

# SKILLS ANALYSIS IN THE BOOK-PUBLISHING SUBSECTOR

Research commissioned by the Media, Advertising, Publishing, Printing and  
Packaging (MAPPP) Sector Education and Training Authority (SETA)

HSRC RESEARCH OUTPUTS  
4029



Human Sciences Research Council

J.C. Erasmus  
J. Roodt  
A.J.C. Hadland  
R. du Toit

2006  
©HSRC

HSRC RESEARCH OUTPUTS  
4029

## ACKNOWLEDGEMENTS

The project team would like to take this opportunity to thank all employers and freelancers who participated in the study. We extend a special word of thanks to the CEOs of the publishing companies and senior executives from PASA, for their time and effort. Lastly, we would also like to make special mention of Ms Trish Persad, Chamber Manager: Print Media and Publishing from **MAPPP SETA**, the Steering Committee of the Publishing Chamber and Dr Francis Galloway, for their guidance and support throughout the study.

### *Research Team:*

#### **Human Sciences Research Council Education, Science and Skills Development (ESSD) Programme:**

Executive Director: Dr Andre Kraak

Dr Rènette du Toit

Dr Johan Erasmus

Ms Joan Roodt

#### **Society, Culture and Identity (SCI) Programme:**

Mr Adrian Hadland

In association with:



Tendai Zauyamakando  
and Fieldworkers

## CONTENTS

LIST OF TABLES IN THE TEXT .....	VII
LIST OF FIGURES .....	VIII
LIST OF ACRONYMS .....	IX
CHAPTER 1 .....	1
BACKGROUND TO THE STUDY .....	1
Introduction .....	1
Objectives and scope of the project.....	2
Methodology.....	2
Situation analysis.....	2
Survey of registered book-publishing companies.....	3
Survey of non-registered book-publishing businesses/independent contractors/freelancers.....	5
Training provider survey .....	6
Data capturing and analysis.....	7
Methodological challenges .....	7
Layout of the rest of the report .....	9
CHAPTER 2 .....	11
PROFILE OF THE BOOK-PUBLISHING SUBSECTOR .....	11
Industrial coverage.....	11
Brief history and topography .....	12
Geographical distribution of employers in the book-publishing subsector.....	15
Distribution of employers by size category .....	16
Ownership .....	18

Turnover.....	20
Drivers of change in the book-publishing subsector .....	20
Employers' views regarding factors that may influence future employment in the book-publishing industry.....	23
<b>CHAPTER 3 .....</b>	<b>26</b>
<b>PROFILE OF THE WORKERS IN BOOK-PUBLISHING.....</b>	<b>26</b>
Quantification of the labour market.....	26
Geographical distribution of the workforce.....	27
Population group distribution .....	28
Gender distribution .....	29
Occupational distribution .....	31
Qualifications .....	33
<b>CHAPTER 4 .....</b>	<b>36</b>
<b>SKILLS SHORTAGES AND SKILLS GAPS .....</b>	<b>36</b>
Skills shortages.....	37
Skills gaps.....	38
<b>CHAPTER 5 .....</b>	<b>41</b>
<b>WORKPLACE TRAINING IN THE BOOK-PUBLISHING SUBSECTOR.....</b>	<b>41</b>
Introduction .....	41
Beneficiaries of training in 2004/2005.....	41
Training ratio for permanent personnel in private small, medium and large companies.....	42
Training in small companies.....	43
Training in medium-sized companies.....	43
Training in large companies .....	44

Type of training provided .....	45
Factors inhibiting skills development in book-publishing companies .....	47
Adult basic education and training (ABET) .....	48
Learnerships .....	48
Mentorship .....	49
Opinions on training issues in book-publishing.....	50
<b>CHAPTER 6 .....</b>	<b>53</b>
<b>SUPPLY OF SKILLS.....</b>	<b>53</b>
Introduction .....	53
Current education and training provision in the publishing sector.....	54
Publishing courses .....	55
e-Publishing.....	56
Qualifications with components of language editing and proofreading .....	56
Writing.....	57
Writing-related courses.....	57
Translation .....	59
Graphic design and/or photography.....	59
Design, arts and crafts.....	60
Output, enrolment and future education and training at institutions .....	61
Universities.....	61
Universities of technology.....	65
Current enrolment in publishing-related courses at universities of technology .....	67
Private training providers.....	70
Graphic design/Multimedia design/e-Publishing .....	70

<b>Funding of publishing-related studies .....</b>	<b>71</b>
<b>Factors that influence access to training .....</b>	<b>72</b>
Restriction on the number of learners attending courses .....	72
Targets with regard to race, gender or disability .....	73
Assessment procedures .....	73
Bridging or remedial programmes .....	73
<b>Factors inhibiting students' access to education and training in the book-publishing sector .....</b>	<b>74</b>
<b>Obstructive factors .....</b>	<b>75</b>
<b>Initiatives to improve education and training .....</b>	<b>76</b>
Career guidance .....	76
Learnerships .....	76
<b>Additional skills to be addressed in the book-publishing sector .....</b>	<b>77</b>
<b>Initiatives or strategies the MAPPP SETA needs to take or implement to improve education and training .....</b>	<b>77</b>
<b>Initiatives or strategies that employers need to take or implement to improve education and training .....</b>	<b>78</b>
<b>Initiatives or strategies that training providers need to take or implement to improve education and training .....</b>	<b>78</b>
<b>Contact with national and international organisations .....</b>	<b>78</b>
<b>CHAPTER 7 .....</b>	<b>82</b>
<b>PROFILE OF FREELANCERS IN BOOK-PUBLISHING .....</b>	<b>82</b>
<b>Introduction .....</b>	<b>82</b>
<b>Services provided by freelancers .....</b>	<b>82</b>
<b>Qualifications .....</b>	<b>85</b>
<b>Skills needs .....</b>	<b>88</b>
<b>Challenges/problems facing freelancers .....</b>	<b>90</b>

<b>CHAPTER 8</b> .....	<b>92</b>
<b>CONCLUSIONS AND RECOMMENDATIONS</b> .....	<b>92</b>
<b>Introduction</b> .....	<b>92</b>
<b>Summary</b> .....	<b>93</b>
<b>Recommendations</b> .....	<b>96</b>
Launch an information dissemination campaign .....	96
Facilitate access to relevant skills development programmes and short courses.....	98
Fast track the setting up of systems and procedures for the generation of qualifications and standards and the accreditation of courses.....	98
<b>REFERENCES</b> .....	<b>100</b>
<b>LIST OF ANNEXURES:</b> .....	<b>105</b>
Annexure A: Sample frame - companies identified as book publishers.	
Annexure B: Employer questionnaire	
Annexure C: Informed verbal consent form companies survey	
Annexure D: African Response field report	
Annexure E: Sample frame – freelancers/independent contractors	
Annexure F: Independent contractor questionnaire	
Annexure G: Informed consent independent contractors	
Annexure H: Training providers database	
Annexure I: Training provider questionnaire	

## LIST OF TABLES IN THE TEXT

Table 1: Data analysed: categories and sources .....	8
Table 2: Probable distribution of book-publishing companies, by province.....	16
Table 3: Probable distribution of interviewed book-publishing companies, by size category	17
Table 4: Distribution of interviewed book-publishing companies, by province and size .....	18
Table 5: Turnover of book-publishing companies, by size category (N=37) .....	20
Table 6: Factors that enhance growth in employment.....	24
Table 7: Factors that may inhibit growth in employment .....	25
Table 8: Probable employment in the book-publishing subsector, according to size category .....	27
Table 9: Probable distribution of workers in book-publishing, by province.....	28
Table 10: Population group distribution of workers, according to occupational category .....	29
Table 11: Gender distribution of workers, according to occupational category .....	30
Table 12: Occupational distribution of workers in book-publishing .....	31
Table 13: Occupational distribution of workers, by company size (n=1 518) .....	32
Table 14: Occupational distribution of workers, by activity .....	33
Table 15: Highest educational level in the book-publishing subsector, N=1 070 .....	33
Table 16: Highest educational level in the book-publishing subsector, by race N=1 072.....	34
Table 17: Occupational distribution vs qualifications profile of workers in book-publishing...	34
Table 18: Highest educational level in the book-publishing subsector, by company size N=1 070.....	35
Table 19: Beneficiaries who received training (external and in-house) in 2004 to 2005 .....	42
Table 20: Training rate, by company size and by race and gender (2004/2005) .....	44
Table 21: In-house training provided in book-publishing companies .....	46
Table 22: Reasons for not providing in-house training .....	46
Table 23: Factors inhibiting investment in skills development .....	47
Table 24: Number of employees who attended ABET in 2004/2005 .....	48
Table 25: Reasons for not participating in the learnership process .....	49
Table 26: Suggested MAPPP SETA initiatives.....	50
Table 27: Suggested employer initiatives.....	51
Table 28: Suggested training provider initiatives.....	52
Table 29: Publishing courses.....	55
Table 30: Total number of learners supplied by universities in fields of study relevant to the MAPPP SETA, according to NQF level, 2003*.....	61
Table 31: The number of learners supplied by universities in fields of study relevant to the MAPPP SETA, according to race and gender, 2003*.....	62



Table 32: Enrolment in fully-fledged publishing courses at universities, by race and gender and according to NQF level, 2005* .....	63
Table 33: Future education and training in fields of study related to the publishing sector at universities .....	65
Table 34: The total number of learners supplied by universities of technology in fields of study relevant to the MAPPP SETA, according to NQF level, 2003* .....	66
Table 35: The total number of learners supplied by universities of technology in fields of study relevant to the MAPPP SETA, by race and gender, 2003* .....	66
Table 36: Enrolment in linguistic courses at universities of technology, by race and gender, and according to NQF level, 2005* .....	67
Table 37: Enrolment in graphic design courses at universities of technology, by race and gender, and according to NQF level, 2005* .....	69
Table 38: Future education and training in fields of study related to the publishing sector at universities of technology .....	70
Table 39: Funding of publishing-related studies .....	72
Table 40: Bridging programmes available at training institutions.....	74
Table 41: Provincial distribution of freelance respondents .....	82
Table 42: Types of services provided by freelancers .....	83
Table 43: Years in freelancing .....	84
Table 44: Type of experience before freelancing .....	84
Table 45: Highest qualification of freelancers (respondents).....	85
Table 46: Fields of study in which freelancers obtained qualifications.....	86
Table 47: Institutions where qualifications were obtained .....	87
Table 48: Other skills acquired besides formal qualifications .....	88
Table 49: Skills needs of freelancers in book-publishing .....	89
Table 50: Training-related problems experienced by freelancers.....	89

## LIST OF FIGURES

Figure 1: Distribution of interviewed book-publishing companies, by size category (N = 37)	17
Figure 2: Share of ownership, by race .....	19
Figure 3: Population group distribution of workers in book-publishing.....	28
Figure 4: Gender distribution of workers in book-publishing.....	30
Figure 5: Provincial distribution of training providers of publishing-relevant courses .....	54

## LIST OF ACRONYMS

ABET	Adult basic education and training
Aids	Acquired immune deficiency syndrome
ASGISA	Accelerated and Shared Growth Initiative for South Africa
AVEA	Audio Visual Entrepreneurs of Africa
BDCSA	Book Development Council of South Africa
BEE	Black economic empowerment
CEO	Chief Executive Officer
CIGS	Culture Industries Growth Strategy
CPP	Community Publishing Project
CTBF	Cape Town Book Fair
FASSET	Financial and Accounting Services Sectoral Education and Training Authority
FET	Further education and training
FIT	Fédération Internationale des Traducteurs (International Federation of Translators)
HEQC	Higher Education Quality Committee
HET	Higher education and training
HIV	Human immunodeficiency virus
HSRC	Human Sciences Research Council
IPASA	Independent Publishers' Association of South Africa
ISBN	International Standard Book Number
IT	Information technology
MAPP	Media, Advertising, Publishing, Printing and Packaging
MD	Managing Director
NEPAD	New Partnership for Africa's Development
NFVF	National Film and Video Foundation
NGO	Non-governmental organisation
NQF	National qualifications framework
OUPSA	Oxford University Press Southern Africa
PanSALB	Pan South African Language Board
PASA	Publishers' Association of South Africa
PEG	Professionals Editors Group
PICC	Print Industries Cluster Council
PSS	Publishing Subsector
SAFREA	Southern African Freelancers Association
SAIRR	South African Institute of Race Relations

SAQA	South African Qualifications Authority
SARS	South African Revenue Service
SASWA	South African Scriptwriter's Association
SATI	South African Translators' Institute
SDF	Skills Development Facilitator
SETA	Sector Education and Training Authority
SGB	Standards Generating Body
SIC	Standard Industrial Classification
SMMEs	Small, medium and micro enterprises
SPSS	Statistical Package for the Social Sciences
UCT	University of Cape Town
UK	United Kingdom
UKZN	University of KwaZulu-Natal
UNISA	University of South Africa
UOFS	University of the Free State
US	United States
WOW	Who Owns Whom
WSP	Workplace Skills Plans

# CHAPTER 1

## BACKGROUND TO THE STUDY

### Introduction

The Publishing Chamber of the Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority (MAPPP SETA) commissioned the HSRC (Human Sciences Research Council) to conduct a study on skills needs in the book-publishing subsector in South Africa.

The passage of a whole raft of laws concerning skills is expected to have a significant impact on the print media and publishing sectors. Key legislation in this regard includes the South African Qualifications Act (1995), the Skills Development Act (1998) and employment equity legislation (1998). According to the first Chief Executive Officer (CEO) of the MAPPP SETA, this legislation is expected to “completely recast the educational and training landscape in the country”. The legislation will also compel the print media and publishing industry to develop and fund skills plans and learning activities. The levy imposed on employers (together with the possibility of reclaiming part of the levy) is expected to elevate the status of training in companies and is further underscored by employment equity laws obliging companies to file their training plans and targets with government.

From earlier research, it is evident that a great deal of uncertainty and ignorance is pervading the print media and publishing sectors concerning the development and implementation of qualifications and learnerships. Progress towards developing unit standards has been very slow. A preliminary qualitative study aimed at providing the MAPPP SETA with a publishing subsector skills plan was conducted (Eve Gray & Associate, 2004), but it leaves much to be desired in terms of providing a critical quantitative and qualitative building block for effective interventions in the subsector. A particular challenge both for the sector and for the Chamber centres on the number of freelancers and small, medium and micro enterprises (SMMEs) that provide services to the print media and publishing houses. Indeed, the Chamber has identified the training and development of these stakeholders as one of its most important challenges.

## **Objectives and scope of the project**

The aim of this study was to conduct a skills analysis of the Publishing Subsector (PSS) in the Media, Advertising, Publishing, Printing and Packaging (MAPPP) sector in order to:

- develop a profile of the subsector in terms of size, demographics (race and gender), geographic location and skills levels;
- provide an inventory of the current training that is being provided to the PSS (including learnerships registered with other SETAs) in terms of training providers, training programmes, participants and common problems;
- identify, analyse and prioritise the current and future skills needs of the PSS; and
- identify the factors driving skills needs and future employment.

The focus of this study was on book-publishing and the registered skills levy paying enterprises operating in this subsector. A number of smaller enterprises (independent contractors) involved in book-publishing but not registered on the South African Revenue Service (SARS) database (that was used for this study) were included as well as a number of accredited and non-accredited training providers.

## **Methodology**

The findings presented in this report are the outcome of an analytical study that drew on secondary data sources as well as data from surveys and interviews. The surveys included a survey of book-publishing companies and of freelancers, and a survey of accredited training providers. Face-to-face and telephonic interviews were conducted with selected senior book-publishing executives and freelancers. African Response was subcontracted to conduct the company and freelancer survey. Senior research staff from the HSRC conducted interviews with senior book-publishing executives and training providers. Student enrolment and output data were obtained from the Department of Education.

## ***Situation analysis***

Existing data sources were explored to establish a broad background against which the empirical study could be planned and operationalised. The research team liaised with key experts and relevant role players in the publishing industry to assist in the collection of background information available from existing research. Detailed histories of the development of the book-publishing sector in South Africa can be found in a number of important works on the topic, including in the draft *National book policy* recently submitted to government, as well as in Nicholas Evans and Monica Seeber's key work, *The politics of*

*publishing in South Africa*, along with various policy documents such as the *Report on book development in South Africa* (Book Development Council of South Africa, 1997), the *South African Publishing Industry Report* (Cultural Industries Growth Strategy – CIGS of the Department of Arts, Culture, Science and Technology, 1998). However, it became evident that certain limitations exist in terms of documented sources relating to skills development in the sector. One of the reasons is that internal corporate training in the sector has often not been documented in a formal way. Another reason is that updated reports on recent developments are not easily accessed. The research team therefore conducted a series of interviews with the CEOs of publishing companies, with much appreciated help from the Publishers' Association of South Africa (PASA – see reference list). This methodology enhanced the analysis of skills development in the sector.

### ***Survey of registered book-publishing companies***

#### **Cleaning of database and sampling**

An important part of the study was to identify the companies that are operating in the book-publishing subsector among the variety of companies included on the South African Revenue Service (SARS) dataset of skills levy paying enterprises. The MAPPP SETA supplied the South African Revenue Service (SARS) dataset of skills levy paying companies in publishing. This comprehensive database included all companies in publishing, which paid skills levy in 2002, under the following headings: company name, contact details, Standard Industrial Classification (SIC) code, estimated payroll or number of employees or skills levy paid as an indicator of company size. Companies with the following SIC codes were listed under publishing on the SARS database:

- *Publishing of books, brochures, musical books and other publications* (SIC code 32410); and
- *Other publishing* (SIC code 32490).

A couple of companies operating in both the publishing and the printing business were classified under the following SIC codes:

- *Books and stationery printing* (SIC code 32392); and
- *Arts, culture and music* (SIC code 32430).

In order to establish a relatively comprehensive sample frame, the following databases were also investigated to compile a final combined list of registered book-publishing companies:

- the SARS database of registered publishing companies;

- the National Library database on International Standard Book Number (ISBN) holders (obtained by means of a written request the MAPPP SETA directed to the National Library); and
- a database of the Publishers' Association of South Africa (PASA).

A general list of book-publishing companies was compiled based on the original SARS database, ISBN database and PASA database (N = 567) and then circulated among members of the Publishing Chamber Steering Committee for comments. Ninety-four companies were identified as book publishers (see Annexure A), and this sample frame was discussed with members of the Publishing Chamber Steering Committee. The list was narrowed down to a final number of 37 levy paying companies identified as crucial to be interviewed for the study.

### **Questionnaire design and survey**

The HSRC subcontracted African Response to do the fieldwork. HSRC officials prepared the structured questionnaire (see Annexure B) that was administered during face-to-face interviews of approximately 45 minutes with the owners, human resource managers, and/or skills development facilitators of the selected companies. To ensure that a company did qualify for an interview, fieldworkers had to ask if the company was a registered member of the MAPPP SETA (question 1.1, Annexure B). Interviewees were contacted telephonically, and informed verbal consent (see Annexure C) to participate had been obtained before any interviews were arranged.

In many instances, not all the information required could be supplied during the interview and final data were either e-mailed to the interviewer or collected later. The 14-page questionnaire included questions on companies' work force and skills profile, future skills needs, training provision and factors that may influence future employment.

Training of the fieldworkers started on 7 November 2005, and the survey was launched in mid-November. Several of the selected (37) book-publishing companies refused to participate (please refer to Annexure D for a field report from African Response). The fieldworkers worked through the list of 37 and then started to select possible respondents from the sample frame of 94 registered companies. By mid-December 21 company interviews had been completed. From the fieldwork progress report received on 11 January 2006 from African Response, it became clear that companies were trying to meet their

commitments before they closed for the summer holidays. Some of the companies were eager to participate, but requested to be interviewed only from 16 January 2006.

By end January, data from 37 companies were collected. Fieldworkers from African Response managed to interview 14 companies from the shortlist of 37 book-publishing companies. It has to be noted that this list included three duplications, which brought the sample to 34 companies. The response rate was 41 percent of the 34 levy paying book-publishing companies identified from the SARS database as crucial to be interviewed. The duplications included the following companies on the SARS dataset of skills levy paying companies:

- L730706894: Butterworth Publishers (Pty Ltd) = L140733637: LexisNexis Butterworth
- L260703279: Juta & Company Ltd = L180739171: Juta Education (Pty) Ltd
- L800703607: Nasboek Bpk = L770701821: Nasou Afdeling van Nasionale Opvoedkundige Groep Bpk (Nasou Via Afrika Publishers)

A further 16 book-publishing companies from the sample frame (N = 94) responded, which resulted in a response rate of 32 percent (14 + 16/94). A further seven book-publishing small, medium and micro enterprises (SMMEs) (N = 23) took part, and this brought the total to 37 interviews.

It has to be emphasized that all of the 37 responding companies indicated that they were registered members of the MAPPP SETA. However, 16 of the respondents indicated that they were non-paying members and another six did not provide a Skills Development Levy Number. It is noteworthy that all of the respondents indicated that they were in book-publishing when they had been asked to describe their company's main business activity.

### ***Survey of non-registered book-publishing businesses/independent contractors/freelancers***

#### **Cleaning of database and sampling**

Because the majority of publishing companies outsource activities such as editing, proofreading, typesetting, book design, cover design, picture research, photography, illustration, project management and translation to freelancers/SMMEs, it was decided in consultation with members of the Publishing Chamber Steering Committee that a list of smaller independent contractors (e.g. freelancers), involved in book-publishing but not registered with SARS, should to be compiled from the following databases:

- the Southern African Freelancers Association (SAFREA) database;



- the National Library database on ISBN holders;
- the Professionals Editors Group (PEG) database;
- various databases of freelancers compiled by bigger companies in the book-publishing industry;
- a database of illustrators; and
- a database of SA Translators.

Forty-nine smaller independent contractors involved in book-publishing were selected for interviews with the help of members of the Steering Committee from a sample frame of 270 companies (see Annexure E).

### **Questionnaire design and survey**

HSRC officials prepared a second short structured questionnaire (see Annexure F) to be used by fieldworkers during face-to-face interviews with non-registered SMMEs and/or freelancers in the book-publishing industry. The structured questionnaire was administered during face-to-face interviews of approximately 20 minutes with the owners or managers of the selected SMMEs or with freelancers in the book-publishing industry. Interviewees were contacted telephonically, and informed verbal consent (see Annexure G) to participate had been obtained before any interviews were arranged.

The two-page questionnaire included questions on the owner/manager's or freelancer's work experience, qualification(s) and skills acquired, skills needs, training-related problems and challenges faced by independent contractors in the book-publishing industry. Over a period of four months, data were collected from 49 independent contractors (35 editors/translators, 11 designers and 3 *other* contractors) in the book-publishing industry.

### ***Training provider survey***

A list of training providers involved in training and education of learners in book-publishing or aspects of book-publishing, such as writing, other writing-related work, translation, editing, graphic design, electronic publishing, foundation design courses and printing, were compiled from a list of current universities, universities of technology and private training providers.

A total of 17 training providers, consisting of four universities, three universities of technology and 10 private training providers, were selected from a sample frame of 150 training providers (involved in training and education in the field of book-publishing or some aspect of book-publishing). The sample frame of 150 training providers consists of 14 universities,

seven universities of technology, 117 private training providers and 12 further education and training (FET) colleges (see Annexure H). Eight institutions offer courses up to doctorate level, seven institutions offer courses up to master's level, six institutions offer courses up to the first-degree level, seven institutions offer courses up to diploma level, and 123 institutions offer courses only up to certificate level that are applicable to the book-publishing sector.

