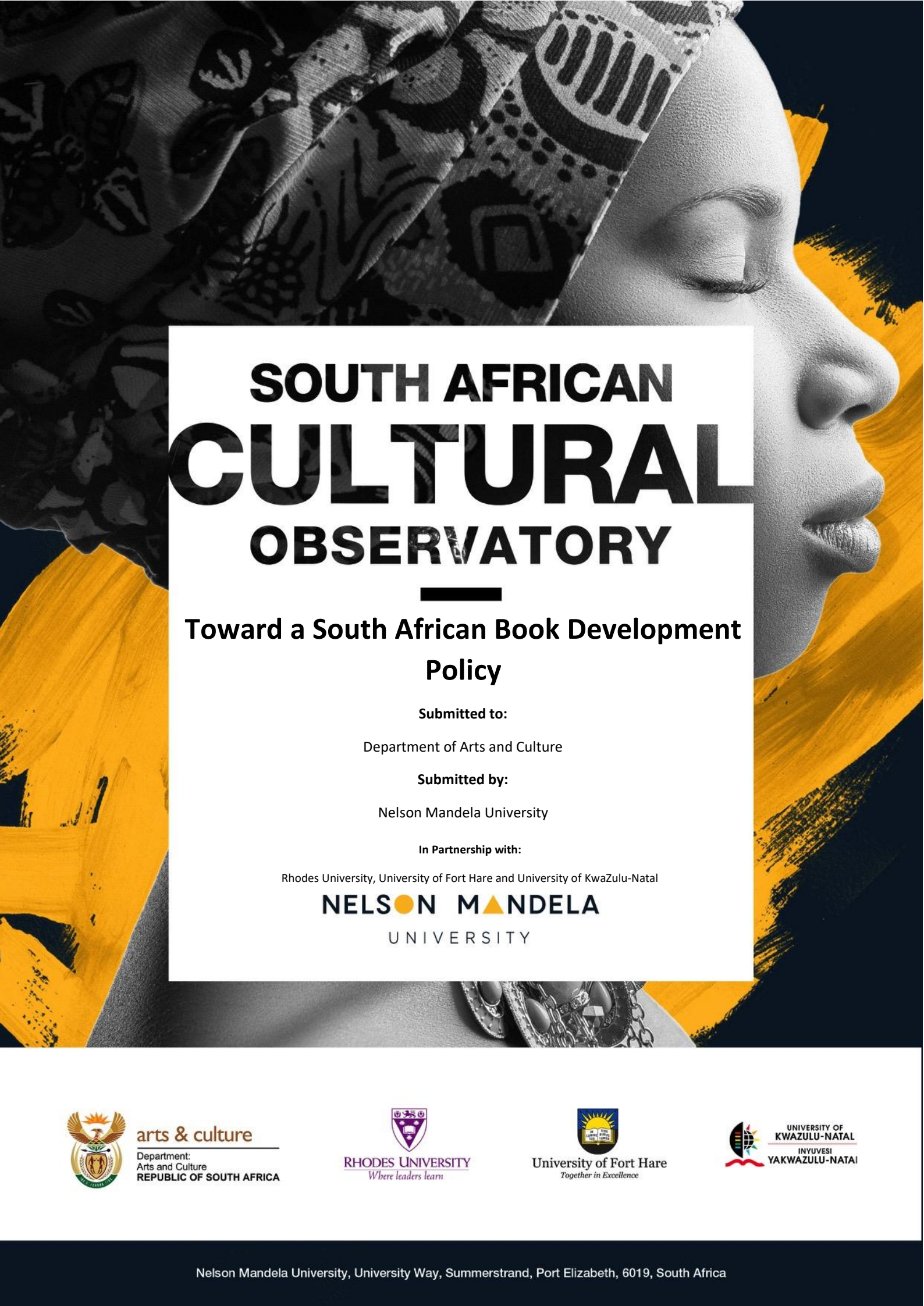




SOUTH AFRICAN CULTURAL OBSERVATORY

Toward a South African Book Development Policy

Submitted to:

Department of Arts and Culture

Submitted by:

Nelson Mandela University

In Partnership with:

Rhodes University, University of Fort Hare and University of KwaZulu-Natal

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South African Cultural Observatory
Toward a South African Book Development
Policy
September 2019

Author

Dr Andre Gouws

Submitted to the Department of Arts and Culture:



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Preface

Messages

Glossary

Indigenous African languages: In this report the term ‘Indigenous African languages’ is used to refer to African languages of the Southern Bantu language family (where ‘Bantu’ is used purely as a linguistic term).

Multilingualism: The ability to use more than two languages, and can be at individual or societal level. At the individual level it refers to the speaker’s competence to use more than two languages. At the societal level it refers to the use of more than two languages in a speech community.

1 Introduction

Literacy and reading is the lifeblood of any modern society. Reading will not only improve the level of literacy but will also contribute to personal development, socio-economic development, nation building and even social cohesion. Books remain an effective means of transmitting knowledge and recording, preserving and disseminating the cultural heritage of the South African people. It also contributes to strengthening human development and can contribute to cultural diversity. It enables participation of the various communities in present society and impacts educational progress. It is foundational to economic development. Reading is therefore an essential means for acquiring knowledge and learning. Books are essential tools and are at the root in education. Therefore, a nation’s book industry must be considered a crucial industry for national development.

Early reading is the basic foundation that determines a child’s educational progress, through school, through higher education and into the workplace.

President Cyril Ramaphosa: State of the Nation Address, June 2019 (<https://www.gov.za/speeches/2SONA2019>)

1.1 Reading, development and the Sustainable Development Goals

Reading, and therefore books not only contribute to the improved quality of life, but is essential for development and the achievement of national and international development goals. At an

-
- *We love reading.*
 - *All our citizens read, write, converse, and value ideas and thought.*
 - *We are fascinated by scientific invention and its use in the enhancement of our lives.*
 - *We live the joy of speaking many of our languages.*
 - *We know our history and that of other peoples.*
- Source: National Planning Commission (2012)*
-

international level, the Sustainable Development Goals (SDGs) are a universal call to form partnerships to end poverty, protect the planet and ensure that all people enjoy peace and prosperity. It was adopted by all United Nations Member States in 2015. Although reading is a necessary condition to achieving the 17 identified goals, it speaks directly to SDG 4: Quality education. All 17 goals are interconnected and are implemented in terms of national development priorities. In South Africa, the National Development Plan and the African Union’s

Agenda 2063 guide the implementation of the SDGs.

South Africa's diverse dynamic and rich culture heritage is one its most important resources that can generate significant social benefits for the nation. Equally important, but less well understood, is the potential for a vibrant and dynamic arts and culture sector to contribute significantly to the economy of the country. The National Development Plan (National Planning Commission 2012) state that to eliminate income poverty (i.e. to reduce the proportion of households with a monthly income below R419 per person (in 2009 prices) from 39 percent to zero; and reduce inequality (i.e. that the Gini coefficient should fall from 0.69 to 0.6), is necessary to increase the quality of education so that all children have at least two years of preschool education and all children in grade 3 can read and write. This requires having suitable schools; the cooperation of both parents and teacher; but above all books that will encourage reading and instil a love for reading.

Although reading on its own will not solve South Africa's socio-economic and environmental problems, reading is foundational to finding and implementing solutions.

1.2 Integration of the sector

The book sector is complex mechanism with different groups of actors, all play their role in bringing a book into existence. For a

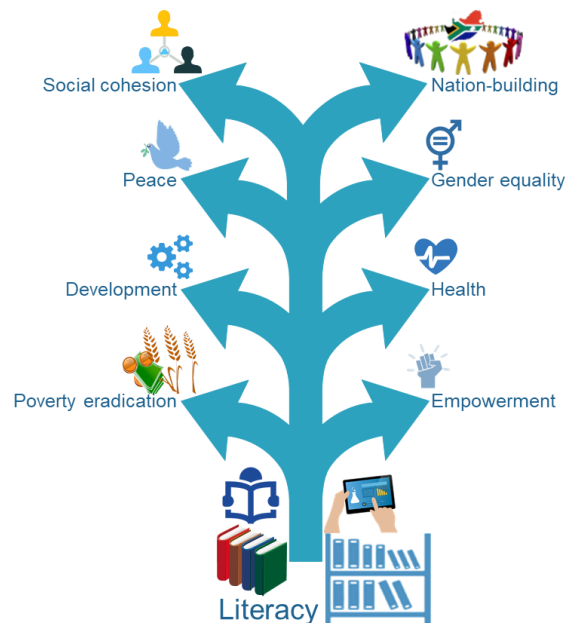
National Book Policy to achieve its objectives, the sector must work together and ensure that all strengths must be taken advantage of, and weaknesses mitigated. These players in the sector include:

- authors
- publishers
- paper manufacturers
- printers
- distributors
- booksellers
- libraries
- readers.

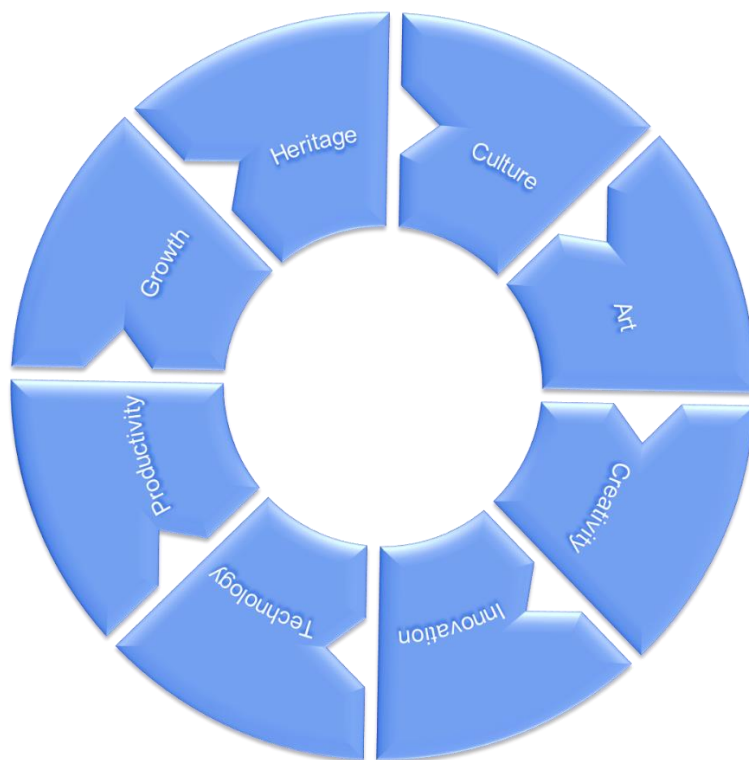
The book value chain also consists of freelancers (editors, proof-readers, designers, artists, indexers, translators). However, it often happens that functions overlap or merge into one and may be executed by the same person, firm or other entities. This book chain contributes to South Africa's socio-economic development through skills development, income generation, and jobs creation. It also contributes to a nation's heritage and culture.

1.3 Virtuous circles

All nations have certain natural endowments. These endowments have an impact on the nation's heritage and influences how people live, what they grow, and what they make. These all have an impact on the nation's culture. The term "culture" incorporates the social behaviour and norms. It also includes knowledge, beliefs, laws, customs, capabilities and habits of the individuals in these

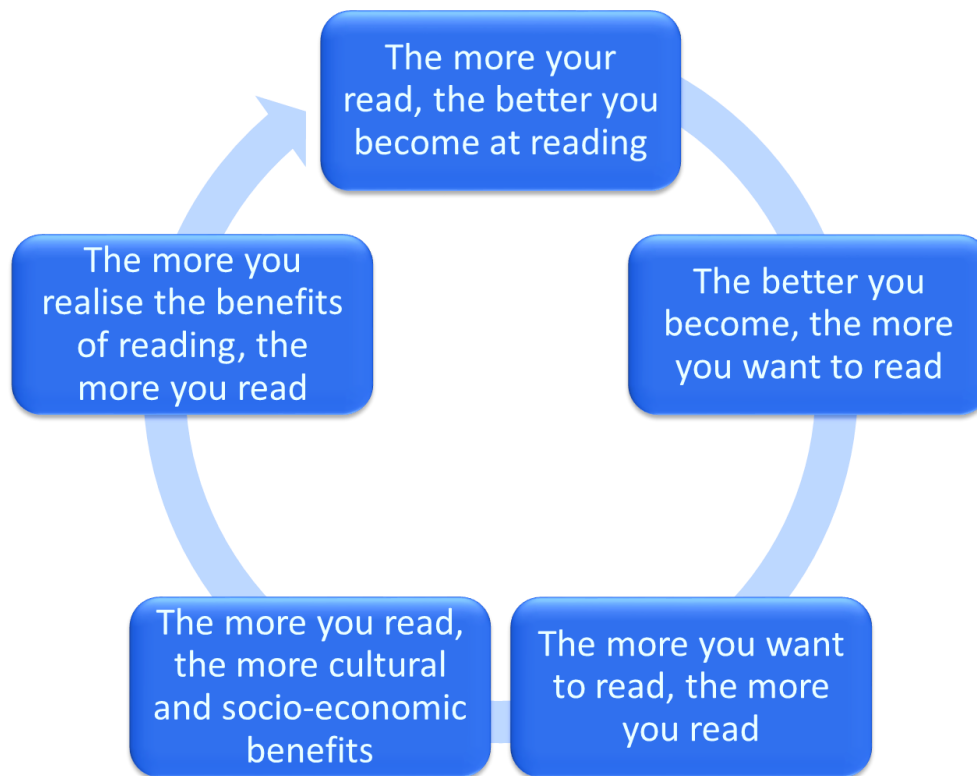


groups. As can be seen in the virtuous circle below a nation's culture influences its art. Art is a foundation of creativity. Innovation is dependent on society's creativity. The more innovative society, the more technology will be produced, other means of production explored, and other innovative means of doing business will be undertaken. These together contribute to improved productivity (labour, capital and total productivity) of the society. As a society becomes more productive, the economy is bound to grow. This will provide more taxes to government as well as greater discretionary income for households. With these added resources, the natural endowments can be improved and the virtuous cycle will continue.



