007b:8)

2.7.2.4 Publishing activities evenly spread across different subject groupings

When reviewing the data on subject categories, one finds that publishing activities of firms funded by “Aid to Publishers” initiative are extremely diverse, and also that Aid to Publisher firms recorded significantly higher sales figures than other publishers in 10 of the subject categories (Department of Canadian Heritage, 2007b).

2.7.2.5 Profile of Canadian books raised

Canadian publishers receiving the International Marketing Assistance funding has more than doubled the markets they export to: in 1993 they provided books to 41 markets and in 2005/2006 they sold books to over 90 foreign markets. The amount Canadian publishers generates by exports and foreign rights sales is estimated to be in the region of \$287 million (R2,292 billion) (Department of Canadian Heritage, 2007b).

2.7.2.6 Book publishers reached outside major urban areas

Of the 220 book publishers that were supported by the BPIDP, 101 are located outside major metropolitan areas. This is a major improvement when considering that in the early seventies there were no publishers listed for Atlantic Canada (Department of Canadian Heritage, 2007b).

2.7.2.7 Canadian publishers diverse in terms of years operating

When considering the number of years that a publisher has been operating, it is noteworthy that an even spread generally exists between the different revenue segments. For example: 19 of the publishers receiving BPIDP support in 2005-2006 were founded more than 40 years ago, while another 50 firms were between 31 and 40 years old. The youngest segment, 0-10 years, contained 23 firms, which is equal to the number of publishers receiving funding in the oldest group (41 years and more).

(Department of Canadian Heritage, 2007b)

2.7.2.8 Overall industry growing steadily

In 2005-2006 there were three times as many Canadian-owned publishers as there were 27 years ago. The increase in the number of publishers has occurred more or less evenly across the different sized publishers. Since 1996-1998 the number of small and very small publishers in the BDIDP has increased from 65 to 90 whilst the large and very large firms increased from 80 to 95 (Department of Canadian Heritage, 2007b).

2.7.2.9 More books sold locally

The book industry recorded a 25% increase in sales of Canadian-authored books between 1996/1997 and 2005/2006 (Department of Canadian Heritage, 2007b).

2.7.3 Legislative Framework

2.7.3.1 Investment Canada Act (1985) and Foreign Investment Policy

The Investment Canada Act requires that foreign investments in the book publishing and distribution sector be compatible with national cultural policies and be of net benefit to Canada and to the Canadian-controlled sector. In the book sector, the Act and policy ensures a strong Canadian-owned sector that competes effectively in the Canadian market.

2.7.3.2 Book Importation Regulations

The Book Importation Regulation of the Copyright Act protects against the parallel importation which occurs when books published in another country are imported into Canada and distributed without the consent of the Canadian exclusive distribution holder. Canadian publishers and distributors have exclusive right to distribute books in Canada. This means that books need to be purchased from Canadian rights holders rather than from foreign sources. The

legislation also protects retailers and consumers by ensuring the delivery of the books within a reasonable time and at a competitive price.

2.7.3.3 Book Publishing Industry Development Programme (BPIDP)

This programme is the Federal Government's principal funding mechanism in support of the Canadian book publishing sector.

2.7.4 Funding

The programme is entirely funded by the Canadian government through the Department of Canadian Heritage.

2.8 GREECE

Book matters in Greece reside with the Ministry of Culture. As a rule, most publishing houses in Greece are still run by their founders or their descendants. Only a few publishing houses belong to larger media groups.

2.8.1 The National Book Centre of Greece (EKEBI)

The **National Book Centre of Greece (NBC, in Greek: E.KE.BI.)** is a legal entity founded by the Greek Ministry of Culture in 1994. It started operating in June 1995 as an independent organisation that aims at growing and developing the book sector.

2.8.2 Aim

The aim of EKEBI is the design and implementation of a Greek national policy on books and reading. The book policy has been developed and the centre is working towards its implementation.

2.8.3 Objectives

- To implement the National Book Policy of Greece

- To coordinate, consult and manage the fields directly and indirectly linked to the book world
- To engage with the key stakeholders in the book production chain to identify problems, agree on solutions and create the necessary consensus for fruitful synergies to take place
- To provide support to key stakeholders in the book chain, stressing in particular the need for the integration of new technologies
- To promote reading and the use of books
- To create partnerships with organisations that promote Greek books abroad.

Membership

-Head of the Directorate for Letters of the Ministry of Culture
 -Representative of the Greek Society of Authors
 -Representative of the Greek Society of Literary Translators
 -Representative of the Pan-Hellenic Federation of Publishers and Stationers, on behalf of publishers
 -Representative of the Pan-Hellenic Federation of Publishers and Stationers, on behalf of booksellers
 -Representative of the Union of Greek Librarians and Information Scientists

Publishers, writers, translators, librarians and booksellers participate at the decision-making level and work together closely to achieve EKEBI's aims.

2.8.4 Activities

2.8.4.1 Book Policies and Regulation of the Book

Market

The National Book Centre aims to mediate in the operation of the marketplace in a regulatory way, without overriding its rules, in order to

- ensure that cultural diversity is sustained and competition is not violated with regard to book production and distribution;
- ascertain that the Retail Price Maintenance Law is properly applied;
- formulate incentives and design programmes for the technological upgrading of enterprises and public libraries;
- ensure full and unrestricted access to books for everyone;

Retail Price Law

This law came into force in 1998.

Publishers must stipulate a retail price on which retailers may offer a limited discount (up to 10 per cent) or increase (up to 5 per cent) for a period of two years from the date of publication. This law protects the profit margins of small publishing houses against the large booksellers, who were excessively discounting their prices to the public.

Current lobbying activities are underway to have the retail maintenance law applied to books purchased for libraries as well.

(EKEBI, 2006)

- undertake initiatives addressed to the public sector, aiming at the adoption of a single policy framework for books and reading by the administration;
- ensure that the intellectual property rights are respected.

Criteria for grants to authors and translators

Students wishing to be admitted to the courses are required to provide proof of their linguistic competence by means of a written examination.

Travel grants

Only for events organised in Europe or the Mediterranean;

Application 2 months before the event;

The author's travel and daily living expenses are covered (tickets are booked by the Centre).

2.8.4.2 Activities to Support Players in the Book Chain

To facilitate the adaptation of organisations to the demands of the information society, the National Book Centre supports the following players in the book chain:

a) Authors

The aim is to give authors more time to devote to their writing and to encourage the promotion of their work.

The following grants are available:

Residential grants – these grants will be awarded to young authors who wish to work away from home at one of the Houses of Literature in Greece.

Grants for travel abroad – EKEBI covers the travel expenses of authors who are invited abroad by universities, bookshops, libraries, etc.

b) Translators

EKEBI provides funding for the European Centre for Translation - Literature and the Human Sciences (EKEMEL), to support its activities to promote the education of new translators and to organise meetings that promote dialogue between the authors of Europe.

c) Publishers

Financial support (35%) to publishers – to publish fundamental texts and reference works, such as in the field of the human sciences.

Community Initiative for Small and Medium Enterprises (SME/s) 1994-1999 – The computerisation of 185 publishers and booksellers, their connection to the Internet and their activation on the web, i.e. the modernisation of enterprises.

Business-to-Business Electronic Environment – Developing e-commerce in the book sector, based on the BIBLIONET database (BIBLIAGORA);

d) Booksellers

BIBLIONET (the electronic books-in-print database) – can be used by booksellers free of charge. This specifically assists smaller bookshops that would otherwise not have the information readily available.

Community Initiative for Small and Medium Enterprises (SME/s) 1994-1999 – The Computerisation of 185 publishers and booksellers, their connection to the Internet and their activation on the web, i.e. the modernisation of enterprises.

e) Libraries

EKEBI provide libraries free of charge with its programmes for promoting reading in order to contribute to the development of their activities and of the services they offer.

2.8.4.3 Book Monitoring Unit (Research and Surveys)

EKEBI created the Book Monitoring Unit to develop a structured, diversified and continually evolving information system that

- meets the needs of the market, the professionals and the associations;
- constitutes the necessary background for the implementation of a modern public-welfare policy for books and reading.

a) Research activities

- Basic research has been carried out concerning all the major players in the book chain (surveys of publishing houses, booksellers, libraries, periodical issues with statistical information, titled: "The book economy in Greece", reading behaviour and literacy surveys);

- New surveys are being carried out concerning the professional profiles of writers and literary translators and the training needs of librarians.
- Members of the Book Monitoring Unit team participate in the Eurostat Working Group for the harmonisation of cultural statistics in the EU.
- Database development includes Greek books in translation that lists all Greek books that were translated into other languages.

2.8.4.4 Biblionet

BIBLIONET is a bibliographical reference database of books that have been published (or are being published) in Greece. It contains 130 000 book titles in the Greek language with details such as title, author's name, publisher, subject, ISBN, price and a cover image of the book.

BIBLIONET offers its services free on the Internet.

2.8.4.5 A library about Books (Bibliological Library)

This is a specialised library, unique to Greece, which possesses more than 6000 titles on all issues relating to books (booksellers and the book trade, publishing production and publishing art, the history of the book, etc.).

2.8.4.6 Reading Promotion

EKEBI has a number of activities that promote reading including:

- Visits to schools by authors to read from their works
- Reading promotion through and in school libraries
- Displays of Greek works by major Greek authors who travel to schools to promote these works
- The Reading Relay programme that runs in Greek primary schools
- The celebration of international events such as World Poetry Day, World Book Day and World Children's Book Day in co-operation with UNESCO and other organisations
- The support of professional book fairs: organisation of events, exhibitions and round-table discussions
- Publicity campaigns for the promotion of books and reading through the media
- Coordination and support of adult and youth reading groups

- Implementation of educational programmes for parents and teachers

2.8.4.7 Promotion of Greek books

EKEBI organises the **Thessaloniki Book Fair** over a four-day period and have a number of parallel events in the city.

The Ministry of Culture and EKEBI also hosted the first **Children's and Young Adults' Book Fair** in 2008 over four days.

2.8.4.8 Promotion of Greek Books abroad

The promotion of Greek books abroad is a long-term process and the National Book Centre is the main body responsible for this. The activities that fall under this aim are:

- Participation in International Book Fairs
- International cultural agreements
- Organisation of cultural exchange programmes and meetings between foreign literary agents, translators, journalists and publishers, on the one hand, and their Greek counterparts and writers on the other
- Publishing of communication materials, such as the English language journal *Ithaca: Books from Greece*

Within the framework of the participation of Greece as an honoured country in the 53rd Frankfurt Book Fair, the National Book Centre:

- Edited and published more than 120 brochures on Greek writers in German and English as well as the concise edition *Greece: Books and Writers*;
- Has scheduled literary events with Greek writers throughout the year in all the German speaking countries - Germany, Austria and Switzerland - in collaboration with approximately 15 Literary Houses,
- Has aided the publication of special periodical issues and the hosting of events in the German media concerning contemporary Greek Literature.