The questionnaire (see Annexure I) that was administered included questions on the nature of training provided, future education and training courses, funding, factors that might impact on learners' access to training, factors that might impact on student failure, support strategies to improve education and training, the role of various role players in addressing issues in education and training in the book-publishing industry, and the level and nature of contact with national and international organisations.

A chief researcher at the HSRC initially contacted training institutions telephonically, after which the questionnaire was e-mailed or faxed to the contact person. Most training providers that had been approached for information responded positively. However, a few of them, especially those in the private sector, were not keen to provide information, especially with regard to output of the number of students. Four universities, three universities of technology, and 10 private training providers responded, although not all of them completed all the questions put to them.

### ***Data capturing and analysis***

After the fieldwork had been completed, the information gleaned from the questionnaires was coded and captured on computer. Categories were created for the responses to open-ended questions in the questionnaire by means of content analysis. The data was captured in Microsoft Excel and converted to SPSS (Statistical Package for the Social Sciences) for Windows for statistical analysis.

### ***Methodological challenges***

The research team had to deal with various methodological challenges before they could finalise the sampling process. Firstly, the actual size of the industry is not known. Various databases such as those obtained from the National Library on International Standard Book Number (ISBN) holders, the Publishers' Association of South Africa (PASA), and the South African Revenue Service (SARS) were considered as sources for sampling purposes of the registered companies in the book-publishing industry. However, the SARS database had

certain limitations because it lacked detailed, up-to-date information on companies, which made it difficult to determine the scope of the book-publishing industry in the MAPPP sector. The SARS database classified most companies related to book-publishing under broad overarching categories such as *Publishing of books, brochures, musical books and other publications* (SIC code 32410) and *Other publishing* (SIC code 32490). It classified a couple of companies that are in both the publishing and the printing business under *Books and stationary printing* (SIC code 32392) and *Arts, culture and music* (SIC code 32430).

An analysis of the geographical spread of the companies that participated in the survey (chapter 2) showed that more book-publishing companies in the Western Cape were willing to be interviewed or delivered completed questionnaires than companies based in Gauteng did.

To get a more comprehensive and balanced view of the sector, not only interview results were analysed but also relevant data obtainable from the SARS database and from Workplace Skills Plans (WSPs) submitted to the MAPPP SETA in 2005. From Table 1, it is clear that the geographical distribution of the 94 companies identified as book publishers could be derived from addresses contained in the SARS database. Data on the number of workers employed in 69 of the 94 companies were available from the SARS database. Employment figures for 24 of the 34 book-publishing companies that members of the Publishing Chamber Steering Committee identified and confirmed could be obtained from various sources, including WSPs. With regard to turnover, factors inhibiting/enhancing employment and ownership, the research team had to rely on the data collected from the 37 book-publishing companies during the survey. In addition, interviews were conducted with nine senior book-publishing executives with the aim to elicit their views on factors that may influence future employment in the sector.

**Table 1: Data analysed: categories and sources**

Employers	Sample frame	Interviewed	Expert IDed
Geographical distribution	N = 94	N = 37	N = 34
Distribution by size category	N = 69	N = 37	N = 24
Turnover		N = 36	
Factors inhibiting/enhancing employment		N = 37	N = 9
Ownership		N = 37	

Table 1: Data analysed: categories and sources (continued)

Employees	Sample frame	Interviewed	Interviews + WSPs
Employment by size category	N = 69	N = 37	N = 43
Population group distribution		N = 37	N = 43
Gender distribution		N = 37	N = 43
Occupational distribution		N = 37	N = 43
Highest educational level		N = 37	
Workplace training		N = 37	

Apart from employment statistics for 69 of the 94 companies on the SARS database and collected from 37 book-publishing companies during the survey, information from an additional six book-publishing companies that had submitted WSPs to the MAPPP SETA was included in the demographic profiling of the workers in the subsector. With regard to the educational levels of workers and training provision, the research team had to rely on the data collected from the 37 book-publishing companies during the survey.

Finally, it has to be noted that although the research team did their best to identify book-publishing companies from the SARS database, the list of 94 companies might include companies whose main business activity is not necessarily book-publishing. However, significant similarities were found from the analysis of the data contained in the different datasets. It is recommended that the employer profile (chapter 2) and the worker profile (chapter 3) be accepted as a reflection of current employment trends in the book-publishing sector. The reader is cautioned to view the results of the study with circumspection and to regard them as qualitative and descriptive rather than quantitative.

### **Layout of the rest of the report**

This report provides an overview of the quantitative and qualitative data collected on the book-publishing subsector.

Chapter 2 provides a business profile of the book-publishing industry. After a brief overview of the book-publishing industry, more detail is given on aspects such as the distribution of employers in the book-publishing subsector in terms of locality and company size as well as ownership, turnover and challenges.

Chapter 3 focuses on total employment as it is spread across occupational category, gender and race. The workforce is further analysed in terms of highest educational level. This

chapter also provides an overview of the factors that may inhibit or encourage future employment in the sector.

Chapter 4 introduces the skills shortages and skills gaps in the book-publishing subsector, as reported by the respondents.

Chapter 5 provides an overview of workplace training in the book-publishing subsector as reported in the company survey. The training ratio and types of training provided during the 2004/2005 financial year and the factors that prevented potential learners from gaining access to training are highlighted. This chapter also identifies possible strategies to address education and training challenges and contains the comments of employers on how the MAPPP SETA can increase its support to employers.

Chapter 6 outlines the training supply to the sector. An overview of education and training provision applicable to book-publishing is given. It reflects the views of training providers on the role of stakeholders in addressing education and training issues in the book-publishing subsector.

Chapter 7 provides a profile of freelancers in the book-publishing subsector. An overview is given of the services freelancers provide, their qualifications and skills needs as well as the challenges they experience.

Chapter 8 closes with conclusions and recommendations on skills issues in the book-publishing subsector.

## CHAPTER 2

### PROFILE OF THE BOOK-PUBLISHING SUBSECTOR

#### Industrial coverage

“Publishing lies between the origination and the destination of the literary text, and is an ensemble of discreet processes which centres on the production and dissemination of the literary artefact. Whole classes of specialised labour are involved in the process ... from plantation workers and paper manufacturers to typesetters, layout artists and printers” (Oliphant, 2000:107).

The Constitution of the MAPPP SETA (17 February 2005) demarcates the sector into seven industries or services, namely: (1) advertising industry, (2) creative industries, (3) electronic media industry, (4) packaging industry, (5) print media industry, (6) printing industry and (7) publishing industry. Section 6 (vii) of the Constitution defines the publishing industry as follows:

**Publishing Industry** – shall mean any individual, partnership, organisation, or company engaged in one or more of the following activities:

- (a) the preparation (commissioning, editing, design and typesetting),
- (b) and/or the issue (publication and/or printing),
- (c) and/or the marketing,
- (d) and/or the warehousing and/or distribution.

of any one or more of the following products:

- (a) books,
- (b) journals,
- (c) loose leaf publications,
- (d) periodicals, and/or
- (e) music.

In print and/or electronic media (Internet, CD-ROM, or any other electronic medium yet to be developed) and/or multimedia (mixed media CD-ROM, DVD, satellite or other medium yet to be developed).

According to the MAPPPSETA's Publishing Subsector Skills Plan (August 2004), book publishers include:

- Trade publishers (fiction, non-fiction and business);

- Publishers of illustrated books (tourism and natural history);
- Map publishers;
- Education publishers:
  - adult literacy
  - school education
  - college and corporate training
  - higher education textbooks
- Scholarly publishers and university presses (including journal publishers)
- Law and professional publishers.

### **Brief history and topography**

There is a “great deal of literary activity” in the country together with “a vibrant marginal publishing culture” (Higgs, 2005). With both mainstream and alternative publishing thriving, there is clearly, as Higgs suggests, “a lot to be excited about in South African publishing”.

Without attempting to reinvent the wheel by restating what is common knowledge in the sector, let us highlight a few brief points to serve as *aide-memoires* and which will have a contextual bearing on the discussion that follows:

- By the close of the 19<sup>th</sup> century, publishing was represented by small family businesses operating mainly in the Cape (DACST, 1998:34).
- Afrikaner nationalism spawned the growth of two giant Afrikaans publishing houses, Nasionale Pers and Perskor, which grew to prominence in the 1930s and 1940s.
- An alternative publishing sector led by David Phillip, Ravan, Skotaville, and others emerged in the 1970s and 1980s.
- The National Book Development Council found that the publishing industry was still skewed in the late 1990s towards educational publishing, did not cater for reading in indigenous African languages, had a thinly-spread book distribution network concentrated in formerly white areas, had human resources that were unrepresentative of the population and noted that training opportunities were unevenly developed (BDCSA, 1997:i).
- In 1990, representatives of progressive book-publishing houses (Sached, Skotaville, Ravan and Seriti sa Sechaba) formed a coordinating group to organise one or two in-service courses to be run by lecturers brought here from London (Czerniewicz & Seeber, 2000:233).

- The Independent Publishers' Association of South Africa (IPASA) was established in 1989. The motivation for the establishment of IPASA was to create an association that would recognise the non-commercial imperatives of publishing, including the need for products that did not support the apartheid ideology.
- In 1991, the IPASA training subcommittee set out its goals as follows: to increase the pool of highly trained and skilled publishing practitioners, with special emphasis on redressing the imbalance between blacks and whites in the industry.
- By 1994, the subcommittee had noted a remarkable growth in publishing ventures by progressive organisations, most particularly by non-governmental organisations (NGOs) but also by trade unions, development groups, women's groups and educational organisations.
- A new publishers' association encompassing the majority of South African book publishers was formed in 1992. This was called the Publishers Association of South Africa (PASA) and IPASA, after prolonged debate, was eventually absorbed into the new association.
- The Book Development Council of South Africa, which was created in 1994, assessed the current state of training and skills development in its 1997 report submitted to the Minister of Arts, Culture, Science and Technology. In the report, the Council noted that training within the sector was "uneven, fragmented and ad hoc" (BDCSA, 1997:17).
- Significant restructuring and ownership changes have occurred in the sector since the early 1990s. Mergers and acquisitions have taken place so frequently and have had such far-reaching consequences that it is no longer possible to classify publishers according to whether or not they collaborated with apartheid (Mpe & Seeber, 2000).
- Apartheid era policy dictated the creation of regulatory committees that oversaw the provision of books including to the black education sector. The system was riddled with Glenn Moss called "cronyism" as privileged relationships determined what products were created, published and distributed (cited in Mpe & Seeber, 2000). Senior book-publishing executives interviewed in 2006 insist that corruption has diminished in recent years just as the commitment to bolstering skills has risen.
- The sector faced major disruption and restructuring in the years following the 1997/98 'textbook crisis', during which time companies either closed down, were liquidated or were sold, and an estimated 60 percent of the permanent workers were retrenched. During the same time, the book-publishing industry suffered a further blow because of the restructuring of the public library system under new local government policies (Andrew, 2004). It is, therefore, understandable that survival overtook transformation and skills development at the top of corporate agendas.



- The Skills Development Act (Act No. 97 of 1998) and the Skills Development Levies Act (Act No. 9 of 1999) introduced the institutions, programmes and funding policies that had been designed to increase investment in skills development and to improve the quality and impact of skills development in South Africa. Accordingly, the Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority (MAPPP SETA) was established to provide skills development support and to transform and empower the sector by creating opportunities for all.
- The Print Industries Cluster Council (PICC) was established formally in October 2002. The PICC remains committed to black economic empowerment (BEE) and to providing support for small or medium-sized enterprises to increase diversity in ownership and product.
- In May 2004, the Department of Arts and Culture formally requested the PICC to draft a national book policy. The policy sets out the need for a comprehensive capacity-building and empowerment plan through a skills development plan. Training and skills development are also referred to, though more in passing, in relation to bookselling, book printing and libraries (PICC, 2005:3).
- At a workshop to discuss the draft framework for the national book policy in Cape Town in August 2005, it was agreed that even at this late stage, “the issue of skills training needs to be looked at across the whole (value) chain” (PICC, 2005). In a position paper accompanying the Draft National Book Policy in 2005, it was acknowledged that “training in this sector is primarily limited to creative writing departments at university level and ad hoc training sessions by development organisations. What is almost completely neglected is training and support for writers in the business of earning a living as writers, including giving help in matters such as finances, copyright, contracts and subsidiary rights.”
- An example of the book-publishing sector’s involvement in transformation and skills development is the Centre for the Book’s Community Publishing Project (CPP), launched in 2001. One of the key aims of the Centre for the Book is to support the development of local writing and emerging writers.
- PASA did celebrate the success of its first internship programme in December 2005, calling the graduation of 30 interns “another crucial step in the transformation of the publishing industry of South Africa in terms of BEE objectives” (PASA, 2005a). The programme was funded by the MAPPP SETA and preparations are underway for the second intake in 2006.
- The most recent development in terms of policy has been PASA’s initiative to capture a black economic empowerment profile of the publishing sector (PASA, 2005b). At the end of 2005, the CEOs/Managing Directors (MDs) of PASA unanimously adopted a statement of intent regarding transformation in the publishing industry (PASA, 2005c).

- According to the MAPPP SETA (2006), the Publishing Chamber has made great strides in the past few months in terms of registering the Standards Generating Body (SGB) for Publishing and beginning the standards generation process towards a national certificate in publishing at national qualifications framework (NQF) Level 5.
- Proportionate to international markets, South Africa does not have a very strong reading culture (WOW, 2004). While South Africa has the third highest literacy rate in Africa, the percentage of literate people who constitute a regular book-buying market is extremely low (WOW, 2004). However, many strides have been made to deepen the national culture of reading and literacy and speed up the transformation of the sector and its products.
- In 2000, it was estimated that the book-publishing industry consisted roughly of 150 publishers (local and international), 8 000 writers, 500 000 regular book consumers, 400 bookshops, 1 200 libraries, a school education system with 400 000 teachers and 14 million learners, and a higher education system servicing more than 500 000 students (Evans & Seeber, 2000:12).
- Section 4.7 of the MAPPP SETA's Publishing Subsector Skills Plan (August 2004) provides an overview of the key organisations in the publishing industry. According to this section, the industry in South Africa is dominated by a few major role players in the educational publishing field.
- Multinational publishers, principally from the United Kingdom (UK) and the United States (US), are key players in the industry, supplying 70 percent of books for the tertiary education sector and 10 percent of primary and secondary school books (WOW, 2004).
- Currently the book-publishing industry employs between 2 000 and 3 000 full-time people, most of whom (70 percent) are engaged in the educational book-publishing sector (PASA, 2006: xlvii).
- During the 2003 Publishing Industry Snapshot Survey it was calculated that the industry was worth about R1,6 billion per annum, roughly divided between educational (55 percent), general or trade (37 percent) and academic (eight percent) publishers (PASA, 2006:xlvi). According to PASA's Executive Director, Mr Dudley Schroeder, because significant growth has taken place in the industry, the figure would now have reached R2 billion.

### **Geographical distribution of employers in the book-publishing subsector**

An analysis of available data on the geographical distribution of book-publishing companies indicates a concentration of companies in Gauteng. Based on an analysis of the addresses of 94 identified book-publishing companies on the SARS database, almost half of the book publishers are based in Gauteng, with more than a third of these companies based in the

Western Cape followed by KwaZulu-Natal hosting a tenth of the book-publishing companies in South Africa, as shown in Table 2, column (a).

**Table 2: Probable distribution of book-publishing companies, by province**

Province	(a) Sample frame		(b) Expert IDed		(c) Interviewed	
	Number	Percent	Number	Percent	Number	Percent
Gauteng	45	47,9%	20	58,8%	4	10,8%
KwaZulu-Natal	9	9,6%	3	8,8%	4	10,8%
Limpopo	2	2,1%	0	0,0%	0	0,0%
Northwest	1	1,1%	0	0,0%	0	0,0%
Western Cape	37	39,4%	11	32,4%	29	78,4%
Total	94	100,0%	34	100,0%	37	100,0%

A similar distribution profile was obtained when the addresses of the 34 book-publishing companies identified by the members of the Publishing Chamber were analysed for geographical distribution.

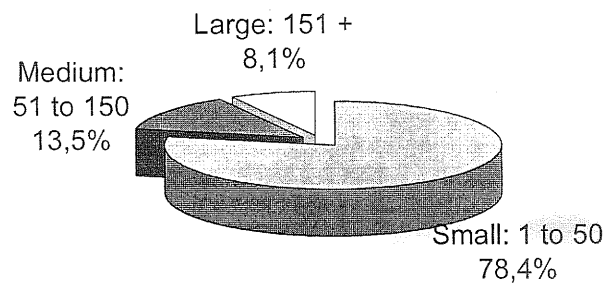
However, according to Wesgro (2000), the Western Cape is the publishing centre of South Africa. Wesgro ascribes this dominance to the fact that printers had established themselves in Cape Town at a time when paper was predominantly imported. Accordingly, an infrastructure has been built up over time, including printers, authors, journalists, editors, designers and typesetters.

This might explain why more than three-quarters of the 37 companies interviewed during HSRC's book-publishing subsector survey were concentrated in the Western Cape (29 companies – see Table 2). Four of the respondents were located in Gauteng and four in KwaZulu-Natal.

### **Distribution of employers by size category**

The majority (78,4 percent) of the 37 book-publishing companies interviewed employ 50 workers or less and can therefore be classified as small (figure 1). Only eight percent of the companies employ more than 150 workers and can be classified as large. Thirteen percent are medium-sized companies, employing between 51 and 150 employees.

**Figure 1: Distribution of interviewed book-publishing companies, by size category (N = 37)**



This profile is very similar to a profile composed from employment statistics available for 68 of the identified 94 book-publishing companies on the SARS database. The SARS database shows that 79,4 percent of the identified book-publishing companies can be classified as small (Table 3), six percent as large and 14,7 percent as medium-sized companies. According to Eve Gray and Associates (2004), internationally book-publishing is characterised by a handful of large companies at one end of the scale, with a proliferation of small and micro companies at the other end.

**Table 3: Probable distribution of interviewed book-publishing companies, by size category**

Size category	Source:	Interviewed		Sample frame		Expert IDed	
		Number	Percent	Number	Percent	Number	Percent
Small		29	78,4	54	79,4	14	58,3
Medium		5	13,5	10	14,7	6	25,0
Large		3	8,1	4	5,9	4	16,7
Total		37	100,0	68	100,0	24	100,0

Most of the small book-publishing companies interviewed during the HSRC survey were located in the Western Cape (Table 4). The large and medium-sized companies included most of the well-known book publishers, such as Juta & Company Limited, Maskew Miller Longman (Pty) Ltd and Oxford University Press Southern Africa (in the Western Cape); LexisNexis Butterworths and Shuter & Shooter Publishers (Pty) Ltd in KwaZulu-Natal; and Heinemann Publishers (Pty) Ltd and Jonathan Ball Publishers in Gauteng.

**Table 4: Distribution of interviewed book-publishing companies, by province and size**

Province	Small	Medium	Large	Total
Western Cape	25	2	2	29
Gauteng	2	2	0	4
KwaZulu-Natal	2	1	1	4
Total	29	5	3	37

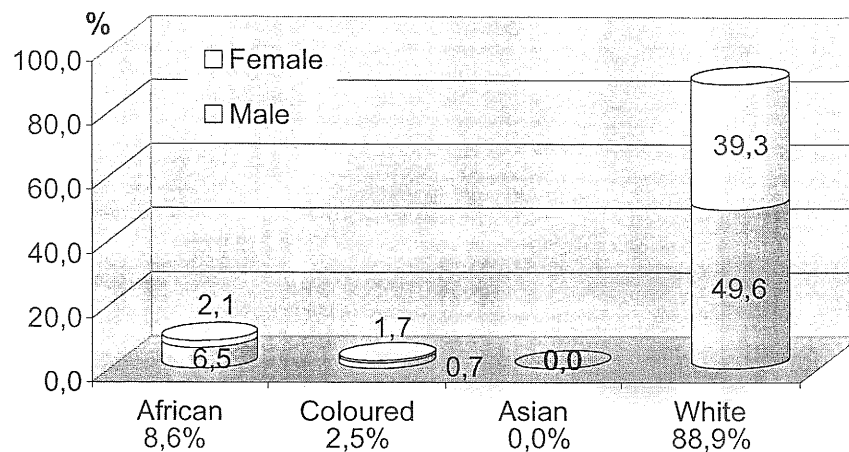
Small book-publishing companies interviewed in the Western Cape included Aardvark Press (Pty) Ltd, Bateleur Books (Pty) Ltd, CLS Publishing CC, Ebony Books CC, Effective Teaching Publishers (Pty) Ltd, Fernwood Press Pty Ltd, Flesch Publications, Lannice Snyman (Pty) Ltd, Quivertree Publications CC and Voices in Africa. In Gauteng, Lemur Books (Pty) Ltd and Vivlia Publishers & Booksellers (Pty) Ltd were interviewed, and in KwaZulu-Natal, New Dawn Publishers (Pty) Ltd and Y Press CC responded in the survey (see Annexure A).

### Ownership

The South African book-publishing industry is dominated by a few large locally- and internationally-owned conglomerates (Eve Gray & Associates, 2004). The book-publishing industry is primarily owned by whites. According to general consensus in the industry, transformation should take place (Wesgro, 2000; PICC, 2005).

The majority (34) of the 37 companies interviewed during the HSRC survey of book-publishing companies were South African owned companies. Locally-owned companies included all of the small companies, three of the medium-sized companies and one large company. One large company reported to be a multinational company (joint venture between foreign and South African companies) and two medium-sized companies were wholly owned by foreign companies.

The results of the HSRC survey confirm the strong predominance of white ownership in the book-publishing industry (figure 2). Whites have a share of 88,9 percent of the ownership of the book-publishing companies interviewed, while Africans hold 8,6 percent of the ownership and coloureds 2,5 percent. More than half (57,9 percent) of the ownership share resides in the hands of males.

**Figure 2: Share of ownership, by race**

As in any other economic sector in South Africa, there will be increased national pressure towards transformation and diversity in the book-publishing industry. The establishment of a Black Economic Charter for the Book and Publishing Industry has already been put on the table (Jordan, 2006).

The most recent development in terms of transformation has been PASA's initiative to capture a black economic empowerment profile of the publishing sector (PASA, 2005b). PASA members were requested to complete Department of Trade and Industry scorecards by mid-September 2005. The data is currently being analysed by the University of Pretoria's Department of Information Science (Publishing Studies) with a view to providing an overview of current transformation in the sector. The scorecards request, inter alia, equity ownership percentages, the proportion of black managers and levels of skills development expenditure relative to total payroll.

Furthermore, in a statement of intent regarding transformation in the publishing industry, which PASA released on 12 December 2005, CEOs/MDs of PASA member companies acknowledged that the publishing industry had to "promote and support the achievement of effective participation by black South Africans". They endorsed and committed themselves unanimously to the objectives and principles underlying the Broad-Based Black Economic Empowerment Act (Act No. 53 of 2003) and the Codes of Good Practice to be published in the Government Gazette, in due course.

## Turnover

Research experience shows it is very difficult to elicit finance-related information from companies in any sector of the economy. Companies are reluctant to provide figures on market share or turnover, and this reluctance increases in a highly competitive but small market such as the book-publishing industry. It was, therefore, decided to ask respondents to the HSRC survey to select the turnover category applicable to their companies for the 2004/2005 financial year (question 1.8, Annexure B). Four of the five medium companies and two of the three large companies indicated that their turnover for the 2004/2005 financial year exceeded R50 million (Table 5). One large company refused to provide an indication of its turnover. The other medium company and two of the 29 small companies had a turnover of between R11 and R20 million. Eleven of the 29 small companies showed a turnover of between R1 and R10 million and sixteen (more than half) of the small companies reported a turnover of less than R1 million.