All through history wealthier societies are known for the art that they produce. This includes fine arts but also includes literature. Although in ancient societies woman and poor people were often illiterate, the literature that was produced help shape the thinking for generations to come. It also helped shape the thinking of other nations who read the literature and adopted their art.

Reading has therefore not only been the result of wealth but also the cause of wealth. Successful nations have always placed their premium on teaching their children to read.



It is important therefore that a nation reads. This reading is inculcated in children from a very young age. In South Africa, this reading culture has not been developed. Very few parents or guardians read to their children. In some cases, especially in the past, parents themselves weren't able to read. However, today a far more fundamental problem is at play. There is very little literature in indigenous languages available for children and their parents to read. The stories that are told are not always relevant or suitable. The goal should therefore be that more South African stories, in all South African languages, written by South African authors are read by South Africans. There is a wealth of untapped stories that can and should be told. The stories need to be captured in literature so that they can be passed on to future generations.

Alexander (2013) points out that language does not acquire value automatically. Unless African languages are given market value and are used in production, exchange and distribution processes, policy change cannot guarantee their use. The dominance and hegemony of English will remain. Policy interventions are necessary, and education plays a critical role. A national development plan in which reform of education and economic development planning must be integrated. (Alexander 2013:108)

The goal of the South African Book Policy should be fourfold:

1. More South African writers telling South African stories in South African languages;
2. More South African book published and printed in South Africa;
3. More books available to all South Africans in urban, periurban, and rural areas; and
4. The reading culture across in tyre South African society including reading for leisure and understanding.

To achieve this goal, it is important that a number of stakeholders are involved. Writers, especially writers of underrepresented literature, must be encouraged to write more South African stories.

Parents, teachers, booksellers and libraries must encourage a culture of reading in South Africa. The publishing industry in South Africa play major role. The following section looks at the history and the state of publishing in South Africa.

2 The state of publishing in South Africa

Publishing is the dissemination of literature, music, or information. It is the activity of making information available to the general public.

The publisher fulfils three basic functions:

- decides what books to publish
- assumes the financial risks associated the publication
- co-ordinates the work of all those who contribute to the production of a book

The contributors to the book include the author, translator, illustrator, printer and bookbinder. The publishers' role continues through to the books promotion and distribution.

2.1 The Definition of a book and the book value chain

As with heritage and culture, the definition of a book has changed. Today with new Information and Communication Technologies (ICT), books are now available in a wide variety of media. Therefore, before a book policy can be finalised, it is necessary to look at what a book actually is.

2.1.1 Definition of a book

The development of writing, and various other inventions such as paper and printing resulted in reading material. These include rock paintings, tablets, scrolls, and sheets of papyrus. Therefore, the earliest history of books actually predates what would conventionally be called "books".

Unfortunately, many ancient books have been lost because of the fact that scrolls and papyrus are perishable. There are however exceptions with the Dead Sea or Qumran Caves Scrolls. These are ancient Jewish religious manuscripts found in the Qumran Caves in the Judean Desert. Fortunately, the desert climate protected them. This was not the case in other more humid areas of the world. Tablets, or carvings on granite or other stone, preserved some ancient literature, such as the Rosetta Stone, as well.

It was expensive and laborious work to reproduce literary works, whether in papyrus and especially those carved into stones. These had to be meticulously hand copied. Because of this, they were valuable, and usually not available to the public. However, there were libraries in larger cities across the ancient world including those at Alexandria, Athens, Constantinople, Ephesus, and Nineveh. But even these were not generally made available to the public.

Hand-bound, expensive, and elaborate books later appeared. These were also meticulously handwritten. It was not until the printing press, a mechanical device for applying pressure to an inked surface resting upon a print medium (such as paper or cloth), thereby transferring the ink, was invented that books became cheaper to produce. With the invention of the printing press by Fust, Schoffer and Gutenberg, mass printed material became widespread. (Rees 2005)

Until the Internet era, a book conventionally consists of a written or printed work consisting of pages glued or sewn together along one side and bound in covers. Although the book is still the most associated type of reading material, in reality this is changing. There are many similarities but also differences. Written information can come from virtually anywhere.

- media,
- blogs,
- books,
- journal and magazine articles, and
- web pages.

The book also became more accessible to the disabled with the advent of Braille and spoken books.

A revolution occurred with the advent of the e-book is structured like a book and is read using a portable electronic device (e-book readers) used to download and read books or magazines that are in digital form. A variety of specialised portable electronic devices can be used to download and read books or magazines that are an appropriate digital form. Unlike desktop computers, laptop computers and tablets (that also can be used read e-books), a major advantages of e-book readers is their long battery life. New technologies can give rise to “digital storytelling” (DST) in particular. This can be used to improve knowledge, skills, and performance for scholars, students and workers. DST can provide a platform from which disadvantage South Africans can progress on an equal footing, locally and internationally.

The book policy should therefore be flexible on what is considered a book. It must include traditional paper books, especially those with an International Standard Book Number (ISBN) or an International Standard Serial Number (ISSN). Publications with an International Standard Music Number (ISMN) may be considered.

E-books, Braille books and spoken books should also be included and should include an ISBN or ISSN.

In line with legislation, a book (for purposes of the book policy) must be submitted to Legal Deposit Libraries¹ and catalogued accordingly.

2.2 A brief early history of publishing in South Africa

The publishing industry in South Africa must be viewed through both economic and political lenses. Tomaselli (1997) points out that “the earliest media developments in the 1800s, access to, and participation in, the South African public sphere was limited to white hegemonic interests. This hegemony derived from colonialism which, in conjunction with mining-capital, later evolved into apartheid.”

Local printing in South Africa dates back only to the 1780s. Requests for printing presses to be imported had been denied by the Dutch East India Company. (le Roux 2012a) According to Lloyd (1914), Johan Christian Ritter edited as bringing printing to South Africa. He was appointed by the Dutch East India company as a bookbinder, but also brought a small printing press with him. It was small printing press to print handbills and advertisements. The publishing sector in South Africa has been heavily influenced by colonisation. According to le Roux (2012b) it was the Dutch East India Company that introduced print culture to South Africa. This was followed by the British colonisers. Colonial governors controlled the use of print. Commercial printing therefore remained a government monopoly.

When freedom to publish was made subject to law and removed in 1829 commercial presses began slowly to multiply in Cape Town, Later, whilst commercial printing spread to Grahamstown in 1830,

¹ These are the Adelaide Tambo Public Library; Constitutional Court Library; Msunduzi Municipal Library; National Library of South Africa [Cape Town]; National Library of South Africa [Pretoria]; Parliamentary Information Centre; and the RJR Masiea Public Library.

to Pietermaritzburg in 1844, to Port Elizabeth in 1845, and in 1850 to Durban and to Bloemfontein. (Picton 1969) The Settler's Press in the Grahamstown area were also established.

The earliest serious Dutch language newspaper De Zuid-Afrikaan founded by P.A. Brand and C.N. Neethling in 1830, published by P. van Breda. The first English newspaper, Cape Times, was published in January 1840 but closed in April of the same year. (Picton 1969)

However, publishers had to face many obstacles. They would have to present themselves to the colonial secretary and prove that they had the necessary resources and also had to enter into a surety bond. After crossing this hurdle, the costs of printing were controlled because paper had to be bought sheet by sheet from the government. In addition, payments had to be paid in advance.

With the discovery of diamonds and later gold in South Africa, mining magnets played an important role especially in the English language press. Tomaselli (1997) points out that the "concentrated ownership of the South African English press up to the late 1980s resulted from its association with the century- old mining industry. This investment sustained the ascendancy of a new class closely associated with British imperial interests."

Although the direct influence of colonisation ended in 1910, many early publishers and booksellers were European immigrants. Many were Dutch, and contributed to Afrikaner nationalist causes.

Although the communities in the colonies were hardly homogenous, the intellectual community was largely anglicised. Dutch or Afrikaans print media moved inland and was influenced by the Netherlands print culture. The oldest continuously operating publisher in South Africa was set up by Jan Carel Juta, a Dutch migrant who moved to Cape Town in the 1850s. Although he initially worked for a Dutch printing firm, he soon set up his own bookshop and publishing house. Other publishing houses include Hollandsch-Afrikaansche Uitgevers-Maatschappij (HAUM) that was established in Cape Town in 1897; De Busy (1896); and Wormser (1896) that later became Hōveker & Wormser. This was eventually sold to Johannes Lambertus Van Schaik in 1914 and known as Van Schaik.

The Government Printing Works were established in 1888 with two purposes: firstly, to meet the printing requirements of the state; but also to create employment and teach youngsters the art of printing.

After the early 1800s there was a rise of Afrikaner nationalism and a concomitant use of Afrikaans as a language, although not an official language. In 1914 Afrikaans began to be used as a medium of instruction at primary schools and in 1918 it was a university-level subject. This required teaching materials and textbooks and was an obvious boon to printers and publishers.

Indigenous language development was largely ignored. There are however a few exceptions. It is a widely acknowledged that it is primarily the Christian missionaries who pioneered the transition of indigenous African languages from oral into written form in the early 1800s. Rev, J,H, Schmelen published the first grammar and Scripture portions printed in Nama-Hottentot. (Picton 1969) Mission presses and their key role in promoting and standardising the use of African and it is difficult to overestimate the significance of Christian Mission presses for the history of printing in South Africa languages. "The first missionary printer-translators took the simple step, profound in its effects, of rendering South African languages into Roman characters so linking the African with the orthography and culture of the West." (Picton 1969) Missionaries were therefore important for the codification of the languages, they wrote descriptive grammars and dictionaries and initiated translation of texts, especially biblical texts and primers for purposes of evangelism and education.

The Department of Higher Education and Training (2015) maintains:

Literacy was exclusively for those converted, who would then enjoy the privilege to attend schools. In the early years of schooling, the language of instruction would be the mother tongue, but would shift to English after four years of schooling, with even the African languages themselves taught in English, especially in post-secondary schooling. This offered little opportunity for the development of the African languages in high function domains.

Möller (2014) stated that during the British colonial period, western companies controlled the publishing houses of Africa because of their expertise and financial backing. Very limited book production took place and books were imported. With a few exceptions, the early publishing industry and the publishing industry up until 1994 serviced colonial interests. Although, missionaries help develop some indigenous literature, very little was done to promote it as it deserved. Christian missionary presses were important in the publishing of South Africa's indigenous languages and generally sought to educate black South Africans (Mpe and Seeber 2000). This has resulted in an underrepresentation of indigenous languages that continues to the present day.

South African languages were given limited support "they held back the developments of the local publishing industry by preventing local decision-making as to what should or should not be published...with little attempt to redress the balance in favour of African needs" (Krynauw 1994). Afrikaner publishers emerged after the Anglo-Boer War and thrived after the National Party came into power. The liberation struggle brought forth a number of writer who could write from their own pain, but many of these authors were force to publish abroad. According to Tomaselli (1997) even though government supported Afrikaner publishing, English capital still constituted the dominant economic fraction. Both the Afrikaner and English publishers, while nominal supporting black authors, if at all, were suppressed. African language titles are almost absent from the trade book market.

Möller (2014) points out that:

Black authors are often unwilling to write in African languages because of the perceived lack of African language readers, and also because their work is then inaccessible to anyone outside of South Africa, and to many even in South Africa." She also points out that there are "still few translators proficient enough to translate books from the African languages into good English editions and financial constraint also plays a role in preventing multilingual publishing from becoming more successful in this country.

In addition to the challenges faced by black authors in South Africa, publishers are wary of publishing African language books because reading markets are too small and there still may be too few bookshops to adequately serve South Africa's population Möller (2014).

Möller (2014) concludes that

Authors from different races and both genders are being published in this country, but the themes of their writings have changed from resistance to reconciliation literature. Today, a greater number of publications on political disaster and crime are appearing, while books detailing South Africa's history remain popular with readers. Authors are also attempting to write 'lighter' material, such as romance, adventure and crime fiction. While there are more women writers on the scene than before, there is a paucity of black women writers. In general, though, women writers still lag behind their male counterparts in the popularity stakes.

Before looking at the current state of publishing in South Africa, the book value chain (including the definition of what a book is) needs to be described.

2.2.1 Ownweship of publishers

According to Tomaselli (1997) economic aspects play an important role media “can make to democratization on the continent”. Often the challenge is lack of material resources and an inadequate infrastructure but also the dominance of corporate capital.

2.2.2 Structure of the Publishing Sector

Le Roux et al. (2019) estimate that there are approximately 150 publishers in South Africa. Of these 127 members of the Publishers Association of South Africa. Most publishers are small or micro businesses and have less than five staff members. The industry is therefore heavily dominated by a small group of very large publishers. These publishers represent more than 80% of production and revenue.

Based on their survey, le Roux estimates that only 20% of the firms are either level I or level 2 according to the BBBEE legislation.

BBBEE level	
Level 1	10%
Level 2	10%
Level 3	20%
Level 4	5%
Level 5	5%
Level 6	-
Level 7	-
Non-compliant	50%

Table 1: BBBEE level

Source: Le Roux et al. (2019)

The majority of new additions in African languages were produced by the education sector. Le Roux points out that: “[t]he increased new digital editions in these languages are likely a result of increased focus on the development of African language digital publications in this [the education] sector. The data indicates a rise in the publication of African languages, although these are still underrepresented.”

2.3 International Comparison

The International Publishers Association (IPA) and the World Intellectual Property Organisation (WIPO) undertook a pilot survey of global publishing activity in 2016 covering three market segments:

- Retail;
- Educational; and
- Scholarly, academic and scientific.

South Africa has a tiny sector compared to international figures. This is despite the fact that South Africa has two Nobel prize-winners in literature. Unfortunately, the figures are not broken down by language. South Africa should be publishing a great deal more books given the stories it has and the number of official languages. China reported a combined total of 57.8 million published titles in

2016; followed by the UK (149.443), South Africa (136.403), France (103.534), the Russian Federation (94.436) and Turkey (93.526).