2.8.4.9 International Activities

The NBC also participates at an EU and international level to influence policy pertaining to the book sector. Here activities include the following:

- Book policies in the European Union where there is a Multiannual Cooperation Agreement in the field of books and reading. Ekebi is the project leader and activities include an annual European conference on books, Study on the situation of the book market, a common website and long- term reading policy for the European public.
- Get caught reading Europe where media, sport, political celebrities are photographed "caught reading", where the photos are distributed through as many media as possible.
- The National Book Centre of Greece (EKEBI) coordinates the publishing and translating activities of RAMSES II. The International Research Network in social sciences and humanities that groups 33 research institutions within the Euro-Mediterranean area. This programme is known as RAMSES II.
- The European Stand is a project where the profile of European publishing and the presence of European books are promoted at various book fairs on other continents. It is funded by the EU.

2.8.4.10 Co-ordination and Support of Libraries

Public libraries in Greece are subject to a fragmented legal framework as they are supervised by three Greek Ministries. Ekebi develops initiatives for the co-ordination and support of libraries on a horizontal level, independent of their institutional framework, while at the same time striving for its revision.

These activities include the following:

- Organising meetings and informational and communication activities e.g. seminars
- Co-operation with the National Documentation Centre (E.K.T.), to support libraries in their effort to operate as Informational Centres
- The development of a Bibliological Library, i.e. a special library with books on books,

- Designing of educational programmes in digital form, addressed to librarians in school libraries

2.8.5 Legislation

2.8.5.1 Retail Price Maintenance Law

Legislation pertaining to the Greek book industry is the Retail Price Maintenance Law which came into force in 1998. Publishers must stipulate a retail price on which retailers may offer a limited discount (up to 10 per cent) or increase (up to 5 per cent) for a period of two years from the date of publication. This law protects the profit margins of small publishing houses against the large booksellers, who were excessively discounting their prices to the public. Current lobbying activities are underway to have the retail maintenance law applied to books purchased for libraries, as well. (EKEBI, 2006)

2.8.6 Funding

EKEBI is funded by the Ministry of Culture.

2.8.7 Growth in the Greek Book Industry

The Book Market in Greece January 2006 edition provides some figures on the growth experienced in the Greek book market in recent years.

Table 6 shows that since the boom in the 1990's the book industry has consistently been producing more than 7000 titles per year.

Table 3: Number of Titles produced

1990	2000	2001	2002	2003	2004
3000	7338	7112	7430	7253	7511

(Source: EKEBI, 2006:3)

In 2004 there were 619 publishers active in the Greek book market. Of that total 16 large publishers (more than 80 titles) produced 36% of titles. 135 Medium publishers (10-80 titles) published 45% of new titles and 468 small publishers (less than 10 titles) produced 18% of new titles. (EKEBI, 2006)

Table 4: Number of publishers

1990	2000	2002	2004
374	592	631	619

© BIBLIONET, data updated on: 16.1.2006

(Source: EKEBI, 2006:3)

The reasons for the growth in title production and number of publishers are not pertinently stated. The following could be possible reasons for the increase:

- Exporting activities to countries with a significant proportion of Greek Diaspora such as Cyprus and other non EU countries for example Turkey, Romania and Poland have increased between 1998 and 2002. (EKEBI, 2006)
- The Grecian book industry is characterized by a strong drive for the translation of books into Greek. Foreign books in translation represent about 35% of the book industry. Of that 56% of were books translated from English. (EKEBI, 2006). EKEBI also provides substantial funding (through EKEMEL) for the translation of foreign books
- Not only is the book market geared towards translation but title production of Greek fiction and non-fiction has boomed in recent years which suggest that more publishers are needed to “house” these authors. EKEBI, 2006).EKEBI also provides funding for authors and publishers which could further explain the increase in these figures.

On the distribution and booksellers' side, Greece has 2000 bookshops of which 90% are small, mixed books and stationary shops. Half of bookshops are located in Athens. (EKEBI, 2006).

The public sector library network of 2000 libraries is spread across the sectors

2.9 INDIA

India is considered as one of the leading countries in world publishing, with a dynamic and vibrant publishing industry.

India gained independence in 1947 and the country was faced with rebuilding itself. The process included building foundations for prosperity. India's first Prime Minister, **Shri Pandit Jawaharlal Nehru**, realized that together with scientific, technological and industrial

advancement, the social and cultural development of the nation was equally important. He decided that the importance of the book should be widely promoted to develop an abiding interest to understand and appreciate the various cultural and traditional heritage of the country. To demonstrate his support and commitment to the book publishing industry, he set up institutions that could work towards this aim. The National Book Trust (NBT) was one such institution and was funded by the government, but enjoyed functional autonomy.

The NBT falls under the auspices of the Ministry of Human Resource Development. This department supports the NBT as a means to grow and develop the book sector, but also has divisions within the ministry that works towards increasing accessibility of books. The NBT will be discussed first, followed by the Department of Education's own initiatives.

2.9.1 National Book Trust (NBT)

The National Book Trust was set up in 1957 and inaugurated by the then President and Prime Minister Nehru. The Trust was formally constituted as an autonomous organisation under the Ministry of Education and was fully financed by the Government of India.

2.9.2 Aim

The National Book Trust aims to promote the importance of the book.

The concept of reading habit or book mindedness as Nehru envisaged was not confined to text books or professional books or career development books but the emphasis was on general reading, thus shaping its major aims and objectives.

2.9.3 Objectives

The initial objectives were:

- To produce and to encourage the production of good literature and to make such literature available at moderate prices to the public
- To publish, more particularly books of the following types in English, Hindi and other languages recognised in the Constitution of India
 - the classical literature of India
 - outstanding works of Indian authors in Indian languages and their translation from one Indian language to another

- translation of outstanding books from foreign languages
- outstanding books of modern knowledge for popular diffusion
- To bring out book lists, arrange exhibitions and seminars and take all necessary steps to make the people book minded:
- To establish or promote the formation of regional book trusts in different parts of the country with objectives similar to those of the Trust.

2.9.4 Activities

2.9.4.1 Book Publishing

The Trust primarily achieved its objectives through publishing a range of books aimed at increasing the reading activity in the country. Approximately 14,000 titles were published by the Trust.

Table 5 lists the categories in the series with a brief description of each category.

Table 5: NBT Publishing Series

Series	Description
India-The Land and the People	Books of this series provide authentic and up-to-date information on various aspects of India including cultural tradition.
Young India Library	Aimed at young readers, this category introduces readers of the 18+ age-group to social, economic and political concepts and issues.
Popular Science	This series aims at enabling the average educated reader to understand the world around him/her, appreciate the progress of science, and learn about the role science and technology play in everyday life, emphasizing, wherever possible, India's contribution to the field. The books in this series are written in a lucid, easy-to-understand, simple style and illustrated with anecdotes and analogies from daily life. Diagrams, sketches and photographs elucidate the text.
Aadan Pradan	This category presents well-known literary works, mainly novels and short stories, of a particular language, to people of other Indian languages including English. Only contemporary works are published.
Folklore	Description of the area, people, myths, mythology, religion, customs, traditions, fairs and festivals, music, dance, drama, arts and crafts, and folk literature are included in the books of this series.
National Biography	Biographies of Indian women and men who have made

Series	Description
	outstanding contribution towards the development of Indian society, culture, science, economy, polity as also a modern Indian sensibility feature in this series.
Nehru Bal Pustakalaya	A treasure house of enjoyable and informative literature which children can read at their own initiative. Books in this series cater to four age-groups, which are pre-school, 6-8, 9-11 and 12-14.
Books for Neo-Literates	Most books in this series are the outcome of workshops organised in rural areas with the participation of local people. Titles are also assigned to authors/experts and suitable books adapted and abridged. The books are written in an idiom, familiar to the needs of the neo-literates. Short stories, biographies, novelettes, folktales, presentation of contemporary issues and functionally useful information make up this series.
World Literature	Books in this series introduce outstanding contemporary writings from Asian, African and Latin American countries to Indian readers.
Creative Learning Series	Books in this series focus on new educational concepts and tools that are now being actively implemented in the pre-primary and primary sectors of education. These books are specially designed keeping in view the needs of teachers and other working in the field of education.
Rural Readers	This category entails the publishing of a series of books for the village reader in all the major languages of India. Books in the series include collections of freedom songs, books of Indian culture, polity, industry, agriculture, etc. The series also comprises major novels of Indian literature abridged for target readership.
General Titles	Significant titles that cannot be covered under the above series are published as General Titles. Here publishing books in Braille for the visually impaired is also included.
Popular Social Science	The books under this series introduce popular concepts and ideas of social sciences to the general reader. A variety of emerging subject areas like gender studies, tribal studies, peace and conflict studies, development economics, social formation, etc. are the major focus of the series. These subject areas have generally remained in the domain of academic discussion and hence there is a felt need to introduce these ideas to the general reader in non-academic and concise monographs.
Indian Diaspora studies	The books under this series focus on the works of and about the Indian diasporic community as settled across globe. The studies seek to bring out the salient features of the impact of cross-cultural interaction, alienation and exile, displacement, immigration, etc. on various knowledge systems like literature, sociology, culture, philosophy, etc. This category is emerging as a significant field of study, and as such this area of publishing is a pioneering effort of the NBT.
Afro-Asian Countries	In the post-colonial world, countries of Asia and Africa have emerged as powerful cultural, social, political and economic

Series	Description
	forces thereby becoming a significant field of study due to similarity of concerns. The books under the series focus on the problems and prospects of sustainable development, globalisation and interdependence in the fields of science and technology, trade, agriculture, infrastructure, education, health, strategic alliances, etc. in these geo-political regions.
Asian/Pacific Co-publication Programme	This UNESCO project aims to develop books for Asian children by Asian authors. Here children in Korea for example can share their fantasies with their counterparts in Sri Lanka. Indian and Pakistani editors have the opportunity to work as part of a team to build a list for children in the 20 or more countries of the continent. These books are for bridging minds and creating a common heritage for the Asian continent.

Since its inception until March 1985, the NBT has brought out 2920 titles under these series, of which 543 were English (19%) and 2377 were in Indian languages (81%).

2.9.4.2 Industry

a) Training in book publishing

In order to meet the demand of a rapidly growing publishing industry, the NBT also provides training in publishing. This is a recent development. It is a four (4) week training course with the aim of giving students an overview of publishing.

The course includes

- the history of publishing
- electronic publishing
- business and financial aspects of publishing
- the organisation and structure of a publishing house
- editorial processes
- copyright issues
- book production and design
- warehousing and inventory

- book promotion and publicity
- book distribution
- sales and marketing

The course is over four (4) weeks, six (6) days a week. It is combined with a two (2) month internship programme. The application fee is Rs100 (R18,30), and the course fee Rs4000 (R732, 33).

b) Scheme for the Subsidised publication of books

Another recent scheme is subsidizing the publication of books.