**Table 5: Turnover of book-publishing companies, by size category (N=37)**

Turnover	Small	%	Medium	%	Large	%	Total	%
Less than 1 million Rand	16	55,2	0	0,0	0	0,0	16	43,2
1 to 10 million Rand	11	37,9	0	0,0	0	0,0	11	29,7
11 to 20 million Rand	2	6,9	1	20,0	0	0,0	3	8,1
More than 50 million Rand	0	0,0	4	80,0	2	66,7	6	16,2
Not stated	0	0,0	0	0,0	1	33,3	1	2,7
Total companies	29	100,0	5	100,0	3	100,0	37	100,0

## Drivers of change in the book-publishing subsector

“The world of publishing in fiction, poetry and other literary forms has changed forever ... for the better” – Dave Chislett, 2005

In considering key drivers of skills needs and future employment, it is important to consider some of the current trends within book-publishing and to look ahead at events and developments that will shape the direction of the industry. As far back as 1998, the CIGS report noted a growing recognition within the publishing industry that book-publishing stakeholders constitute an information resource (DACST, 1998:72) and therefore form part of a new kind of converged business. “The orientation of the sector is increasingly one of ‘product and package’ (implying) an emphasis on publishing and the origination and processing of quality content and attractive presentation as the core of the cluster with paper,

printing, broadcast and telecommunication industries serving as support sectors to this process" (DACST, 1998:72).

Changes in the technological process (convergence of print media and electronic and digital forms of production and dissemination) and the emergence of new types of publications, new genres and new forms of reading have all shifted traditional perceptions of book-publishing. As Oliphant observes, "the traditional notion of literature consumed mainly in solitary conditions through an individual text is in the process of being modified and incorporated into new, interactive media" (Oliphant, 2000:123). One aspect of this is that relationships between publishers and writers are shifting as publishers have now become more involved in commissioning, designing and targeting content.

Electronic publishing, as Steve Kromberg has argued for some time, is revolutionising the economics and politics of publishing globally (Kromberg, 200:259). "Instead of having to go through established publishers, literary journals or outlets," writes Dave Chislett, "writers suddenly have a spectrum of choices available for getting their work to the world at large. From website publications, mail groups and newsletters, digital print-on-demand solutions, custom publishing and underground magazines, the choice has never been wider" (cited in Higgs, 2005:4).

Research done by Who Owns Whom notes a "definite shift to local content and an increased demand for local books, especially biographies of local celebrities, self help and advice books" (p 4). It also points to opportunities in Africa as being an area of major potential for the local publishing business. Eve Gray agrees, but says that reaching into Africa has its challenges. Tariff barriers, distribution problems and high distribution costs will all inhibit the growth of South African publishing interests up north. She calls for the exploration of co-publishing and joint academic textbook development (Gray, 2000:173). The PICC has also noted the need for the industry to contribute to the New Partnership for Africa's Development (NEPAD) and the African Renaissance (PICC, 2004:4). One analyst observes that it is to local publishers' advantage that "many of the challenges faced by those involved in book provisioning in developing countries, namely how to create capacity in a situation in which there are no authors, few publishers, no paper and no booksellers, do not exist in South Africa" (Evans, 2000:212).

Other challenges facing the book-publishing industry include the hurdles to employment equity where English is the major publishing language and employees only speak English as a second language. In addition, it is important to reverse the clustering of black employees in



African language publishing or in sales to education departments and schools, especially in rural areas (Czerniewicz & Seeber, 2000:236). Copyright violation and piracy, the threat from substitute products (such as DVDs), growing competition across all sectors, a fluctuating currency and diminishing leisure time globally all constitute threats to the sector.

On the other hand, conditions have improved significantly in the educational publishing environment as the industry is becoming "more streamlined and regulated" and government is becoming more predictable (WOW, 2004:4). Other positive prospects for the sector include e-commerce and potential growth in the children's book market (ibid). However, "the transformation issue is looming on the horizon, especially for educational publishers" while some companies are edgy about restructuring staff in line with equity charters. It is true, nevertheless, that other companies are being more proactive (WOW, 2004:4).

Senior publishing executives point to the debilitating impact of the 1997/98 textbook crisis and the radical retrenchments and restructuring that followed it as a vital reason for sluggish transformation and skilling in the subsector. "Publishers have been under huge pressure to survive under circumstances of low wages, huge work loads and with no capacity for training. It has not been a question of not hiring a more diverse workforce. For quite some time, there was no hiring at all," according to Nelleke de Jager of Kwela Books. De Jager also said that skills development in the sector had been severely underestimated, particularly recently, and highlighted a range of initiatives being undertaken at Kwela Books, but also elsewhere, aimed at bolstering the skills and opportunities of black writers and editors.

According to PASA's Executive Director, Mr Dudley Schroeder, the first ever book fair to be held in Cape Town, South Africa, in June 2006 should assist in popularizing reading more widely in South Africa and will expose readers to high-profile and emerging local and international authors. The event will provide business opportunities - joint ventures, co-productions and licensing -- and should establish South Africa as a centre for Africa's book industry. The Cape Town Book Fair (CTBF) is a joint venture between PASA and the largest and most successful book fair in the world, the Frankfurter Buchmesse. Sponsored by the Sunday Times and supported by the Nelson Mandela Foundation, the CTBF will become an annual event. From 17 to 20 June 2006, the book fair will host local and international authors as well as local and international publishers under the theme, "Celebrate Africa". It is anticipated that more than 30 000 visitors including publishers, authors, booksellers, the press, paper manufacturers, printers, librarians, literary agents, lecturers and students, teachers and pupils, government officials, policy makers and the general public will attend the Fair extending over four days.

The book-publishing industry might also benefit from the Accelerated and Shared Growth Initiative for South Africa (ASGISA). President Mbeki introduced ASGISA at the joint sitting of Parliament on 3 February 2006. He said that "ASGISA is not intended to cover all elements of a comprehensive development plan; rather it consists of a limited set of interventions that are intended to serve as catalysts to Accelerated and Shared Growth Development". The Deputy President, Ms Phumzile Mlambo-Ngcuka, presented ASGISA to Cabinet on 6 February, and this was followed (over the next few days) by a series of presentations by ministers as Heads of Clusters, such as the briefing on 10 February by the Minister of Arts and Culture, Pallo Jordan, on Economic Cluster 11: Sector Investment Strategies. Mr Jordan (2006) highlighted the interventions relating to arts, culture and heritage within this cluster during 2006/07. The major activities and projects of specific interest to the book-publishing sector include the following:

- A R100-million investment will be channelled into the creative industries such as film, crafts, music, television, books and publishing to make a major contribution to closing the gap between First and Second Economies.
- Publishing will be boosted through promoting literature in the indigenous languages. A national book and publishing strategy will be finalised to stimulate the publication and export of local literature. Significantly, more books will be translated from indigenous languages into English and vice versa.
- The establishment of a Black Economic Charter for the Books and Publishing Industry.
- A massive R1 billion will be made available over the next three years to fund public libraries. This is to ensure the transformation of the sector and promote a reading culture. A charter similar to that for the Books and Publishing Industry is being prepared for libraries.
- The assessment of the feasibility of establishing a translation and editing agency that can absorb numerous language graduates into the economy.

### **Employers' views regarding factors that may influence future employment in the book-publishing industry**

During the HSRC survey of book-publishing companies, respondents were probed for information on factors that may influence future employment in their companies. Responses were given regarding factors that may enhance growth in employment as well as factors that may be responsible for future stagnation or decline in employment.

The book-publishing industry considers demand factors in the market as most important to employment growth (Table 6). According to respondents, these demand factors relate to the growth of the website market, the increase in tourism in South Africa, the extension of work emanating from the education sector and the subsequent increase in government spending, the expansion of business into the rest of Africa, the request for new titles, and the development of niche markets. Other factors that may enhance the future growth in employment refer to the establishment of strategic partnerships, less strict labour laws, the establishment and implementation of a mentorship as well as an internship, development of the skills of previously disadvantaged individuals, BEE compliance and strong leadership in the industry.

**Table 6: Factors that enhance growth in employment**

Factors	Responses
Demand/brand value	32
Economic growth in SA	6
Partnerships	4
Acquisitions - buying opposition / increase market share	3
Resources to address demand	3
BEE compliant	3
More donar funds available	2
Expansion into Africa	1
Less restrictive labour laws	1
Development of niche markets	1
Diversify	1
Total (N = 37 respondents listed more than one factor)	57

Senior book-publishing executives are hopeful that the emerging black middle class will devote an increasingly large portion of their disposable income to the acquisition of books, and the supply of work in indigenous languages is on the rise.

The most important and obvious factor that may have a negative impact on employment growth is a decrease in the demand for book-publishing services and products (Table 7). A decline in the demand for educational products from government can have a major effect on the industry, and the 1997/98 scenario is a good example of that. Important dynamics that may cause a decrease in the demand for services and products relate to the diminishing of donor funds, a decline of student numbers due to HIV/Aids and a drop in tourism rates. Other factors that may inhibit employment growth in the sector are strong competitors entering the

market, the lack of sufficient skills and experience, the changing nature of the business, overly strict labour laws, low BEE uptake and poor strategic planning by companies.

**Table 7: Factors that may inhibit growth in employment**

Factors	Responses
Less demand	21
Competition for sought after candidates	5
Finance - donor funds dry up	4
Lack of skills	4
Labour laws/BEE	3
Poor strategic planning	2
Total (N = 37 respondents listed more than one factor)	39

With regard to developments in SMMEs, senior book-publishing executives have warned that current dynamics and market forces coupled with the competitive nature of the industry make it extremely difficult for newcomers to start enterprises in the book-publishing sector (Pienaar, Shezi, 2006). According to Pienaar, a large number of enterprises fail; however, there are also many success stories. Consolidation towards a few large publishers – rather than fragmentation – is an international trend, and this might increasingly happen in South Africa, especially during the postcurricular development phase. This will further reduce small business opportunities.

Dirk Swanepoel (2006), Chief Operating Officer of Via Afrika Limited, summarizes the constraints to growth in the book-publishing sector as follows:

- the copying of books;
- overseas publishers that dominate the local general book market;
- the majority of books are imported (e.g. about 50 percent of tertiary books are imported)
- local books are in Afrikaans and then in English;
- not enough work in publishing houses, because books come from overseas;
- inconsistent spending of different education departments; and
- SA books that are not sold overseas.

## CHAPTER 3

### PROFILE OF THE WORKERS IN BOOK-PUBLISHING

#### Quantification of the labour market

Formal employment in the book-publishing industry is estimated at between 2 000 and 3 000 workers (PASA, 2006:xlvii). Table 8 provides a comparative overview of the number of workers in the book-publishing industry, based on three datasets, namely (1) the responses from 37 book-publishing companies interviewed during the HSRC survey (N = 1 519 workers); (2) employment statistics obtained from six WSPs submitted to the MAPPP SETA in addition to survey data (N = 1 760 workers); and (3) employee numbers obtained for 69 of the 94 companies identified from the SARS dataset (N = 2 481 workers).

No significant differences were found across the three datasets with regard to distribution according to the size of the companies, the average number of workers per company, or the share of employment according to the size category. In summary:

- In all three datasets, large companies account for less than a tenth of the companies, medium companies account for around 15 percent and small companies for more than three-quarters of the book-publishing companies.
- Large companies employ between 277 and 286 workers each, medium-sized companies employ between 87 and 96 workers each, and small companies between six and nine workers each.
- Large companies provide half of the permanent jobs in the subsector, medium-sized companies account for a third of the jobs and small companies for less than a fifth of the jobs.

The 37 book-publishing companies interviewed during the HSRC survey collectively employ 1 519 workers, giving an average of 41 workers each. Large companies employ an average of 286 workers each, medium-sized companies employ 96 workers each, and small companies 6 workers each (Table 8).

Although large companies account for less than a tenth of all book-publishing companies interviewed, they provide more than half of the jobs in the subsector (Table 8). Medium-sized companies account for a third of the jobs and small companies for a tenth.

**Table 8: Probable employment in the book-publishing subsector, according to size category**

N = 37 Companies interviewed	Large	Medium	Small	Subtotal
Number of companies	3	5	29	37
% Distribution	8,1	13,5	78,4	100,0
Total employed	858	479	182	1519
Average (workers per company)	286	96	6	41
Employment according to size	56,5	31,5	12,0	100,0

N = 37 Interviewed + 6 WSPs	Large	Medium	Small	Subtotal
Number of companies	3	7	33	43
% Distribution	7,0	16,3	78,7	100,0
Total employed	858	607	295	1760
Average (workers per company)	286	87	9	41
Employment according to size	48,8	34,5	1,8	100,0

N = 69 Companies on SARS dataset	Large	Medium	Small	Subtotal
Number of companies	5	10	54	69
% Distribution	7,2	14,5	78,3	100,0
Total employed	1108	902	471	2481
Average (workers per company)	277	90	9	36
Employment according to size	44,7	36,4	19,0	100,0

### ***Geographical distribution of the workforce***

Due to the fact that more book-publishing companies in the Western Cape were willing to be interviewed or completed questionnaires than companies based, for example, in Gauteng or KwaZulu-Natal did, the survey data cannot be trusted to calculate a valid geographical distribution of the workforce in the book-publishing industry (Table 9, column A). Employment data obtained for 69 companies from the SARS database (Table 9, column B) and for 24 of the 34 book-publishing companies identified by members of the Publishing Chamber (Table 9, column C) might provide an acceptable estimate. This data show that about two-thirds of the workers are concentrated in the Western Cape, followed by Gauteng (more than a quarter of the workers) and less than five percent in KwaZulu-Natal.

**Table 9: Probable distribution of workers in book-publishing, by province**

Province	(a) Interviewed		(b) Sample frame		(c) Expert IDed	
	Number	Percent	Number	Percent	Number	Percent
Gauteng	239	15,7	693	27,9	571	31,5
KwaZulu-Natal	338	22,3	105	4,2	85	4,7
Limpopo	0	0,0	69	2,8	0	0,0
Northwest	0	0,0	3	0,1	0	0,0
Western Cape	942	62,0	1 611	64,9	1 159	63,9
<b>Total</b>	<b>1 519</b>	<b>100,0</b>	<b>2 481</b>	<b>100,0</b>	<b>1 815</b>	<b>100,0</b>

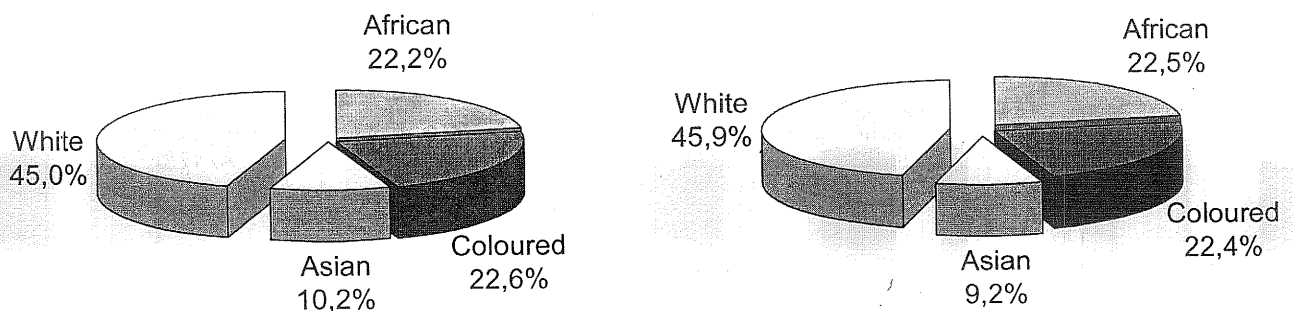
According to Wesgro (2000), the Western Cape dominates the publishing industry in South Africa. Notably, the provincial distribution profile of workers developed from all three datasets suggests a concentration of workers in the Western Cape (Table 9).

**Population group distribution**

More than half (55 percent) of all workers in the book-publishing companies, who responded to the survey, were black and 45 percent were white (figure 3). Africans accounted for 22,2 percent of black workers, coloureds for 22,6 percent and Asians for 10,2 percent. A comparative analysis of employment statistics collected from the 37 book-publishing companies that participated in the survey and information from an additional six book-publishing companies that submitted WSPs to the MAPPP SETA provide a similar race breakdown.

**Figure 3: Population group distribution of workers in book-publishing**

Interviewed N = 37 companies / 1518 workers      Interviewed + WSPs N = 43 companies / 1759 workers



An analysis of race across occupational levels shows an inverted pattern: Whites predominate in the top-level jobs, while it is mainly black (African, Coloured or Asian)

workers who are employed in the lower positions (Table 10). More than two-thirds of the managers, professionals and technicians are white, while the majority (about 90 percent) of operators and labourers are black. Seventy percent of clerical workers and 56 percent of service workers are black. Almost all the operators (95,5 percent) and labourers (87,2 percent) are black.

A comparative analysis of employment statistics collected from 37 book-publishing companies during the survey and information obtained from an additional six book-publishing companies that submitted WSPs to the MAPPP SETA provide a similar race breakdown across the different occupational levels.

**Table 10: Population group distribution of workers, according to occupational category**

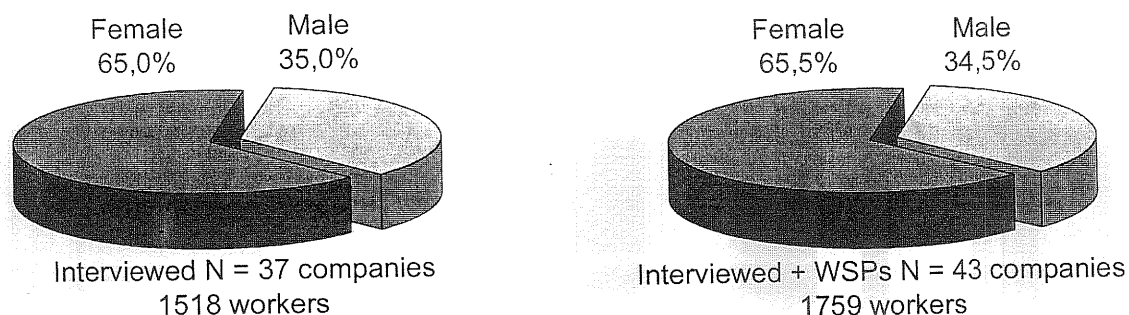
Interviewed N = 37 companies	African	Coloured	Asian	White	Total
Managers	17,3	7,3	6,0	69,4	100,0
Professionals	24,5	8,4	3,9	63,2	100,0
Technicians	3,7	14,2	17,9	64,2	100,0
Clerks	13,9	40,8	15,6	29,7	100,0
Service workers	33,0	16,7	6,4	43,9	100,0
Operators	40,9	50,0	4,5	4,5	100,0
Labourers	62,8	22,1	2,3	12,8	100,0
Apprentices	62,5	0,0	37,5	0,0	100,0
<b>Total N = 1 518 workers</b>	<b>22,2</b>	<b>22,6</b>	<b>10,2</b>	<b>45,0</b>	<b>100,0</b>
Interviewed + WSPs N = 43 companies	African	Coloured	Asian	White	Total
Managers	17,2	6,6	5,6	70,6	100,0
Professionals	23,5	7,4	4,4	64,7	100,0
Technicians	4,2	16,8	15,7	63,4	100,0
Clerks	14,3	41,0	14,5	30,3	100,0
Service workers	34,2	17,7	5,8	42,3	100,0
Operators	40,9	50,0	4,5	4,5	100,0
Labourers	60,6	26,9	1,9	10,6	100,0
Apprentices	62,5	0,0	37,5	0,0	100,0
<b>Total N = 1 759 workers</b>	<b>22,5</b>	<b>22,4</b>	<b>9,2</b>	<b>45,9</b>	<b>100,0</b>

### Gender distribution

Female workers predominate in the book-publishing subsector of the MAPPP Sector (figure 4). Men only constitute a third of this workforce. A comparative analysis of employment statistics collected from 37 book-publishing companies during the survey and information obtained from an additional six book-publishing companies that submitted WSPs to the MAPPP-SETA provide a similar gender breakdown.



**Figure 4: Gender distribution of workers in book-publishing**



More than half of managers, 69,0 percent of professional workers and 72,2 percent of technicians and associated professionals are women (Table 11). In addition, three-quarters of clerks and 62,6 percent of service workers are women. No female workers are employed as operators. Fewer than half of the labourers and a quarter of the apprentices are women. A comparative analysis of employment statistics collected from 37 book-publishing companies during the survey and information obtained from an additional six book-publishing companies that submitted WSPs to the MAPPP SETA provide a similar gender breakdown across the different occupational levels.

**Table 11: Gender distribution of workers, according to occupational category**

Occupation	Interviewed N = 37 companies/1 518 workers			Interviewed + WSPs N = 43 companies/1 759 workers		
	Male	Female	Total	Male	Female	Total
Managers	48,0	52,0	100,0	46,5	53,5	100,0
Professionals	31,0	69,0	100,0	29,4	70,6	100,0
Technicians	27,8	72,2	100,0	28,3	71,7	100,0
Clerks	23,4	76,6	100,0	23,1	76,9	100,0
Service workers	37,4	62,6	100,0	36,5	63,5	100,0
Operators	100,0	0,0	100,0	68,4	31,6	100,0
Labourers	55,8	44,2	100,0	53,8	46,2	100,0
Apprentices	75,0	25,0	100,0	75,0	25,0	100,0
<b>Total</b>	<b>35,0</b>	<b>65,0</b>	<b>100,0</b>	<b>34,5</b>	<b>65,5</b>	<b>100,0</b>

## Occupational distribution

Managers accounted for 16,3 percent of the workforce in the 37 book-publishing companies that were interviewed. Professionals, technicians and associated professionals each accounted for 10 percent of the workforce (Table 12). Clerical workers (32,6 percent) and service workers (22,5 percent) accounted for more than half of the workers in book-publishing companies. The rest of the jobs were held by operators (1,4 percent), labourers (5,7 percent) and apprentices (0,5 percent). A comparative analysis of employment statistics collected from 37 book-publishing companies during the survey and information obtained from an additional six book-publishing companies that submitted WSPs to the MAPPP SETA provide a similar occupational breakdown.

**Table 12: Occupational distribution of workers in book-publishing**

Occupation	Interviewed N = 37 companies/1 518 workers		Interviewed + WSPs N = 43 companies/1 759 workers	
	Number	%	Number	%
Managers	248	16,3	303	17,2
Professionals	155	10,2	204	11,6
Technicians	162	10,7	191	10,9
Clerks	495	32,6	532	30,2
Service workers	342	22,5	395	22,5
Operators	22	1,4	22	1,3
Labourers	86	5,7	104	5,9
Apprentices	8	0,5	8	0,5
<b>Total</b>	<b>1 518</b>	<b>100,0</b>	<b>1 759</b>	<b>100,0</b>

Small companies reported a greater need for labourers than medium and large companies (Table 13). Respondents from large and medium companies reported a greater need for technicians, associated professionals, clerical workers and service workers than small companies.