The total revenue from sales and licensing for the retail sector in 2016 (USD million) is given in the table below.

Country	Total revenue
US	15 903,6
Japan	8 361,0
Germany	5 716,5
Republic of Korea	2 823,8
UK	2 629,9
France	2 049,6
Spain	1 946,1
China	1 047,4
Russian Federation	1 023,5
Norway	207,0
Sweden	194,7
Greece*	166,1
Finland	162,4
Denmark	161,5
Turkey	157,7
Mexico*	154,0
Belgium	94,8
Serbia	93,1
Slovenia	77,0
South Africa	55,1
Colombia	52,6
Georgia*	4,7
Iceland	0,03

Table 2: Total revenue (sales and licensing) for the retail sector, 2016 (USD million)

Source: The Global Publishing Industry in 2016 (WIPO and IPA 2017)

The research found that the bulk of the total retail sector revenue is generated by print editions; with digital editions accounting for around 28% of the total in China, 24% in Colombia and around 18% each in Japan and America. The digital market only accounted for 15%.

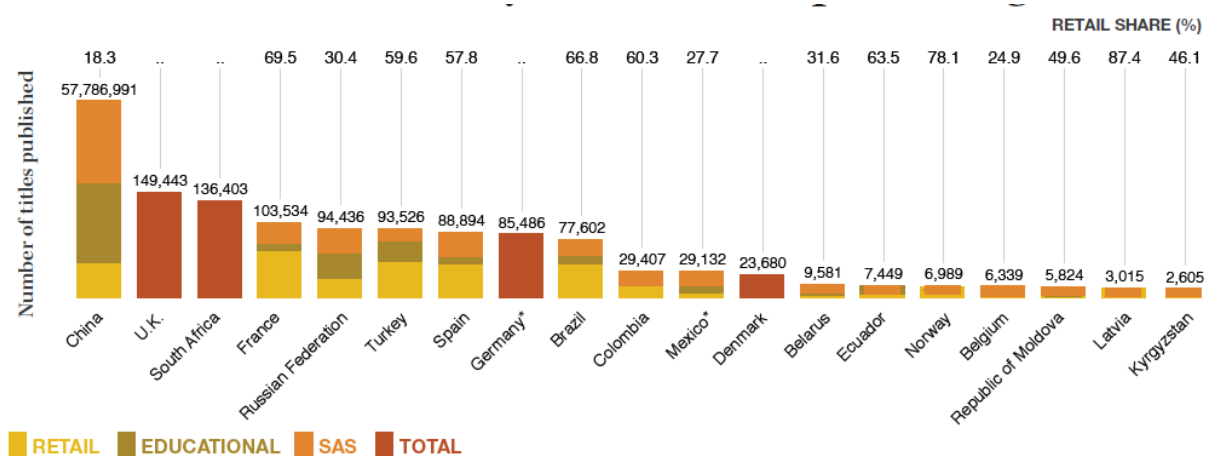


Figure 1: Total number of titles published covering retail, educational and scholarly and scientific publishing, 2016

Source: The Global Publishing Industry in 2016 (WIPO and IPA 2017)

Given the low digital share in South Africa, DAC should investigate how this share could be increased. Given the number of titles published, it seems as though digital books could be a solution to the high fixed costs in printing and the possibility of reaching rural areas in South Africa.

2.4 The publishing industry sub-sectors

The publishing industry can be divided into three sub-sectors:

1. Academic;
2. Trade; and
3. Education.

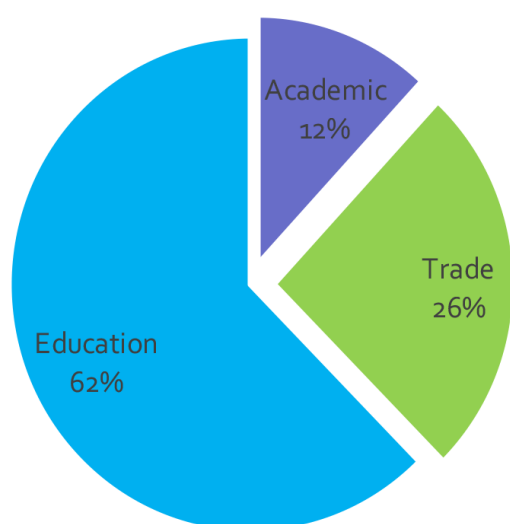


Figure 2: Publishing sectors in South Africa

Source: Le Roux et al. (2019)

2.5 Understanding the book value chain

Although the industry is rapidly changing due to new technology, the production of a book goes through a number of phases. Each of these phases can be undertaken separately or can even be undertaken by one person, i.e. a person who self publishes.

A typical value chain describes the process or activities by which economic agents (companies, organisations or individuals) add value to an article and include elements such as production, marketing, and the provision of after-sales service. The reading value chain is far more complex much follows similar principals.

Before the book reaches the reader there are a few processes that broadly include:

1. Conceptualisation, creation or writing of the book;
2. Production of the book;
3. Distribution of the book or making access to the book possible.

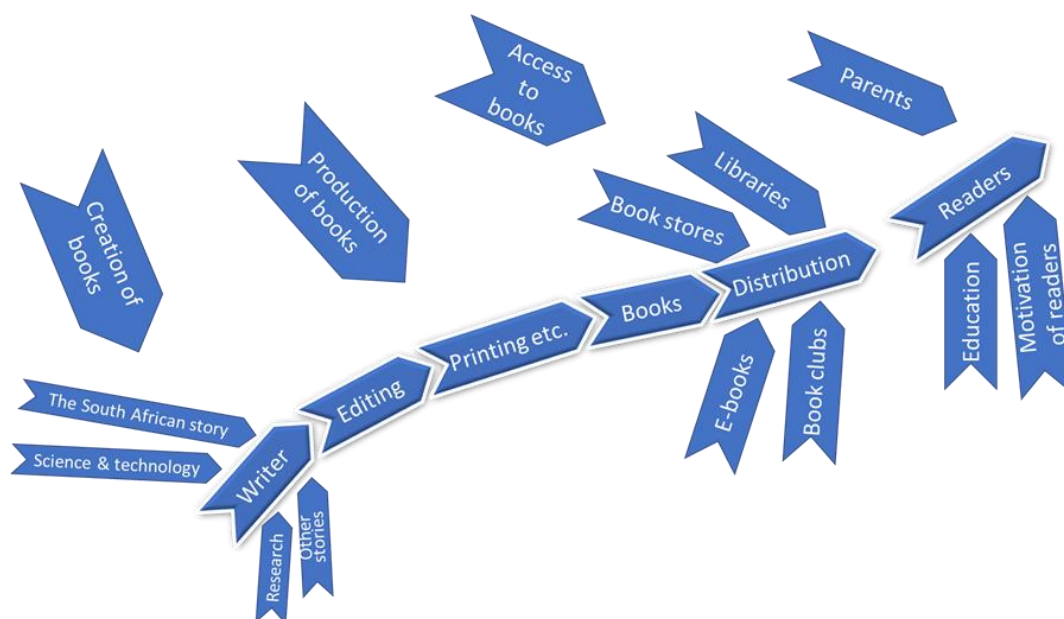


Figure 10: A simple traditional book value chain Source: Author

As can be seen, there are many influences along the value chain that affect the quality of the final product and its sustainability. If any of the elements are missing or weak the entire value chain will be weak. To sell more books you need more readers. To get more readers, there must be good material available.

However, with e-commerce, writers can avoid parts of the traditional value chain and sell directly to their readers. Similarly, brick and mortar bookstores or libraries are no longer critical for the book to reach the reader.

With the traditional value chain, there are many South African government departments that have an influence on each segment. The Department Sports, Arts and Culture would play an important role in encouraging and supporting writers and editors. The Department of Trade and Industries would focus on copyright issues and the printing industry as a sector. It would also look at books and book distribution, especially from a competition point of view. The Departments of Basic Education, Further Education and Training, and Sports Arts and Culture would play a vital role in encouraging

readers of all ages to become avid readers and consumers of South African books based on South African stories and written by South African authors.

2.6 The recent performance of the South African publishing industry

According to PwC (2018) in South Africa, the consumer and educational book publishing market includes consumer purchases of books; spending by schools, government agencies and students. Educational books include those on elementary, high school and college textbooks, postgraduate textbooks and academic textbooks². It also includes spending on books in electronic formats, also known as electronic books or e-books as well as spending by libraries and institutions for subscriptions to electronic book databases. Print sales include audio books, books on CDs and books on DVDs³.

2.6.1 Production Volumes

According to Stats SA publishing consists of :

- Publishing of books, brochures, musical books and other publications (SIC: 32410)
- Publishing of newspapers, journals and periodicals (SIC: 32420)
- Publishing of recorded media (SIC: 32430)
- Other publishing (SIC: 32490)

The publishing sector's performance in terms of production volumes has declined dramatically in the past seven years. The index (2015=100) has dropped from 185 in Oct 2012 to 64 in January 2019. Although there are seasonal highs (during October and November) that may disguise the downward trend, a 12-month moving average distinctly shows the alarming decline.

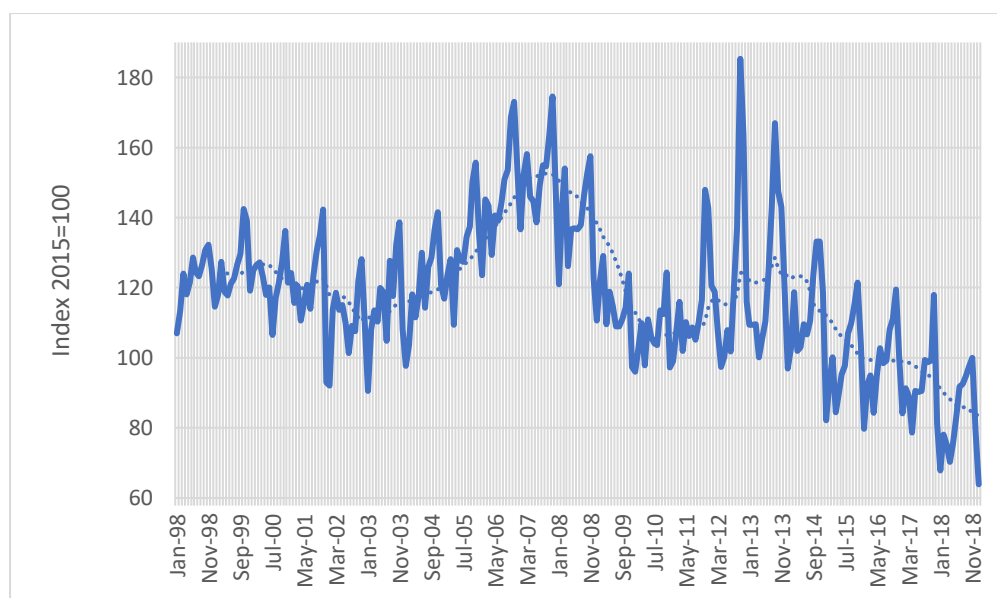


Figure 3: Publishing: Index of Physical Volume Production

² Supplemental educational spending, administrative software, or testing materials are not included.

³ In the past the Publishers' Association of South Africa (PASA) books on CDs and DVDs were combined with electronic books and included in the electronic book category. Recently PASA generated new data separating CD- and DVD books.

Source: Stats SA (2019)⁴

It would appear as though a decline in from 2007 (probably due to the Global Recession) until mid-2010 was followed by a slow recovery before the eventual decline.

2.6.2 Consumer and educational publishing market

According to the International Publishers Association (IPA) in its "Country Report: Publishing in South Africa", there are over 150 publishers in South Africa: commercial publishers, university presses, non-governmental organisations and small private firms. (The International Publishers Association 2015)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Print¹										
Consumer books	1490	1445	1375	1435	1475	1515	1560	1605	1650	1695
Educational books	2585	2850	2425	2330	2320	2350	2370	2375	2365	2345
Total print	4075	4295	3800	3765	3795	3865	3930	3980	4015	4040
Electronic books										
Consumer books[†]	1	1	1	1	2	4	6	10	14	19
Educational books	1	3	4	5	7	11	15	23	31	40
Total										
Total electronic	1	4	5	6	9	15	21	33	45	59
Total consumer	1490	1446	1376	1436	1477	1519	1566	1615	1664	1714
Total educational	2586	2853	2429	2335	2327	2361	2385	2398	2396	2385
Total	4076	4299	3805	3771	3804	3880	3951	4013	4060	4099

Table 3: Consumer and educational publishing market (R millions)

As can be seen from the table above, publishes derive more than half their revenues from the educational sector. The publishing industry is pursuing alternative revenue streams. This is largely due to fluctuating support from the DBE, a relatively small reading market, and unstable economic conditions.

2.6.3 Trade publishers

Trade publishers produce books for the general reader. The sector is characterised by large international and local imprints, as well as several small to medium specialised niche publishers. It is dominated by multinational publishers that use a variety of distributors to import the books for the South African market. Only a small portion of these imports are captured by the Publishers Association of South Africa (PASA) survey. The trade sector includes specialist publishers focusing on the religious market.

The PricewaterhouseCoopers (PwC) Entertainment and Media Outlook: 2018 to 2022 estimate a slight increase in the consumer publishing market (0,9%) by 2022. The PwC report expects that the e-book market will double its market share by 2022.

From the table below it is clear that the lion's share of revenue from fiction sales is from imported publications.