The broad objective of the scheme is to provide assistance to authors and publishers for producing books of an acceptable standard at reasonable prices for students and teachers of Indian universities and technical institutes.

The books may be in English, Hindi or in any other Indian language. Publications include textbooks, discipline-oriented supplementary reading material and reference books.

Only such books are subsidised under the Scheme for which a definite need is felt and which relate to subject areas where books of an acceptable standard are either not available or are so highly priced to be beyond the means of students.

Some salient features of the Scheme, which are recently been revised to remove bottlenecks and make it more attractive for authors and publishers, are given below.

- The author receives royalty @ 20 per cent of the published price of the subsidised edition of the book, directly from the Trust, on publication of the book;
- The publisher is paid 50% of the total cost of production of the book, as a subsidy.
- The selling price of the book is fixed at two times the unit cost of production.
- A letter of recommendation is required from a person who is either a Dean of Faculty or a Professor in a university in the subject to which the manuscript/book relates or, in the case of Diploma level books, the Head of the Department of the concerned discipline,

certifying that the book/manuscript is of an acceptable standard and would be useful to students studying at the Diploma or Degree level.

- Once a manuscript is accepted, the publishers are required to send provisional cost estimates to the NBT. Only a 10% variation is allowed for actual costs.
- The NBT calculates the price using the most cost-effective method of printing and on its approved schedule of rates, works out the amount of subsidy and royalty payable to the publisher and author respectively, and the tentative price of the book.
- An agreement is then signed by the publisher.
- Once the book is printed, a physical verification by the NBT officials is conducted and if the Trust is satisfied that all specifications have been complied with, it authorises the publisher to release the book for sale.

After the book is released for sale, the publisher submits a certificate of audit, based on which payment of subsidy and royalty is released by the Trust.

c) International Rights exhibition (page could not be found 9 April), page not found August, September and October.

2.9.4.3 Reading Promotion

a) NBT Book Club

The aim of the club is to encourage people to buy and read good books. Here members pay Rs50 (R9.15) membership fee and can purchase books at a discount of 20%. The Book Club thus operates as a bookseller.

2.9.4.4 Promotion of Indian books

a) The New Delhi World Book Fair

The New Delhi World Book Fair is organised biennially by the National Book Trust and is largest in the Afro-Asian region.

b) Other Indian fairs and festivals

The Trust holds also holds a number of other book festivals and fairs in different parts of the country such as Bhatinda, Varanasi and Kolkata.

c) National Children and Youth Book Fair

Kolkata is the book fair aimed at children and youth.

Table 6 lists the book fairs that were held in India in 2007.

Table 6: Book Fairs in India 2007

	Name of Book Fair	Dates
1	Jabalpur Book Fair	8-16 September 2007
2	Bilaspur Book Fair	22-30 September 2007
3	Jodhpur Book Fair	29 September-7 October 2007
4	National Book Fair, Nagpur	6-14 October 2007
5	National Book Fair, Varanasi	3-11 November 2007
6	National Book Fair, Kolkata	10-18 November 2007
7	Vadodara Book Fair	17-25 November 2007
8	North Bengal Book Fair	1-8 December 2007
9	Sambalpur Book Fair	1-9 December 2007
10	Bhatinda Book Fair	1—9 December 2007
11	Dharwad Book Fair	8-16 December 2007
12	Goa Book Fair	24-31 December 2007
13	Karnal Book Fair	29 March-9 April 2008

The Trust also promotes Indian books abroad through participating in International Book Fairs and displaying a cross-section of representative Indian publications brought out by various Indian publishers.

2.9.4.5 Promotion of Indian books abroad

Since 1970 the NBT has participated in over 300 International Book Fairs. Some of the leading book fairs participated in includes Frankfurt, Bologna, Beijing, Zimbabwe etc.

The **National Book Trust** participates in these fairs by displaying a cross-section of representative Indian publications brought out by various Indian publishers.

The **NBT** also organized exhibitions of Indian books at Port of Spain (Trinidad & Tobago) and Georgetown (Guyana).

2.9.4.6 Literary Activities

The Trust also organises a number of book launches throughout the year.

2.9.4.7 Pustak Parikrama

This entails mobile book exhibition vans in underserved areas. In 2006 for example, 1250 mobile exhibitions were organised.

2.9.4.8 National Centre for Children's Literature

The National Centre for Children's Literature (NCCL) was set up in 1993 by the NBT as a coordinating agency to promote children's literature in all the languages of India.

The primary objective of this Centre is to collect and make available joyful Indian and foreign materials and expertise to publishers, authors, illustrators and others interested for the rapid and balanced development of children's literature.

The major activities of the Centre are briefly discussed below.

a) Training and promotion

The NCCL organises training/orientation(s) for teachers/facilitators to provide practical knowledge regarding the setting up and running of a Reader's Club. This includes the selection of books as well as activities that can be undertaken at schools and resource centres. Published writers and experts are used for the training programmes.

Workshops on creative writing or interesting activities for children or members of Reader's Clubs are also organised.

b) Readers' Club Movement

The aim of the Reader's Clubs is to make reading and teaching more interesting in schools, non-formal education centres, libraries and in education centres run by NGOs. It costs Rs100 (R18,30) to join.

c) Reader's Club Bulletin

The NCCL publishes a bilingual magazine entitled Reader's Club Bulletin every month for children. This magazine is sent free to the members. The magazine includes reviews (at least one new book) and articles written by children are given priority in the publication. The bulletin is sent free to small regional newspapers with the objective that the materials published in it can be used free for non-commercial purposes. This also leads to promotion of both the club and the magazine.

2.9.4.9 Department of Education

The National Policy of Education envisages accessibility of books to all sectors of its diverse population. The Department of Higher Education and Department of School Education and Literacy fall under the *Ministry of Human Resource Development*. The Department of Book Promotion and Copyright reside within the Department of Higher Education.

The Book Promotion & Copyright Division is responsible for promoting the production of good quality books at reasonable prices, encouraging indigenous authorship, promoting reading habits, providing assistance to the Indian book industry and promotion of children's literature. A designated division to promote and develop languages other than Sanskrit and Classical Languages also fall under the Department of Education. (MHRD, India 2007a).

Table 7 sets out how book promotion and development of indigenous languages is done in India. The participation criteria and funding detail of the respective activities is provided in the last column.

Table 7: Breakdown of Department of Education's book development activities

Division	Aim	Activities (How?)	Criteria/ Funding detail
Book Promotion & Copyright Division	Promote the production of good quality books at reasonable prices, encourage indigenous authorship, promote reading habits, provide assistance to Indian book industry and promote children's literature	<p>Assistance to voluntary/private organisations for organising seminars/training courses/workshops/ annual conventions, etc., with the objective of promoting books</p> <p>The assistance scheme to voluntary organisations was formulated in 1986 for providing financial assistance, on ad hoc basis, to organisations registered under the Societies Registration Act, 1860 (Act 21 of 1860).</p>	<p>The <u>criteria</u> for organisations to partake in this scheme is the offering of the following book developmental activities:</p> <p>(a) seminars of Indian authors/publishers/book sellers on subjects which have direct bearing on book promotion in India;</p> <p>(b) training courses on subjects directly related to book promotion;</p> <p>(c) annual conventions/conferences of writers/publishers/ printers/booksellers;</p> <p>(d) research/survey connected with the book industry; and</p> <p>(e) any other activity which may be conducive to the development of book industry.</p>
Book Promotion & Copyright Division	<p>Copyright Enforcement Advisory Council (CEAC)</p> <p>Established in 1991 to improve the enforcement of copyright</p>	<p>Members are senior representatives from relevant government departments and other stakeholders.</p> <p>The CEAC reviews the implementation of the Copyright Act and advises government regarding measures to improve enforcement.</p>	<p>Three subcommittees currently operates</p> <ol style="list-style-type: none"> 1. Awareness building 2. Enforcement and shared experiences of members 3. Mechanisms to ensure that the benefits of enforcements flow back to creators and rights holders. <p>A number of Enforcement Cells have been set up around the country to deal with copyright offence cases.</p> <p>Twenty four states have designated Nodal Officers to deal with copyright offences.</p> <p><u>Scheme for IP Education, Research and Public Outreach</u></p> <p>Financial assistance is given to recognised universities and other organisations dealing with IP.</p>

Division	Aim	Activities (How?)	Criteria/ Funding detail
Development of Sanskrit and other classical languages	a) The Rashtriya Sanskrit Sansthan is an autonomous organisation registered under the Societies' Registration Act 1860 (Act XXI of 1860) and was established in October 1970.	Book Purchase Scheme	Rashtriya Sanskrit Sansthan has been giving grants to individuals/publishers/organisations for printed books (general books of reference) on account of purchase from authors/publishers for free of cost for distributions among the Sanskrit institutions and libraries to encourage the authors and publishers and the Sanskrit literature
		Financial assistance for production of Sanskrit Literature	Financial assistance is provided to scholars for production of research work and original writings in Sanskrit
Promotion and development of languages other than Sanskrit and classical languages	<p><u>Hindi Language</u></p> <p>a) Central Hindi Directorate was set up in 1960 as a subordinate office with the object of propagation and development of Hindi as a link language as per the Constitutional Directive contained in Article 351</p>	<p><u>Ongoing Schemes:</u></p> <p>1) Schemes of Publication:</p> <ul style="list-style-type: none"> - Preparation of foreign language dictionaries - Preparation of Bi-lingual/Tri-lingual dictionaries - Publication of Bhasha/ Varshiki/ Sahityamala :The Directorate brings out Hindi journals - Holding of Exhibitions - For propagation of Hindi the Directorate organizes/participates in book fairs/exhibitions - Free distribution of Hindi 	

Division	Aim	Activities (How?)	Criteria/ Funding detail
		Books	
		2) Awards to Hindi Writers	Two schemes are applied. Criteria to apply for Hindi awards <ul style="list-style-type: none"> - Hindi writers whose mother-tongue is something other than Hindi on books originally written in Hindi and - - Shiksha Puruskar which is given to select books originally written in Hindi on education-related subjects
		3) Extension Services and Programmes	<u>Specifications of the programme:</u> 8 workshops for new Hindi writers; 2 conducted tours for students; 8 lecture tours of university professors from Non-Hindi speaking areas to Hindi-speaking areas and vice versa; 2 Symposia of Hindi scholars to discuss the latest techniques and forms of literature; and travel grant to 20 research students
		4) Grants to Voluntary Organisations for prorogation and development of Hindi (including Dakshin Bharat Hindi Prachar Sabha) and scheme OF assistance for publication/purchase of books	For the development of Hindi as a link language, voluntary organisations are given financial assistance to the extent of 75% for undertaking activities like conducting Hindi teaching classes, shorthand/typing classes, Hindi libraries, publication of brochures/magazines etc. About 200 voluntary organisations are receiving grants every year.
	b) Commission for Scientific & Technical terminology was set up in October, 1961 for evolution of Scientific and Technical Terminology in Hindi and other Indian languages, production of university level books and reference literature in all	<u>Continuing Schemes:</u> 1) Publications	Undertaking publication of definitional dictionaries and Pan-Indian glossaries etc.
		2) Terminology orientation workshops	Organizing workshops for University/College teachers with a view to popularize the use of Scientific and Technical Terminology

Division	Aim	Activities (How?)	Criteria/ Funding detail
	disciplines, identification of pan-Indian Terminology, setting up a national terminology bank and organizing terminology orientation workshops to facilitate smooth change over of media of instruction in universities	3) University level books in Hindi	Production of university level books in Hindi and in other Indian Languages

2.9.5 Legislation

2.9.5.1 Import Policy

Import of educational, scientific and technical books and journals are allowed under Open General Licence, subject to a ceiling of 1000 copies of a single title per importer. Prior permission for more copies is required from the Ministry of Education.