**Table 13: Occupational distribution of workers, by company size (n=1 518)**

Occupation	Number of workers			Distribution		
	Small	Medium	Large	Small	Medium	Large
Managers	62	83	103	30,7%	17,4%	12,3%
Professionals	20	39	96	9,9%	8,2%	11,5%
Technicians	9	46	107	4,5%	9,6%	12,8%
Clerks	31	141	323	15,3%	29,5%	38,5%
Service workers	31	126	185	15,3%	26,4%	22,1%
Operators	0	13	9	0,0%	2,7%	1,1%
Labourers	49	22	15	24,3%	4,6%	1,8%
Apprentices	0	8	0	0,0%	1,7%	0,0%
Total	202	478	838	100,0%	100,0%	100,0%

A comparison between the occupational distribution of workers in the book-publishing companies that were surveyed and that of workers in the publishing industries, the printing industries and the South African workforce overall gives an indication of skills needs in the book-publishing subsector (Table 14).

More than a third (37,4 percent) of the workers in the 37 book-publishing companies that were interviewed were employed as managers, professionals or technicians and associated professionals (Table 14). According to statistics from the Labour Force Survey (LFS) of March 2005, managers, professionals, technicians and associated professionals accounted for 20,1 percent of the publishing workforce, accounted for 28,3 percent of all workers in printing in South Africa and accounted for 27,2 percent of the national workforce (Table 14). The difference may be ascribed to the need for highly skilled workers in the book-publishing subsector, for example, only six percent of the workers in the publishing sector were professionals, as opposed to 10,3 percent of the workers in the respondent book-publishing companies.

Clerical and sales workers accounted for 55,4 percent of the workforce in respondent book-publishing companies, but for only 19,4 percent of the publishing sector in general. This can be attributed to the greater need for clerical and sales workers in companies that are active in warehousing, distribution, sales and marketing. Very few of the workers in the 37 book-publishing companies that were interviewed were employed as operators (1,5 percent), as opposed to 42,2 percent of the publishing workforce, 26,4 percent of all workers in printing in South Africa and 19,1 percent of the national workforce. Only 5,7 percent of the workers in book-publishing companies were labourers.

**Table 14: Occupational distribution of workers, by activity**

Occupational level	Book-publishing	SIC 32400 Publishing*	SIC 32500 Printing*	South Africa*
Managers	16,4%	3,0%	13,5%	8,8%
Professionals	10,3%	5,9%	0,0%	6,1%
Technicians	10,7%	11,1%	14,9%	12,3%
Clerks	32,8%	19,4%	15,4%	13,7%
Service workers	22,6%	0,0%	0,0%	13,2%
Agricultural workers	0,0%	0,0%	0,0%	0,9%
Artisans	0,0%	2,6%	21,9%	13,5%
Operators	1,5%	42,2%	26,4%	12,5%
Labourers	5,7%	15,7%	8,0%	19,1%
Total	100,0%	100,0%	100,0%	100,0%

\*Source: LFS March 2005, Stats SA.

### Qualifications

Respondents to the survey of book-publishing companies were asked to provide the number of employees per highest qualification level. From Table 15 it can be seen that close to half of all workers in the 34 companies that responded had attained a postschool qualification. Half the workers acquired matric or some senior secondary school education. None of the workers was reported to be illiterate. According to the Joint Education Trust, people who have not had at least seven years of formal schooling are regarded as functionally illiterate (SAIRR, 1997:152).

**Table 15: Highest educational level in the book-publishing subsector, N=1 070**

NQF level	Band	Qualification	Total	%	Total per band	%
1	General Education & Training (GET)	Functionally literate (Grade 7/Std 5)	25	2,3	28	2,6
		Grade 9/Std 7/Form 2/ABET 4	3	0,3		
2	Further Education & Training (FET)	Grade 10/Std 8/Form 3/N1	194	18,1	539	50,4
3		Grade 11/Std 9/Form 4/N2	10	0,9		
4		Grade 12/Std 10/Form 5/N3	335	31,3		
5		Diploma/Certificate	247	23,1	503	47,0
6	Higher Education & Training (HET)	First degree/Higher diploma	198	18,5		
7		Honours/Master's	58	5,4		
8		Doctorates	0	0,0		
Total			1 070	100,0	1 070	100,0

It was only among African workers where lower educational qualifications were reported (Table 16). The ratio of African workers with matric and lower to those workers who acquired postschool qualifications was 60:40. The qualifications reported for Coloured workers were concentrated in the FET Band (87:13), while most Asian workers had an higher education and training (HET) qualification (21:79). The ratio of White workers with matric and lower to those workers who acquired postschool qualifications was 42:58.

**Table 16: Highest educational level in the book-publishing subsector, by race N=1 072**

NQF Band	African	Coloured	Asian	White	Total
General Education & Training (GET)	10,5	2,1	0,8	0,0	2,8
Further Education & Training (FET)	49,8	84,5	19,8	41,5	50,3
Higher Education & Training (HET)	39,7	13,4	79,4	58,5	46,9
Total	100,0	100,0	100,0	100,0	100,0
NQF Band	African	Coloured	Asian	White	Total
General Education & Training (GET)	24	5	1	0	30
Further Education & Training (FET)	114	201	25	199	539
Higher Education & Training (HET)	91	32	100	280	503
Total	229	238	126	479	1 072
Ratio of GET/FET to HET	60:40	87:13	21:79	42:58	53:47

The qualifications profile shows a strong relationship with the occupational profile (Table 17).

**Table 17: Occupational distribution vs qualifications profile of workers in book-publishing**

Occupation	%	Occupational level	%	Qualification level	%
Managers	16,3				
Professionals	10,2	Senior personnel	37,2	Highly qualified	47,0
Technicians	10,7				
Clerks	32,6	Mid-level personnel	55,1	Qualifications at an intermediary level	50,4
Service workers	22,5				
Operators	1,4	Low-level personnel	7,1	Low educational qualifications	2,6
Labourers	5,7				
Apprentices	0,5	Apprentices	0,5		
Total	100,0		100,0		100,0

There is no significant difference in the qualifications profile across company size (Table 18).

**Table 18: Highest educational level in the book-publishing subsector, by company size**  
N=1 070

	Small	Medium	Large	
Band	0 to 50	51 to 150	151 +	Total
GET	11	4	13	28
FET	47	213	279	539
HET	78	145	280	503
Total	136	362	572	1070

Band	0 to 50	51 to 150	151 +	Total
GET	8,1	1,1	2,3	2,6
FET	34,6	58,8	48,8	50,4
HET	57,4	40,1	49,0	47,0
Total	100,0	100,0	100,0	100,0

## CHAPTER 4

### SKILLS SHORTAGES AND SKILLS GAPS

Skills shortages and skills gaps may arise owing to occupational and experience requirements or geographical imbalances in the demand for and supply of particular skills (Van Aardt, 2002). In the sections that follow, skills shortages, skills gaps and other factors that may influence skills needs in the book-publishing subsector will be discussed.

Employers were asked to provide information on the skills that existed in their organisations, skills that were available in the organisation but needed upgrading, and skills that were not available at that moment (see question 3, Annexure B). The reported skills shortages and gaps did not differ significantly across small, medium and large organisations.

Core skills needed in the sector in order for book-publishing companies to function effectively and to operate their business successfully are listed below and can be classified as technical, business and generic skills.

- Writing
- Translation
- Editing
- Proofreading
- Indexing
- Picture research
- Application for permissions
- Granting permissions
- Book/list project management
- Illustrations/artwork
- Photographic work
- Book design
- Production
- Commissioning and list building
- Sales
- Marketing
- Customer service
- Distribution

- Information technology
- Finances
- Business
- Management/human resources
- Secretarial/reception

### ***Skills shortages***

Skills shortages arise when employers are not able to fill vacancies in a recognised occupation or field of specialisation, or when they experience difficulties doing so under their current conditions of employment or at their present rate of remuneration (Van Aardt, 2002).

The organisations that were interviewed identified skills shortages relating to marketing, sales, commissioning and list building, information technology, artwork and photographic work, and distribution. In terms of marketing, it seems that web-based activities were one of the challenging areas. Specific skills shortages in the areas of website marketing, website coding, design and management were highlighted. The competency to identify gaps and opportunities in the market was also mentioned as a problem area.

The specific skills shortages in sales-related activities that were underlined by the companies ranged from face-to-face, telephonic and website sales. Skills in sales-related activities seem to be problematic in the industry. In the book-publishing industry, sales management was also one of the areas that was pinpointed.

Skills shortages relating to publishing of material by means of a CD-ROM, a video, cassette tape, electronically and on the web were highlighted under commissioning and list-building activities.

Although computer literacy and competency is seen as being part of a portfolio of generic skills these days, it remains one of the areas in which workers need constant upgrading of skills. The reported skills shortages in this study relating to information technology referred, inter alia, to information technology (IT) user support (hardware and software) and database management.

Other skills shortages that were identified were related to distribution (specifically import and export functions), artwork and photographic work.



### **Skills gaps**

Skills gaps are experienced when the skills level of an organisation's workforce is inferior to what is required to meet business needs, or when the workforce does not have the necessary skills mix to ensure high levels of productivity, innovation and ability to adapt to new market and production requirements (Van Aardt, 2002).

All the core skills areas listed above were highlighted in terms of skills gaps. This means that, although the skills are available at the companies, upgrading of these skills is needed. The training rate of companies is 54 percent (chapter 5), which is an indication of their commitment to address skills gaps in the sector by upgrading the skills of their employees.

Employers indicated that the highest priority for skills upgrading relate to market research and sales activities. More than half of the companies that participated in the study indicated that they experienced skills gaps in the following areas and that their employees needed upgrading of these skills: market research (62,2 percent); analysing the market (56,8 percent); selling face-to-face (59,5 percent); telephonic sales (54,1 percent); selling a project to a sponsor (54,1 percent); and telephone technique and communication (51,4 percent).

Almost half of the companies that were interviewed also listed a skills gap in the competency to identify gaps and opportunities in the potential market (48,6 percent), sales management and forecasting of sales and budgets (43,2 percent) and public relations as part of marketing (40,5 percent). Information technology related activities such as basic IT literacy (45,9 percent) database use (45,9 percent), and IT support (42,2 percent) were also identified as areas where employees could benefit from training. Other skills gaps referred to skills to conduct effective conflict resolution (40,5 percent) and negotiation skills with suppliers (40,5 percent).

Employers indicated that most of their in-house training took place in the area of administration and customer service (40,5 percent). Only 16,2 percent of companies indicated that they offered IT-related training and a mere 13,5 percent provided sales and management training. Although marketing was identified as one of the areas where skills gaps and shortages were a priority, only 5,4 percent of the companies said that they provided training in this field to their employees.

Some of the major factors that have an effect on skills needs in the sector reside in insufficient expertise in the recruitment industry, low salary levels and changes in the market focus. Gray (2004) indicates that it is relatively easy for the recruitment industry to recruit the more generic skills needed in the book-publishing industry such as administrative, general business and IT skills, but more challenging to recruit technical skills. This is because there is a bigger supply of generic skills that are usually applicable across industries, whereas there is smaller supply of technical skills in the book-publishing industry. The reason for the smaller supply of technical skills is that people do not graduate from training institutions with technical book-publishing qualifications like in other trades. Most of the skills are attained through in-house training after a person has entered the employment sector. It has also been found that employers need to fast track the in-house training of employees in order to keep up with the demands in the market. Because companies are lacking in this area, they sometimes poach skills from other companies to obtain the needed skills for a specific period.

Dr Francis Galloway (2006) warns against underestimating the contribution of the tertiary sector regarding the provision of professional skills to the publishing industry in South Africa ... “we are actually on the forefront of this international trend, while pioneering outcomes-based education in publishing.” Examples are the *Book in Africa Project* (University of the Western Cape) and the *Book History in South Africa Project* (co-hosted by the University of Pretoria and the University of the Witwatersrand and funded by the National Research Foundation – see page 58).

Another key factor that gives rise to skills needs and is an international trend is the low salary levels offered in the book-publishing industry compared to other industries. Pienaar (2006) indicates that publishing is not an industry with high margins and that skills are often lost to, for example, the magazine industry. Clarke (2006) states that the Publishing Industry, as an academic and educational industry, requires high skills levels that are costly to obtain. Candidates with the required skill sets can often command significantly higher salaries in other industries.

Changes in the market focus usually have a big influence specifically on marketing and sales skills in the book-publishing industry. Clarke (2006) points out that traditional marketing and brand-building strategies cannot easily be applied to the marketing of products in the retail sector of the Publishing Industry given the constantly changing product mix. Investments in promotions, for example, have to yield immediate returns as very few book products have

long shelf-lives. This places a high demand on the level of skills and business acumen required in the marketing field for the industry.

According to Clarke (2006), professional selling skills are required for the successful selling of academic textbooks. In addition, Academic Sales Consultants often have several thousand products to offer their customers. The ability to apply professional selling skills to such a wide range of individual products requires a highly intelligent, skilled and articulate sales force.

## CHAPTER 5

### WORKPLACE TRAINING IN THE BOOK-PUBLISHING SUBSECTOR

#### Introduction

Although skills training in the publishing sector lagged behind in the past, training is currently increasingly taken place. Examples of recent developments in capacity building is provided by the Community Publishing Project (CPP) that was launched in 2001 with a view to developing new small publishers, and by the successful completion of the Publishers' Association of South Africa's (PASA) first internship programme funded by the MAPPP SETA. PASA chairman, Lindelwe Mabandla, commented as follows: "The internship programme is a milestone in the black economic empowerment of the publishing industry. It helps industry to contribute meaningfully to the upliftment of skills levels of the previously disadvantaged who in the past were unable to access the necessary skills training to enter the publishing environment" (PASA, 2005a). According to Nelleke de Jager at Kwela Books, skills development in the sector was severely underestimated and currently there is a range of initiatives aimed at bolstering the skills and opportunities of black writers and editors.

#### Beneficiaries of training in 2004/2005

A simple and useful measure of training participation can be obtained by dividing the number of employees who have received training (according to a standard definition) by the total number of employees. This is computed as a 'training ratio' or a 'training rate'. The rate of training is a critical indicator that sheds light on the general state of training in an economy (Kraak cited in Paterson & Du Toit, 2005). The training rate for private companies in the MAPPP SETA was estimated at 18 percent during the National Skills Survey in 2003 (Paterson & Du Toit, 2005:59). At a national level, the training rate for private companies stood at 24 percent across all sectors of the economy. The training rate for the 2004/2005 financial year reported by respondents to the survey of book-publishing companies was at 54 percent much higher than the national training rate or the training rate of the MAPPP SETA in 2003.

Of the 37 book-publishing companies, 20 indicated that their employees had received training in 2004/2005, either external or in-house. Among all workers, 53,8 percent were beneficiaries of training in 2004/2005, as indicated in Table 19. Most technicians (90,1 percent), nearly two-thirds of clerical personnel, half of managerial staff, 40,9 percent of

operators, 40,7 percent of labourers, 39,8 percent of service workers, and 39,4 percent of professionals received training.

**Table 19: Beneficiaries who received training (external and in-house) in 2004 to 2005**

Category	African	Coloured	Asian	White	Total	Rate	All workers
Managers	24	7	11	85	127	51,2	248
Professionals	12	4	3	42	61	39,4	155
Technicians	5	19	27	95	146	90,1	162
Clerks	45	107	60	89	301	60,8	495
Service workers	39	25	9	63	136	39,8	342
Operators	6	1	1	1	9	40,9	22
Labourers	30	3	1	1	35	40,7	86
Apprentices	1	0	0	0	1	12,5	8
<b>Total</b>	<b>162</b>	<b>166</b>	<b>112</b>	<b>376</b>	<b>816</b>	<b>53,8</b>	<b>1 518</b>

### **Training ratio for permanent personnel in private small, medium and large companies**

Research experience has clearly indicated that enterprise size is strongly associated with training rates, i.e. large enterprises provide more training than medium-sized enterprises, which, in turn, train more than small enterprises. During the National Skills Survey conducted in 2003, the minimum possible level of training for permanent personnel in private small companies was 23 percent and the maximum level of training was 31 percent. The minimum possible level of training for permanent personnel in private medium-sized companies was 24 percent and the maximum level of training was 37 percent. The minimum possible level of training for permanent personnel in private large companies was 25 percent and the maximum level of training was 46 percent (Paterson & Du Toit, 2005:51-52).

Book-publishing companies in general reported higher training rates for the 2004/2005 financial year. However, the training rate for small companies was at 21,7 percent slightly lower than at national level. The training rate for permanent personnel of medium-sized companies was at 76,6 percent significantly higher than the national average training rate. At a training rate of 48,1 percent (see table 20), large book-publishing companies seem to be on par with national averages. Paterson and Du Toit (2005:56) warn that on its own, a training rate is not a sufficient means to judge training performance because the training rate does not say anything about the quality or 'volume' of training.

### ***Training in small companies***

Generally more male than female employees received training in small book-publishing companies (1 to 50 workers) in 2004/2005 (Table 20). Among the managers in small companies, two-thirds of African males, a third of African females, 17,9 percent of white females and 9,5 percent of white males received training over this period. Sixty percent of white male professionals and 36,4 percent of white female professionals in small companies received training in 2004/2005. All Asian female technicians, half of the coloured male technicians and a third of white female technicians received training in small companies over this period. All African male clerks, two-thirds of coloured male clerks, half of African female clerks, a fifth of coloured female clerks and a tenth of white female clerks were trained over this period. All (male and female) coloured, all white male, and three-quarters of African male service workers received training in 2004/2005 in small companies. Ten percent of African females were the only labourers in small companies, who received training in 2004/2005.

### ***Training in medium-sized companies***

In medium-sized companies (51 to 150 workers), it was mostly females among all race groups, who received training in 2004/2005. Among the managers in medium-sized companies, all African females, coloured males, Asian females and white males received training over this period. Half or more of the managers in medium-sized companies among the other groups received training in 2004/2005, except for the coloured female managers, of whom only 20 percent were trained in 2004/2005.

Among the professionals, three-quarters of the white females, two-thirds of African males, half of the coloured males and a quarter of African females received training in 2004/2005. All African and white female technicians, half of the Asian male technicians, 42,9 percent of white male technicians, and a third of the coloured female technicians received training over this period.

All African male and female clerks, all Asian female and all white female clerks were trained, while two-thirds of coloured male and a fifth of white female clerks received training in 2004/2005. All coloured male service workers were trained over this period. Two-thirds of African operators and 14,3 percent of coloured operators received training in 2004/2005. All African male and female labourers and coloured female labourers were trained over this period.

**Training in large companies**

In large book-publishing companies, more of the African and coloured males than females received training, while more of the Asian and white females than males received training in 2004/2005. Among the managers, all coloured females were trained. Among professionals, all Asian females received training. All African male technicians, coloured female technicians, Asian male and female technicians, and all white male and female technicians received training and 88,9 percent of coloured male and two-thirds of African female technicians received training in 2004/2005. Among the clerks, 84,6 percent of Asian females were trained, while only a third of the coloured female clerks and more than half of the other groups were trained over this period. All Asian male service workers received training and only 18,2 percent of white male service workers received training in 2004/2005. All Asian and white male operators and two-thirds of African male operators were trained over this period. All Asian and white male labourers received training in 2004/2005.

**Table 20: Training rate, by company size and by race and gender (2004/2005)**

Occupations by size of companies	African		Coloured		Asian		White		Total %
	Male %	Female %	Male %	Female %	Male %	Female %	Male %	Female %	
<b>Total managers</b>	<b>57,7</b>	<b>52,9</b>	<b>50,0</b>	<b>25,0</b>	<b>66,7</b>	<b>83,3</b>	<b>44,6</b>	<b>53,1</b>	<b>51,2</b>
Small (1 to 50)	66,7	33,3	0,0	0,0	0,0	0,0	9,5	17,9	17,7
Medium (51 to 150)	81,8	100,0	100,0	20,0	50,0	100,0	100,0	97,0	89,2
Large (151 plus)	33,3	0,0	25,0	100,0	80,0	75,0	38,9	40,5	40,8
<b>Total professionals</b>	<b>30,8</b>	<b>32,0</b>	<b>40,0</b>	<b>25,0</b>	<b>0,0</b>	<b>100,0</b>	<b>40,7</b>	<b>43,7</b>	<b>39,4</b>
Small (1 to 50)	0,0	0,0	0,0	0,0	0,0	0,0	60,0	36,4	35,0
Medium (51 to 150)	66,7	25,0	50,0	0,0	0,0	0,0	0,0	71,4	64,1
Large (151 plus)	0,0	17,6	33,3	25,0	0,0	100,0	44,4	30,8	30,2
<b>Total technicians</b>	<b>100,0</b>	<b>75,0</b>	<b>81,8</b>	<b>83,3</b>	<b>77,8</b>	<b>100,0</b>	<b>69,6</b>	<b>97,5</b>	<b>90,1</b>
Small (1 to 50)	0,0	0,0	50,0	0,0	0,0	100,0	0,0	33,3	33,3
Medium (51 to 150)	0,0	100,0	0,0	33,3	50,0	0,0	42,9	100,0	82,6
Large (151 plus)	100,0	66,7	88,9	100,0	100,0	100,0	100,0	100,0	98,1
<b>Total clerks</b>	<b>66,7</b>	<b>64,6</b>	<b>59,6</b>	<b>50,7</b>	<b>54,5</b>	<b>87,3</b>	<b>42,9</b>	<b>63,5</b>	<b>60,8</b>
Small (1 to 50)	100,0	50,0	66,7	20,0	0,0	0,0	0,0	11,1	35,5
Medium (51 to 150)	100,0	100,0	60,0	95,3	0,0	100,0	20,0	100,0	85,8
Large (151 plus)	50,0	59,3	59,0	33,3	75,0	84,6	63,6	49,3	52,3
<b>Total service workers</b>	<b>43,1</b>	<b>25,5</b>	<b>34,8</b>	<b>50,0</b>	<b>14,3</b>	<b>53,3</b>	<b>30,0</b>	<b>46,4</b>	<b>39,8</b>
Small (1 to 50)	75,0	0,0	100,0	100,0	0,0	0,0	100,0	0,0	25,8
Medium (51 to 150)	63,3	76,9	100,0	65,0	0,0	50,0	33,3	82,9	64,3

Occupations by size of companies	African		Coloured		Asian		White		Total %
	Male %	Female %	Male %	Female %	Male %	Female %	Male %	Female %	
Large (151 plus)	12,5	12,9	21,1	23,1	100,0	54,5	18,2	34,4	25,4
<b>Total operators</b>	<b>66,7</b>	<b>0,0</b>	<b>9,1</b>	<b>0,0</b>	<b>100,0</b>	<b>0,0</b>	<b>100,0</b>	<b>0,0</b>	<b>40,9</b>
Small (1 to 50)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Medium (51 to 150)	66,7	0,0	14,3	0,0	0,0	0,0	0,0	0,0	38,5
Large (151 plus)	66,7	0,0	0,0	0,0	100,0	0,0	100,0	0,0	44,4
<b>Total labourers</b>	<b>72,2</b>	<b>22,2</b>	<b>28,6</b>	<b>8,3</b>	<b>50,0</b>	<b>0,0</b>	<b>33,3</b>	<b>0,0</b>	<b>40,7</b>
Small (1 to 50)	0,0	10,0	0,0	0,0	0,0	0,0	0,0	0,0	2,8
Medium (51 to 150)	100,0	100,0	0,0	100,0	0,0	0,0	0,0	0,0	95,5
Large (151 plus)	88,9	16,7	28,6	0,0	100,0	0,0	100,0	0,0	46,4
<b>Total apprentices</b>	<b>0,0</b>	<b>100,0</b>	<b>0,0</b>	<b>0,0</b>	<b>0,0</b>	<b>0,0</b>	<b>0,0</b>	<b>0,0</b>	<b>12,5</b>
Small (1 to 50)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Medium (51 to 150)	0,0	100,0	0,0	0,0	0,0	0,0	0,0	0,0	12,5
Large (151 plus)	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
<b>Grand total</b>	<b>54,4</b>	<b>41,7</b>	<b>48,7</b>	<b>48,2</b>	<b>50,9</b>	<b>84,0</b>	<b>43,9</b>	<b>59,3</b>	<b>53,8</b>
Small (1 to 50)	35,3	20,9	50,0	13,3	0,0	50,0	23,5	15,7	21,7
Medium (51 to 150)	74,1	94,6	57,7	79,2	16,0	86,4	50,9	92,0	76,6
Large (151 plus)	36,6	29,5	45,9	35,8	80,0	84,2	47,1	50,8	48,1

### Type of training provided

Fifteen respondents indicated that in-house training was provided, as shown in Table 21. Only two in-house courses were accredited, while 16 of the courses were not accredited because most courses were once-off courses. All fifteen companies provided training in administration and customer service. Six companies provided in-house computer/information technology training, five offered sales training, five provided management training and five provided financial training. Four of the companies provided in-house production/typesetting training, three offered editing and proofreading courses, and two companies provided marketing and induction courses. The following courses were offered once, each at a different company: desktop publishing, security training, art classes, writing, strategic planning, publishing and legal/contractual courses.