Genre of publication	2016/17 (R'000)	Column1	2017/18 (R'000)	Column2
	Locally published	Imported	Locally published	Imported
Adult fiction print	39 218	166 653	36 285	158 247

⁴ Manufacturing: Production and sales (Statistical release P3041.2) is available on the Stats SA website: www.statssa.gov.za

Genre of publication	2016/17 (R'000)	Column1	2017/18 (R'000)	Column2
	Locally published	Imported	Locally published	Imported
Adult fiction digital	16 664	753	14 435	687
Children's fiction print	26 425	115 320	33 822	113 683
Children's fiction digital	818	369	550	489

Table 4: Revenue from fiction

Source: Le Roux et al. (2019)

2.6.4 International Trade

South Africa's exports of books are fairly low. It would seem as though imports of books (in terms of nominal South African Rand) has been growing slowly until approximately 2014. Since then there has been a gradual decline in the value of books been imported. Exports show a similar pattern. The value of exports was very low until 2010. The value of exports grew moderately, averaging just over R600 per annum, a level that it continues to maintain.

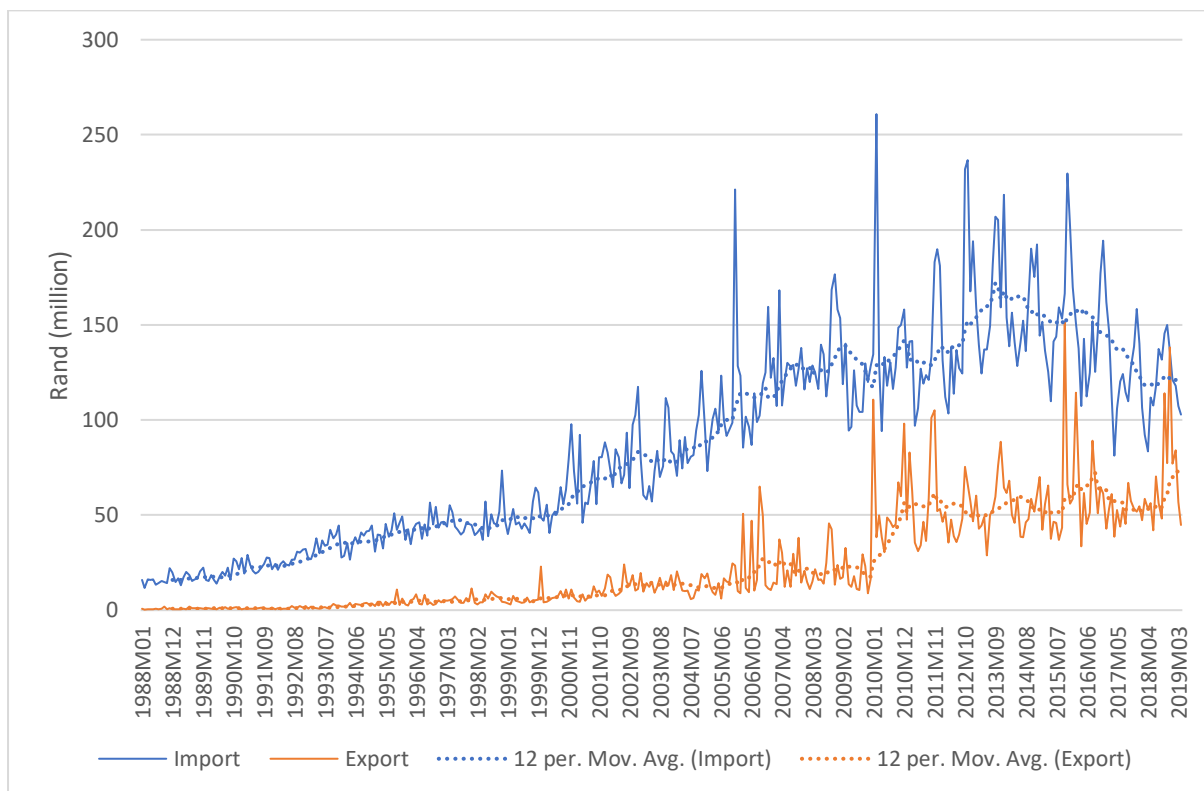


Figure 4: Exports and imports of publications

Source: Customs and Excise (2019)

The numbers in the figure above reflects only physical books and not e-books. Currently e-books are a small part of the market, but it is anticipated that they will become a more important component of international trade in the future.

2.6.5 Academic publications

Academic textbooks, journals and other scholarly work, including conference proceedings, play an important role in academic information exchange. South African universities are partially funded

according to the number of publications they produce in accredited journals, such as the Thomson Reuters indexed journals. According to Tomaselli (2018) this tends to exclude some journals. Independent titles particularly suffer from these publishing incentives. Tomaselli (2018) states that “South African university administrations are obsessed with their faculty publishing in so-called ‘accredited journals’”. Universities therefore exhibit rent-seeking behaviour to a certain extent.

Many South African journals are now published by international publishers, some who have of whom have branch offices in South Africa. There are however a few publishers of scholarly works in South Africa. A list compiled by Van Schalkwyk and Luescher (2017) is presented in the table below:

SCHOLARLY PUBLISHER	PUBLICATION TYPES				OPEN ACCESS	
	Academic books	Trade	Journals	Textbooks	Other	yes / no
Fort Hare University Press				x		No
Pretoria University Law Press	x			x		yes
UCT Press	x		x			yes
Unisa Press	x	x	x	x		No
University of KwaZulu-Natal Press	x	x	x		x	No
Wits University Press	x	x	x		x	No
African Minds	x	x				yes
HSRC Press	x	x				yes

Table 5:
Scholarly

publications in South Africa

Source: Van Schalkwyk and Luescher (2017)

The book policy must engage the Department of Higher Education and Training to ensure that more works are published in South African indigenous languages.

2.6.6 Authors: Engine or Handmaiden of publications

An important question to ask is what is the role of the author in the publishing sector? Do authors drive and influence what is published or to the publishing houses identify authors that will make profits? There are many authors, particularly unknown authors, that submit manuscripts to publishers only to find that these are rejected. There are many reasons why publishers reject manuscripts, even if they are well written. The reasons given are that the book will not sell (the profit motive is important to publishers; it is a wrong genre; there is an inventory glut; all the market is not performing particularly well. In many cases new authors simply do not know who to approach and what is required.

Once an author is successful, publishers fall over themselves to get new work from them. Authors therefore face a “catch 22” situation. They cannot get published if they don’t have a manuscript but they can’t produce a manuscript unless the publishers agree. This is even more difficult for authors writing in non-English languages. Publishers know that even if the book is relatively successful, the market to which it is selling is very small and there is little chance for the book to be profitable.

However, without authors publishers cannot produce books. Publishers therefore focus on established writers (in English) that are well known either through the writing or other reasons. A TV personality may therefore be asked to write a book because it is his or her name that will sell the book. There are also topical books that are often written by journalists that deal with newsworthy events that need more than a column or two in a newspaper to explain. Currently, with the various corruption commissions in South Africa (e.g. Zondo Commission), a number of books have been published on the subject and on all accounts are selling well. There is clearly a market failure.

Although there are renowned South African authors whose works are well-known, both in South Africa and internationally, the South African publishing industry is relatively small and has room to grow.

Well-known South African authors

Besides the ancient rock art that is found across South Africa, one of the first literary works of note and recognised internationally is Olive Schreiner's 1883 *The Story of an African Farm*. Mossman (1990) argues that "Cry, the Beloved Country" by Alan Paton is probably the most frequently taught work of South African literature in American classrooms. South Africa's literature has almost always been a commentary on the political situation at the time

Missionaries inspired black authors to produce the first texts in African languages. These were often inspired by and frequently dealt with African history, in particular the history of kings such as Chaka. Modern South African writing in the African languages tends to play at writing realistically, at providing a mirror to society, and depicts the conflicts between rural and urban settings, between traditional and modern norms, racial conflicts. Racial friction is often a theme of South African literature and is frequently depicted in South African literature of all languages. However, there are differences between how white authors depicts black characters and conversely how some black writers depict whites.

South African writers command respect in the literary circles across the globe. South Africa is the only country on the African continent to boast two Nobel Laureates for Literature:

- Nadine Gordimer, and
- JM Coetzee.

National Poet Laureate are internationally renowned poet and include:

- Mazisi Kunene (1995 - 2006,
- Keorapetse Kgositsile.

Political activist and poet Mongane Wally Serote, won the Golden Wreath Award which is given the prominent poets and activists worldwide. Serote joined world famous poets like Pablo Neruda, Ted Hughes and Seamus Heaney who have previously been honoured with the award.

The younger generation of writers continue to put South Africa on the global map. Authors like the Booker Prize nominated, Damon Galgut, the Commonwealth Writers' Prize Winner, Mandla Langa, the Noma Award winning poetess, Lebo Mashile, are some of the most celebrated authors the world over.

Deon Meyer's works are translated into over 20 languages across the world and young writers such as Niq Mhlongo, Kopano Matlwa, and Kgebetli Moele works have been translated into languages such as French, German, Spanish and Italian.

2.6.7 Publications by language

Because publishing is driven by profit motive and more people tend to read English, far the most titles published are in English. This is followed by Afrikaans. Other languages form a very small percentage of sales revenue. Olivier (1995) argues: "Of all the literatures in South Africa, Afrikaans literature has been the only one to have become a national literature in the sense that it developed a clear image

of itself as a separate entity, and that by way of institutional entrenchment through teaching, distribution, a review culture, journals, etc. it could ensure the continuation of that concept."

Language	Print (2016/17)	Digital (2016/17)	Print (2017/18)	Digital (2017/18)
English	927 178	42 829	1 380 676	50 317
Afrikaans	236 516	2 414	913 222	23 448
IsiZulu	35 155	35	124 708	516
IsiXhosa	90 207	1	32 162	1 325
Sepedi	4 528	-	37 163	247
Sesotho	3 854	-	19 807	551
Setswana	2 757	-	42 805	271
IsiNdebele	3 504	-	1 312	14
Xitsonga	659	-	16 472	81
Tshivenda	3 965	-	6 556	35
SiSwati	2 871	6 105	2 431	1
Multilingual	1 223	274	2 429	15
Other languages	1 776	45	1 601	45
Total	1 243 194	51 703	2 581 344	76 866

Table 6: Revenue from local titles by language (R'000)

Source: Le Roux et al. (2019)

Despite the fact that there are nine official African languages in South Africa, most speakers are fluent in either Afrikaans or English (and often both). There is also small market for writing in African languages. This is not only to do with the number of speakers of indigenous languages, but also the fact that many are poor or live in rural areas where the distribution of books and therefore the access to books is difficult. This has led many African writers to write in English or Afrikaans. Olivier (1995) further argues that investigation into the history of different literatures in South Africa would be a more rewarding exercise than premature attempts at establishing a tradition of "South African-ness".

Percentage of population by first language

English is the first language of only 10% of the population. IsiZulu, isiXhosa, and Afrikaans have more people that claim these languages as a first language than English. The chart below shows the percentage of population by first language that was calculated from the 2011 Census undertaken by Stats SA.

The figure below shows how the percentage of population by first language has changed from the 2001 Census to the 2011 Census. The proportion of people speaking English and Afrikaans has grown over this time. This has been to the detriment of most, but not all, of the indigenous languages.

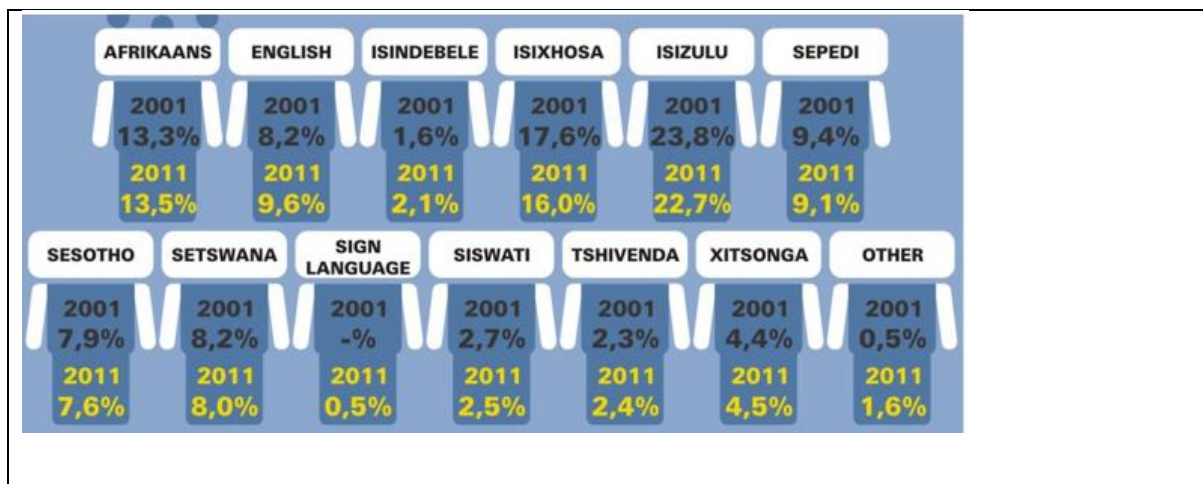


Figure 5: Percentage of population by first language

Source: Stats SA Census (2011)

IsiZulu and IsiXhosa are the languages that have the highest proportion that are used by South Africans as their first language. This is followed by Afrikaans and then English.