Import of foreign edition of books for which editions of Indian reprints are available is not allowed. Imports of foreign reprints of Indian publications are also not allowed.

2.9.6 Funding

The National Book Trust is funded by the Indian government.

2.10 THE PHILIPPINES

In the Philippines cultural matters reside within the *Department of Education*.

The first book in the Philippines was published in 1593, but despite this early start, the capabilities and outputs of the local publishing industry have fallen behind that of other Asian countries.

This lack of a thriving publishing industry meant that the government was not able to provide enough textbooks to learners. The Government responded to this crisis through producing textbooks through the Instruction Materials Corporation, while private publishers were left to publish for private schools. All other policy interventions from government was also related to the education market, hence very little growth of the industry occurred.

The government finally showed their commitment to the book industry through the development of a National Book Policy with active participation from the private sector. This gave rise to the National Book Development Board (NBDB).

2.10.1 National Book Development Board (NBDB)

The **Book Publishing Industry Development Act** (Republic Act 8047) provides for the establishment of the **National Book Development Board (NBDB)**. The board's mandate includes the formulation, implementation and monitoring of policies and programmes contained in the National Book Policy.

The National Book Development Board was thus created in 1998 with the mandate to develop and support the Philippine book publishing industry.

The NBDB is under the administrative supervision of the Office of the President.

Membership

a. 5 representatives of government,

- Department of Education, Sports & Culture
- Department of Trade & Industry
- Department of Science & Technology
- National Commission of Culture & Arts
- Book Industry Association
- Commission on Higher Education

b. 6 representatives nominated from book industry stakeholders

- Private book publishers, printers, writers, book industry related activities.

The Board is composed of 11 members who are appointed by the President of the Philippines.

Quality is a major factor in the Philippine book system. In the past, the state was responsible for book production for primary and secondary schooling. To this end, implementation of the policy is geared towards improving the overall quality of books.

2.10.2 Aim

The National Book Development Board aims to do the following:

- Increase investment in the book industry
- Develop an environment conducive for the growth of the book publishing industry
- Enhance market growth of the book industry by promoting lifelong learning through readership

2.10.3 Objectives

The National Book Policy outlines the objectives as:

- 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
- Obtain priority status for the book publishing industry
- Ensure an adequate, affordable and accessible supply of books for all segments of the population
- Promote book readership especially among the young and neo-literates, through programmes promoting literacy and good reading habits, book fairs and exhibits and an efficient nationwide system of libraries and reading centers especially in the rural areas.
- Promote development of indigenous authorship and of translations among various language groups in the country
- Promote the translation and publication of scientific and technical books and classic works in literature and the arts
- Promote effective distribution of books in the domestic as well as in the international markets through an efficient and reliable postal and transport delivery system
- 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 suits related thereto
- Promote, whenever appropriate, the use of recycled/waste paper and other inexpensive local materials in the manufacture of books to reduce the cost of such locally produced books
- 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 in other similar agreements

2.10.4 Activities

2.10.4.1 Registration and Accreditation

In order to qualify for any of the interventions and incentives offered through the National Book Policy and other strategies offered by the Board, enterprises have to register and be accredited

by the Board. A once-off application fee is paid for this process. The applicant is then classified according to the activity it is primarily involved in. Further classification depends on declared financial position, production and marketing capabilities.

All persons and enterprises involved in book publishing can register with the Board and includes local publishers, printers, book importers, booksellers, importers of raw materials, local manufacturers of raw materials, associations, authors etc.

2.4.10.2 Textbook quality

Textbook quality remains a key challenge in the Philippines. A number of interventions are geared towards improving quality.

a) Textbook Review Service

The Textbook Review Service aims to provide a mechanism towards the improvement of the quality content of textbooks and teacher's manuals written and published by Filipinos.

Publishers and authors can have their textbook and teacher's manual evaluated by the NBDB.

A payment of PHP 20,000 (R3,716) is required as an evaluation fee. A group of independent evaluators (with which the Board has a Memorandum of Understanding) then evaluates and comments on the book. The following is evaluated;

- Grammatical correctness and textual clarity;
- Factual and conceptual accuracy;
- Logical and rhetorical flow of ideas; and
- Appropriateness to the educational level of the target learners.

b) Textbook Quality Seal

The NBDB Quality Seal is given to a published private school textbook (PST) after undergoing strict evaluation by NBDB's pool of evaluators. The aim is to increase the quality of books being produced for private schools.

c) Textbook Award

The objectives of the NBDB Awards are:

- To give recognition and appreciation to textbook publishers and authors for quality textbooks;
- To make textbooks written and published by Filipinos become more competitive in the market;
- To motivate and encourage Filipino publishers and authors to produce quality textbooks.

The Awards take place annually. Textbooks are judged on the quality of content, writing, editing and design. Eleven (11) awards are conferred for the elementary and secondary levels.

2.10.4.3 Financial Incentives

- The Expanded Value Added Tax Law includes the VAT exemption of books (NBDB, the Philippine, 2005)
- An incentives package for publishers to enlist in the Philippine Stock Exchange. This will give local book publishing companies the opportunity to tap into the equity market for much needed capital. The incentives include a free three-year registration with the NBDB, 25% discount when using the Textbook Review Service for 3 years, priority in NBDB-sponsored seminars, training and projects and free advertising space on the NBDB website, subscription to the NBDB's quarterly publication of the Book Watch. (NBDB, 2005).
- Importation of tax- and duty-free raw materials for book publishing such as paper. This is based on the condition that the raw material is not available locally. In 2000 for example, 3,690.602 metric tons of paper was imported, amounting to PHP 26,203,207 (R4,867 million) tax being waived.
- Tax and duty-exempt importation of spare parts and supplies on capital equipment used in book production. The exemption cannot exceed 10 years from date of registration.
- Additional deduction for labour expenses. 5 years from registration, an enterprise shall be allowed an additional deduction from taxable income of 50% of the wages corresponding to the increment of direct and indirect labour. This can be doubled in less developed areas.

2.10.4.4 Author development

In 2000, the NBDB held a series of writing-seminar workshops throughout the country. The workshops were made possible through the President's Social Fund. PHP 10,000,000 (R1,791 million) was made available for author development.

2.10.4.5 Promotion of Philippine books abroad

a) Book Exporters Association

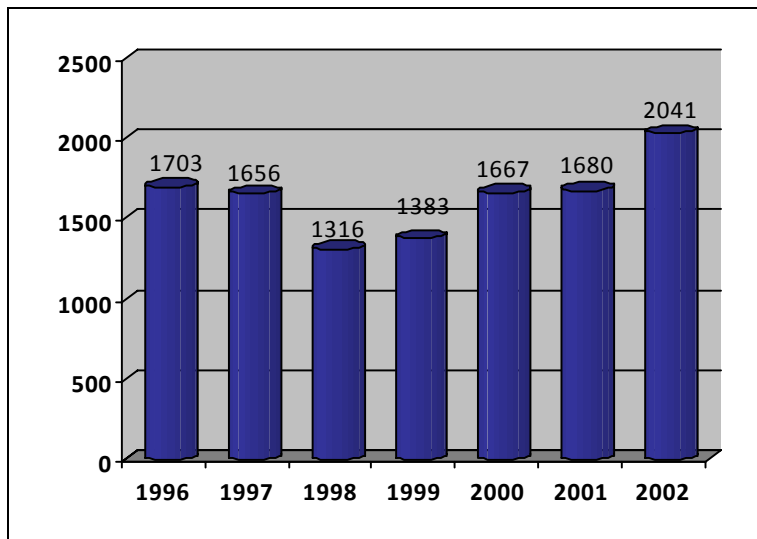
The Board set up a Book Exporters Association to promote local books abroad in 1999. This is primarily done through providing opportunities for local enterprises to participate in international book fairs.

2.10.4.6 Book Industry Research

a) Data bank

The Board implements continuous research to inform policy and strategy direction, as well as monitoring the industry. Research to date includes the development of a data bank which includes indicators on annual book titles produced, import and exports, registered industry stakeholders. The data bank serves as a repository of information for the book industry.

Figure 2: Book titles Published and Printed

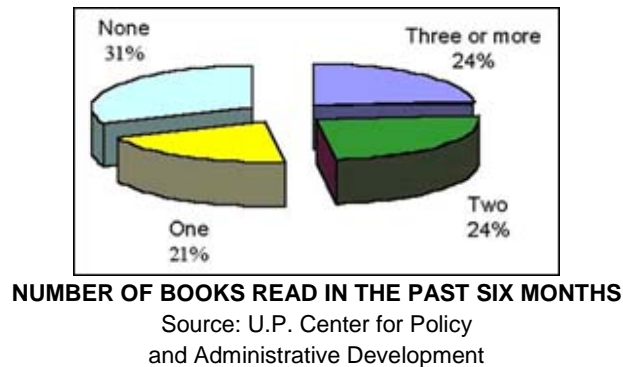


(Source: NBDB, 2004)

b) National Reading Survey

The National Book Development Board also commissioned the Social Weather Stations to conduct a survey on the reading attitudes and preferences of Filipinos. This was a comprehensive study on book readership in the country and was implemented in 2003.

Figure 3: Number of books read in the past six months



2.10.4.7 Reading Promotion

a) Booklatan sa Bayan (Open a Book)

Booklatan sa Bayan is a Readership Promotion Programme that brings together a range of activities under one event. It addresses the issues of access and availability of books to all sectors in all the provinces. The programme is a collaborative activity between publishers, authors, government agencies, non-government organisations and local government units. The activities include the following:

- Readership Enhancement and Advancement (READ) Programme for Trainers
- Forum/Seminar on Establishment of Barangay Reading Centers
- Seminar on Library Administration
- Forum/Seminar on the Establishment of Book Outlets
- Storytelling Workshops and Sessions
- Buknoy Appearances (NBDB mascot for readership)
- Book Donation

(NBDB, the Philippine, 2006c)

b) Book Development Month

A Presidential Proclamation declared the month of June the Philippine Book Development Month. This annual celebration focuses on the importance of book in meeting the economic development and social growth of the nation.