**Table 21: In-house training provided in book-publishing companies**

Type of in-house training	Responses
Admin and customer service	15
Computer/IT	6
Sales	5
Management	5
Financial	5
Production/typesetting	4
Editing/proofreading	3
Marketing	2
Induction	2
Desktop publishing, security, art, writing, strategic planning, publishing, legal/contractual	1

Twenty respondents gave reasons for not providing in-house training. Sixteen were of the opinion that in-house training was too time consuming while they had deadlines to meet. Thirteen indicated that they did not have mentors to help with training and one each referred to a lack of interest from learners, staff turnover and the challenge to keep up with new developments, as shown in Table 22.

**Table 22: Reasons for not providing in-house training**

Problems relating to in-house training	Responses
None	17
Time consuming/deadlines to meet	16
Availability of mentors	13
Lack of interest from learners	1
Staff turnover	1
Keeping up with new developments	1

Eleven companies indicated that they had made use of external training providers to train employees, mostly for them to acquire management, computer/information technology, customer service and financial skills. According to them, the main reason for companies not making more use of external training in small, medium-sized and large companies was that personnel was sufficiently skilled for the job.

## Factors inhibiting skills development in book-publishing companies

The factor all companies, regardless of size, most frequently mentioned, which inhibited investment in the skills development of their employees was employees being already sufficiently skilled (Table 23). Furthermore, small companies (1 to 50 workers) do not enrol their employees in training because they do not have the capacity to release them for training. The reasons for their lack of training provision include work pressure, lack of mentors, high cost of training, lack of information on learnership programmes, lack of available funds, the use of freelancers and various other reasons as indicated in Table 23.

Medium-sized companies (51 to 150 workers) also had a problem mainly with capacity, lack of mentors, high staff turnover and work pressure. Large companies (151 or more) experienced a high staff turnover and therefore did not regard external training involving high costs as an option. It was remarked that the cost of training had become more expensive in recent years. Large companies experience similar problems as small and medium-sized companies, but to a lesser extent, as shown in Table 23.

**Table 23: Factors inhibiting investment in skills development**

Small companies (1 to 50) N = 29	Responses	Rate (%)
Employees are sufficiently skilled	23	79,3
Staff component is too small to be released for training	18	62,1
Work pressure makes it difficult to release staff	8	27,6
Unavailability of mentors	7	24,1
High cost of training	5	17,2
Lack of information on learnership programmes	5	17,2
Lack of available funds	3	10,3
Subcontracting of freelancers to help out and therefore no training	3	10,3
High staff turnover	1	3,4
Labour regulations	1	3,4
No suitable training modules	1	3,4
Uncertainty over future	1	3,4
Medium-sized companies (51 to 150) N = 5	Responses	Rate (%)
Employees are sufficiently skilled	2	40,0
Work pressure makes it difficult to release staff for training	2	40,0
Unavailability of mentors	2	40,0
High staff turnover	1	20,0
Work pressure makes it difficult to release staff	1	20,0

Table 23: Factors inhibiting investment in skills development (continued)

Large companies (151 plus) N = 3	Responses	Rate (%)
Employees are sufficiently skilled	2	66,7
High staff turnover	2	66,7
High cost of training	1	33,3
Lack of available funds	1	33,3
Work pressure makes it difficult to release staff	1	33,3
Lack of information on learnership programmes	1	33,3
No suitable training modules	1	33,3
Unavailability of mentors	1	33,3

### Adult basic education and training (ABET)

In the book-publishing subsector, being a highly skilled subsector (61,7 percent of workers are qualified in the HET band), not many candidates (2 percent of all workers) were available for ABET training, as shown in Table 24. Only two companies among the respondents had workers who attended ABET training in 2004/2005 and all were black. Instead of replacing current loyal, low-ranking staff with temporary staff that had higher skill levels, these companies made an effort to improve the skills levels of these employees. Unfortunately, though, none of those who had attended ABET-level training completed their training. Three respondents who had listed problems with regard to ABET training indicated that there was a lack of enthusiasm among potential ABET trainees, as the lapse of time since previous study (30 to 40 years ago) made current acquiring of skills difficult.

Table 24: Number of employees who attended ABET in 2004/2005

Level	African	Coloured	Asian	White	Total
ABET4	12	2	6	0	20
ABET3	0	0	0	0	0
ABET2	10	0	0	0	10
ABET1	0	0	0	0	0
Total	22	2	6	0	30

### Learnerships

Only nine of the respondents in the survey of book-publishing companies indicated that they had information on learnerships and their financial benefits to participants. Only four of the

respondents had participated in the learnership process. The main reason stated for not participating in learnerships was that employees in the book-publishing industry were adequately qualified, as shown in Table 25. Secondly, respondents indicated that the MAPPP SETA had no guidelines/information/systems/unit standards in place to address training. Learnerships were also not supported because of red tape and the time-consuming process that was involved. Furthermore, it became clear that respondents outsourced most of the work and therefore there was no need for training. Companies were also not keen to participate in the learnership process because they had found that, after the effort of putting trainees through a learnership process, these employees often left the company. However, four respondents planned to participate in learnerships in future.

**Table 25: Reasons for not participating in the learnership process**

Reason	Responses	Rate (%)
No need for learnerships as employees are qualified	14	37,8
SETA has no guidelines/info/systems/unit standards in place	8	21,6
Red tape/time consuming	6	16,2
Have future plans to participate in learnerships	4	10,8
Outsource most work	3	8,1
None	1	2,7
Trainees leave organisation after training	1	2,7
Total	37	100,0

## Mentorship

More than half of the respondents did not use mentors for training in their companies. When mentors were indeed used, they supervised learners while still carrying on with their work as usual and only assisted where necessary. Mentors were only used if a need had been identified. Mentoring took place under the supervision of an expert, director or line manager. Mentoring plans were usually set up by the human resources department and were monitored through report writing.

Senior book-publishing executives emphasised that – although mentorship was not always used – all newly appointed staff would receive training on all aspects of book-publishing. At Oxford University Press Southern Africa (OUPSA), skills development goals are set for staff as part of their performance appraisal system, and staff are helped/supported through task-oriented training to achieve the set goals (Kotzé, 2006). Being a multinational company, OUPSA is in the fortunate position to have an exchange programme and to share

international experience: every year, the Board Award allows a deserving worker (through a proposal system) to visit an OUP branch abroad and learn specific skills/gain specific experience and exposure. OUPSA is currently investigating the feasibility of implementing a mentorship programme in the local company – with the main focus being on pairing local skills with overseas skills.

### Opinions on training issues in book-publishing

Twenty-one companies gave their opinions on how the MAPPP SETA should start addressing training issues in publishing (Table 26). Six companies indicated that better communication, information and feedback from the MAPPP SETA were required. Another six companies were of the opinion that the MAPPP SETA should provide skills development programmes and online material. Five respondents would like to have less red tape. Five companies were of the opinion that the registration process needed to be streamlined. Three required the MAPPP SETA to provide money and grants for training; three referred to the fact that learnerships and unit standards were not in place; two mentioned registration with the Standard Generating Body; two felt there was not enough transparency with regard to registered companies and their contact details; two required more structural and systemic support; and two required the MAPPP SETA to market learnerships more aggressively. Others required the MAPPP SETA to design a strategic framework, employ staff members who are more competent and to train more people from previous disadvantaged groups.

**Table 26: Suggested MAPPP SETA initiatives**

Initiative	Responses
Better communication/information/feedback required	6
Provision of skills development programmes/material online	6
Less red tape	5
Streamlined registration process	5
Money/grants for training (SETA must provide)	3
Learnerships/unit standards to be put in place	3
Registration with SGB (Standard Generating Body)	2
Transparency: list companies who are registered and provide contact	2
Structural and systemic support required	2
More aggressive marketing of learnerships	2
Design of a strategic framework	1
Incompetent MAPPP SETA staff	1
More people from previously disadvantaged groups to be trained	1

Thirty-one companies gave their opinion with regard to the role of employers in training (Table 27). Thirteen respondents indicated that more employers should get involved with in-house, hands-on training. Seven companies were of the opinion that publishing houses had to employ qualified people. Five respondents referred to up-skilling, to keep up to date with new developments. Three respondents indicated that employers did not invest enough money in training, while another three indicated that employers should provide opportunities for learnerships. Two were of the opinion that not enough time was allocated to training. Others required more networking, more participation in the development of unit standards and access to information.

**Table 27: Suggested employer initiatives**

Initiative	Response
More in-house, hands-on training is required	13
Employers should employ qualified people	7
Training of employees to keep up to date with developments	5
Invest more money in training	3
Employers should provide opportunities for learnerships	3
Invest more time in training	2
Networking	1
Employers should take part in development of unit standards	1
Provide access to information	1

Twelve companies gave their opinions on the role of training providers in training and education in the publishing sector (Table 28). Four respondents indicated that more specialised training, for example, electronic publishing was required. Four were of the opinion that not enough information was available on training programmes. Four companies required training providers to provide courses that are up to date with the most recent developments in the industry. Three respondents requested opportunities for more people to be trained. Two respondents required training providers to have effective modular design and material support. Two were of the opinion that there were not enough short courses and two required more online and distance-learning courses. Others needed training providers to advertise their training programmes through PASA, and get training courses accredited. In general, it was also requested that the national skills database be expedited, that training providers included general and sales management, as well as writing for public relations in their training programmes, that stress-handling guidelines be provided and that guidance with regard to the balancing of professional and personal lives be given.

**Table 28: Suggested training provider initiatives**

Initiative	Responses
Provide specialised training for publishing: e.g. electronic publishing	4
More information on programmes required	4
Keeping up to date with most recent developments in industry	4
Opportunities for more people to be trained are required	3
Effective modular design with material support	2
Short courses required	2
Distance courses/Online courses required	2
Advertising of training programmes through PASA	1
Accreditation of courses is required	1
Training in general and sales management and writing for public relations is required	1

## CHAPTER 6

### SUPPLY OF SKILLS

#### Introduction

Training and educating future book publishers and employees for publishing houses has become an increasingly challenging task, as we live in a world of converging technologies and transglobal forces. Local and international trends suggest that training in electronic publishing skills will be of strategic importance to the South African publishing industry (Publishing Subsector Skills Plan, 2004).

In South Africa, there is an additional challenge to uphold high professional standards and at the same time create a more diverse workforce. If the book-publishing industry is to be able to grow its markets and increase job creation, it will be important to address the BEE profile of content creators in order to reach a broader readership.

Furthermore, the current lack of suitable role models should be addressed. A specific South African content paradigm still has to emerge. Within the colonial paradigm, artists, designers and writers were forced to look abroad for inspiration. Education and training remain essentially Eurocentric, while a distinctly African approach is required (Sutherland, 2006). Content creators need to be drawn into the training environment by creating development programmes that are targeted at equipping the pool of black writers with professional and business management skills. There is a further challenge to promote publishing in South Africa's eleven official languages. Training should expand to develop new skills and new players in the sector (Publishing Subsector Skills Plan, 2004).

Content creators have seemingly been overlooked in industry approaches to skills development across the sector. Policy and strategy developments have focused on the core industry sector, the publishing companies, while writing training, for example, has tended to occur within cultural initiatives such as the Writers' Network. There has been an absence of strong writers' organisations with an interest in the professional development of writers and the protection of their contractual and commercial interests, as well as their creative development. Apart from writers, there are also other content creators such as illustrators, photographers and translators, each with their own particular needs (MAPPP SETA, 2004).



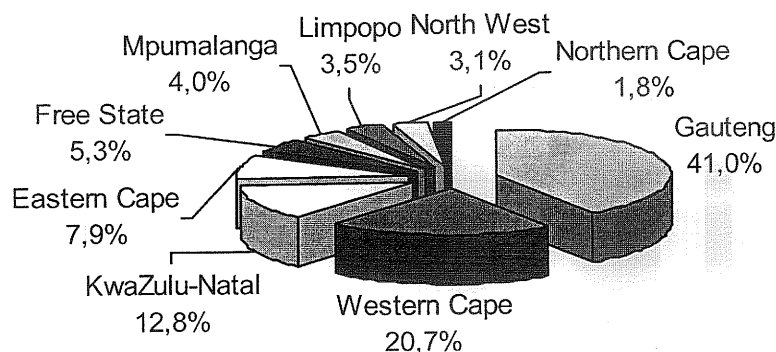
There are high levels of outsourcing in the publishing industry, and the industry depends greatly on the skills and professionalism of freelancers. Many publishers in South Africa regard the training of freelancers as falling outside of their area of responsibilities, although there are complaints in the industry of a lack of professional knowledge and professional standards in the freelancing workforce.

### Current education and training provision in the publishing sector

Currently in South Africa, there are approximately 151 training providers (15 universities, 7 universities of technology, 117 private training providers and 12 further education and training colleges) offering courses that are in some way relevant to the publishing industry, as shown in Annexure H. Eight institutions offer courses up to doctorate level (6 universities and 2 universities of technology), seven institutions offer courses up to master's level (6 universities and 1 university of technology), six institutions offer courses up to the first-degree level (3 universities, 2 universities of technology and 1 private training provider), seven institutions offer courses up to diploma level (2 universities of technology and 5 private training providers) and 123 institutions offer courses up to certificate level (111 private training providers and 12 FET colleges), which are relevant to the book-publishing sector.

The provincial distribution of training providers that offer courses relevant to the publishing sector is uneven because these training providers are distributed mainly according to the preponderance of economic activity in the various provinces, as shown in Figure 5.

**Figure 5: Provincial distribution of training providers of publishing-relevant courses**



Around 41,0 percent of training providers are situated in Gauteng, 20,7 percent are located in the Western Cape, 12,8 percent in KwaZulu-Natal, 7,9 percent in the Eastern Cape, 5,3 percent in the Free State, 4,0 percent in Mpumalanga, 3,5 percent in Limpopo, 3,8 percent in the Northwest, and 1,8 percent in the Northern Cape.

## Publishing courses

There are only two training providers that offer fully-fledged publishing qualifications in the Higher Education and Training (HET) band, which are both situated in Gauteng (refer to Annexure H). The University of Pretoria offers *B IS (Information Science) Publishing*, a three-year degree course, followed by Honours (two years), while a Master's and Doctorate are also available (Table 29). The University of the Witwatersrand offers a *BA Honours in Publishing Studies* (part-time over two years or full-time over one year) that is run under the auspices of the Department of African Literature. The course covers all aspects of the publishing industry.

**Table 29: Publishing courses**

<b>Institution:</b>	University of Pretoria
<b>Course:</b>	B IS Publishing
<b>HQF band and level:</b>	HET band at level 6
<b>Core skills:</b>	The South African publishing industry is contextualised. Specific application is to book-publishing and corporate publishing. The objectives are to equip students with background knowledge on the local industry, role players and trends as well as with specific skills linked to the publishing value chain. These skills include the commissioning of manuscripts aimed at specific markets; management of the design, reproduction and printing phase; copy-editing and proofreading; and financial and marketing management. Students are enabled to act as responsible information intermediaries who can add value to publications during the various phases of the publishing process.
<b>Duration:</b>	3 years, full-time
<b>Theoretical/practical component:</b>	70 percent/30 percent
<b>Course:</b>	B IS (HONS) Publishing
<b>HQF band and level:</b>	HET band at level 7
<b>Core skills:</b>	The objectives are to equip students with in-depth knowledge of the local publishing industry and with specific skills. They are also equipped with research skills and have to apply these to investigate current issues and trends in the local and international publishing environment. Specific advanced modules focus on the theory and practice of publishing management (management and finance; organization and processes); publishing in the corporate environment; the creation and preparation of integrated design solutions for paper and screen-based publications; and e-publishing.
<b>Duration:</b>	2 years, part-time
<b>Theoretical/practical component:</b>	80 percent/20 percent

---

Course:	M IS Publishing
HQF band and level:	HET band at level 7
Core skills:	Research based.
Duration:	2 years, part-time
Theoretical/practical component:	100 percent/0 percent

---

Course:	PhD Publishing
HQF band and level:	HET band at level 8
Core skills:	Research based.
Duration:	4 years, part-time
Theoretical/practical component:	100 percent/0 percent

---

Institution:	University of the Witwatersrand
--------------	---------------------------------

---

Course:	Publishing Studies: Honours Degree
HQF band and level:	HET band at level 7
Duration:	1 year, full-time, or 2 years, part-time

---

In addition to these publishing courses, there are a variety of publishing-related courses that deal with aspects such as e-publishing, language editing and proofreading, writing, writing-related aspects, translation and graphic design.

### **e-Publishing**

Electronic publishing, as Steve Kromberg has argued for some time, is revolutionising the economics and politics of publishing globally (Kromberg, 2000:259). "Instead of having to go through established publishers, literary journals or outlets," writes Dave Chislett, "writers suddenly have a spectrum of choices available for getting their work to the world at large. From website publications, mail groups and newsletters, digital print-on-demand solutions, custom publishing and underground magazines, the choice has never been wider" (cited in Higgs, 2005:4). There are about 85 private training providers that offer short courses in e-publishing at certificate level, as shown in Annexure H.

### **Qualifications with components of language editing and proofreading**

Copy-editing and proofreading form one component of the honours course at the University of the Witwatersrand in the Department of African Literature. The Department also offers this component as a stand-alone diploma/certificate course (refer to Annexure H).

Eleven universities offer components of editing at degree level or in short courses:

Nelson Mandela University, North West University, Rhodes University, UNISA, University of Cape Town, University of Johannesburg, University of KwaZulu-Natal, University of Pretoria, University of Stellenbosch, University of the Free State, and the University of the Witwatersrand.

Two universities of technology offer editing components from diploma level up to doctorate level: Durban Institute of Technology and Tshwane University of Technology.

The Central University of Technology, Free State, offers a course in editing at a diploma level.

Eight private training providers offer short courses in editing: Jenny-Hunter Blair, John Linnegar, Kate McCullum, Nicola Harris (published the self-teach book, *Copyediting: The text*), the Magazine Publishers Association, the Public Relations Institute of SA, the Publishing Training Centre (at the Bookhouse in London) and the Write Co.

## **Writing**

The University of the Free State offers writing as a component of a first degree up to doctorate level. In addition, a further 12 universities offer writing as a component at first-degree level: Nelson Mandela University, North West University, Rhodes University, UNISA, University of Cape Town, University of Johannesburg, University of KwaZulu-Natal, University of Pretoria, University of Stellenbosch, University of Limpopo, University of the Western Cape and the University of the Witwatersrand. Cape Technikon and City Varsity offer a course in writing at diploma level. The AAA School of Advertising and Centre for the Book offer a writing course at certificate level (refer to Annexure H).

## **Writing-related courses**

Three universities offer writing-related components at first-degree level: University of KwaZulu-Natal, University of Stellenbosch and the University of the Witwatersrand. There are approximately nine private training providers that offer writing-related training (refer to Annexure H).

In addition, ten universities offer journalism/communication and media studies that contribute to the pool of people with writing skills: The universities of the Free State, KwaZulu-Natal,

Limpopo, North West, Johannesburg, Stellenbosch and the Western Cape, Nelson Mandela Metropolitan University, Rhodes University and UNISA.

Furthermore, currently the University of the Western Cape has a project running called the *Book in Africa Project*. The project is undertaking the mapping of the material and intellectual history of the book in Africa. This project will bring together African scholars, writers and other producers of books such as publishers, bookbinders and illustrators, to discuss the impact of the book in Africa and Africa's influence on the shape of the book. The participation of non-African scholars working on book culture on other continents will provide a comparative perspective that will enhance the study of the significance of the rich histories of the African diaspora for the development of the book. The project was launched in South Africa in 2000 and is funded by the National Research Foundation. The plan is to extend these studies to other African locations, with research associates based at various African universities. Three regional surveys are conducted in South Africa, based in Gauteng, the Cape Province and KwaZulu-Natal. The surveys will include the identification and listing of archives, the history and current state of indigenous presses, current research within Africa on book cultures and the history of the book, and indigenous language publishing (University of the Western Cape, 2006).

Another project funded by the National Research Foundation is the *Book History in South Africa Project*, which is co-lead by Dr Francis Galloway (University of Pretoria) and Prof Isabel Hofmeyr (University of the Witwatersrand). By drawing on the international scholarship and combining it with the existing work on book history in South Africa, this project seeks to chart out a series of exploratory case studies that can form the nucleus for further research into and development of this important field. The four case study programmes include:

- Production and other statistical trends in book publishing and book selling
- Circulation, distribution and the meaning of the book as a commodity
- Consumption of books and the social meaning of reading
- Exploring a mass market for books in South Africa.

Honours, MA and PhD students were recruited for each project, with the aim to produce postgraduates with research skills and knowledge appropriate to the publishing and other media industries. The studies will culminate in an international conference on the *History of the Book in Africa* expected to be held in December 2006 (Galloway, 2006).

Four universities of technology offer National Diplomas and B. Tech. degrees in journalism, which add to the pool of writing skills: Walter Sisulu University of Technology, Durban Institute of Technology, Cape Peninsula University of Technology and Tshwane University of Technology.

The Tshwane University of Technology is also planning to present an online skills program in basic journalism. The course has been especially developed for junior journalists or would-be journalists who do not have the opportunity to attend or have access to journalism training facilities. The student has to complete all six modules within six months to obtain a Tshwane University of Technology Certificate in Basic Journalism (online). One of the modules includes language and writing skills. A unique feature of the online course is the online mentoring system. Apart from a variety of lecturers, an experienced journalist will be appointed to help the student acquire skills such as publishing professional copy and building up a portfolio of his or her own work (Tshwane University of Technology, 2006).

## **Translation**

Ten universities provide translation components at first-degree level: North West University, UNISA, University of Limpopo, University of Nelson Mandela, University of Johannesburg, University of KwaZulu-Natal, University of Pretoria, University of Stellenbosch, University of the Free State and the University of the Witwatersrand. The University of Cape Town and the University of Limpopo also offer a course in translation at post-graduate level. Three universities of technology provide a translation course at a diploma level: Central University of Technology, Free State, Durban Institute of Technology and Tshwane University of Technology (refer to Annexure H).