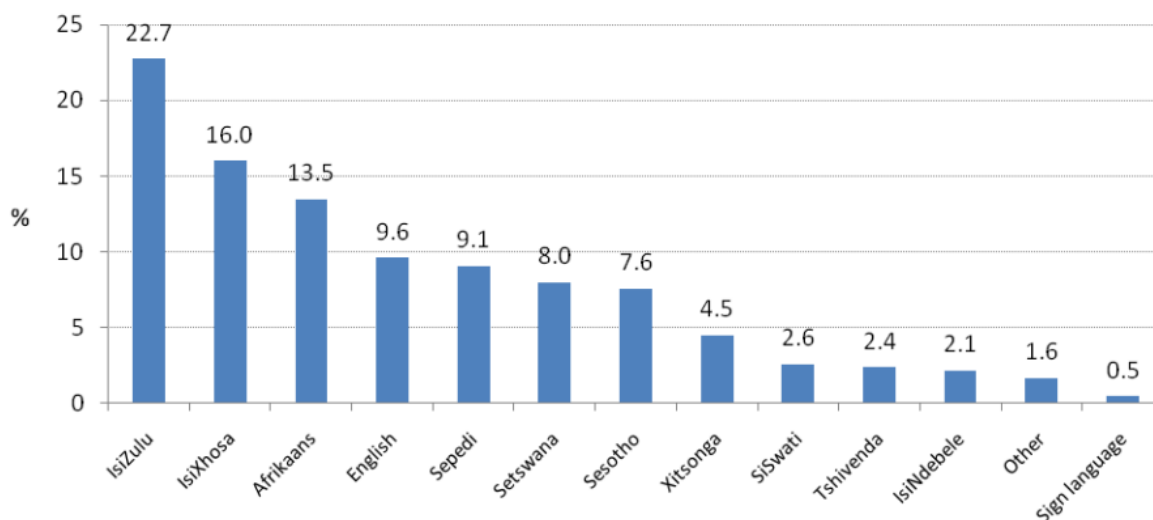


Figure 6: Percentage of people speaking each language as their first home language

Source: Stats SA (2012)

However, using data from the 2001 survey, English is the “second language” of almost 40% of South Africa’s population. This is followed by Afrikaans with 20% who consider the language their second language. This is partly a legacy of colonialism and apartheid; but English is emerging as the “lingua franca”⁵ in South Africa.

Having a lingua franca is very useful in a country that has so many languages. Internationally, English is considered the world’s lingua franca and is the language that makes communication a lot easier and understanding one another more effective.

⁵ This is the language that has been adopted as a common language between speakers whose native languages are different.

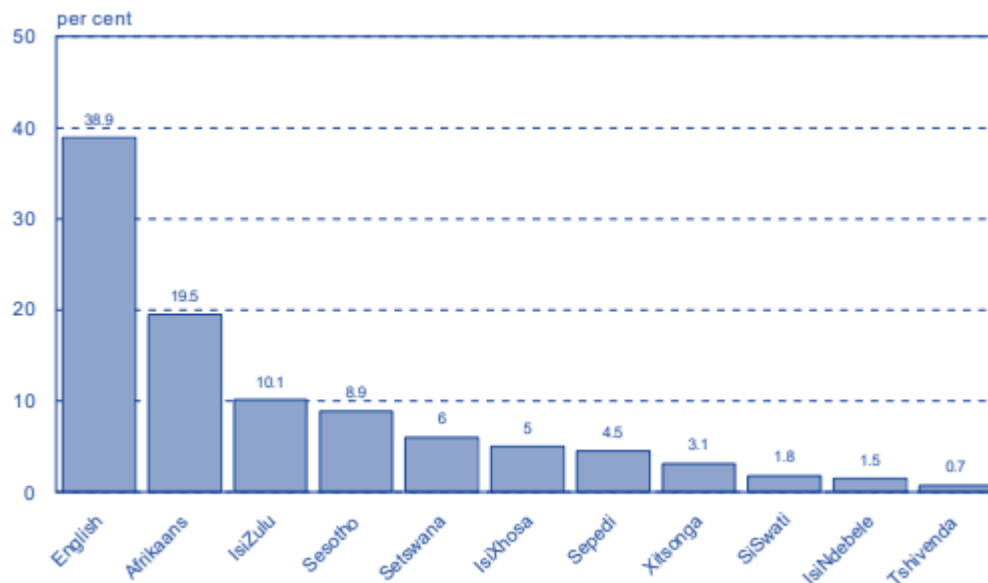


Figure 7: Among those who speak more than one language at home, percentage of people speaking each official language as their 'second home language'

Source: Simelane (2002)

However, the revenue that publishes derive from different language publications is not representative of the proportion of people that have particularly indigenous languages as their first language.

As can be seen from the graph below, just under 90% of revenue is derived from English (53.5%) and Afrikaans (35%) publications. This is followed by IsiZulu (4.8%) and IsiXhosa (1.3%).

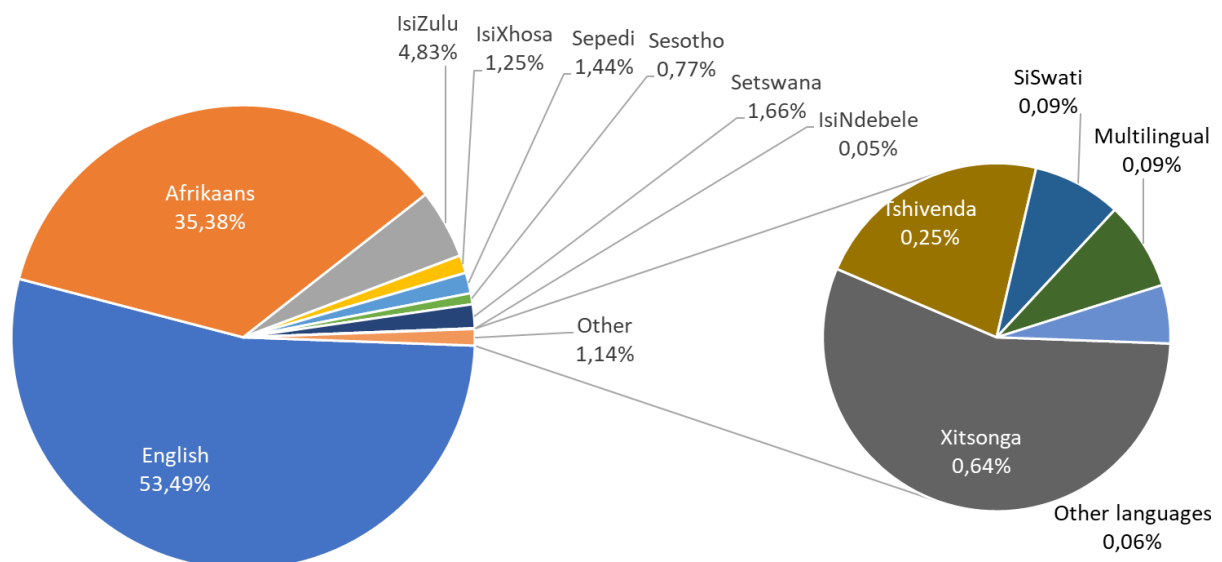


Figure 8: Revenue from local title by language (Education sector)

Source: Le Roux et al. (2019)

Alexander (2013) points out the importance of South Africa's children learning to read, write, and think in their own mother tongue but importantly also understanding the need for mastery in an

international language. Alexander and Busch (2007) also advocate promoting what they call low-status and non-dominant languages in education. They also highlights the importance of:

- language awareness,
- stimulating and encouraging a reading culture in low-status languages, and
- developing criteria for teaching and learning materials that respect linguistic diversity and promote multilingualism.

The Department of Higher Education and Training (2015) highlights the value of languages and especially South Africa's indigenous languages:

- **The socio-cultural value:** language has value as an expression of identity, culture and heritage of its speakers.
- **The cognitive value:** highlights the value of language to producers and consumers of knowledge, especially in the learning process.
- **The economic value:** demonstrates the value to workers in participating in production in the labour market. Language that has a direct impact on human development, and consequently, social transformation (Alexander 2013).Language make doing business easier and more efficient.

Given the constitutional imperatives, other legislation and government policy, the publishing of books in languages other than English or Afrikaans is unacceptably low. The National Arts Council, The Department of Basic Education, Lotto, and other institution providing financial assistance or making decisions on purchasing books should make grants available to suitable writers.

Libraries can also make an important contribution to the development of authors. If all libraries agreed to purchase a minimum number of books to cover part of the fixed costs of publishing the books, more non-English titles will appear.

These writers' publications should be featured during the National Book Week.

2.6.8 Translators

With having 11 official languages (and a number of unofficial languages that are widely spoken) in South Africa, translation is a necessity. Simply put translators render one language into another language. This is done by retaining, as far as is possible, the content of the message and the formal features and functional roles of the original text. It is difficult enough to translate from one language to another because of the use of idioms etc, but can be almost impossible when translating literature and especially poetry with its specific rhyme and rhythm to another language.

Nevertheless, South Africa has many stories to tell. Many of the stories are in indigenous languages that make it difficult for the majority of the population to read. Unless the stories are firstly captured either in written form or some other means of recording them, the stories will be lost forever. Secondly, the stories can contribute to nation building and social adhesion and may have to be translated in order for the stories to reach a wider audience.

Many translators, if not the majority of translators, are involved in legal work either in the courts or preparing legislation and regulations where they are required in languages other than English. Nevertheless, translators can play a very important role in preserving and disseminating South Africa's culture.

2.6.9 Editors

Editors read content submissions, editing technical aspects such as spelling, punctuation and grammar. They also look at the style and can adapted for the intended audience. In addition, editors

must also verify facts and determine if a manuscript or article is ready for publication, then approve final versions.

There are different types of editors, including:

- copy editors
- book editors
- managing editors.

However, they all have a few skills in common:

- Good editors have strong writing skills, and have experience as writers or reporters
- Editors need good judgment to decide what stories should run, and
- they also need sound leadership abilities to guide reporters, writers and junior editors in their work.

Although many editors work for publishers, there are also a number of freelance editors. Freelance editors have traditionally been specialists in a particular field. However, with more authors self publishing, there is a need for more freelance editors to support these endeavours.

2.6.10 Printers

in traditional publications, printers played a vital role. However now with electronic media and e-books, printers are not indispensable. Nevertheless, layout artists and web designers are necessary to ensure that the look and feel of the publication, whether on paper or electronically, are suitable for the intended audience.

2.7 Readers

2.7.1 Current State of Reading

The SABDC (2016) found that reading is the fifth highest leisure activity (43%) done in the past month by SA adults.

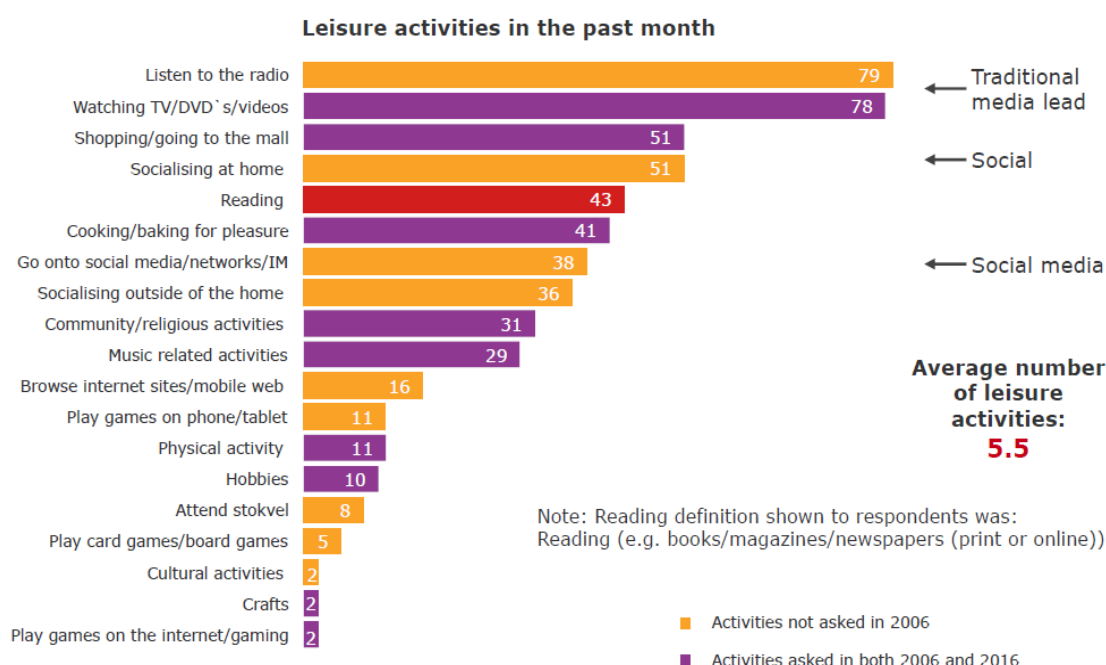


Figure 9: Leisure activities in the past month

Source: The SABDC (2016)

South Africa is one of the few countries in Africa that conduct Time Use Surveys (TUS). The first South African Time Use Survey was conducted in 2000 and the second in 2010⁶.

Code Description	Male		Female		Both sexes	
	Thousand	Minutes	Thousand	Minutes	Thousand	Minutes
910 Reading						
2000	1 191	65	1 094	78	2 285	71
2010	1 586	68	1 408	70	2 994	69

Table 7: Number of respondents who engaged in a particular activity and mean minutes per day spent by them on that activity by sex (10 years and above)

However, the SABDC (2016) report that only 14% of the South African population are active book readers, and a mere 5% of parents read to their children. The NBW is an important initiative in encouraging the nation to value reading as a fun and pleasurable activity and to showcase how reading can easily be incorporated into one's daily lifestyle (DAC⁷).

Reading for pleasure

⁶ <http://www.statssa.gov.za/publications/Report-02-02-00/Report-02-02-002010.pdf#page=117>

⁷ <http://www.dac.gov.za/content/national-book-week-2013>

Reading for information

Literacy is conventionally defined merely as the ability to read and write. The definition of literacy has evolved to a more inclusive and broader perspective influenced,

the word literacy itself has come to mean competence, knowledge and skills.

interaction of reader and text.

Levels of literacy, as carried out by UNESCO Institute of Statistics (UIS) and the World Bank Edstart, are conventionally arrived at by simply counting the number of 'yes' or 'no' answers to the question "Can you read and write?" in a household survey or census. The statistics are no doubt useful as a point of reference for measuring global literacy progress but are inadequate as a means of measuring the range of skills associated with a broader conception of literacy.⁸

Reading Culture: Role of government

During his State of the Nation Address on 20 June 2019 President Ramaphosa (Ramaphosa 2019) identified five fundamental goals for South African for the next decade. Included among the five fundamental goals is "Our schools will have better educational outcomes and every 10-year-old will be able to read for meaning." He further said:

"If we are to ensure that within the next decade, every 10-year-old will be able to read for meaning, we will need to mobilise the entire nation behind a massive reading campaign.