In 2000, the inauguration of the programme was celebrated through an *Authors and Writers Forum*, which received PHP 10,000,000 (R1,791 million) from the Presidents Social Fund.

This festival aims to instill a reading culture and unites all the players in the publishing chain. Typical activities include book fairs, exhibits and storytelling sessions, manuscript fairs, contests on book illustration and photography, storytelling and a SMS Text Quiz on books with the Philippine Daily Inquirer. (NBDB, the Philippine, 2006d)

The SMS Text project acknowledges that the current generation use short messaging service on a continuous basis. The questions are presented in a multiple-choice format and participants are required to text the correct answer. Registration for the competition is done via sms and Monday to Saturday winners are rewarded with award-winning books and Sunday winners get an iPod shuffle and award-winning books. (NBDB, 2005).

In June 2005 a seven day book fair was held that brought books to the malls at affordable prices. (NBDB, 2005).

c) Get caught reading campaign

The Board also implemented this project which it adapted from the United States. Posters of celebrities, reading their favourite book, are distributed for display to libraries, bookstores, and other relevant places to promote reading.

2.10.5 Legislation

National Book Policy promulgated through Book Publishing Industry Development Act in 1995.

2.10.6 Funding

The NBDB is funded by their government. The NBDB receives an average of PHP 21,703 million (R3,889 million) per annum.

2.11 SINGAPORE

The Ministry of Information, Communication and the Arts (MICA) is home to the Arts and Heritage development division.

2.11.1 National Book Development Board

Membership

Executive Committee

-Society for Reading and Literacy
-Singapore Booksellers and Stationers Association
Library Board
Writers Force of the 50's
Tamil Writers Association - 6 individual members

-National
-Malay
-Singapore

The ***National Book Development Council of Singapore*** is a non-profit umbrella organisation which was founded in 1969 to promote storytelling, reading, writing and publishing. The council brings the book industry and literary community together through social events.

2.11.2 Aim

The Council aims to establish and develop Singapore as the Asian centre for publishing and the literary arts.

2.11.3 Objectives

The Council has two broad objectives:

- 1) To promote and encourage the reading of books amongst all sections of the population in Singapore for the purpose of education, information and culture
- 2) To co-operate and liaise with all members of the national and international book world

2.11.4 Activities

2.11.4.1 Centre for Literary Arts and Publishing (CLAP).

CLAP is the training division of the National Book Development Council of Singapore. The centre is dedicated to upgrading professionals in publishing and the literary arts.

The centre delivers quality, relevant programmes to the industry which is informed by key stakeholders. CLAP also collaborates with other training institutions in the field, like the Publishing Training Centre in UK. Participants pay to attend all CLAP programmes.

Examples of some of the courses offered by CLAP follow below:

- Indexing books and electronic materials
- The business of magazine publishing
- Reading aloud to children workshop, helping children write their own books
- The art of photographic narratives.
- Developing marketing and brand messages through stories
- Digital storytelling
- Science education through stories
- Master Class – writing and illustrating for children's books

2.11.4.2 Book Awards

a) Singapore Literature Prize

The Singapore Literature Prize was launched in May 1991 by the National Book Development Council to encourage the growth of higher quality creative writing in English by Singapore writers.

Unpublished works of fiction and poetry/drama in English by Singaporean writers qualify for this award.

b) NBDCS Book Awards

The NBDCS Book Awards were inaugurated in 1972 to mark the International Year of the Book and were first made in 1976. Works of fiction, non-fiction, poetry and children's books form part of the award.

The Awards are for the best works by Singaporeans and permanent residents, published in Singapore or abroad, in any of Singapore's four official languages: Malay, Chinese, Tamil and English.

2.11.4.3 First-Time Writers & Illustrators Publishing Initiative

This initiative was started in 2006 and is a jointly organised initiative of the National Book Development Council of Singapore and the Media Development Authority (MDA).

The Initiative is targeted at assisting the publication of new works by unpublished local writers and/or illustrators. It furthermore aims to nurture aspiring local writers and illustrators to develop talents in the local publishing industry.

In 2006 for example, 200 individuals participated of whom 14 applicants were short-listed. The selected applicants attended workshops, seminars and manuscript assessment sessions to help them refine their works and marketing plans. The manuscripts are then published. In 2007, the second time this initiative was implemented, rights for a children's book was bought by a big independent publisher and the book is now being distributed worldwide.

In developing the initiative, the third round in 2008 includes an introductory workshop for those interested to submit their work.

22 books were published over the two years since the initiative started.

The council also hosts an annual Asian Children's Writers and Illustrators Conference which started in 2005.

2.11.4.4 Publishers Writers Network (PWN)

The Publishers Writers Network presents an opportunity for writers and publishers to meet. It is the gathering of professionals and amateurs in the writing and publishing world for an entertaining and stimulating evening. Participants are updated on current and developing trends in the publishing field through sharing sessions with acclaimed authors & talks given by representatives from publishing companies.

2.11.4.5 Support for associations

The council also sponsors the formation of new associations. Two such examples would be the Society of Singapore Writers and the Association for Book Designers and Illustrators.

2.11.4.6 Young Writers' Workshop

This workshop is held with youth between 11 to 18 years of age and was started in 2005.

Youth are introduced to various types of writing and visuals through simple tips and mini projects. They have an opportunity to write, design, prepare a book dummy and also get to rewrite some familiar tales by adding their own twists.

2.11.4.7 Information Management

a) Author database

The council has an online list of authors of fiction and poetry, with a short profile of each author.

b) Publishers database

An online database of publishers with a short profile on each is also available.

2.11.4.8 Reading Promotion

a) Book Club

The Singapore Book Club, jointly organised by the National Book Development Council Singapore and the Arts House, holds meetings on the third Friday of every other month for the public to share their views on a selected book. The focus is on books with a strong Singaporean flavour aims to foster public interest in the local literary and creative arts scene.

Other book clubs organised by the council is the ReadAsia and Read to Lead Book Clubs.

b) Singapore International Storytelling Festival (SISF)

The first Singapore International Storytelling Festival (SISF) was organised in 2006. It is a 10-day Festival which aims to promote storytelling as an enjoyable medium for effective communication, bonding, teaching and learning.

2.11.5 Legislation

No legislation could be found.

2.11.6 Funding

The NBDCS is funded by their government.

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

This section analyses and summarises the section on the international book development activities. The analysis identified a number of salient issues, which led to the categorisation of challenges. These were then summarised into a 'Priority Column' in the table. This priority is **what** the countries aimed to address or wanted to achieve. A simple definition of the category is given based on interpretation. The term 'Priority' is used to facilitate interpretation back into the Draft National Book Policy.

This is then followed by corresponding interventions across the countries. The intervention is the **how** i.e. the strategy/intervention used to address the challenge under the 'Priority Column'. This is the second column named "Intervention".

Each of the interventions aims to benefit specific or all subsectors. The next column identifies the 'Stakeholder' and answers the question **who**.

The last column links the research to the SABDC's Draft National Book Policy document. The policy document identifies priorities across the value chain. Interventions are thus matched to the policy priorities identified in the Draft National Book Policy as first step in developing a South African Book Development Plan. At a glance one is able to connect policy imperative to strategy/intervention as it is implemented elsewhere in the world.

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
<p>BOOK DEVELOPMENT PLAN OR POLICY</p> <p>This is a dedicated, integrated plan or policy developed to grow the book sector and impacts across the value chain.</p>	<p>Book Industry Assistance Plan (2001)</p>	<p>Australia</p>	<p>All stakeholders</p>	
	<p>Book Publishing Industry Development Programme (1979)</p>	<p>Canada</p>	<p>All stakeholders</p>	
	<p>National Book Policy</p>	<p>Greece</p>	<p>All stakeholders</p>	
	<p>Book Publishing Industry Development Act (1995)</p>	<p>Philippines</p>	<p>All stakeholders</p>	
<p>LEGISLATION</p> <p>This is a policy or law that is specifically designed for a sub sector/s in the value chain, or is a general policy applied to the book sector. Some of these laws/policies can also be seen as</p>	<p>Public Lending Rights</p>	<p>Australia</p>	<p>Authors; Publishers</p>	

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
removing barriers to access for smaller players.				
	Educational Lending Rights	Australia	Authors; Publishers	
	Investment Canada Act	Canada	Publishers	Ownership – To achieve sufficient diversity in ownership. (pg 8; 11; 13)
	Book Importation Regulations	Canada	Publishers; Booksellers	Ownership – To achieve sufficient diversity in ownership. (pg 8; 11)
	Retail Price Law	Greece	Publishers; Booksellers	Ownership – To achieve sufficient diversity in ownership. (pg 8; 11)
	Import Policy	India	Publishers; Booksellers	Ownership – To achieve sufficient diversity in ownership. (pg 8; 11)
	National Textbook Publishing Policy	Kenya	Authors; Publishers; Booksellers	
	Nigerian Enterprises Promotion Decree	Nigeria	Publishers	Diversity in ownership To achieve sufficient diversity in ownership (8;11; 13)
	Decentralisation of Instructional Material Project (DIMP)	Uganda	Booksellers	Distribution Network – To establish an effective and accessible network of distributors to service publishers and booksellers. (pg 10)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>Bookselling Network – To establish an effective and accessible network of stock holding bookstores throughout the country. (pa 11)</p> <p>LTSM Procurement Policy – To ensure that the tender system achieves the recruitment and retention of previously disadvantaged booksellers to service their communities and contribute towards the creation of permanent bookshops throughout the country.</p>
<p>REGIONAL COOPERATION</p> <p>Where a number of countries cooperate to advance the book sector within a region or continent.</p>	<p>East African Book Development Association</p>	<p>Kenya Tanzania Uganda</p>		
	<p>Multiannual Cooperation Agreement</p>	<p>Greece Europe</p>		
<p>OWNERSHIP</p> <p>This is an intervention that has the purpose of regulating ownership to</p>	<p>Foreign Investment Policy</p>	<p>Canada</p>	<p>Publishers; Distributors; Booksellers; Retailers</p>	<p>Diversity in ownership To achieve sufficient diversity in ownership (8;11; 13)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
advance the development of local industry.				
	Nigerian Enterprises Promotion Decree	Nigeria	Publishers	Diversity in ownership To achieve sufficient diversity in ownership (8;11; 13)
FINANCIAL SCHEMES Financial assistance to the book sector. This is normally through a dedicated plan and has a dedicated budget from government or is an incentive scheme from government offering rebates or tax and duty reductions/deductions.	Public Lending Rights	Australia	Authors; Publishers	
	Educational Lending Rights	Australia	Authors; Publishers	
	Rebate on paper imports	Australia	Paper Manufacturers; Printers	Raw material To establish the cost and optimum quality of raw materials required and its contribution to