## **Graphic design and/or photography**

Five universities offer graphic design up to first-degree level: Midrand University, Nelson Mandela University, North West University, University of Johannesburg and the University of Pretoria. The Stellenbosch Academy of Design and Photography offers a degree course in graphic design and photography. Four universities of technology provide diploma courses in graphic design: Cape Peninsula, Cape Technikon, Central University of Technology, Free State and Tshwane University of Technology.

Two private training providers also offer diploma courses in graphic design: Damelin Education Group and Inscape Design College. Eight private training providers offer graphic design at a certificate level. In addition, two FET colleges offer certificate courses in graphic design: Benoni and Roodepoort. The National College of Photography (FET college) provides a certificate course in photography (refer to Annexure H)

### **Design, arts and crafts**

Nine universities offer degree courses in various aspects of design, arts and crafts. Five universities of technology provide design, arts and crafts components at a diploma level, three universities of technology offer design, arts and crafts at first-degree level and the Central University of Technology, Free State, provides design, arts and crafts at postgraduate level. Seven private training providers offer short courses in design, arts and crafts, and nine FET colleges offer certificate courses in design, arts and crafts, as shown in Annexure H.

## Output, enrolment and future education and training at institutions

### Universities

#### Total output from universities

Total output from universities in courses relevant to the publishing sector in 2003 is indicated in Table 30. The majority of qualifications were obtained in courses related to the *Study and Uses of the English Language* (27,5 percent), *Information Communication* (13,1 percent), the *Study and Uses of the Afrikaans Language* (7,8 percent), and *Linguistics* (7,0 percent). More than half (58,1 percent) of learners obtained their qualification at NQF level 6, while 29,1 percent obtained their qualification at NQF level 7, 11,5 percent at NQF level 5 and only 1,2 percent at NQF level 8.

**Table 30: Total number of learners supplied by universities in fields of study relevant to the MAPPP SETA, according to NQF level, 2003\***

Field of study	NQF				Total	
	Level 5	Level 6	Level 7	Level 8	N	%
Study and uses of the English language	290	630	170	11	1 100	27,5
Information communication	2	186	337	1	525	13,1
Study and uses of the Afrikaans language	117	141	50	4	313	7,8
Linguistics	3	153	113	9	279	7,0
Journalism	0	191	68	0	259	6,5
Information	8	193	55	2	257	6,4
Mass communication	2	173	5	0	180	4,5
Literary studies	1	82	69	1	153	3,8
Other language, linguistics	6	71	62	5	144	3,6
Communication methodology	0	92	38	1	131	3,3
IsiZulu	3	58	23	1	85	2,1
Print media	2	69	4	0	75	1,9
IsiXhosa	8	46	11	1	66	1,6
SeSotho	2	54	7	0	64	1,6
Other African languages	0	0	52	2	54	1,3
French	0	33	8	2	44	1,1
Hebrew	0	20	16	3	39	1,0
German	0	26	8	1	35	0,9
Greek	0	16	14	1	30	0,8
SeTswana	5	15	8	0	29	0,7
SeSotho Sa Leboa	11	16	1	0	28	0,7
Norwegian	0	0	24	2	26	0,6
TshiVenda	0	12	7	0	19	0,5



Field of study	NQF				Total	
	Level 5	Level 6	Level 7	Level 8	N	%
XiTsonga	0	9	1	0	10	0,2
Graphic arts	0	10	0	0	10	0,2
Latin	0	5	5	0	10	0,2
Portuguese	0	2	2	3	7	0,2
Arabic	0	4	3	0	7	0,2
SiSwati	0	5	1	0	6	0,1
Communication technology	0	3	3	0	6	0,1
Shona	0	6	0	0	6	0,1
Artificial languages	0	2	0	0	2	0,0
Dutch	0	0	2	0	2	0,0
Italian	0	2	1	0	2	0,0
Spanish	0	2	0	0	2	0,0
Russian	0	1	0	0	1	0,0
The study and uses of language	0	0	1	0	1	0,0
<b>Fields of study combined (N)</b>	<b>459</b>	<b>2 326</b>	<b>1 166</b>	<b>50</b>	<b>4 000</b>	<b>100</b>
<b>Fields of study combined (%)</b>	<b>11,5</b>	<b>58,1</b>	<b>29,1</b>	<b>1,2</b>	<b>100</b>	

\*Source: DoE (2003) – HEMIS database

In 2003, a third of students who graduated at universities in fields of study relevant to the publishing sector were white females, 24,7 percent were African females, 16,0 percent were African males, 13,9 percent were white males, 4,6 percent were Asian females, 3,5 percent were coloured females, 2,2 percent were Asian males, and less than one percent were from other racial groupings, as shown in Table 31.

**Table 31: The number of learners supplied by universities in fields of study relevant to the MAPPP SETA, according to race and gender, 2003\***

Fields of study	African		Coloured		Asian		White		Other		Total
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	
Information communication	125	61	19	9	48	23	172	67	0	0	525
Communication methodology	22	25	0	2	2	3	13	64	0	0	131
Communication technology	2	2	0	0	0	1	0	0	0	0	6
Journalism	26	49	7	5	1	12	43	117	0	0	259
Mass communication	22	36	1	5	5	23	12	76	0	0	180
Print media	17	28	0	2	1	8	3	15	0	1	75
Graphic arts	0	0	0	1	0	0	1	9	0	0	10
Linguistics	55	79	5	12	2	12	24	89	0	1	279
Literary studies	19	33	3	11	1	7	19	60	0	0	153
Study and uses:											
Afrikaans language	30	53	6	15	2	3	27	173	2	2	313
Study and uses:											
English language	145	255	19	69	18	58	130	397	3	6	1 100

Fields of study	African		Coloured		Asian		White		Other		Total
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	
Artificial languages	0	0	0	0	0	0	1	1	0	0	2
Shona	5	1	0	0	0	0	0	0	0	0	6
SeSotho	15	46	0	0	0	0	1	1	0	0	64
SeSotho Sa Leboa	6	21	0	0	0	0	0	1	0	0	28
SiSwati	1	5	0	0	0	0	0	0	0	0	6
XiTsonga	2	8	0	0	0	0	0	0	0	0	10
SeTswana	7	18	0	0	0	0	0	3	0	0	29
TshiVenda	8	11	0	0	0	0	0	0	0	0	19
IsiXhosa	10	42	1	2	0	2	3	6	0	0	66
IsiZulu	20	52	0	0	1	4	4	5	0	0	85
Other African languages	19	33	0	0	0	0	0	2	0	0	54
Other languages	25	25	3	5	5	8	46	88	0	0	204
Study and uses of language	0	0	0	0	0	0	1	0	0	0	1
Other language, linguistics	21	34	1	1	1	15	17	54	0	0	144
Information	39	71	0	4	2	6	39	96	0	0	257
Fields of study combined (N)	640	989	65	141	88	184	557	1323	5	10	4 000
Fields of study combined (%)	16,0	24,7	1,6	3,5	2,2	4,6	13,9	33,1	0,1	0,2	100

\*Source: DoE (2003) – HEMIS database

### Current enrolment in fully-fledged publishing courses at universities

Only two training providers offer fully-fledged publishing qualifications in the Higher Education and Training (HET) band. In Table 32, the enrolment at the University of Pretoria and at the University of the Witwatersrand at NQF levels 6, 7 and 8 is provided for 2005. The majority (83,6 percent) of enrolments were white, 15,7 percent were African, less than one percent was coloured and there were no Asian enrolments in 2005 in any of the fully-fledged publishing courses. Three-quarters of these enrolments were female and a quarter was male. Two-thirds of enrolments were white females, 17,1 percent were white males, 8,6 percent were African females, 7,1 percent were African males, less than one percent was a coloured female and there were no enrolments among coloured males and Asian males or females.

**Table 32: Enrolment in fully-fledged publishing courses at universities, by race and gender and according to NQF level, 2005\***

Race group	Gender	NQF level 6	NQF level 7	NQF level 8	Total	Race group	Gender
		N	N	N	N	%	%
African	Male	8	1	1	10	15,7	7,1
	Female	11	1		12		8,6
	Total	19	2	1	22		

Race group	Gender	NQF level 6	NQF level 7	NQF level 8	Total	Race group	Gender
		N	N	N	N	%	%
Coloured	Male	0	0	0	0		0,0
	Female	1	0	0	1		0,7
	Total	1	0	0	1	0,7	
Asian	Male	0	0	0	0		0,0
	Female	0	0	0	0		0,0
	Total	0	0	0	0	0,0	
White	Male	19	5	0	24		17,1
	Female	68	25	0	93		66,4
	Total	87	30	0	117	83,6	
TOTAL	Male	27	6	1	34		24,3
	Female	80	26		106		75,7
	Total	107	32	1	140	100	100

\*Source: University of Pretoria and the University of the Witwatersrand

#### Current enrolment in writing courses at universities

The University of the North West indicated that for the year 2005, 122 students enrolled for the creative writing course. Out of this total of 122 students, 106 students enrolled for the first-year creative writing course and 16 students enrolled for the second-year creative writing course.

#### Future education and training provision at universities

In addition to current output and enrolment in courses relevant to the publishing sector, universities are planning new courses relevant to the publishing for the future. As indicated in Table 33, the University of Pretoria plans short courses in various components of the publishing process, to upgrade skills of employees in the industry further. The University of the Witwatersrand also plans to offer part-time courses in editorial management, editing and proofreading, the publishing environment, sales and marketing, commissioning and costing, management and finance as well as an Honours degree.

**Table 33: Future education and training in fields of study related to the publishing sector at universities**

Training area/course	NQF band	NQF level	Duration	Institution
Short courses in various components of the publishing process, e.g. editing, proofreading, commissioning, project management, DTP. (Target audience = employees in the industry who need reskilling or upgrading of skills.)	HET	5	3 to 5 days per course	University of Pretoria
Module to cover editorial management as an alternative to editing, but not sure if the resources will be available to offer this course.	HET	5		WITS
Editing and proofreading module (Certificate)	HET	5	Part-time	WITS
The publishing environment	HET	5	Part-time	WITS
Sales and marketing	HET	5	Part-time	WITS
Commissioning and costing	HET	5	Part-time	WITS
Management and finance	HET	5	Part-time	WITS
Editorial management	HET	5	Part-time	WITS
Honours degree: 3 modules can be accumulated as credits towards an honours degree.	HET	7	Part-time	WITS

As mentioned previously in this report, the University of the Western Cape is currently running The Book in Africa Project. This project will bring together African scholars, writers and other producers of books such as publishers, bookbinders and illustrators, to discuss the impact of the book in Africa and Africa's influence on the shape of the book (University of the Western Cape, 2006).

### ***Universities of technology***

#### **Total output from universities of technology**

In 2003, most learners in courses relevant to the publishing sector at universities of technology graduated at NQF level 5 (82,3 percent), 17,1 percent at NQF level 6, less than one percent at NQF level 7 and none at NQF level 8, as shown in Table 34. Nearly a quarter of students graduated in graphic arts, 21,6 percent in journalism, 21,4 percent in information communication and very few in other fields of study relevant to the publishing sector.

**Table 34: The total number of learners supplied by universities of technology in fields of study relevant to the MAPPP SETA, according to NQF level, 2003\***

Field of study	NQF				Total	
	Level 5	Level 6	Level 7	Level 8	N	%
Information communication	125	16	3	0	143	21,4
Communication methodology	0	3	0	0	3	0,4
Communication technology	28	0	0	0	28	4,2
Journalism	123	22	0	0	145	21,6
Mass communication	22	0	0	0	22	3,3
Graphic arts	166	40	0	0	206	30,7
Linguistics	39	19	0	0	58	8,6
Study and uses of the Afrikaans language	1	2	0	0	2	0,3
Study and uses of the English language	21	3	0	0	23	3,5
French	1	1	0	0	2	0,2
IsiXhosa	3	0	0	0	3	0,4
IsiZulu	0	1	0	0	1	0,1
Other language, linguistics	24	7	1	0	32	4,8
Information	0	3	0	0	3	0,4
<b>Fields of study combined (N)</b>	<b>552</b>	<b>115</b>	<b>4</b>	<b>0</b>	<b>671</b>	<b>100</b>
<b>Fields of study combined (%)</b>	<b>82,3</b>	<b>17,1</b>	<b>0,6</b>	<b>0,0</b>	<b>100</b>	

\*Source: DoE (2003) – HEMIS database

In 2003, almost a quarter of graduates in fields of study relevant to the publishing sector were African males, almost a third were African females, 20,4 percent were white females, 11,6 percent were white males, 4,3 percent coloured females, 3,4 percent Asian females, 2,9 percent coloured males and 1,4 percent Asian males, as shown in Table 35.

**Table 35: The total number of learners supplied by universities of technology in fields of study relevant to the MAPPP SETA, by race and gender, 2003\***

Fields of study	African		Coloured		Asian		White		Total
	Male	Female	Male	Female	Male	Female	Male	Female	
Information communication	52	72	2	1	1	0	9	6	143
Communication methodology	0	2	0	0	0	0	0	0	3
Communication technology	4	21	0	0	0	0	0	3	28
Journalism	37	41	6	22	4	18	5	12	145
Mass communication	10	11	0	1	0	0	1	0	22
Graphic arts	21	7	10	4	3	2	58	102	206
Linguistics	19	29	0	0	0	0	2	8	58
Study and uses of Afrikaans language	2	0	0	1	0	0	0	0	2

Fields of study	African		Coloured		Asian		White		Total
	Male	Female	Male	Female	Male	Female	Male	Female	
Study and uses of the English language	7	14	0	0	0	1	1	1	23
French	1	1	0	0	0	0	0	0	2
IsiXhosa	1	2	0	0	0	0	0	0	3
Other language, linguistics	7	13	1	0	1	3	2	5	32
Information	2	1	0	0	0	0	0	0	3
<b>Fields of study combined (N)</b>	<b>162</b>	<b>213</b>	<b>20</b>	<b>29</b>	<b>9</b>	<b>23</b>	<b>78</b>	<b>137</b>	<b>670</b>
<b>Fields of study combined (%)</b>	<b>24,2</b>	<b>31,7</b>	<b>2,9</b>	<b>4,3</b>	<b>1,4</b>	<b>3,4</b>	<b>11,6</b>	<b>20,4</b>	<b>100</b>

\*Source: DoE (2003) – HEMIS database

### *Current enrolment in publishing-related courses at universities of technology*

#### **Linguistics**

Among the respondents to the training provider survey, three universities of technology offer linguistic courses. Three-quarters of those enrolled for the linguistic courses in 2005 were African, 21,5 percent were white, 2,5 percent were coloured and less than one percent were Asian, as shown in Table 36. Two-thirds of those who enrolled for linguistics were female and a third was male. Almost half of the enrolled learners in linguistics were African females, more than a quarter were African males, 14,3 percent were white females, 7,2 percent were white males, 1,8 percent were coloured females, 0,7 percent were coloured males, 0,2 percent were Asian females, and there were no Asian males enrolled for linguistics in 2005.

Nearly two-thirds of learners in 2005 were enrolled for courses in linguistics at universities of technology at NQF level 5, 29,8 percent at NQF level 6, 5,4 percent at NQF level 7, and only 1,6 percent at NQF level 8 (refer to Table 36).

**Table 36: Enrolment in linguistic courses at universities of technology, by race and gender, and according to NQF level, 2005\***

Race group	Gender	NQF level 5	NQF level 6	NQF level 7	NQF level 8	Total	Race group	Gender
		N	N	N	N	N	%	%
African	Male	91	31	3	1	126	75,8	28,2
	Female	156	48	7	2	213		47,7
	Total	247	79	10	3	339		
Coloured	Male	0	3	0	0	3	2,5	0,7
	Female	3	5	0	0	8		1,8
	Total	3	8	0	0	11		

Race group	Gender	NQF level 5	NQF level 6	NQF level 7	NQF level 8	Total	Race group	Gender
		N	N	N	N	N	%	%
Asian	Male	0	0	0	0	0		0,0
	Female	0	0	0	1	1		0,2
	Total	0	0	0	1	1	0,2	
White	Male	10	16	5	1	32		7,2
	Female	23	30	9	2	64		14,3
	Total	33	46	14	3	96	21,5	
TOTAL	Male	101	50	8	2	161		36,0
	Female	182	83	16	5	286		64,0
	Total	283	133	24	7	447	100	100
	%	63,3	29,8	5,4	1,6	100		

### Translation

One university of technology provided a breakdown of their enrolments in 2005 for a translation course, by race and gender and at NQF level 5. Nearly two-thirds (62,5 percent) of those who enrolled for the translation course were African females and a little more than a third (37,5 percent) were African males.

### Graphic design

One university of technology provided a breakdown of enrolments in 2005 by race and gender, as well as according to NQF level, for graphic design. Enrolment was mainly (91,6 percent) at NQF level 5 and only 8,4 percent at NQF level 6, as shown in Table 37. Half of those who enrolled for graphic design were white, 36,6 percent were coloured, 10,1 percent were African and only 3,4 percent were Asian. More than half of those who enrolled for graphic design were female and 47,9 percent were male. A quarter of enrolments were white females, almost another quarter were white males, 19,7 percent were coloured females, 16,8 percent were coloured males, 5,0 percent were African males and 5,0 percent were African females, while 1,7 percent of both Asian males and females enrolled for graphic design in 2005.

**Table 37: Enrolment in graphic design courses at universities of technology, by race and gender, and according to NQF level, 2005\***

Race group	Gender	NQF level 5	NQF level 6	Total N	Race group %	Gender %
		N	N			
African	Male	10	2	12	10,1	5,0
	Female	11	1	12		5,0
	Total	21	3	24		
Coloured	Male	40		40	36,6	16,8
	Female	45	2	47		19,7
	Total	85	2	87		
Asian	Male	2	2	4	3,4	1,7
	Female	2	2	4		1,7
	Total	4	4	8		
White	Male	52	6	58	50,0	24,4
	Female	56	5	61		25,6
	Total	108	11	119		
TOTAL	Male	104	10	114	100	47,9
	Female	114	10	124		52,1
	Total	218	20	238		100
	%	91,6	8,4	100		

### Future education and training provision at universities of technology

In addition to current output and enrolment in courses relevant to the publishing sector, universities of technology are planning new courses relevant to the publishing sector. As shown in Table 38, Tshwane University of Technology plans to introduce book-publishing as part of the language practice programme at NQF levels 5 to 8, as from 2006 or 2007. The Durban Institute of Technology plans to offer an M Technology degree, as well as a doctorate in interpreting practice in future.



**Table 38: Future education and training in fields of study related to the publishing sector at universities of technology**

Training area/course	NQF band	NQF level	Duration	Institution
Plan to introduce book-publishing as part of the language practice programme from 2006 or 2007.	HET	5 to 8		Tshwane University of Technology
Online skills program in basic journalism			6 months	Tshwane University of Technology
M Tech Translation and Interpreting Practice	HET	7	2 years	Durban Institute of Technology
D Tech Translation and Interpreting Practice	HET	7	4 years	Durban Institute of Technology

Furthermore, the Tshwane University of Technology intends presenting an online skills program in basic journalism. As mentioned previously in this report, the course was especially developed for junior journalists or would-be journalists who do not have the opportunity to attend or have access to journalism training facilities. The student has to complete all six modules within six months to obtain a Tshwane University of Technology Certificate in Basic Journalism (online). One of the modules includes language and writing skills. A unique feature of the online course is the online mentoring system. Apart from a variety of lecturers, an experienced journalist will be appointed to help the student acquire skills such as publishing professional copy and building up a portfolio of his or her own work (Tshwane University of Technology, 2006).

### **Private training providers**

#### ***Graphic design/Multimedia design/e-Publishing***

Ten private training providers supplied information with regard to courses in graphic design/multimedia design/e-publishing. Most courses offered by private training providers fall in the FET band. Around 60 percent of courses are offered at NQF level 4 and a quarter at NQF level 3. Only about 14 percent of courses are provided in the HET band at NQF level

5. Roughly, 70 percent of learners are white, 10 percent are African and 20 percent are from other racial groups. Around 30 percent of learners are male and 70 percent female.

### **Future education and training provision at private training institutions**

Private training providers are planning future courses mainly in the FET band. Their training usually revolves around new software that comes on the market.

### **Funding of publishing-related studies**

Six training providers of publishing-related courses indicated the way in which learners were funded to obtain their qualifications. Most learners (48,1 percent) enrolled for publishing-related courses are funded through private funds, approximately a quarter of learners study by means of bursaries, another quarter are funded by means of student loans, and less than one percent of learners are funded by sponsors, as shown in Table 39.

Africans are almost equally funded by means of private funds (35,0 percent) and bursaries (34,1 percent), while more than a quarter study by means of student loans and 1,3 percent by means of sponsor funding. Almost half of coloureds pay their studies by means of bursaries; about a third uses private funds, 20 percent study by means of student loans, while none is being sponsored. Most (85,3 percent) Asians provide their own funding for studies, 11,8 percent make use of student loans and 2,9 percent obtained bursaries, while none is being sponsored. The majority of white students (75,1 percent) study by means of private funds, 18,2 percent make use of student loans and 6,7 percent obtained bursaries, while none is being sponsored.

Men are almost equally funded through private funding (38,6 percent) and bursaries (35,9 percent), while a quarter make use of student loans and less than one percent are being sponsored. Women rely mostly on private funding (55,3 percent) and student loans (22,7 percent) for funding their studies, while 21,5 percent obtained bursaries and less than one percent are being sponsored.

**Table 39: Funding of publishing-related studies**

	Private funding	Bursaries	Sponsors	Other student loans	Total
	%	%	%	%	%
<b>Race group</b>					
African	35,0	34,1	1,3	29,6	100
Coloured	32,8	47,2	0,0	20,0	100
Asian	85,3	2,9	0,0	11,8	100
White	75,1	6,7	0,0	18,2	100
Total	48,1	27,7	0,6	23,6	100
<b>Gender</b>					
Male	38,6	35,9	0,7	24,9	100
Female	55,3	21,5	0,5	22,7	100

Eight training providers responded to the question of whether learners are financially assisted by means of bursaries offered by training providers. Most (five) of the respondents indicated that they did not offer financial assistance, while three said that they did. At all eight training providers' bursaries are offered in any field of study; however, there are no bursaries for publishing-related courses as such. Bursaries are awarded mainly on grounds of academic merit and financial need, while sport, cultural and leadership qualities are taken into account, although to a lesser degree.

### **Factors that influence access to training**

#### ***Restriction on the number of learners attending courses***

Nine training providers responded to the question of whether any restrictions are placed on the number of learners attending their courses. Among the respondents, seven indicated that they did restrict the number of students attending courses, while two indicated that they did not place any restrictions on the number of students attending classes and that room would always be made to accommodate as many students as possible.

Seven training providers gave reasons for restricting the number of students attending their courses. Most (five) were of the opinion that numbers should be restricted in order to assure quality through the learner/lecturer ratio. Three indicated that the equipment available restricted the number of students that could be accommodated, and three mentioned the available space as a restricting factor. Two training providers complained about limited

funds, one indicated the lack of English proficiency as a factor restricting the number of learners who can attend classes, one training provider indicated that competency in isiZulu and isiXhosa was required, and one respondent referred to limited job opportunities in the market as a factor restricting the number of students allowed to attend their courses.

### ***Targets with regard to race, gender or disability***

Nine training providers responded to the question of whether ratios are applied according to race, gender or disability when students are admitted to courses. Eight indicated that no ratios were applied, while only one respondent indicated a ratio with regard to race. Places were mainly available for coloureds (54 percent), then equally for Africans (22 percent) and whites (22 percent) and 2 percent for Asians.