Early reading is the basic foundation that determines a child's educational progress, through school, through higher education and into the workplace.

All other interventions – from the work being done to improve the quality of basic education to the provision of free higher education for the poor, from our investment in Technical and Vocational Education Training colleges to the expansion of workplace learning – will not produce the results we need unless we first ensure that children can read.

It is through initiatives like the National Reading Coalition that we will be able to coordinate this national effort."

Reading is therefore a national priority with the National Reading Coalition identified as a key partner.

Reading Culture: Role of parents and guardians

More than six-tenths of the parents or care givers of the children aged 0–4 in KwaZulu-Natal (70,1%), North West (66,9%), Northern Cape (62,1%) and Eastern Cape (58,2%) kept the children at home with parents or other adult guardians. Nationally, 49,2% of children remained home with their parents or guardians, 38,4% attended formal ECD facilities, and 5,9% were looked after by other adults

⁸ http://uir.unisa.ac.za/bitstream/handle/10500/24496/JNS_19_Ola-Busari%202016.pdf?sequence=1&isAllowed=y

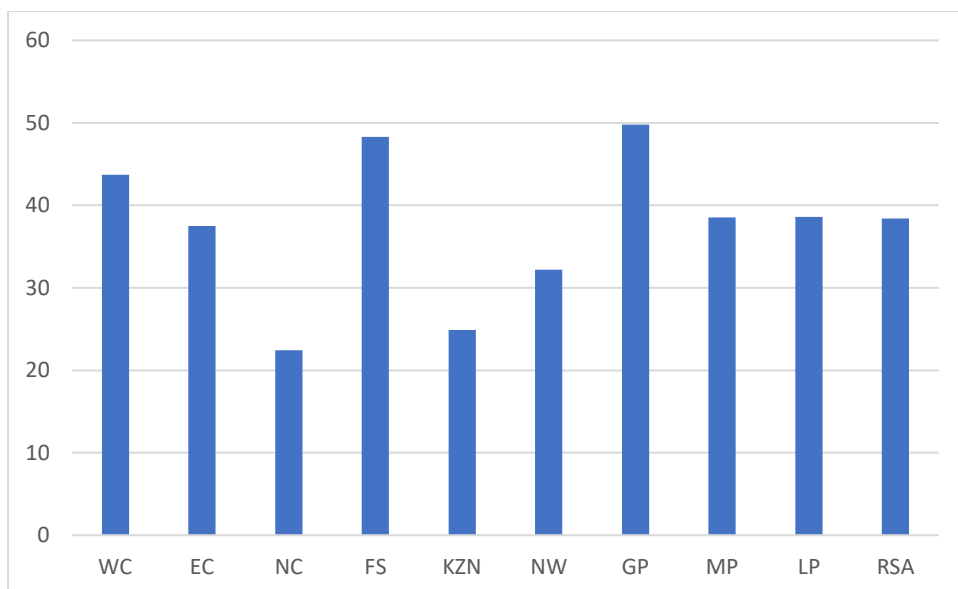


Figure 10: Percentage 0-4 year olds attending Grade R, Pre-school, nursery school, crèche, educare centre

Reading Culture: Role of parents and guardians

Type of early childhood development (ECD) stimulation provided to children aged 0–4, 2018

	Telling stories with a child	Reading books with a child
Never	35,1	46,8
Sometimes	31,4	26,2
Often	33,5	27,0

2.8 Distribution and Access to Books

It is important to get the publication to the reader. Traditionally, booksellers fulfilled this role. Publishers would simply deliver their books to the bookseller. These include national regional bookseller chains; independent booksellers and other book retailers; non-book retail outlets; internet booksellers; book clubs and direct mail booksellers; business and corporations (direct sales); the public (direct sales); libraries; state and provincial departments; schools and educational institutions; schoolbook distributors and tenders; export sales; and supermarkets and department stores. Books are made available to readers through these retail methods, libraries and other channels such as book clubs.

2.8.1 Turnover Per Sales Channel

According to le Roux et al. (2019), there was a drop in reported income from publishing between 2015/16 and 2017/18, especially in sales to schools and government institutions. It is difficult for small publishers to survive with erratic sales. Efforts should be made to purchase books more consistently.

Type of sales outlet	2015/16	2016/17	2017/18
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National regional bookseller chains	737 566	1 132 567	699 540
Independent booksellers and other book retailers	266 403	233 326	189 504
Non-book retail outlets	55 565	30 435	7 246
Internet booksellers	40 241	19 312	9 427
Book clubs and direct mail booksellers	6 462	56 882	43 884
Business and corporations (direct sales)	90 491	6 520	3 008
The public (direct sales)	38 991	27 390	80 704
Libraries	15 026	7 984	7 672
State and provincial departments	978 824	23 220	9 280
Schools and educational institutions	193 067	984 260	294 945
Schoolbook distributors and tenders	510 637	199 378	198 501
Export sales	19 161	445 929	181 152
Supermarkets and department stores	940	32 973	20 505
Other	5 724	143 619	131 548
Total (as reported)	2 888 102	3 343 795	1 876 916

Table 8: Turnover per sales channel (R'000)

Source: Le Roux et al. (2019)

2.8.2 Booksellers

In South Africa, the geographic spread of booksellers is not even. Small towns and rural areas are particularly poorly serviced. However, from the bookseller's point of view, it is not economically viable to operate bookstores in far-flung areas. Unless, the purchase of books (traditional paper books) increases the situation will not be remedied.

However, new technologies are available and are continually emerging where books can be sent almost to any part of the country. This however requires that the reader must have a knowledge of what is available and where to order the publication from. The reader must also have access to electronic banking facilities to execute the transactions. In the past, mail order was used but always experienced problems with the post office or railways who were responsible for the delivery. These have now been replaced by courier companies. Unfortunately, this service is expensive and adds to the cost of purchasing.

Electronic distribution of books is also seen rapid technological innovations. Books can be purchased almost instantaneously from anywhere in the world. In South Africa, the cost of broadband, especially in the rural areas, makes this option expensive.

2.8.3 Libraries

Libraries are an important means of access to books, especially for those that do not purchase their own books. The South African library system:

- The National Library
- Public and municipal libraries
- School libraries
- Specialist libraries

- Community Art Centres⁹

There are approximately 800 public and municipal libraries. These libraries have the widest geographic spread in South Africa, although more could be done to improve access for rural communities. Many of these libraries are specific to the discipline of the institution. Schedule 5 of the Constitution lists “libraries other than national libraries” as “functional areas of exclusive provincial competence” (Constitution of the Republic of South Africa, 1996). Public libraries are available in most cities and towns. The service however is not universal and many rural communities and townships do not have access to even the most rudimentary library and information services. Unfortunately, the Schools Act makes no mention of libraries. Since power has been devolved to schools’ governing bodies, the focus of scarce resources has been allocated to other areas and not to libraries. Higher education and research institutions also have libraries.

According to Library and Information Association of South Africa (LIASA) (2015), the South African library network includes:

- The National Library of South Africa (Pretoria and Cape Town)
- The South African Library for the Blind
- The Library of Parliament
- 5 Legal Deposit Libraries
- 9 Research Council Libraries
- 23 Higher Education Libraries
- 1993 public libraries (1612 provincial/381 metro)
- Approximately 2000 school libraries
- Special Libraries, which include corporate libraries, law libraries, government libraries; prison libraries; etc
- Independent and private libraries, including United Nations Information Centre (NIC), Goethe Instituut, US Embassy and Consulates Information Centres, Room to Read, Monash University, The Brenthurst Library, etc

Legal Deposit in South Africa

A Legal deposit is a legal requirement that a person or group submit copies of their publications to a repository, usually a library. According to the Legal Deposit Act, the State Library shall, with the assistance of other places of legal deposit and other appropriate libraries or institutions, compile a national bibliography; and statistics of the South African production of published documents on the basis of the documents supplied and the information furnished. The South African Library and the National Film, Video and Sound Archives shall, with the assistance of other places of legal deposit, preserve at least one copy of each document supplied for current and future use.

2.8.4 Book Clubs

Book clubs provide an opportunity for readers to share information and the pleasure of reading. The main purpose of establishing book clubs is to encourage people to read and share information. There are a number of book clubs already in existence and operating successfully in South Africa.

The DBE has provided guidelines on how to start a book club¹⁰.

⁹ <https://www.gov.za/about-sa/arts-culture>

¹⁰ These can be found at <https://www.education.gov.za/Programmes/Read2Lead/BookClubs.aspx>.

The ninth Funda Mzantsi Competition organised by the, Centre for the Book saw over 70 book clubs participating.

The Department of Correctional Services has more than five thousand inmates and high school learners across the country that are members of book clubs and participate at the annual Funda Mzansi national championship.

More book clubs should be established.

2.9 Cost of producing books

2.9.1 Development costs

Development / origination costs (authorial support, reviewers, editorial, design, typesetting production, project management, artwork, permission fees, index). Production costs are usually divided into origination costs and PPB costs (paper, print, and binding).

2.9.2 Production costs

Production costs and decisions (The factors which affect the production cost and therefore the price of a book are paper, print, binding, colour, format, and extent). While paper, print, binding method, format and extent are as inexpensive as they can be, the use of full colour instead of black and white, or two colours, is a more recent development in South African educational publishing, which emerged with the CAPS curriculum. The cost of publishing a book in full colour is roughly 3%-24% more expensive than the cost of publishing it in black and white, depending on the size of the print run.

2.9.3 Official languages

Value added Tax

Revenue from local titles

Language	Print (2016/17)	Digital (2016/17)	Print (2017/18)	Digital (2017/18)
English	927 178	42 829	1 380 676	50 317
Afrikaans	236 516	2 414	913 222	23 448
IsiZulu	35 155	35	124 708	516
IsiXhosa	90 207	1	32 162	1 325
Sepedi	4 528	-	37 163	247
Sesotho	3 854	-	19 807	551
Setswana	2 757	-	42 805	271
IsiNdebele	3 504	-	1 312	14
Xitsonga	659	-	16 472	81
Tshivenda	3 965	-	6 556	35

Language	Print (2016/17)	Digital (2016/17)	Print (2017/18)	Digital (2017/18)
SiSwati	2 871	6 105	2 431	1
Multilingual	1 223	274	2 429	15
Other languages	1 776	45	1 601	45
Total	1 243 194	51 703	2 581 344	76 866

Figure 11: Revenue from local titles by language (R'000)

Figure 12: Revenue from local titles
Source:

Developing 11 language versions of each book.

Developing 11 language versions is more expensive than developing one version. The cost is exacerbated when, for example, only four versions may sell in sufficient quantities to be economically viable, and the other seven are produced at a loss, or, for example, where only two language versions are approved and the costs of the other language versions have to be written off.

Size of print run (and size of market). The relative cost of the print run is a material consideration up to a print run of 50,000 copies. Thereafter the improvement in the economy of scale is negligible. For example, the cost of paper, print, and binding a book of 128 pp, full colour, format A4, may be:

3,000 copies	R18.18
10,000 copies	R10.69
50,000 copies	R8.32
100,000 copies	R8.07
500,000 copies	R6.83
1,000,000 copies	R6.58

Source:

One of the trade-offs in publishing is that of durability versus cost. For example, a book printed on good quality paper and with a strong binding could have a retail price of R100 (VAT inclusive), and would last five years, making its annual cost R20. The same book could be printed on newsprint and with a cheaper form of binding, to cost R80, but would need to be replaced annually at a price of R80 (VAT inclusive).

2.10 Digital books

In the 2000s, with the increasing availability of affordable handheld computing devices, the opportunity to share texts through electronic means became an option for publishers. Thus, contemporary books may even have no physical presence with the advent of the e-book. With Braille the book also became more accessible to the disabled. Even traditional books have evolved with audio books blurring the distinction between what is a traditional book and other

media. The Collins Dictionary (www.collinsdictionary.com/dictionary/english/reading-material accessed 20 June 2019) provides the following definition for reading material:

... any matter that can be read; written or printed text

As the information age develops and the fourth industrial revolution matures, there will be a continued blurring between the reading material types.

With the saving on paper, print, binding, and warehousing production of digital books is cheaper than print books. However, both digital and printed books require editorial, design, typesetting, royalties, selling, and marketing. The final price depends on the definition of “e-book”. Any digital version of a printed book is a separate product which will require a budget for the purchasing of digital material. The price will vary depending on the functionality of the e-book. For example, whether it is:

- a static PDF e-book,
- an ePub e-book with or without hyperlinks to external videos and websites, or
- an interactive e-book with embedded enhancements such as videos (which will not be in the print edition).

Other costs in the digital ecosystem have moved from the producer/ publisher (so are no longer reflected in the price of a book) to the user. These costs relate to hardware (e-readers), training and technical support, upgrading costs, file server and maintenance costs, and bandwidth costs.

The Spanish Publishers Association also released its annual reading habits report which reported 67.2% of the population had read a book in 2018. The report reveals that those who read eBooks tend to read more books than those reading physical books (13.2 per year compared to 11.2. per year) but, perhaps worryingly, 79% of digital books read in the last year were obtained without paying for them.¹¹

The National Book Policy must not only focus on the production of conventional books but must include the development of e-books. Strategies across government must contribute to the development of e-book. DSAC must promote quality content in official languages but focusing on indigenous languages. The Departments of Basic Education and Higher Education and Training must ensure that learners (and teachers and parents) have suitable devices. The Department of Communications must ensure that the internet can be accessed across South Africa at affordable prices. The Department of Science and Technology must continually research technologies that will facilitate the use and development of e-books.

2.11 Promotion of books in South Africa

South Africa is host to a number of international festivals that host prominent writers from other parts of the world. Conversely, South African writers headline international events such as the Frankfurt Book Fair, London Book Fair, and the Edinburgh Book Festival among others.