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>the cost of books. (13)</p> <p>Building capacity in the local paper and print industries To ensure that the paper and print industries become globally competitive (13)</p>
	Educational Textbook Subsidy Scheme	Australia	Booksellers	Cost of books
	Grants to Primary School Libraries	Australia	Libraries	<p>School libraries To establish a network of operational school libraries in Section 20 and Section 21 schools. (14)</p>
	Grants to overseas book publishers	Australia	Publishers	<p>Exports To achieve the full export potential of South African heritage and culture. The cultural industries have been identified as a key export growth area. (9)</p> <p>Exportation of books To encourage and increase the exportation of South African products within Africa and globally (12)</p>
	Literature on International Market	Australia	Authors; Publishers	Exports

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Development Programme			<p>To achieve the full export potential of South African heritage and culture. The cultural industries have been identified as a key export growth area. (9)</p> <p>Exportation of books To encourage and increase the exportation of South African products within Africa and globally (12)</p>
	Aid to publishers	Canada	Publishers	<p>Finance To achieve adequate and alternative industry financing schemes to assist SMME development and indigenous publishing. (9; 12)</p>
	The Collective Initiative	Canada	All stakeholders	
	Industry Research	Canada	Industry	<p>Research To identify and ensure ongoing research as a basis for strategic intervention (9)</p> <p>Research To collect data on an annual basis for strategic interventions. (12)</p>
	Business Planning	Canada	Industry	<p>Training and development</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				To achieve comprehensive capacity building as ongoing development and to support BEE. (8; 11; 13)
	Publishing Internships	Canada	Publishers	<p>Training and development To achieve comprehensive capacity building as ongoing development and to support BEE. (8)</p>
	Supply-Chain Initiative	Canada	Industry	
	International Marketing Assistance Programme	Canada	Industry	<p>Exports To achieve the full export potential of South African heritage and culture. The cultural industries have been identified as a key export growth area. (9)</p> <p>Exportation of books To encourage and increase the exportation of South African products within Africa and globally (12)</p>
	Export Marketing Assistance Programme	Canada	Publishers; Booksellers	<p>Exports (9)</p> <p>Exportation of books (12)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Foreign Rights Marketing Assistance Programme	Canada	Publishers	<p>Exports (9)</p> <p>Exportation of books (12)</p>
	Residential Grants	Greece	Authors; Translators	<p>Training/Fellowships for writers To establish and strengthen fellowships to writers as an incentives to improve and increase South African writing including academic writing. (7)</p> <p>Diversity To achieve diversity at all levels of creation, including writers, Illustrators, graphic designers, translators, photographers etc</p>
	Grants for travelling abroad	Greece	Authors; Translators	<p>Training/Fellowships for writers To establish and strengthen fellowships to writers as an incentives to improve and increase South African writing including academic writing. (7)</p> <p>Diversity To achieve diversity at all levels of creation, including writers, Illustrators, graphic designers, translators, photographers etc. (7)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Community Initiatives for SMME's	Greece	Booksellers	<p>Training and development To achieve comprehensive capacity building as ongoing development and to support BEE. (8;11; 13)</p>
	Assistance Scheme to Voluntary Organisations	India	NGOs, Associations.	<p>Writers' Associations To establish and strengthen writers' associations for all genres or create a single national writers' organisation in order to realise greater negotiating power for writers with regard to copyright, contract, etc. (6)</p>
	Book Purchase Scheme	India	Authors; Publishers; Booksellers; Libraries	<p>Local language writing To increase writing in local languages. This should not only include translations from English or Afrikaans to the other local languages. (6)</p> <p>Diversity To achieve diversity at all levels of creation, including writers, illustrators, graphic designers, translators, photographers etc. (7)</p> <p>Ownership To achieve sufficient diversity in ownership (8;</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>11)</p> <p>Product</p> <p>To achieve greater output of indigenous books beyond the school market. (8)</p> <p>LTSM book selection policies</p> <p>To ensure good quality, diverse LTSM materials are procured whilst ensuring a thriving book publishing sector. (9)</p> <p>LTSM procurement policy</p> <p>To ensure that the tender system achieves the recruitment and retention of previously disadvantaged booksellers to service their communities and contribute towards the creation of permanent stockholding bookshops throughout the country. (12)</p> <p>Book spend</p> <p>To have clearly defined procurement and book spend policies for public libraries including ring-fencing book budgets to ensure a healthy relationship between personnel, infrastructure and book spending. (14)</p>
	Schemes of Publications	India	Authors; Publishers; Booksellers; Libraries	Local language writing (6)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>Diversity (7)</p> <p>Ownership (8)</p> <p>Product (8)</p> <p>LTSM book selection policies (9)</p> <p>LTSM procurement policy (12)</p> <p>Book spend (14)</p>
	Expanded Value Added Tax Law	Philippines	Industry	
	Importation of tax and duty free raw materials for book publishing	Philippines	Printers	<p>Raw material To establish the cost and optimum quality of raw materials required and its contribution to the cost of books. (13)</p> <p>Technology/Equipment</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>To achieve greater investment in capital equipment and technology, to improve productivity and quality and to reduce the cost of books. (13)</p> <p>Building capacity in the local paper and print industries To ensure that the paper and print industries become globally competitive. (13)</p>
	Tax and Duty Exempt Importation of spare parts and supplies on capital equipment	Philippines	Printers	<p>Raw material (13)</p> <p>Technology/Equipment (13)</p> <p>Building capacity in the local paper and print industries (13)</p>
	Deduction for labour expenses	Philippines	Industry	
CHILDREN'S LITERATURE The development and promotion of children and/or youth literature.	Children's Reading Tents	Kenya	Readers; Teachers	
	Children's and Young Adults' Book Fair	Greece	All stakeholders	

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	National Centre for Children's Literature	India	Authors; Illustrators; Publishers	
	National Children and Youth Book Fair	India	All stakeholders	
	Young Writers' Workshop	Singapore	Authors; Illustrators	
	Children's Reading Tents	Uganda	Readers; Teachers	
	Children's Reading Tents	Tanzania	Readers; Teachers	
CAPACITY BUILDING Training and development of professionals throughout the book value chain.	Printing Industries Competitive Scheme includes a Skills Development Programme	Australia	Printers	Employment To achieve greater diversity at all levels of employment in book printing specifically. (13)
	Professional development	Canada	Authors; Publishers; Distributors; Booksellers; Teaching Institutions; Associations.	Training/Fellowships for writers To establish and strengthen fellowships to writers as an incentives to improve and increase South African writing including academic writing. (7) Training and development To achieve comprehensive capacity building as ongoing development and to support BEE. (8;

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				<p>11; 13)</p> <p>Professionalising bookselling To achieve greater professionalism in the trade, with specific reference to the educational sector. (12)</p> <p>Training To achieve sufficient diversity at all levels of employment and ongoing skills development. (14)</p> <p>Training and development To achieve comprehensive capacity building as an ongoing activity and to support employment diversity. (16)</p>
	Publishing Interns	Canada	Publishers; Distributors; Booksellers	Training and development (8; 11; 13)
	Design and implement training programmes for continuous and lifelong learning	Greece	Authors; Publishers; Translators; Booksellers; Librarians.	(7; 8; 11; 12; 13; 14; 16)
	Training in book publishing	India	Publishers	Training and development (8)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	National Centre for Children's Literature Training Programme for Reading Clubs and Creative Writing for Children	India	Authors; Publishers; Teachers; Other.	
	Training for professionals in the book sector	Kenya	Authors; Publishers; Associations; Executive Boards.	Training and development (8; 11; 13)
	Workshops on quality control	Nigeria	Publishers; Teachers; Education Department	<p>LTSM book selection policies To ensure good quality, diverse LTSM materials are procured whilst ensuring a thriving book publishing sector. (9)</p> <p>LTSM procurement policy To ensure that the tender system achieves the recruitment and retention of previously disadvantaged booksellers to service their communities and contribute towards the creation of permanent stockholding bookshops throughout the country. (12)</p> <p>Book spend To have clearly defined procurement and book spend policies for public libraries including ring-fencing book budgets to ensure a healthy relationship between personnel, infrastructure</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				and book spending. (14)
	Writers Seminar-Workshops from the Presidents Social Fund	Philippines	Authors	Training/Fellowships for writers To establish and strengthen fellowships to writers as an incentives to improve and increase South African writing including academic writing. (7)
	Readership Enhancement and Advancement Programme for Trainers (Booklatan sa Bayan)	Philippines	Teachers	
	Library Administration	Philippines	Librarians	Training and development To achieve comprehensive capacity building as an ongoing activity and to support employment diversity. (16)
	Establishment of Book Outlets	Philippines	Booksellers	Professionalising bookselling To achieve greater professionalism in the trade, with specific reference to the educational sector. (12)
	Centre for Literary Arts &	Singapore	Authors; Publishers;	(7; 8; 11; 12; 13; 14; 16)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Publishing		Librarians.	
	Training for professionals in the book sector	Tanzania	Authors; Publishers; Associations; Executive Boards.	Training and development (8; 11; 13)
	Training for professionals in the book sector	Uganda	Authors; Publishers; Associations; Executive Boards.	Training and development (8; 11; 13)
<p>PROMOTION OF LOCAL BOOKS</p> <p>The promotion of the local book sector internationally and/or incentives to international stakeholders to advance local production.</p>	Grants to overseas publishers	Australia	Publishers; Other	<p>Exports To achieve the full export potential of South African heritage and culture. The cultural industries have been identified as a key export growth area. (9)</p> <p>Exportation of books To encourage and increase the exportation of South African products within Africa and globally (12)</p>
	Community partnerships and market development	Australia	Authors; Publishers; Other	
	Visiting International Publishers (VIP)	Australia	Publishers; Other	<p>Exports (9)</p> <p>Exportation of books (12)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Literature International Market Development Programme	Australia	Authors; Publishers; Other	Exports (9) Exportation of books (12)
	International Marketing Assistance Programme	Canada	Publishers; Other	Exports (9) Exportation of books (12)
	Association for the Export of Canadian Books	Canada	Authors; Publishers; Booksellers; Other.	Exports (9) Exportation of books (12)
	Promotion of Greek Books Abroad	Greece	Authors; Publishers; Booksellers; Libraries; Translators; Other.	Exports (9) Exportation of books (12)
	The European Stand	Greece	Authors; Publishers; Booksellers; Libraries; Translators; Other	Exports (9) Exportation of books (12)
	Promotion of Indian Books Abroad	India	Authors; Publishers; Booksellers; Printers; Paper Manufacturers; Other.	Exports (9) Exportation of books (12)
	International Rights Exhibition	India		(9; 12)
	Book Exporters Association	Philippines	Authors; Publishers; Booksellers; Printers; Other	(9; 12)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
LOCAL BOOK FAIRS AND FESTIVALS The promotion of the book sector and reading locally through dedicated events	Thessaloniki Book Fair	Greece	All stakeholders	
	Children's and Young Adults' Book Fair	Greece	All	
	New Delhi Book Fair, Multiple fairs and festivals	India	All	
	Pustak Parikrama (Mobile Book Exhibitions in underserved areas)	India	All	
	National Book Week Festival	Kenya	All	
	Nigeria International Book Fair	Nigeria	All	
	Zonal Book Fairs	Nigeria	All	
	International Storytelling Festival	Singapore	All	
	National Book Week Festival	Tanzania	All	
	National Book Week Festival	Uganda	All	
	Uganda International Book	Uganda	All	