### ***Assessment procedures***

Eight respondents indicated that they used assessment procedures for the admittance of students. Five make use of an entrance examination, five make use of personal interviews, three make use of psychometric testing, while two indicated that students had to have passed their undergraduate degree with a pass mark of at least 65 percent to be considered for postgraduate studies and two applied physical testing (e.g. eyesight tests) to screen future candidates. A further two indicated that students were screened according to matriculation results because matriculation exemption with an average of 60 percent, English or Afrikaans or another African language at HG and an M-score of 14 were required for admittance to courses. One required a portfolio from prospective students and another one assessed future students according to their potential to make a success.

### ***Bridging or remedial programmes***

Eight training providers responded to the question of whether bridging programmes are on offer for potential students who do not meet the initial entry requirements for courses. Four of the training providers offer bridging programmes and four do not offer any. Bridging programmes are available for potential students who do not comply with initial entry requirements or students from other disciplines who are interested in postgraduate studies in the publishing field of study. Foundation programmes are also available for black and coloured potential students specifically as well as for all first-time entrants, as indicated in

Table 40. Students who attend bridging programmes complete a course on an extended curriculum of one year.

**Table 40: Bridging programmes available at training institutions**

Subjects, course or field of study	Description	Duration	Target group	Institution
1 <sup>st</sup> -year B.A., own choice (selection of subjects from the Faculty of Humanities)	A bridging year	1 year	Available to students who do not comply with entry-level requirements for B.IS Publishing	University of Pretoria
A selection of undergraduate publishing modules	Bridging course for students interested in postgraduate studies in publishing (non-degree purposes)	1 year	Available to applicants with degrees other than B.IS Publishing	University of Pretoria
General, applicable to all prospective students	Bridging courses are designed for applicants who have not met all of the initial requirements. They are accepted based on the writing of the selection test and/or interviews. These students will be required to complete the degree programme on an extended curriculum.	1 year	Applicants who have not met all of the initial requirements.	University of the Witwatersrand
Communication	Beginner's course	1 year	First-year students	Free State University
Graphic design	Foundational course	1 year	Blacks/coloureds	Cape Peninsula Technikon
Foundational course that includes foundational English	Basic skills	1 year	All first-time entrants at TUT	Tshwane University of Technology

### **Factors inhibiting students' access to education and training in the book-publishing sector**

Five training providers indicated factors that inhibited access to training and education in the book-publishing sector. Four respondents were of the opinion that limited funds inhibited access to training and education in the book-publishing sector.

Three respondents indicated that the language barrier inhibited potential students whose mother tongue was not English. Currently, all publishing courses have a strong editing

component that requires proficiency in a language. Most training institutions currently only have the capacity to offer editing in English. This restricts access to students who are not proficient in English and students who may want to pursue a career in publishing outside of the field of editing. There are plans to register a module that will cover editorial management as an alternative to editing, but it is not sure if the resources will be available to offer such a course.

Two respondents were of the opinion that potential students were uninformed about careers in the book-publishing sector. Two respondents indicated that the few job opportunities available at entrance level inhibited potential students' access to the publishing sector. Two training providers were of the opinion that insufficient art training inhibited access to certain courses. One respondent blamed poor matriculation results for inhibiting access to training and education, and another indicated that the location of training institutions hindered access to education and training. Fully-fledged publishing courses are only offered in Gauteng at present and in other centres, courses are limited to short courses that do not provide a context for those people who are not yet working in the industry.

### **Obstructive factors**

According to seven respondents, an average of 9,9 percent of learners drop out of courses. The dropout rate normally is bigger during the first year of study, less in the second year of study and very small in the third year and onwards.

Nine training providers highlighted factors contributing to failure of students in their studies. Seven respondents were of the opinion that personal reasons, such as time available and financial and health problems, affected studies and lead to failure. Not all prospective students have the luxury of not having to earn an income while they are pursuing their studies. While part-time options are available, it is still an onerous amount of work to undertake and requires a large personal commitment on the part of the student to complete the course.

Six respondents felt that the wrong career choice and a lack of talent for the chosen course resulted in failure. Four training providers were of the opinion that inadequate school preparation contributed to failure at tertiary level. Two respondents indicated that poor language skills impacted on students' failure and one training provider referred to students' lack of perseverance as a factor contributing to failure in studies.

The Tshwane University of Technology is using business intelligence software to develop a model that could improve first-year student retention. "Tertiary institutions face the problem of students not completing their first year successfully, and taking too long to graduate," says Izak Smit, former statistical analyst at the Tshwane University of Technology, Department of Statistical Support. Using business intelligence software, the Tshwane University of Technology is designing a model that can assist in getting students to finish their studies more quickly and limiting the number of dropouts.

## **Initiatives to improve education and training**

### ***Career guidance***

Out of eight respondents, seven training providers reported that they offered career guidance and one training provider indicated that no career guidance was offered. Five respondents indicated that personal interviews were conducted with prospective students as a form of career guidance. Three training providers have career guidance and counselling services situated in specific centres (e.g. the Centre for Student Affairs at the University of Pretoria). Four respondents indicated that they sent invitations to school principals and guidance teachers to make learners at school aware of Open Day events at these institutions. Three training providers make visits to schools to provide information sessions. Two respondents indicated that advertisements were, for instance, placed in the PASA Directory and that brochures were distributed at schools.

### ***Learnerships***

Six training providers indicated whether they were involved in apprenticeships/learnerships pertaining to book-publishing. Three respondents are involved in learnerships and three are not involved in learnerships. Training providers indicated that they did not have compulsory apprenticeships or learnerships, but that students were encouraged to work part-time or voluntary in the book-publishing or book-selling environment. Two training providers are formally involved in the PASA and MAPPP SETA-funded internship programme, in the role of delivering training to interns and of advising PASA on the training component of the programme. Both of these two training providers were involved in the 2005 programme. They are also involved in the planning of the 2006 programme. One of the private training providers indicated that Cambridge University Press sponsored one of their students.

## **Additional skills to be addressed in the book-publishing sector**

Firstly, current skills need to be upgraded to bring employees up to date with the most recent developments and to ensure a deeper knowledge basis. Secondly, previously disadvantaged candidates should be fast-tracked from entry-level positions to middle- and upper-level management positions. Thirdly, employees that join the publishing industry from other industries, such as teachers joining as commissioning editors, need training to bring them up to date with the publishing industry as quickly as possible.

Specific skills that should be addressed are:

- Middle-management skills;
- African language editing;
- Lexicography;
- Terminology;
- Translation;
- Proofreading;
- Editing; and
- Text analysis.

Short courses should be presented to address skills shortages. However, other higher-education qualifications need to be sponsored to address mid-level training programmes in order to provide depth of knowledge. Some programmes and/or curricula should be restructured to address certain skill shortages. Mentors in the workplace should assist learners and present in-service training for lexicography, terminology, translation, proofreading, editing and text analysis required.

## **Initiatives or strategies the MAPPP SETA needs to take or implement to improve education and training**

Five respondents indicated strategies that the MAPPP SETA should implement in order to improve education and training in book-publishing. Three indicated that better communication between the various role players were required. Two respondents were of the opinion that more funding from the MAPPP SETA was necessary. Two training providers would prefer to have guidelines regarding skills priorities. It was also mentioned that the MAPPP SETA needed to develop unit standards, train mentors, market job opportunities and develop a database of short courses available in book-publishing.



### **Initiatives or strategies that employers need to take or implement to improve education and training**

Four training providers proposed possible strategies employers in the book-publishing industry could implement. Three respondents indicated that employers needed to provide funding and/or bursaries for education and training in book-publishing. Three training providers were of the opinion that better communications between the various role players (employers, training providers and the MAPPP SETA) were necessary. Three respondents felt that employers should become more involved with experiential training and internships. Furthermore, it was indicated that employers needed to send staff on short courses; fast-track previously disadvantaged candidates; and take part in part-time lecturing at training institutions.

### **Initiatives or strategies that training providers need to take or implement to improve education and training**

Three training providers proposed strategies with regard to the improvement of education and training in book-publishing. Firstly, training providers need to improve communication with the various role players. Furthermore, professional training in short courses should be presented, experiential training should become compulsory, a culture of learning and the reading of books needs to be restored, and collaborative research should be done.

### **Contact with national and international organisations**

Only 18 percent of respondents indicated that they had contact with national and international organisations to identify training courses needed in the sector. Seventeen percent indicated that they did have contact with national and international organisations to arrange funding for training.

#### ***Contact with national organisations***

Training providers had contact with the following national organisations:

- **Government organisations:**
  - MAPPP SETA, with the purpose of identifying training courses and obtaining funding for training;
  - Standards Generating Body (SGB), with the purpose of developing standards and accrediting courses;
  - Language Services, with the aim of obtaining information for lecturing and advice;

- Pan South African Language Board (PanSALB), to obtain information for lecturing and advice;
  - National Film and Video Foundation (NFVF); and
  - Higher Education Quality Committee (HEQC).
- **Employers:**
- Individual publishing houses, with the purpose of identifying training courses needed in the sector, obtaining funding for training, organising placement for students and sourcing lecturers for publishing courses.
- **Professional Bodies:**
- PASA, with the aim to identify training courses, to participate in the PASA Internship Project and to share information;
  - PICC, with the purpose of identifying training courses needed in the sector;
  - South African Translators' Institute (SATI), with the aim to obtain information and for professional development;
  - South African Scriptwriter's Association (SASWA); and
  - Audio Visual Entrepreneurs of Africa (AVEA).
- **Training providers:**
- The University of Pretoria and the University of the Witwatersrand had contact with each other because of their mutual participation in the PASA Internship Project, sharing of information and the University of Pretoria staff acting as moderator for the University of the Witwatersrand Publishing Studies degree.
  - The University of Cape Town had contact with the University of the Witwatersrand with regard to the initial stages of discussions around co-operation with the Centre for Open Learning.
  - The Durban Institute of Technology had contact with University of South Africa (UNISA), University of KwaZulu-Natal (UKZN) and University of the Free State (UOFS) to exchange lecturing information.
  - The private training provider, Tulalani Computer Consultancy, had contact with Zululand University (Mntuzini) in KwaZulu-Natal to lecture various computer and electronic courses.
  - City Varsity, University of Cape Town (UCT) and Stellenbosch also had contact with each other.

▪ **Other national organisations:**

- The private training provider, Tulalani Computer Consultancy, indicated that they were involved with community projects through Khule Community Projects, a non-profitable organisation (Reg 0128649 NPO), giving computer and other training along with running various projects for the upliftment of the community, ensuring a better life for all.
- Currently, the University of the Western Cape is running *The Book in Africa Project*. As mentioned previously in the report, this project was launched in South Africa in 2000, and is funded by the National Research Foundation. The plan is to extend similar such studies to other African locations with research associates based at various African universities (University of the Western Cape, 2006).

▪ **Contact with previous students:**

Almost half of the respondents indicated that they kept track of previous students:

- to inform them of job opportunities in the publishing sector;
- to get information on career paths; and
- to keep informal contact.

▪ **Contact with international organisations:**

Training providers indicated that they had contact with the following international organisations:

- Oxford International Centre for Publishing Studies and Oxford Brookes University in the UK, to assess courses against international training standards and research participation, and to exchange students on postgraduate level.
- The Centre for Publishing, the School of Continuing and Professional Studies and New York University, to identify training courses needed in the sector and assess courses against international training standards and research participation.
- The Centre for Publishing Studies, the University of Stirling, Scotland, to identify training courses needed in the sector, to assess courses against international training standards and research participation, and to exchange students on postgraduate level.
- Book House Training Centre in the UK, to source training material that can be adapted for South Africa.

- FIT (Fédération Internationale des Traducteurs – International Federation of Translators – professional body), in order to obtain lecturing information.
- Cambridge University Press, to sponsor a South African learner.

## CHAPTER 7

### PROFILE OF FREELANCERS IN BOOK-PUBLISHING

#### Introduction

Freelancers provide an important skills base to the book-publishing industry, especially in editing, typesetting and design (Wesgro, 2002). Wary of the serious downturn in the market because of decreased educational expenditure that led to substantial retrenchments in the education publishing sector in the late 1990s, book-publishing companies are now relying heavily on freelance workers, rather than employing permanent staff.

Recognising freelancers as important stakeholders in the book-publishing industry, the Publishing Chamber of the MAPPP SETA solicited the HSRC to conduct a survey of selected freelancers as part of the study on skills needs in the book-publishing subsector in South Africa. The directive was to include at least 30 editors/translators/proofreaders, 10 designers and 10 'other' freelancers in the survey.

Forty-nine freelancers were interviewed from November 2005 to January 2006. Half of the respondents to the survey resided in KwaZulu-Natal and a third of the respondents were based in the Western Cape (Table 41). Three respondents each came from Gauteng, the Limpopo Province and the Eastern Cape.

**Table 41: Provincial distribution of freelance respondents**

Province	Frequency	Percent
Eastern Cape	1	2,0
Gauteng	3	6,1
KwaZulu-Natal	24	49,0
Limpopo	3	6,1
Western Cape	18	36,7
Total	49	100,0

#### Services provided by freelancers

Respondents were asked to give an indication of the type of work they did for clients in the publishing sector (question 2, Annexure F). From their responses, it became apparent that

freelancers are multi-skilled. Twenty-two (44,9 percent) of the 49 freelancing respondents indicated that they were providing more than one type of service to their clients. One of the respondents listed seven activities, including project management, proofreading, print and production management, writing, desktop publishing, editing and publishing. Table 42 provides an overview of the diverse range of services provided by freelancers.

**Table 42: Types of services provided by freelancers**

Type of work	Frequency	(b) %	(c) %
Editing	21	20,6	42,9
Proofreading	17	16,7	34,7
Project management	16	15,7	32,7
Publishing	6	5,9	12,2
Writing	6	5,9	12,2
Marketing/promotion	5	4,9	10,2
Graphic design	4	3,9	8,2
Overwriting	4	3,9	8,2
Print and production management	4	3,9	8,2
Translation	4	3,9	8,2
Desktop publishing	2	2,0	4,1
Evaluation	2	2,0	4,1
Illustrating	2	2,0	4,1
Indexing	2	2,0	4,1
Typesetting	2	2,0	4,1
Binding service	1	1,0	2,0
Layout of books	1	1,0	2,0
Photography	1	1,0	2,0
Product trainer	1	1,0	2,0
Provision of information	1	1,0	2,0
Total (a)	102	100,0	N = 49

Notes:

- (a) 49 respondents – some do more than one type of work
- (b) Number of services as a percentage of 102 responses
- (c) Number of services as a percentage of 49 respondents

Only four of the freelancers interviewed were in the freelancing business for less than one year (Table 43). More than half (28) of the respondents indicated that they had been freelancing for between one and five years in the publishing sector, and 10 indicated that

they had been freelancing for between six and ten years. Seven were freelancing for longer than 10 years.

**Table 43: Years in freelancing**

Years	Frequency	Percent
Less than one year	4	8.2
1-5 years	28	57.1
6-10 years	10	20.4
11-15 years	5	10.2
More than 15 years	2	4.1
Total	49	100.0

Spot checks were carried out to see whether there was a relationship between the number of years the respondents had worked as freelancers and the number of services provided by the respondents. The respondent who had listed seven activities reported between 11 and 15 years' experience in freelancing. Two out of the three respondents who had listed five activities indicated that they had been in freelancing for between 11 and 15 years. Furthermore, the respondent who had listed seven activities reported to have worked in the publishing industry before this respondent became a freelancer. From Table 44, it can be seen that the majority of the respondents indicated that they had worked in publishing before. A substantial number had worked as teachers or lecturers before they became freelance workers in the book-publishing industry.

**Table 44: Type of experience before freelancing**

Type of experience	Frequency	(c) %	(d) %
Publishing industry related experience (a)	30	48,4	61,2
Teaching/lecturing	16	25,8	32,7
Studying	6	9,7	12,2
Marketing	5	8,1	10,2
Biological research	2	3,2	4,1
Clinical medicine	1	1,6	2,0
HR research	1	1,6	2,0
Secretarial	1	1,6	2,0
Total (b)	62	100,0	N = 49

Notes:

(a) 49 respondents – some did more than one type of work in the past

- (b) Publishing (8), editing (5), graphic design (3), writing (3), development of educational material (2), print and production (2), translation (2), typesetting (2), desktop publishing (1), language practitioner (1), sorting of books (1)
- (c) Number of types of experience mentioned as a percentage of 62 responses
- (d) Number of types of experience mentioned as a percentage of 49 respondents

Ten of the respondents reported that they had worked in the publishing industry before, at companies such as Struik/New Holland Publishers (3), Goot Printers (1), newspapers (1), McMillan SA (1), Francolin Publishers (1), magazines (1), Maskew Miller Longman (1) and Oxford University Press (1). Two of the respondents had experience in the insurance industry (Southern Life and Old Mutual), two respondents were in the SA Navy, two had a university or college for further education background, and one respondent worked at the Sea Fisheries Research Institute.

### Qualifications

Respondents to the freelancer survey were asked to state their highest level of qualification. From Table 45, it can be seen that the majority of the respondents attained a postschool qualification. Ten of the respondents acquired a diploma/occupational certificate and 14 obtained a degree or higher diploma. Nineteen of the respondents held an Honours/Master's degree and two attained their doctorate. Only four of the respondents acquired only matric.

**Table 45: Highest qualification of freelancers (respondents)**

Qualification	Frequency	Percent
Grade 12/matric	4	8,2
Diploma/Occupational certificate	10	20,4
First degree/Higher diploma	14	28,6
Honours/Master's degree	19	38,8
Doctorate	2	4,1
Total	49	100,0

Table 46 provides an overview of the fields of study in which freelancers obtained their qualifications. A significant number of freelancers interviewed had been teachers before. Thirteen of the respondents studied in publishing-related fields.



**Table 46: Fields of study in which freelancers obtained qualifications**

Fields	Frequency	(b) %	(c) %
Education	16	21,6	32,7
English	7	9,5	14,3
Computer courses	6	8,1	12,2
Natural sciences	6	8,1	12,2
Social sciences	5	6,8	10,2
Editing/proofreading	3	4,1	6,1
Geology	3	4,1	6,1
Language practice	3	4,1	6,1
Marketing	3	4,1	6,1
Running a small business	3	4,1	6,1
Desktop publishing	2	2,7	4,1
Fine art	2	2,7	4,1
History	2	2,7	4,1
Journalism	2	2,7	4,1
Translation	2	2,7	4,1
Bookkeeping	1	1,4	2,0
Graphic design	1	1,4	2,0
Lithography	1	1,4	2,0
Mathematics	1	1,4	2,0
Network writing	1	1,4	2,0
Photography	1	1,4	2,0
Production design	1	1,4	2,0
Project management	1	1,4	2,0
Task job evaluation	1	1,4	2,0
<b>Total (a)</b>	<b>74</b>	<b>100,0</b>	<b>N = 49</b>

Notes:

- (a) 49 respondents – some do more than one type of work
- (b) Number of study fields listed as a percentage of 74 responses
- (c) Number of study fields listed as a percentage of 49 respondents

Table 47 provides an overview of the institutions at which freelancers obtained their qualifications.

**Table 47: Institutions where qualifications were obtained**

Institution	Frequency
University of KwaZulu-Natal	6
UNISA	5
Rhodes University	4
University of Cape Town	4
Technikon Natal	3
Wits	3
Damelin	2
John Linnegar (PASA)	2
London College	2
University of Pretoria	2
University of Scotland	2
Abroad	1
CS Holding	1
Deloitte & Touche HCC	1
Hirt and Carter	1
Jutastat (Pty) Ltd	1
Maritzburg College	1
Pretoria Technikon	1
SBDC (Small Business Development Corporation)	1
Stellenbosch University	1
Sunda College	1
Technikon SA	1
University of Aberdeen	1
University of Durham	1
University of the OFS	1
Vista University	1
<b>Total</b>	<b>50</b>

Freelancers listed a variety of skills they had acquired besides formal qualifications, with computer skills being the most frequently mentioned skill (Table 48).

**Table 48: Other skills acquired besides formal qualifications**

Skills	Frequency	(b) %	(c) %
Computer skills	15	18,8	30,6
Project management	6	7,5	12,2
Writing	5	6,3	10,2
Teaching	5	6,3	10,2
Marketing skills	5	6,3	10,2
Editing	5	6,3	10,2
Publishing processes	4	5,0	8,2
HR skills	4	5,0	8,2
Public relations	3	3,8	6,1
Graphic design	3	3,8	6,1
Art	3	3,8	6,1
Translation	2	2,5	4,1
Proofreading skills	2	2,5	4,1
Print and production process	2	2,5	4,1
Photography	2	2,5	4,1
Multi-tasking	2	2,5	4,1
Desktop publishing	2	2,5	4,1
Curriculum/material development	2	2,5	4,1
Business skills	2	2,5	4,1
Research	1	1,3	2,0
Facilitation	1	1,3	2,0
Communication	1	1,3	2,0
Bookkeeping	1	1,3	2,0
Best English student in matric	1	1,3	2,0
Assessment skills	1	1,3	2,0
Total (a)	80	100,0	N = 49

Notes:

- (a) 49 respondents – some do more than one type of work
- (b) Number of skills mentioned as a percentage of 74 responses
- (c) Number of skills mentioned as a percentage of 49 respondents

### Skills needs

Freelancers were asked to provide information on the skills they needed to be able to function effectively and operate a business successfully in the publishing sector. The freelancers who were interviewed identified skills shortages relating to information technology, marketing, communication and financial skills (Table 49).

**Table 49: Skills needs of freelancers in book-publishing**

Skills needs	Frequency	Percent
Keeping up with technology/IT/typesetting	9	19,6
Electronic/desktop publishing	6	13,0
Expansion of client base	4	8,7
Effective communication/media communication	3	6,5
Financial skills	3	6,5
Marketing	3	6,5
Media communication	3	6,5
Business skills	2	4,3
Design	2	4,3
Editing	2	4,3
Interface between publisher and printer/setter	2	4,3
Proficiency in English	2	4,3
Publishing process	2	4,3
Journalism	1	2,2
Print and reproduction industry skills	1	2,2
Writing skills	1	2,2
Total	46	100,0

Although freelancers pointed out that they did have skills needs, they also emphasized that it was difficult for them to attend training. They cited the high cost of training as one of the main reasons (Table 50). Finding time to study is also problematic. Freelancers accused publishers of not being helpful in providing training opportunities and expressed concern about the lack of industry-related courses in the country.

**Table 50: Training-related problems experienced by freelancers**

Problem	Frequency	Percent
High cost of courses	17	34,0
No time to attend courses	14	28,0
Publishers not helpful in providing training opportunities	8	16,0
Courses not applicable - no real hands-on courses in SA	5	10,0
Claims back on levies not enough	2	4,0
MAPPP SETA not co-operative in funding training for SMMEs	2	4,0
Technology becomes outdated rapidly	2	4,0
Total	50	100,0

## Challenges/problems facing freelancers

Freelancers were asked to identify the challenges they faced in performing their work. Some of the major problems that were highlighted follow below:

- **Low fees**

It is a well-known fact that book-publishing is not an industry with high profit margins like other comparable industries. Freelancers voiced their concern about the stagnation of fees over the last few years, while deadlines and demands had become far tighter and more unrealistic. Experienced and reliable freelancers depart from the industry because of low salary levels and an unsatisfactory job environment. Freelancers indicated that current fees were disproportionate to the skills and effort required to complete projects.

- **Unrealistic deadlines**

Unrealistic deadlines are a critical issue in this work environment because freelancers are penalised by losing a percentage of their income if they do not deliver on the agreed time. This puts pressure on freelancers and impacts on their quality of work. Time management and meeting deadlines are therefore a huge challenge.