2.12 State of books in South Africa

¹¹ <https://www.internationalpublishers.org/news/776-statistics-galore-european-and-international-publishing-figures-released>

Legislation and other policies affecting books

Culture and books in South Africa

Literacy and books in South Africa

South African writers

Even though South Africa has produced two Nobel Prize winners: Nadine Gordimer and JM Coetzee, the NBW must also encourage more South African writers telling South African stories in South African languages.

Book publishing sector

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

Book festivals

There are several book fairs and literary festivals¹² and literature awards¹³ in South Africa. The organisers of these events should collaborate even more to ensure that a reading culture is strengthened in South Africa.

Coordination between the public and private sectors

Coordination between the different departments and spheres of government

3 Global publishing

Obtaining comparable global statistics is difficult. The International Publishers Association (IPA), a non-profit based in Geneva that studies and promotes books globally, is trying to bridge this gap and encourages its members and other publishers' associations and statistics offices to gather these

¹² South African Book Fair, The Jozi Book Fair, Time of the Writer International Festival, Franschhoek Literary Festival, Open Book Festival, Kimberley Book Fair, Abantu Book Festival, South Africa's Children's Book Fair

¹³ South African literary awards include: Alan Paton Award, Alba Bouwer Prize, Amstel Playwright of the Year Award, ATKV Prose Prize, Barry Ronge Fiction Prize, C.P. Hoogenhout Award, Central News Agency Literary Award, David Higham Prize for Fiction, Dinaane Debut Fiction Award, Exclusive Books Boeke Prize, Eugène Marais Prize, Hertzog Prize, Ingrid Jonker Prize, M-Net Literary Awards, Maskew Miller Longman Literature Awards, Media24 Books Literary Awards, Olive Schreiner Prize, Percy FitzPatrick Award, Sol Plaatje Prize for Translation, South African Literary Awards, The Cape Tercentenary Foundation, Thomas Pringle Award, University of Johannesburg Prize, and the W.A Hofmeyr Prize.

statistics to enable evidence-based policy making in areas such as education, literacy, copyright and culture.

According to the IPA, the biggest books markets are China (28%) and America (20%)¹⁴ which correlates with the fact these are the two largest economies. However, looking at the number of books per capita gives a better sense of a country's book culture. By that measure the UK, Iceland, and Denmark are leaders with China further down and the US in the middle.

3.1 Europe

Europe is an important publishing region. Based on 2017 revenue data, six to eight of the top ten of the world's top publishing groups are European-owned (Wischenbart and Fleischhacker 2018). In addition, the world's major book fairs (Frankfurt, London, Bologna) take place in Europe. More than half a million new titles are published every year by European publishers. The 24 official EU languages and the dozens of minority languages spoken across the continent are used. European readers (and other readers) therefore have a selection of millions of titles available to each European reader. (Federation of European Publishers 2018)

Until the Global Financial Crisis in 2007 there was steady growth both in terms of turnover and of title output. In 2008 title production kept growing whilst turnover declined. Because of favourable exchange rates, the European publishing industry in 2010 grew. However, between 2011 and 2014 saw further decline in sales while and title production growth was sluggish. The e-book market grew and exports were strong. For the last 3 years the European e-book market (now around 7% of the total) showed signs of stagnation, while the traditional book market and title output kept increasing.

According to the Federation of European Publishers (FEP), the 2017 sales figures in 2017 for the European publishing industry was in the order of € 22.2 billion¹⁵ with 610,000 new titles published by companies employing around 130,000 people full time. The entire book value chain (including authors, booksellers, printers, designers, etc.) is estimated to employ more than half a million people.

In Italy book shops accounted for 69% of sales while eBooks represent 5% of turnover. Despite a marginal drop in sales in Italy, the Italian Publishers Association President Ricardo Franco Levi said:

'The data confirm once again the value and weight of the book in the culture and economy of Italy. However, there is a need for an intervention of strong policies to support the demand and promotion of reading.'

3.2 China

In China, Xinhua news agency reported a year on year 11.3% rise in retail sales of books reaching \$13.1bn. The year saw 203,000 new books published with purchases via online stores rising by 27% and bookstore sales dropping 6.69%.

¹⁴ This include re-editions of older titles, but not self-published books.

¹⁵ This is the publishers' net turnover, i.e. the publishers' total revenues from the sales of books, not the total market for books (margin of booksellers or other retailers). The Total market value is estimated at € 36-38 billion.

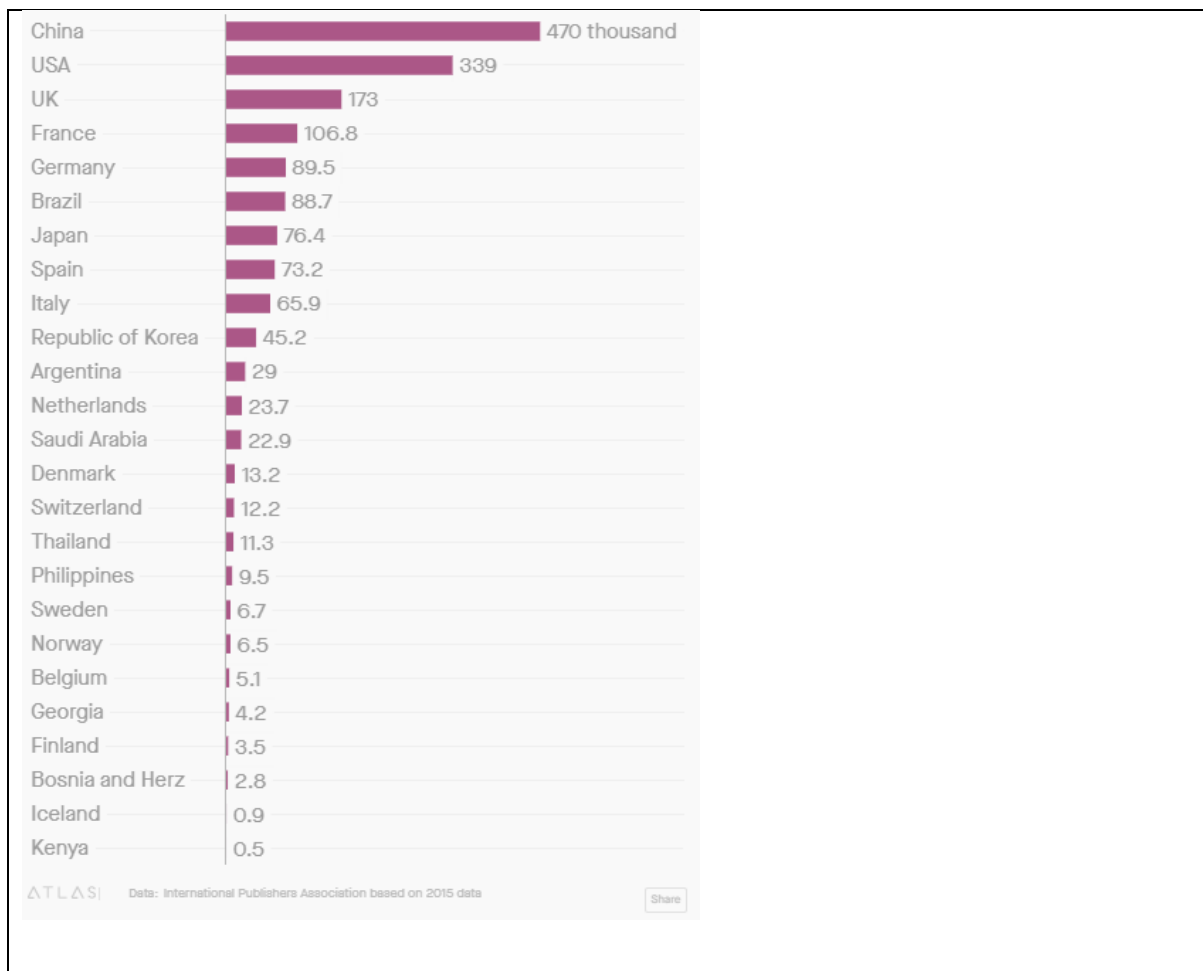


Figure 13: New titles published

Source: <https://qz.com/1057240/which-country-publishes-the-most-books/> (accessed 28 October 2019)

3.3 America

The Association of American Publishers (AAP) represents the leading book, journal, and education publishers in America, found that publishers saw double-digit growth in November 2018 compared to November 2017 in all categories of trade books:

- Adult Books (+19.6%),
- Children's/Young
- Adult (+17.3%) and
- Religious Presses (+14.1%).

Revenue for trade books (sales to bookstores, wholesalers, direct to consumer, online retailers, etc.) grew from over \$7.3 billion to more than \$7.6 from 2017 to 2018 (The Association of American Publishers 2019).

3.4 Africa (Zell 2008)

In LOGOS, in 1990, I described Africa in those years “as largely a bookless society”. Happily, by the early 1990s, African publishing entered a period of recovery, transformation and innovation. (Zell 2008)

4 Objectives

4.1 Vision

South African writers telling South African stories in South African languages read by all South Africans for leisure and understanding; inculcating a national reading culture

A thriving, dynamic, globally competitive and sustainable book industry that contributes to South Africans socio-economic welfare and enjoyment of a wider global audience.

4.2 Mission

preservation, development, promotion, dissemination and consumption of South African literature in all its forms and genres.

promote a culture of reading and writing

develop a sustainable book industry that supports equitable development of all South African languages

create an enabling environment for the mainstreaming of the arts sector as an important contributor to job creation, poverty reduction and skills development.

4.3 Policy goals

The objectives would generally be:

- to encourage literary creation
- to establish an appropriate legal framework for the protection of authors' rights
- providing a conducive environment where the South African book industry thrives and is globally competitive
- ensuring that the sector increases its socio-economic contribution to South Africa (including its contribution to economic growth, employment and equity)
- to provide fiscal, credit and administrative incentives for the publishing industry
- to facilitate nationwide distribution and free international circulation of books
- to establish nationwide library networks
- to introduce new methods for the teaching of reading
- to train human resources in the different skills involved in the book sector.

4.4 Sustainable Development Goals

To achieve the Sustainable Development Goals (SDGs)¹⁶ it will be essential to ensure that everyone has access to, and is able to understand, use and share relevant information². It will be essential that everyone can read and write. A learning community is needed where libraries are the central node supporting literacy activities for everyone regardless of age, gender or level of education. SDG 4 calls for inclusive and equitable quality education and the promotion of lifelong learning opportunities for all.

Every human being should have access to books and literacy programmes by 2030.

National sustainable development strategies should include a long-term plan for literacy programmes, for libraries and for local book writing and publishing.

4.5 Statement of policy and policy objectives

Increasing content

(More South African writers telling South African stories in South African languages)

human resources development

4.5.1 Increasing publishing

(including the stimulation of diversity in ownership, employment and literary product across the entire book value chain)

(More South African books published and printed in South Africa)

human resources development

4.5.2 Implementation philosophies

Rather than working top down, libraries, authors and publishers should be made central to these strategies to ensure that no one is left behind.

4.5.3 Increasing export

human resources development

4.5.4 Increasing access

(More books made available to all South Africans in urban, peri-urban and rural areas)

(including the reading needs of people with print disabilities)

(adequate, affordable and accessible supply of books for all segments of the population, including people with print disabilities)

human resources development

¹⁶ See the call recognized by the signatories of the Lyon Declaration, August 2014. Available from: <http://www.lyondeclaration.org/>

4.5.5 Increasing readership

A reading culture across the entire South African society including reading for leisure

facilitate and coordinate reading promotion activities

human resources development (assist and encourage parents to read to the children)

human resources development (teachers + librarians)

5 Legislative context

National Book Policy, coordinate with other government Departments re : copyright legislation, develop database of writing programmes, support reading and writing campaigns

5.1 South African Constitution

5.2 National Development Plan

The media has an impact on the values that people hold and the lives they aspire to. "Radio, television, film, and the other products of the culture industries provide the models of what it means to be male or female, successful or a failure, powerful or powerless. Media culture also provides the materials out of which many people construct their sense of class, of ethnicity and race, of nationality, of sexuality, of 'us' and 'them'." The outputs of media organisations are not value-neutral. They carry the values and ethos of their owners, the staff and readers. P463

5.3 Draft White Paper

5.4 National Education Policy Act 1996

5.5 Procurement legislation

5.6 International agreements

5.6.1 Intellectual property

5.6.2 ISBN

Pricing of ISBNs

5.6.3 Government

Department of Sports, Art and Culture

DSAC established the Books and Publishing unit in 2004. The unit is a component of the Cultural Development section whose strategic focus is the advancement of the economic potential of creative industries to contribute job creation, reduction of poverty and skills development.

DSAC Interventions

The Department creates publishing opportunities for aspiring writers, encourages the culture of reading and recognizes excellence in literature. These include:

National Book Week was established by DSAC in association with the South African Book Development Council as an annual reading promotion event in 2010.

South African Literary Awards have been the principal by DSAC since their establishment in 2005. The awards were initiated by the writers' associates, which also appoints an independent adjudication committee. These awards play a pivotal role in encouraging the culture of reading and writing, recognizing excellence in literature as well as developing audiences for South African literature. South African literature also stimulates interest and appreciation of our cultural products.

The Baobab Literary Journal was established in 2008 with the purpose of providing regular publishing platform for writers. The journal presents an opportunity for budding writers to exercise their writing muscle alongside seasoned writers.

The Reprint of Classics project is mandate of the National Library of South Africa promotes Indigenous. The classics are made available in the public domain through public libraries and have been reproduced and distributed to public libraries across the nation. The reprinted texts include some rare but classical works by writers such as O.K. Matsepe, D.M. Jongilanga, D.P.S. Monyaise, Sibusiso Nyembezi, L.D. Raditladi, etc.

The Indigenous Languages Publishing Programme (ILPP) is an attempt to uncover new talents and produce new material in indigenous languages in collaboration with the SABDC initiated. The ILPP is aimed at publishing books, mainly by emerging writers, in all the nine indigenous languages.