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Festival			
<p>RESEARCH</p> <p>The collection of data on economic and cultural indicators across the value chain to inform interventions and monitor the book sector.</p>	Australian Bureau of Statistics – Book publishers; Booksellers	Australia	Publishers; Booksellers	<p>Research</p> <p>To identify and ensure ongoing research as a basis for strategic intervention. (9)</p> <p>Research</p> <p>To collect data on an annual basis for strategic interventions. (12)</p>
	Books Alive Campaign – Book reading and buying patterns	Australia	Readers	<p>Reading habits</p> <p>To understand reading activity, preferences and barriers on an ongoing basis.(16)</p> <p>Reading campaigns</p> <p>To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)</p>
	Industry Research Programme	Canada	Authors; Publishers; Booksellers.	Research (9; 12)
	Book Monitoring Unit	Greece	Authors; Literary Translators; Publishers; Booksellers; Libraries;	<p>Research</p> <p>To identify and ensure ongoing research as a basis for strategic intervention. (9)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
			Readers.	<p>Research</p> <p>To collect data on an annual basis for strategic interventions. (12)</p> <p>Reading habits</p> <p>To understand reading activity, preferences and barriers on an ongoing basis.(16)</p> <p>Reading campaigns</p> <p>To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)</p>
	Greek books in translation database	Greece	Authors; Translators; Publishers; Libraries	
	Book Industry Research	Philippines	Authors; Publishers; Booksellers; Other	Research (9; 12)
	Social Weather Stations - National reading survey	Philippines	Readers	<p>Reading habits</p> <p>To understand reading activity, preferences and barriers on an ongoing basis.(16)</p> <p>Reading campaigns</p> <p>To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Author and Publishers database	Singapore	Authors; Publishers	
<p>TECHNOLOGY</p> <p>Adoption and use of innovative technologies to ensure an efficient and effective infrastructure that builds competitiveness.</p>	Printing Industry Competitive Scheme	Australia	Printers	<p>Technology/Equipment</p> <p>To achieve greater investment in capital equipment and technology to improve productivity and quality and to reduce the cost of books. (13)</p>
	Supply-Chain Initiative	Canada	Publishers; Booksellers; Distributors; Retail; Other	<p>Research</p> <p>To collect data on an annual basis for strategic interventions. Research into supply chain interventions and electronic data interchange as part of the cost of books study to identify opportunities available to reduce operating costs and increase service levels through improved supply chain management. (12)</p>
	Electronic Data Interchange (EDI)	Canada	Publishers; Booksellers; Distributors	<p>Research</p> <p>To collect data on an annual basis for strategic interventions. Research into supply</p>

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				chain interventions and electronic data interchange as part of the cost of books study to identify opportunities available to reduce operating costs and increase service levels through improved supply chain management. (12)
	Business-to business/e-commerce environment (EDI)	Greece	Publishers; Booksellers.	Research To collect data on an annual basis for strategic interventions. Research into supply chain interventions and electronic data interchange as part of the cost of books study to identify opportunities available to reduce operating costs and increase service levels through improved supply chain management. (12)
	BIBLIONET database on Internet	Greece	All stakeholders	
AWARDS The stimulation of local writing through awarding authors and publishers for quality works within a defined framework	Textbook Award	Philippine	Authors; Publishers	Local language writing To increase writing in local languages. This should not only include translations from English or Afrikaans to the other local languages. (6)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Singapore Literary Prize	Singapore	Authors	Local language writing (6)
	NBDCS Book Award	Singapore	Authors; Publishers.	Local language writing (6)
	First Time Writers & Illustrators Publishing Initiative	Singapore	Authors; Illustrators; Publishers	(6)
	NABUTO Literary Award	Uganda	Authors	(6)
READING PROMOTION The promotion of reading and book reading specifically to all sectors of the society.	Books Alive Campaign	Australia	All stakeholders	Reading campaigns To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)
	Celebration of World Book Day etc.	Greece	All stakeholders	
	Reading Relay Programme	Greece	Readers (primary schools)	
	Readers Club Movement	India	Readers (schools)	

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	National Book Trust Book Club	India	Readers	
	Reading Tents	Kenya	Readers	
	Booklatan sa Bayan (Open a book)	Philippines	Authors; Publishers; Booksellers; Government; Associations	
	Book Development Month	Philippines	All	
	Get Caught Reading Campaign	Philippines	Readers	Reading campaigns To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)
	International Storytelling Festival	Singapore	All	
	Reading Tents	Tanzania	All	
	Reading Tents	Uganda	All	
READING CAMPAIGNS A dedicated national campaign to promote book reading and showcase local books.	Books Alive Campaign	Australia	All	Reading campaigns To develop and implement a national, coherent campaign that promotes reading to all segments of the population. (16)

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's
				DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
	Get Caught Reading Campaign	Philippines	All	Reading campaigns (16)
FORMATION OF INDUSTRY BODIES Support to organisations to establish and maintain associations within the value chain.	Formation of industry bodies	Philippines	Associations	Writers' Associations To establish and strengthen writers' associations for all genres or create a single national writers' organisation in order to realise greater negotiating power for writers with regard to copyright, contract, etc. (6)
	Formation of industry bodies	Singapore	Associations	Writers' Associations (6)
LIBRARY DEVELOPMENT Support and incentives to develop library infrastructure.	Grants to primary school libraries	Australia	Libraries	School libraries To establish a network of operational school libraries in Section 20 and Section 21 schools. (14)
	Coordination & support of libraries	Greece	Libraries	Responsibility for libraries To achieve effective uniformity in the shared responsibility of libraries across the provincial and local authorities. (14)
	Training in Library Administration	Philippines	Libraries	Training To achieve sufficient diversity at all levels of

3. ANALYSIS AND SUMMARY OF INTERVENTIONS

Table 8: Interventions across countries

PRIORITY	INTERVENTION (HOW)	COUNTRY	SUB SECTOR (WHO)	SABDC's DRAFT NATIONAL BOOK POLICY PRIORITY (WHAT)
				employment and ongoing skills development. (14)

4. BEST PRACTICE GUIDELINES

This section of the report aims to identify guidelines for the successful implementation of book development. Macro as well as micro level guidelines are identified. The macro level guidelines refer to the environment required for successful implementation and are primarily dependent on the countries government and its priorities.

The micro level guidelines refer to the interaction and relationship between the state, the private sector and civil society in growing and developing the book sector.

The guideline follows and flows from the analysis made in the previous section.

4.1.1. Macro Level

Best practice guideline 1: Government should take the lead in all book development programmes.

Without adequate Government support (financially and legislatively) it is extremely difficult to grow the industry. In countries where government has enacted policy and provided financial backing such as the Canada, Greece and the Philippines, growth has been recorded.

Political will underpins government support. India, the third largest producer of English books in the world, received a major boost by their First Prime Minister Nehru, who advocated for the importance of the book post British rule and subsequently started the National Book Trust in 1957, shortly after they gained independence.

Government support and legislation creates the longevity required for sustained book development.

Funding for book development should be part of the responsible ministry/department's annual and medium term budgets.

The Department of Education should also be involved in book development as it is a key consumer of books. Policies within education had positive effects on long-term book development as can be seen in Uganda, Philippines, Kenya, and Nigeria etc.

Best practice guideline 2: National policy and/or plans are required to address the diverse challenges faced by the book sector.

UNESCO advocates for National Book Policies. These policies are designed to address diverse challenges across the value chain. The policies and plans allow for very specific interventions over a long period to create the environment required for growth.

The policy should be informed by all stakeholders. In countries that have these policies or plans in place, growth has been recorded. These policies/plans should address training gaps, infrastructural development, ensure access to financial support, devise strategies to attract funding etc. The policy needs to be revised on a continuous basis.

Best practice guideline 3: Book development is a long-term intervention.

India started their book development process in 1957. Singapore started in 1969 and Canada in 1979. All these programmes are still being implemented.

Greece and the Philippines started in the 1990's. This demonstrates that there are no quick fix solutions to grow and develop the book sector.

Best practice guideline 4: Proper legislation, informed by supply chain members, should be enacted and continually revised.

The backing of appropriate legislation is extremely important. Australia has a number of policies in place to grow the book industry for example the Public Lending Rights Scheme and Educational Lending Rights Scheme.

Canada's Foreign Investment Policy serves the purpose of growing indigenous, Canadian owned and -controlled enterprises. In the Philippines the book bodies have been able to get legislation passed to retain VAT exemption on books through the Expanded Value Added tax law.

The Decentralisation of Instruction Material Project (DIMP) saw the flourishing of booksellers in Uganda.

Best practice guideline 5: Bodies earmarked to develop the book sector should be capacitated to do so. These organisations should have the appropriate funding and executing powers to operate sufficiently.

Funding determines a book council's longevity and effectiveness. Most African countries' book councils don't survive due to lack of financial support. These councils are generally donor funded.

Canada, India and Singapore have long standing book development programmes, all of them in existence more than 20 years. The governments in these countries continue to fund book development. The legislative powers granted to these bodies add to the success of the interventions.

Best practice guideline 6: Regional cooperation is an important element to book development as it provides opportunities for synergies across borders.

Regional cooperation provides opportunity for trade across borders within a region. Synergies, particularly in indigenous language, can be exploited. Regional cooperation furthermore allows for the strengthening of the individual book economies while developing a region as well. This is particularly important for Africa as it strives to overcome its socio-economic challenges.

In Africa, Kenya, Uganda and Tanzania have this cooperation through the East African Book Development Association. These countries collectively lobby their respective government on book practices, such as the privatisation of educational publishing, which had a marked effect on increasing publishers and booksellers.

In Greece, EKEBI has a specific programme for cooperation in Europe and promoting the European Book Sector.

4.1.2. Micro Level

Best practice guideline 7: Financial Schemes are required to encourage indigenous publishing, develop local infrastructure and address challenges in the local market.

Financial schemes are particularly geared towards developing local enterprises to establish sound infrastructure for a sustainable and viable book sector. In Canada, the various programmes of the BPIDP are geared towards locally owned publishers and booksellers to enable them to compete with well established foreign enterprises.

Book development is firmly located within and in harmony with national development. Through financial schemes, governments effectively influence the publishing outputs to reflect the national agenda.

In India the government provides funding to authors and publishers of textbooks and reference materials in subject areas where a need has been identified. In the Philippines authors who qualify for the NBDB quality seal award pay no royalty tax.

Grecian authors are eligible for residential grants and translators receive these grants for translations of contemporary Greek literature.

In Australia Public Lending Rights and Education Lending Rights increase income to authors and publishers.