- **Delayed payments**

Freelancers expressed their frustration with publishers that take too long to forward payments after the work had been delivered. This often causes serious cash flow problems for these individuals and impacts on their attitude towards publishing companies.

- **Inexperience of full-time staff**

Freelancers raised concern about the gross inexperience and lack of knowledge among full-time staff. Due to this inexperience and lack of knowledge, companies often do not know how to pace their work throughout the year and then expect freelancers to do everything at the last minute. They further indicated that a lack of quality control in publishing companies sometimes also influenced the delivery of products.

- **Exclusion from planning phase of projects**

Freelancers mentioned that one of the problems they experienced is their exclusion from the planning phase of projects. They are very seldom involved in the conceptualisation of publications and are only drawn in at the end as a 'technical' editor.

- **Poor communication**

According to the interviewed freelancers, publishers do not always provide clear guidelines of contracts in writing, and misunderstandings arise from this. Because the terms of reference are not clear, it often leads to situations where freelancers think they are contracted to do a specific job but then end up doing extra things that have not been stipulated in the contract.

- **Skills development and training**

Freelancers pointed out that there was a definite shortage of sufficient skills among freelancers. They also indicated that, because they had to deliver work in good time, it was difficult to plan ahead and put time aside for training. Moreover, funds are also not readily available to enrol for training courses.

- **General glitches of the trade**

Freelancers shared the following frustrations with the research team regarding their realm of work:

- general lack of respect in the business
- long hours that they have to work
- lack of feedback from publishers after completion of their work
- inconsistent work flow
- working in isolation
- lack of benefits
- limited resources
- finding clients

## CHAPTER 8

### CONCLUSIONS AND RECOMMENDATIONS

#### Introduction

The South African book-publishing sector is a sophisticated, complex and important component of the economic and particularly the cultural life of the nation. Nevertheless, there is still much to resolve and much that needs changing within book-publishing. The yoke of the apartheid (and, indeed, colonial) legacy continues to distort and skew the industry's structure and direction. Educational publishing remains dominant and is governed by sometimes arcane and often flawed ordering and distribution procedures. The relationship between the book-publishing sector and government is deeply complex, at times contradictory, most particularly in the area of educational publishing. With nine provinces, three different types of schools and a constantly shifting curricula landscape in recent years, strategic planning has been difficult at best for educational publishers.

Fundamental, often political, differences of opinion have also exacerbated disunity in the sector and, at times, have caused collective ambivalence around priorities. In addition, the sector faced major disruption and restructuring in the years following the 1997/98 'textbook crisis', during which time companies either closed down, were liquidated or were sold, and an estimated 60 percent of all permanent workers were retrenched. It is, therefore, understandable that survival overtook transformation and skills development at the top of corporate agendas.

Enormous strides have been made since the early 1990s to diversify ownership, deepen the national culture of reading and literacy and speed up the transformation of the sector and its products. A national book development policy was drafted and is currently being considered by government. Work is also underway on refining an integrated book development strategy and on creating charters for different sectors of the industry.

Certainly, skills development is one area that has lagged, but training is increasingly taking place now, as the data obtained through the survey indicates clearly. An example of recent developments in capacity building is provided by the Community Publishing Project (CPP) that was launched in August 2001 and was aimed at developing new small publishers. Furthermore, some significant advances have been achieved in recent months, including a project to gather and then analyse black economic empowerment "scorecards" from

publishing houses, together with the successful completion of the Publishers' Association of South Africa's (PASA) first internship programme funded by the MAPPP SETA.

This chapter provides an overview of the previous chapters. The aims of the study and the findings of the documentary and empirical research are summarised and specific recommendations made.

## Summary

The Publishing Chamber of the MAPPP SETA commissioned the HSRC to conduct a study on skills needs in the book-publishing subsector in South Africa. The aims of the study were the following:

- To develop a profile of the subsector in terms of size, demographics (race and gender), geographic location and skills levels.
- To provide an inventory of the current training that is being provided to the subsector in terms of training providers, training programmes, participants and common problems.
- To identify, analyse and prioritise the current and future skills needs of the subsector.
- To identify the factors driving skills needs and future employment.

In Chapter 2, the focus was on the employers in the book-publishing industry. An analysis of available information on the geographical distribution of book-publishing companies suggests that the book-publishing industry is concentrated in Gauteng and the Western Cape, particularly in Cape Town. The South African book-publishing industry is dominated by a few large locally- and internationally-owned conglomerates at one end of the scale, with a proliferation of small and micro companies at the other end. The results of the 2005/2006 HSRC survey confirm the strong predominance of white ownership in the book-publishing industry. Notably, at the end of 2005, the CEOs/MDs of PASA unanimously adopted a statement of intent regarding transformation in the publishing industry.

With the serious downturn of the market associated with the initial phases of competency based education implementation and the related decrease in educational expenditure which led to substantial retrenchments in the education publishing sector in the late 1990s, the current increase in demand is being managed through the reduced core staff along with the input of freelancers rather than through an increase in permanent employees. Uncertainty regarding the sustainability of this current demand is reported as being one of the main factors inhibiting growth of formal employment within the subsector.



In Chapter 3 the focus shifted to the labour force within the book-publishing subsector. Formal employment in the industry is estimated to be between 2 000 – 3 000 workers. However, book-publishers rely heavily on freelance workers. Although large companies account for less than a tenth of all book-publishing companies interviewed, they provide more than half of the jobs in the subsector. The provincial distribution profile of workers developed from several datasets suggests a concentration of workers in the Western Cape and Gauteng.

More than half (55 percent) of all workers in the book-publishing companies, who responded to the 2005/2006 HSRC survey, were black (African, Coloured or Asian) while 45 percent were white. The ratio of men to women was 35:65. An analysis of race and gender across occupational levels shows that White females predominate in the top-level jobs (managers, professionals and technicians), while it is mainly black workers who are employed in the lower positions (clerical workers, service workers, operators and labourers).

The occupational profile of the workers in the book-publishing subsector indicates a concentration of highly skilled personnel. Managers accounted for 16,3 percent of the workforce in the book-publishing companies that were interviewed. Professionals, technicians and associated professionals each accounted for 10 percent of the workforce. Clerical workers (32,6 percent) and service workers (22,5 percent) accounted for more than half of the workers in book-publishing companies. The rest of the jobs were held by operators (1,4 percent), labourers (5,7 percent) and apprentices (0,5 percent).

The qualifications profile of the workers within the companies surveyed shows a strong relationship to the occupational profile. Close to half of all workers had attained a postschool qualification. Half the workers had acquired matric or some senior secondary school education. None of the workers reported to being illiterate. Lower educational qualifications were reported only among African workers.

Chapter 4 outlined the reported skills shortages and skills gaps in the book-publishing subsector. The organisations that were interviewed identified skills shortages relating to marketing, sales, commissioning and list building, information technology, artwork and photographic work, and distribution. In terms of marketing, web-based activities appear to be one of the challenging areas: Specific skills shortages in the areas of website-marketing, -coding, -design and -management were highlighted. Competencies in the identification of market gaps and opportunities were also mentioned as being in short supply.

Employers indicated that the highest priority for skills upgrading relate to market research and sales activities. Information technology related activities such as basic IT literacy, database use and IT support were also identified as areas where employees could benefit from training. Other gaps include the skills required to effectively conduct negotiations and conflict resolution with suppliers.

There are a few additional factors that have an effect on the current skills needs in the sector: Firstly, candidates with high-level skills appropriate to the industry, but who also have the skills to work in other more highly paying sectors, and who through demographic or other characteristics are in short supply, will not generally choose the low-paying publishing sector. Secondly, rapid changes in the work environment related particularly to information and associated technologies results in a decrease in the lifespan of existing skills and thus a need for constant upgrading. Finally, recruitment agencies are considered not to have sufficient knowledge around the specifications of expertise required in the industry.

Chapter 5 provided an overview of the reported workplace training within the book-publishing subsector. The 54 percent training rate of these companies can be seen as an indication of their commitment to address sectoral skills gaps through upgrading the skills of their existing employees. Most technicians (90,1 percent), nearly two-thirds (60,8 percent) of clerical personnel, 51,2 percent of managerial staff, 40,9 percent of operators, 40,7 percent of labourers, 39,8 percent of service workers, and 39,4 percent of professionals received training in 2004/2005. Following international trends, large and medium-sized companies provided more training than did the small companies. Training was, however, generally once-off, non-accredited training and provided in-house.

Training in administration and customer service constituted the largest focus, with this being followed by computer/information technology training, sales training, management training and financial training. Other training included courses in production/typesetting, editing and proofreading, and in marketing and induction. Desktop publishing, security training, art classes, writing, strategic planning, publishing and legal/contractual courses were each offered once, all at a different company.

Regardless of size, all companies mentioned two key factors which limited their investment in skills development: Firstly they considered the vast majority of employees to be sufficiently skilled to execute their current jobs. Secondly, where skills gaps were identified, work pressure made it difficult to release the staff to undergo the necessary training.

An overview of education and training provision applicable to book-publishing was given in Chapter 6. An analysis of available data on the number of learners supplied in 2003 by universities in fields of study relevant to the book-publishing subsector revealed that 47,0 percent are White, with these furthermore being female. Only the University of Pretoria and at the University of the Witwatersrand offer fully-fledged publishing qualifications in the Higher Education and Training (HET) band. In 2005 the majority (83,6 percent) of enrolments at these two institutions were white and again female. A finding which links closely to the dominance of White females in the subsector's top-level jobs.

Chapter 7 provided a profile of freelancers in the book-publishing subsector. From their responses, it became apparent that freelancers are both multi-skilled and highly-qualified. Those freelancers who were interviewed identified skills shortages relating to information technology, marketing, communication and financial skills. And while they pointed out that they did indeed have individual skills needs, they also emphasized that it was difficult to attend training, citing the high cost of training as one of the main reasons for this.

This section has recapped some of the most pertinent findings from chapters 2 to 7 of this report. This summary of the key findings serves as both an introduction as well as a motivation for the recommendations made in the following section.

## **Recommendations**

Due to a variety of reasons, the Publishing Chamber has not managed to accomplish in its first years of existence what the majority of other Chambers and SETAs have managed to do in respect of the development of Learnerships and Unit Standards. This work, however, remains fundamental to any medium to long-term skills development strategy and must thus become the main focus of the immediate future. The recommendations which follow from the research conducted during this study, and which are outlined below, must be read in this context.

### ***Launch an information dissemination campaign***

Respondents to the book-publishing survey indicated that better communication, information and feedback from the MAPPP SETA is required. Training providers also indicated that better communication between all the various role players is necessary for coordinated and

successful skills upgrading efforts. In its Publishing Subsector Skills Plan compiled in 2004, the Publishing Chamber of the MAPPP SETA acknowledged furthermore a lack of communication between training providers, companies and the MAPPP SETA. Clearly, this is still an issue that requires attention.

Employers need training providers to advertise their training programmes and have their training courses accredited. Training providers, however, are of the opinion that potential students are uninformed about careers in the book-publishing sector. In addressing the first of these concerns, employers need to be clearly informed that claims against levies paid can be made on non-accredited short courses and skills skills programmes. However, it is still necessary to submit Workplace Skills Plans (WSPs), Workplace Implementation Reports, and the names of skills development facilitators (SDFs). This process can be facilitated by using the list of 94 companies that were identified as book publishers (see Annexure A), focusing especially on the 34 book-publishing companies identified by Publishing Chamber. Within these, it will be necessary to concentrate on the employers that currently do not make claims against their skills development levies.

In addressing the lack of information in respect of courses and careers within the subsector, it is recommended that the Chamber make use of the MAPPP SETA's and other information distribution platforms (e.g. the Cape Town Book Fair) with a focus on the following:

- Publish a matrix of relevant existing accredited and non-accredited courses and providers on the MAPPP SETA website (Annexure H).
- Publish a matrix of careers available in the book-publishing sector, with emphasis on identified skills shortages and gaps (chapter 4).
- Provide information on, and successes related to, the existing internship programme and encourage employers to participate in the process of learner placement and provision of mentoring.
- Inform employers that the Publishing Chamber is in the process of registering the Standards Generating Body (SGB) for Publishing and have started the standards generation process towards a national certificate in publishing at NQF Level 5, and the eventual conversion of the successful internship programme into a registered learnership.

***Facilitate access to relevant skills development programmes and short courses***

Respondents to the book-publishing survey indicated that the MAPPP SETA should provide skills development programmes and emphasised that there are not enough short courses. In support of this, freelancers expressed concern about the lack of industry-related and “hands-on” courses in the country. Employers and freelancers both recommended that training providers should develop modular courses, provide material support, at the same time suggesting that more online and distance-learning courses are required.

Skills shortages and gaps identified in this research relate to marketing, sales, commissioning and list building, information technology, artwork and photographic work, and distribution. These skills needs were confirmed by the fact that during the 2003/2004 financial year, companies provided training in administration; customer service; computer/information technology; marketing and sales, management and finance; production/typesetting; editing and proofreading; and induction. The freelancers who were interviewed identified similar skills shortages, stressing information technology, marketing, communication and financial skills.

With regard to facilitating access to relevant skills development programmes and short courses, the following general recommendations are made: Identify the most appropriate of the existing short courses that could be implemented to address the most pressing skills needs. Develop a database of these courses and providers and publish on the MAPPP SETA website.

One way of identifying existing accredited courses may be to scan the Department of Labour’s database on Registered Learnerships within other SETAs for possible learnerships relevant to the book-publishing subsector that might address pressing skills shortages and gaps. Examples include the *National Certificate in Business Administration* and the *National Certificate in Small Business Financial Management* registered by the Financial and Accounting Services Sectoral Education and Training Authority (FASSET); and learnerships in *Field Marketing Research, Marketing Communications, Marketing and Sales* and *New Venture Creation* registered by the SERVICES SETA.

***Fast track the setting up of systems and procedures for the generation of qualifications and standards and the accreditation of courses.***

Employers indicated that the MAPPP SETA had no guidelines/information/systems/unit standards in place to address training. Training providers encouraged the MAPPP SETA to

develop unit standards and to train mentors. In its Publishing Subsector Skills Plan compiled in 2004, the Publishing Chamber of the MAPPP SETA acknowledged the lack of unit standards and admitted that the fragmented training available from a range of training providers was not being leveraged to serve the needs of the industry, the NSDS and the national HRD goals. It is recommended that the newly established Standards Generating Body (SGB) and the Chamber plan and implement the following activities:

- Secure formalised appointment as SGB from the South African Qualifications Authority (SAQA).
- Apply to the Department of Labour to register the intern programme as a learnership and start to generate qualifications and standards for this learnership.
- Provide guidelines regarding skills priorities to training providers.
- Submit to SAQA qualifications and standards for recommendation for registration on the NQF.
- Encourage training providers to apply for accreditation of their courses, perhaps through the provision of a stipulated 3-year deadline after which expenses on non-accredited courses will not be refunded by the SETA.
- Align current subsector skills needs with existing qualifications and unit standards that are registered on the National Qualifications Framework (NQF) – and available on SAQA's searchable databases – to avoid duplication of effort. Examples include 26 qualifications and 256 marketing-related standards registered by the *Marketing SGB*; 10 standards registered by the *Entrepreneurship and Small Business Development SGB*; 76 standards registered by the *Art, Craft and Design SGB*; nine standards by the *Communication Studies SGB*; and 59 by the *Computer Sciences and Information Systems SGB*.
- Examine existing non-accredited programmes or curricula for relevancy (or gaps) and provide guidelines to the training providers about areas in which these courses can be restructured to address certain skills shortages and gaps.
- Work together with the existing HET providers in developing relevant and focussed accredited short courses which will not only supplement existing degree and post-graduate qualifications with qualifications aimed at continuous professional development, general skills upgrading and career fast-tracking in support of equity targets.

## REFERENCES

### Published works and resources

Andrew, J. 2004. *Publishing market profile, South Africa*.

Centre for the Book. 2005. *Community Publishing Project*. [Web:]  
<http://www.centreforthebook.org.za/> [Date of access: 31 March 2006].

Cross, M. & Brodie, K. 1998. *Getting Published and Getting read in South Africa: A handbook for writers of scholarly articles*. Cape Town: Juta.

Czerniewicz, L & Seeber, M. 2000. "Transform, support, stimulate: professional development in the book-publishing industry, 1990 – 2000." In Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.233-258.

Evans, N. & Seeber, M. (eds). 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press.

Evans, N. 2000. "A textbook as cheap as a can of beer: schoolbooks and public education in South Africa." In Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.189-218.

Eve Gray & Associates. 2004. *Qualitative Research for MAPPP SETA Sector Skills Plan*.

Gray, E. 2000. "Academic publishing in South Africa." In Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.163-188.

Higgs, C. 2005a. *Supporting small and micro-publishing enterprises*. Unpublished paper. Cape Town: Centre for the Book.

Higgs, C. 2005b. *A rough guide to small-scale and self-publishing*. Cape Town: Centre for the Book.

Jordan, P. 2006. *Briefing by Minister of Arts and Culture, Pallo Jordan, at the Parliamentary Media Briefing week, Economic Cluster 11: Sector Investment Strategies*. Issued by: Department of Minerals and Energy 10 February 2006. [Web:]

<http://www.info.gov.za/speeches/2006/06021015451001.htm> [Date of access: 27 February 2006].

Kromberg, S. 2000. "How digital technologies are transforming book publishing." *In* Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press.

Maake, N. 2000. "Publishing and perishing: Books, people and reading in African languages in South Africa." *In* Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.127-162.

MAPPP SETA. 2004. *Publishing Subsector Skills Plan*.

MAPPP SETA. 2006. *Print Media and Publishing*. [Web:] <http://www.mappp-seta.co.za/printmediaandpublishing.htm> [Date of access: 31 March 2006].

Mpe, P & Seeber, M. 2000. "The Politics of Book-publishing in South Africa: A critical overview." *In* Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.15-42.

Oliphant, A. 2000. "From colonialism to democracy: writers and publishing in South Africa." *In* Evans, N & Seeber, M (eds) 2000. *The Politics of Publishing in South Africa*. Scottsville: University of Natal Press, p.107-126.

PASA (Publisher's Association of South Africa). 2006. *The PASA Directory 2006*. Cape Town.

Paterson, A. & Du Toit, J. 2005. "Training rates and training expenditure in small, medium and large private enterprises" *In*: Paterson, A., McGrath, S. & Badroodien, A. (eds) (2004) *South Africa: National Skills Survey, 2003*. Pretoria, Human Sciences Research Council. p.43-74

SAIRR (South African Institute of Race Relations). 1997. *South African Survey 1996/97*. Johannesburg. 910 p.

Stats SA (Statistics South Africa). 2001. *Labour force survey: March 2005*. Pretoria.



- Sutherland, I. 2006. *Paradigm shift: The challenge to Graphic Design education and professional practice in a post-apartheid South Africa*. [Web:] [http://www.dsa.org.za/library/14\)%20Ian%20Sutherland.pdf](http://www.dsa.org.za/library/14)%20Ian%20Sutherland.pdf) [Date of access 6 February 2006].
- Tshwane University of Technology. 2006. *Online Skills Programme in Basic Journalism*. [Web:] [http://www.tut.ac.za/tut\\_web/index.php?struc=897](http://www.tut.ac.za/tut_web/index.php?struc=897) [Date of access: 6 February 2006].
- University of the Western Cape. 2006. *UWC English Department Projects: The Book in Africa Project*. [Web:] <http://www.uwc.ac.za/arts/english/index.html> [Date of access: 6 February 2006].
- Van Aardt, C. 2001. *Key skills shortages and the fast tracking of skills development*. Pretoria:
- Van der Sandt, E. 2005. 'Challenging Issues' prepared for *Bookmark*, April-June edition, 2005.
- Van Rooyen, B. 2005. *Get your book published in South Africa: 30 (relatively) easy steps*. Johannesburg: Penguin.
- Wesgro. 2000. *Background report on the publishing industry in the Western Cape*.
- Who Owns Whom (2004). *Research Report on The Publishing of Books* (siccode 32410), August 2004. Compiled by Avie Cherrington: [research@whoownswhom.co.za](mailto:research@whoownswhom.co.za)

### **Policy Documents**

- BDCSA (Book Development Council of South Africa). 1997. *Final research report on Book Development in South Africa*. Compiled by Helene Perold, Shanoo Chupty & Amanda Jordaan. Pretoria: Book Development Council of South Africa.
- DACST (Department of Arts, Culture, Science and Technology). 1996. *White Paper on Arts, Culture and Heritage*. Pretoria: Government Printer.
- DACST (Department of Arts, Culture, Science and Technology). 1998. *Cultural Industries Growth Strategy (CIGS). The South African Publishing Industry Report*. Pretoria.

PASA (Publisher's Association of South Africa). 2005a. *BEE milestone for Publishers' Association of South Africa*. Media announcement released by PASA and MAPPP SETA, December 2005.

PASA (Publisher's Association of South Africa). 2005b. *BBBEE Scorecard Project*. Letter from the PASA Chair of the Industry Skills and Development Sector, 2 September 2005.

PASA (Publisher's Association of South Africa). 2005c. *Statement of Intent Regarding Transformation in the Publishing Industry*. Released on 12 December 2005.

PICC (Print Industries Cluster Council). 2004. *Ten years of democracy: What now?* Unpublished report on Strategic Planning Workshop, 24 May 2004.

PICC (Print Industries Cluster Council). 2005. *Draft Framework for the National Book Policy*. (Second draft). Unpublished.

Skills Development Act, No. 97 of 1998. Pretoria : Government Printer.

Skills Development Levies Act, No. 9 of 1999. Pretoria : Government Printer.

### **Interviews/Electronic submissions**

Nikki Clarke, Managing Director: Pearson Education (2006).

Nelleke de Jager, Publisher: Kwela Books (2006).

Dr Francis Galloway. Senior Lecturer, Department of Information Science, UP and Co-director of the *Book History in Africa Project* (2006).

Colleen Higgs, Director of the Centre for the Book (2005).

Lieze Kotzé, Managing Director: Oxford University Press Southern Africa, PASA Vice Chair (2006).

Lindelwe Mabandla, Public Relations Director: Maskew Miller Longman, PASA Chair and PASA EDEX Vice Chair (2006).

Nhlanhla Ngubane, Publishing Director: Heinemann Publishers (Pty) Ltd and PASA Sector Representative: Industry Skills and Development (2006).

Japie Pienaar, Chief Executive Officer: Maskew Miller Longman (Pty) Ltd (2006).

Claudia Regnart, Regional Director: MML International Maskew Miller Longman and PASA Treasurer (2006).

Dirk Swanepoel, Chief Operating Officer: Via Afrika Limited (2006).

Dr Musa Shezi, Managing Director and Dirk Swanepoel Chief Operating Officer: Via Afrika (2006).

Dudley Schroeder, Executive Director: Publishers' Association of South Africa (2006).

Elitha van der Sandt, Director: Print Industries Cluster Council (PICC) (2005).

Brian Wafawarowa, Chair of the PICC Transformation Committee and former chair of the Publishers' Association of South Africa (PASA) (2005).

**LIST OF ANNEXURES:**

- Annexure A: Sample frame - companies identified as book publishers.
- Annexure B: Employer questionnaire
- Annexure C: Informed verbal consent form for company survey.
- Annexure D: African Response field report
- Annexure E: Sample frame – freelancers/independent contractors
- Annexure F: Independent contractor questionnaire
- Annexure G: Informed consent independent contractors
- Annexure H: Training providers database
- Annexure I: Training provider questionnaire