Literary Festivals and Book Fair have been supported. These include

- The Cape Town International Book Fair, which hosts about 50 000 people in attendance;
- Time of the Writer and Poetry Africa festivals, hosted in by the University of KwaZulu-Natal in Durban annually and includes participants from different countries across the world.
- WordFest, a literary component of the National Arts Festival with a focus on the development of indigenous languages
- A similar initiative has been established in Mangaung, and in run alongside Macufe festival

5.6.4 Organised business

The South African Book Development Council

The South African Book Development Council (SABDC) is recognised as the representative body of the sector. The council is comprised of associations representing the book chain including writers, publishers, printers, booksellers, etc.

The Publishers' Association of South Africa

There are about 160 publishers subscribed to the Publishers' Association of South Africa (PASA), which is the biggest publishers' organisation in the country.

Following are some of the major role players in the South African book sector:

- Paper Manufacturers' Association South Africa (PAMSA)
- Printing Industries Federation of South Africa (PIFSA)
- Publishers' Association of South Africa (PASA)
- African Publishers' Association (APA)

5.6.5 Writers' associations

In 2007, over 16, 000 authors received royalties and the number keeps increasing every year.

- Academic & Non-Fiction Authors' Association of South Africa (ANFASA)
- South African Writers' Association (SAWA)
- Language and Media Practitioners (LAMP)

5.6.6 Distributers and libraries

- South African Booksellers' Association (SABA)
- National Library of South Africa (NLSA)
- Library and Information Association of South Africa (LIASA)
- South African Library for the Blind (BLINDLIB)

6 Encouraging reading

Fellow South Africans,

If we are to ensure that within the next decade, every 10-year-old will be able to read for meaning, we will need to mobilise the entire nation behind a massive reading campaign.

Early reading is the basic foundation that determines a child's educational progress, through school, through higher education and into the workplace.

All other interventions – from the work being done to improve the quality of basic education to the provision of free higher education for the poor, from our investment in Technical and Vocational Education Training colleges to the expansion of workplace learning – will not produce the results we need unless we first ensure that children can read.

It is through initiatives like the National Reading Coalition that we will be able to coordinate this national effort.

All foundation and intermediate phase teachers are to be trained to teach reading in English and the African languages, and we are training and deploying a cohort of experienced coaches to provide high quality on-site support to teachers.

We are implementing the Early Grade Reading Programme, which consists of an integrated package of lesson plans, additional reading materials and professional support to Foundation Phase teachers.

This forms part of the broader efforts to strengthen the basic education system by empowering school leadership teams, improving the capabilities of teachers and ensuring a more consistent measurement of progress for grades three, six and nine.

We also have to prepare our young people for the jobs of the future.

This is why we are introducing subjects like coding and data analytics at a primary school level.

President Cyril Ramaphosa: State of the Nation Address 2019

<https://www.gov.za/speeches/2SONA2019>

6.1 Integrated reading initiative

Stakeholders:

- Children
- Early Childhood Development Centres
- Parents / grandparents / guardians
- Church / Sunday schools
- Local radio stations
- Libraries
- Government
 - DBE
 - DSAC
- Existing reading initiatives (NGOs)
-

7 The development and promotion of writing of book

7.1 Motivation of writers

7.2 Encouraging of young writers

younger publishers, writers, and artists need to understand the current state of South Africa's publishing ecosystem. The industry must answer two pivotal questions:

- How can the publishing industry be improved? and
- How can the ecosystem evolve to develop South Africa's next generation of publishers?

7.3 Encouraging of indigenous writers

7.4 Assistance to authors (and publishers)

7.5 Books for the disabled (differently abled)

Boosting access to books for the visually impaired

7.6 Books for children

Improve reading comprehension in the first years of school is essential in equipping children to succeed in education, in work and in life. This is possibly the single most important factor in overcoming poverty, unemployment and inequality.

7.7 Academic and scholastic books (textbooks)

Achieving quality education in line with the United Nation's Sustainable Development Goal 4 requires providing students and teachers with sufficient teaching and learning materials. This session will discuss the scarcity of learning materials in African schools, the issues it causes for the region, and potential solutions for reaching the goal of a textbook for every child. It will draw from the varied successes of African countries including free textbook programs and market-based interventions to make textbooks cheaper.

Scholarly and Academic Presses part of play a critical role in developing and disseminating original thought and research. They play a meaningful role in shaping the futures by allowing differing minds to make available their meaningful thought through books and journals, in return are rewarded in a way of royalties and recognition.

Foreign publishers enter into contracts with us to print and distribute their books in South Africa at the more affordable local price because South Africa is a signatory to the Berne Convention, and because they are assured their copyright is protected.

8 Translation of books

8.1 Developing translation programmes

8.2 Institutional support to promote translation of books

9 Policies for the publishing subsector

9.1 Publication of books in different formats

9.2 Statistics for publishing

9.3 Promotion and publishing of academic and scholastic books (textbooks)

9.4 Publishing of foreign books

9.5 Enhancing the availability of Africana and rare books

9.6 Enhancing the availability of used books

9.7 Setting up of book publishing and promotion hubs

10 Policies for the printing and production subsector

10.1 Ingenious publishing

hundreds of indigenous languages, which contribute significantly to cultures and economies, are disappearing at an alarming rate. Despite efforts to preserve indigenous languages, such as UNESCO's declaration of 2019 as the International Year of Indigenous Languages, a great majority of these languages are likely to disappear.

the role of governments in preserving and promoting indigenous languages,

the role of publishers in preserving and promoting indigenous languages, and

the role of authors in preserving and promoting indigenous languages.

how the publishing industry can support African authors in reaching global audiences and publishing in indigenous languages.

10.2 Digital publishing

how emerging markets are now a main source of publishing industry growth and how digital transformation is allowing these developing publishing markets to leapfrog into the future. Discussions will also include how publishers and other industry ecosystem stakeholders can cooperate to respond to the evolving needs of readers of the future as well as how they can adapt to pressures for digital transformation.

11 State publishing entity

In its submission by the Publishers Association of South Africa ("PASA") to the minister of the Department of Basic Education on the Draft National Policy for the Provisioning and Management of Learning and Teaching Support Material for grades R to 12, it stated:

"In the normal course of events, state publishing should never be necessary. As a principle, the state should not use taxpayer funds to compete with commercial publishers. The one exception is when there is no competition, for example, when enrolment figures for a particular subject in a particular language are so small as to not make the publishing of relevant text books economically viable."

PASA further went on to say that:

As we have said above, the state should not use taxpayer funds to compete with commercial publishers and other LTSM developers, and in the normal course of events, state publishing should never be necessary.

The notion of state publishing implies an assumption that the State is better able to produce cost-effective high quality material than the skilled and experienced private sector, but the

Draft Policy contains no mechanism for independent assessment of either the cost-effectiveness or the quality of such material. Such monitoring, evaluation and accountability is critical.

PASA further went on to say that:

As we have said above, the state should not use taxpayer funds to compete with commercial publishers and other LTSM developers, and in the normal course of events, state publishing should never be necessary.

12 Policies for the trade and distribution subsector

12.1 Libraries

12.1.1 Improving spatial distributors

12.1.2 Separate children's sections

12.1.3 Separate differently abled sections

12.1.4 Collaboration between libraries and educational institutions

12.1.5 Enhancing connectivity among libraries

12.1.6 Open access

12.1.7 Application and development of new technologies

12.2 Distribution of books

12.2.1 Expansion of book distribution networks

12.2.2 Online sale of books

12.2.3 Cataloguing in publication

12.3 Export of South African books

13 Policies for authors and protection of their work by copyright

Policies for the development and w

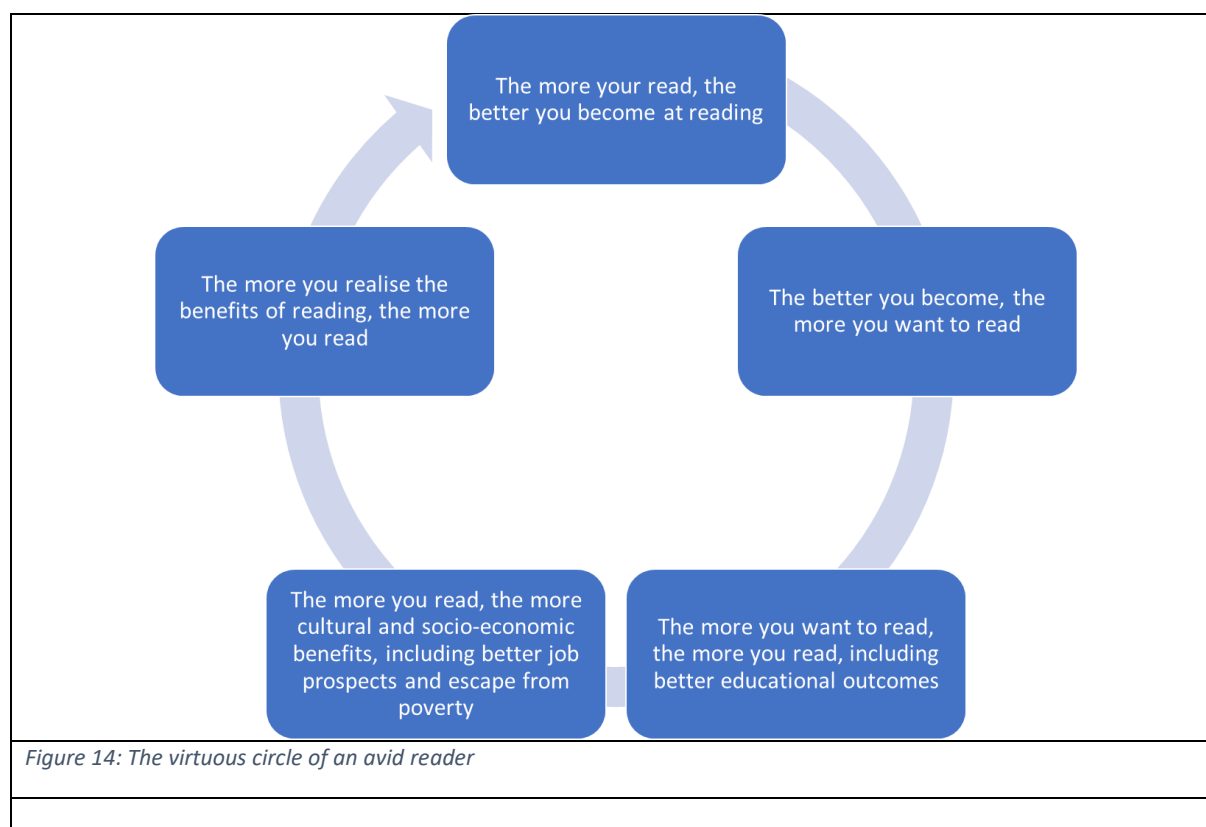
14 Policies on reading

The International Federation of Library Associations and Institutions (IFLA), the International Publishers Association (IPA), the International Authors Forum (IAF) and the Reading & Writing Foundation (RWF) have a core mission in promoting reading and literacy.¹⁷

Literacy is a basic skill that everyone needs. Without it, people will be condemned to live poorer, less fulfilled lives.

implement coherent and properly resourced strategies to promote literacy for all.

14.1



14.2 Inculcating book reading habits: creating the readers of the future

Strong national reading cultures contribute significantly to promoting literacy skills, enhancing learning opportunities, and addressing poverty. However, despite the presence of many literacy programs in South Africa, little attention is paid to instilling a culture of reading amongst youth. The result is a generation that is reading less and watching more than ever before.

¹⁷ https://www.internationalpublishers.org/images/news/2015/jointstatement_on_literacy_and_reading.pdf

14.2.1 The role of governments in fostering a culture of reading

14.2.2 The role of donor agencies in fostering a culture of reading

14.2.3 The role of publishers in fostering a culture of reading

14.2.4 The role of librarians in fostering a culture of reading

14.2.5 The role of teachers in fostering a culture of reading

14.2.6 The role of families (parents or guardians) in fostering a culture of reading

14.3 Book fair and exhibitions

14.4 Literary festivals

14.5 Enabling Libraries to act as nodal points for reading promotion

14.6 Children's book hubs

14.7 Book clubs

14.8 Book incentives (book coupons)

14.9 Readership surveys

15 Transformation

The publishing industry also remains unwelcoming to outsiders, whether they are female, or from other disadvantaged groups.

15.1 SMME

15.2 Black publishers

15.2.1 Gender

The South African publishing industry has a diversity problem. While publishing attracts women, few are at the executive or board levels and many face significant gender pay gaps. Women are given more traditional functions such as communications, human resources, and educational divisions. In many countries.

16 Implementation

16.1 Institutional framework

16.2 Resource requirements

16.3 Monitoring, supporting, reporting and evaluation

There is a widespread agreement that the publishing and cultural industries can be a major driver of sustainable development and economic growth. However, the lack of industry data is a key weakness for planning and coordinating the publishing industry's development and mobilising government industry support.

the importance of data innovation to the future development of publishing and the creative industries and establishing their contribution to sustainable development.

17 Conclusion

The South African book sector is the most thriving in Africa and has got a potential to be a force to be reckoned with internationally. For the full potential of the industry to be realised, it is imperative that the book sector is declared as one of the national priorities.

There is a need for an integrated national strategy, supported by a National Book Policy as a legislative framework, in order to fully exploit the potential of the book industry. In this regard, the Minister of Arts and Culture appointed a Ministerial Task Team with the purpose of identifying growth opportunities for the local books and publishing sector. One of the key recommendations of the Task Team is the establishment of a statutory body for the book sector. Such an institution would play a central role in developing growth strategies for the sector in order to nurture a globally competitive local book industry.

At the core of any strategy to develop the book sector is a sustained reading promotion strategy that encourages equitable development of all South African languages. A widespread culture of reading and writing will assist us as a nation to meet the demands of developing a knowledgeable society and advance the contribution of the book sector in the country's economy.