Best practice guideline 8: Enact policy and develop schemes whereby book prices can be reduced.

The Philippines have enacted the Expanded Value Added tax law to retain the VAT exemption on books. In Australia the Printing Industry Competitiveness Scheme offered a 4% rebate as imported books attract no import duties whilst paper and raw material still attract import duty.

The Philippines offer rebates on raw material imports used in the production of books.

Best practice guideline 9: The development and promotion of children's literature.

There is consensus that the reading habit should be culminated at an early age. This does not just require the promotion of reading, but also the creation of local and relevant children's literature.

India's National Book Trust established a National Centre for Children's Literature to develop materials for children and also to build capacity amongst authors, illustrators, publishers and teachers. India also has a dedicated book fair known as Kolkata.

Greece implemented its first Children's and Young Adult's Book Fair in 2008.

Children's Reading Tents form part of the National Book Week in Kenya, Uganda and Tanzania.

Best practice guideline 10: Capacity building of professionals across the book value chain is undertaken.

In all the countries, the book development organisations present training workshops and seminars to the stakeholders across the book chain.

Some countries, like Canada, have dedicated programmes and a budget for professional development, ensuring that it is a sustained, long-term activity.

The President's Social Fund in the Philippines made funds available for the development of authors. This also signals the level of commitment from the highest office in the country.

Best practice guideline 11: Creators of content should receive support to encourage indigenous publishing.

Writing development is an important part of book development and is widely implemented across the countries.

A number of grant programmes form part of the incentives offered by the book development programmes. Development of authors is one of the most prevalent practices across all the countries.

In Australia for example, Public Lending Rights and Education Lending Rights increase the income of authors and publishers.

In India, there are book schemes for publication and purchases.

The Philippines have Writers Seminars and Workshops paid for from the President's Social Fund.

Best practice guideline 12: Indigenous language to be developed through translation initiatives, infrastructural support, authorship development, financial assistance and research projects.

India employs the most comprehensive list of activities to develop indigenous languages. Centres where postgraduate study of certain languages can take place have been established and financial assistance to sustain these institutions has been provided. Financial assistance is

provided to scholars for research and original writing in certain languages and funding earmarked for surveys of official languages have been but in place.

Best practice guideline 13: Awards/prizes can develop indigenous language publishing and grow the general book sector

Kenya, India, Singapore and Australia have book awards in place within their book development structures. These rewards are often linked to the production of books of non-fiction, poetry and children's books in indigenous languages.

Best practice guideline 14: Research across the value chain is undertaken on a regular basis and is key component of book development.

The importance of research in the book sector is superbly demonstrated by Australia, where the Australian Bureau of Statistics (equivalent of Stats SA in South Africa) collects data on the book sector annually. They also release a quarterly trends survey, benchmarking reports and have a dedicated Centre for Culture and Recreation Statistics within the Australian Bureau of Statistics.

EKEBI in Greece has a dedicated Book Monitoring Unit responsible for research on the book sector. Grecian research extends into their regional cooperation programmes with the rest of Europe's book development activities.

Canada has dedicated funds for their Industry Research Programme within the BPIDP.

Best practice guideline 15: The advancement of technology leads to a more productive book chain

The Supply-Chain Initiative in Canada is concerned with publishers reaching maximum productivity. An e-commerce environment is explored and exploited to create greater supply chain efficiencies.

Australia had a Print Industry Competitive Scheme aiming to use technology to improve competitiveness.

In Greece, EKEBI assisted in the implementation of business-to-business and e-commerce technology to improve efficiencies.

Best practice guideline 16: The promotion of books and a reading culture is central to book development. .

Australia and the Philippines have dedicated reading campaigns implemented on a national scale.

In Kenya, Uganda and Tanzania, children's reading tents and reading tents in general are used to promote the reading habit during National Book Week.

In India, 2114 book clubs were established and the Pustak Parikrama project makes books available at people's doorsteps through their mobile exhibitions.

In Singapore the profile of Asian authors are raised through the ImaginAsia project.

Best practice guideline 17: Local and International promotional activities are an important book marketing tool.

Almost all of the countries studied in this report organize local book festivals/fairs and participate in international book fairs as part of their book development activities. These annual events are important to create energy around the book and promote the local book to overseas markets.

Best practice guideline 18: Part of growing local publishing includes creating and expanding export markets for books.

International markets need to be stimulated in the same way as local markets. Dedicated export programmes assist the promotion of local books to foreign markets.

Canada's Export Marketing Assistance Programme (EMAP) assists Canadian publishers to develop and strengthen their sales to foreign markets and to expand foreign markets.

In the Philippines, the National Book Development Board (NBDB) developed the Book Exporters Association to promote local books abroad in 1999 and Australia implements a Literature International Market Development Programme.

Best practice guideline 19: Development and support of libraries to reach underserved, marginalised and rural markets.

Australia has a Grant to School Libraries Programme for the purchase of books for school libraries.

EKEBI in Greece offers coordination and support to libraries to deal with fragmentation in the library sector. Children are also assisted to learn how to use school libraries.

Uganda, the Philippines and Greece have initiatives focused on reaching libraries in rural areas.

5. BOOK DEVELOPMENT IN SOUTH AFRICA

This section briefly turns to book development in South Africa and compares it to some of the best practice guidelines.

The earliest attempt at book development in South Africa dates back to 1994 with the establishment of the Book Development Council of South Africa (BDCSA). Like other book development initiatives in Africa, the Council faced a funding shortage and ceased to exist in 1997.

The Print Industries Cluster Council (PICC) was constituted in 2001 by industry stakeholders as the book industry continued to face enormous challenges. The PICC later took on an expanded role (beyond its members) and in 2007 the South African Book Development Council (SABDC) was formed in consultation with the National Department of Arts and Culture (DAC). The SABDC is the representative book development council in South Africa. The National Department funded both the SABDC and the PICC.

The work of the council is briefly listed below.

- **National Body for the book sector** with committed book sector experts
- **Industry Consultative Workshop 2005** with all key stakeholders to adopt the Draft National Book Policy
- **Draft National Book Policy 2005** submitted as an adopted book sector strategy
- **Industry data for 2002, 2003, 2004, 2005, 2006** from publishers, and 2006 for booksellers
- **Intellectual Property Rights Report 2004** in the Book Industry Sector
- **Interactive Reading Promotion Database** detailing activities in the country
- **Qualitative Reading Research Report** that details the “street speak” of reading across demographics, with 20 focus groups
- **Market Analysis through the National Reading Survey** on the reading activity of adult South Africa to inform all activities across the book value chain.
- **Costing Analysis through the Cost of Books Study** outlining the factors contributing to the cost of books and recommendations across the value chain
- **Library Research Report** detailing governance structures and budgets for public libraries
- **R1,17 million grants to reading** promotion projects.

The council has been operating on an average budget of approximately R1 million over 6 years. The council however continues to face funding challenges.

How does South Africa compare with the best practice guidelines?

Only a few best practice guidelines are explored below as a simple demonstration of what is required in South Africa to create an enabling environment for book development.

South Africa is more or less on par with the other African countries. One of the main differences is that in South Africa, the Department of Arts and Culture has made an effort to sustain the book development activities. This is true for Nigeria as well where their government established a dedicated Book Development Centre. The other countries have very little support from their government.

Another major difference is that the book development activities of the other countries have led to changes in legislation and/or policy which have seen the growth of the industry such as the *Decentralisation of Instructional Materials Procurement* in Uganda which is applicable to textbook procurement. Although the Department of Education is a major book consumer in South Africa, no policy to contribute to growth and development in the sector has been implemented.

South Africa however fairs poorly when compared to the other countries. India started implementing book development soon after they gained independence. The importance of book development was led from the highest political office at the time, i.e. Prime Minister Nehru. The activities of the National Book Trust continue and India has become a world leader in publishing. In the Philippines, the National Book Development Board is accountable to the President of the country and receives funds from the Presidency. In Greece book development is located within the Ministry of Culture.

Many of the countries also have dedicated programmes for book development, i.e. the Book Industry Assistance Plan in Australia, the Book Publishing Industry Development Programme in Canada and the Book Industry Development Act in the Philippines. South Africa has a Draft National Book Policy 2005 that still needs to be adopted by government. This report is a next step into formulating and promoting a dedicated plan for the country.

The governments of the respective countries also have dedicated budgets for their book development activities. The Australian government committed \$240 million (R1,5 billion) to the Book Industry Assistance Plan over four years. Canada's BPIDP on average receives \$38 million (R306 million) per year. The Filipino government commits approximately PHP 21,703 Million (R3,9 million) per annum.

Many of the countries have general and specific legislation and/or policies applicable to their book sector with the aim of stimulating and/or increasing growth. The legislation includes Public and Educational Lending Rights in Australia, the Investment Canada Act, the Retail Maintenance Law in Greece and Import Policy in India. South Africa has no legislation or policy of this nature.

Book development is underpinned by subsidies and financial schemes to both the private sector and cultural organisations. No such subsidies and schemes exist in South Africa.

South Africa has a very good research programme and the data collection activities are on par with or better than the countries included in the study.

Compared to the best practice guidelines in the previous sector, South Africa has a long way to go to make book development part of national development.

6. CONCLUSION

Approaches to book development differ across countries. There is also a significant difference in sophistication in the policies and plans used to implement book development. The level of commitment from political principles and government also vary significantly across the countries. Some countries have or had the support from the highest political office (Philippines; India) while others are unable to secure funding from their government (Kenya, Uganda).

Where adequate government support, both legislatively and financially, has been secured, book development could be implemented in a much more holistic, integrated manner. The study also demonstrates that book development is a sustained, long-term intervention and is best implemented by a dedicated agency should government capacity not be available. Book development had early starts in India and Canada, 1957 and 1979 respectively.

Despite the differences, common activities were identified across the countries. They include the promotion of reading and local books, financial schemes, research and capacity building. Author development seems to be a standard activity across all countries, with great emphasis on stimulating new writing.

African countries do not seem to enjoy adequate support from their governments to implement book development. This might be one of the key reasons for Africa's inability to develop sustainable and commercially viable indigenous publishing industries.

Comparatively, South Africa does not fair well as an enabling environment for book development still needs to be created. Given governments desire to increase indigenous publishing, both in terms of content and language, sound intervention is urgently required.

The analysis of interventions reveals a significant coherence with the priorities identified in the Draft National Book Policy. With further inputs from the Factors Influencing the Cost of Books in South Africa and other key studies, a well-informed, multifaceted plan can be developed for South Africa.

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ANNEXURE 1

FOREIGN CURRENCY	EXCHANGE RATE	DATE SOURCED
Australian Dollar	1 AUD = 6.2949 ZAR	07-10-2008
Canadian Dollar	1 CAD = 8.2311 ZAR	08-10-2008
Indian Rupee	1 INR = 0.183 ZAR	07-10-2008
Philippine Peso	1 PHP = 0.858 ZAR	07-10-2008