

# **Strengthening Publishing in Africa**

**An evaluation of APNET**

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**Department for Democracy  
and Social Development**



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## Executive Summary

### Introduction

APNET - the African Publishers Network - was formed in 1992 to promote indigenous publishing in Africa. From a modest beginning, APNET has grown to become a well-established network with members in 27 countries in all parts of the continent. With a secretariat in Harare and the active participation of the Board and General Council members, APNET has gained recognition as an important Pan-African network.

From the inception, Sida has been one of the core donors of APNET. Sida and APNET jointly selected COWI to undertake the present evaluation, which is circulated to all donors and key stakeholders. The evaluation was designed to assess the achievements of APNET with a view to promote learning within APNET and make recommendations for the future. In addition, the effectiveness of the donor support for APNET should be assessed.

The evaluation was undertaken from August to December 1998. It has included five country case studies and workshops with the Secretariat and Board, and participating as observers at the International Book Fairs in Zimbabwe and Ghana. This executive summary of the evaluation includes a total of 44 key findings, 15 conclusions and 16 recommendations. In the following, the main conclusion and recommendation are presented:

### MAIN CONCLUSION AND RECOMMENDATION

**In its short period of existence, APNET has contributed significantly to linking publishers within and between regions in Africa and has enhanced the capacity of African publishing. APNET's structure allows the network to have a solid understanding of the publishing scene in its member countries. APNET's interventions, although not always moving in one direction according to an overall plan, create opportunities for African publishers.**

**APNET is only as strong as its parts and its success to a large extent depends on the effectiveness of its members, the National Publishing Associations. APNET has taken upon itself a wide variety of functions, which reflect the range of pressing needs and high expect-**

**tations from many different corners. APNET has not yet been able to adequately set priorities, which match the comparative advantages and the capacity of the network.**

**With the support from the Bellagio Publishing Network, APNET has gained confidence among donors and has thereby been able to secure a relatively high level of funding. APNET is heavily dependent on donor funds, but the relationship with donors is not effective. The financial sustainability of APNET will depend on the ability of APNET to generate more of its own resources and manage the relationship with donors more effectively.**

**Overall, APNET is a relatively well-functioning network and generally highly regarded amongst its members. APNET responds to genuine needs of the African publishing industry in the wider context of book development in Africa and deserves continued funding from donors.**

## **I Publishing in Africa**

### **Key Findings**

1 Many African men, women and children have limited access to written material, because of poverty and illiteracy, the absence of written material in languages they know and poor distribution systems. There are great variations with regard to publishing between various countries in Africa, in terms of historical development, readership and market size, printing and publishing technology, and communication infrastructure. These differences, to a large extent, reflect the state of development and the contemporary economic and political situation of the individual countries.

2 Certain problem areas, however, cut across these differences: inadequate access to capital, the high price of many raw materials, and the shortage of qualified staff, in particular at middle-level, often lead to poor aesthetic and physical quality of books, even if significant improvements have taken place in this respect. In addition, underdeveloped marketing and distribution systems, the dominance of northern publishers, inadequate attention on the part of most African governments to book development policies, and difficulties in export, in particular in intra-African trade, are challenges facing the African publishing industry.

3 Education in Africa is an area of great concern to African publishers, because the publishing industry is textbook dominated. The vast majority of African publishers are involved in textbook production. In the estimation of APNET, around 60% to 70% of all books produced in Africa are textbooks. Most of the textbook production is financed by the World Bank and bilateral donors, who are also supporting APNET.



4 During the 1990s, the environment for publishing in Africa has seen a number of improvements. Liberalisation, which in many countries goes hand in hand with reform of the political system, has entailed the breaking of state monopoly of textbook publishing. The move towards lifting of restrictions on foreign exchange and the dramatic improvements in communications technology have contributed to a more conducive book environment. Democratisation and the globalisation of information flows have meant a greater demand for information, which also has implications for the demand for books, in particular among the younger generations.

5 Publishing in Africa has now reached a level of quality and quantity, which is a sufficient base for growth. The status of publishing in Africa has gone up, there is a younger generation of men and women publishers with entrepreneurial skills and international connections and there are general improvements in terms of school enrolment and literacy levels. Women, however, are disadvantaged both in the publishing sector, with some notable exceptions, and as readers and writers of books.

## **II Mandate, Objectives, Strategies and Primary Functions of APNET**

### **Key Findings**

6 The APNET mandate has an explicit focus on the promotion of indigenous publishing that directs the attention of APNET towards African-owned publishing firms. On the whole, APNET has avoided falling into the trap of becoming a club of affluent publishers. APNET is catering for both small and large publishing houses, including publishers linked to multinational publishing companies. There is no bias in APNET's constitution in favour of small publishers or women publishers.

7 The 3-year programme of APNET (1997-2000) is a well structured and comprehensive document with objectives, strategies, activities, expected outcomes and corresponding budget lines for each primary function. The programme follows the Constitution of APNET and has been prepared through a participatory process, involving a large part of the APNET constituency. What the programme lacks, however, is a clear statement of priority.

8 The constituents generally have a positive attitude to APNET, which is considered a truly Pan-African network. The constituents have a certain pride in APNET's achievements.

9 There are many views on how APNET should develop to best serve its mandate. Some would like APNET to move further in the direction of an association, which primarily promotes the economic interests of African publishers. Others would like to see APNET continue as a multi-purpose network linking publishers in various parts of Africa and maintaining contacts with partners in the North. Some see APNET as an intermediary donor, which channels funds

from northern donors to African publishers, and lately - on one occasion - APNET has been functioning as a consulting firm.

### **Conclusion**

1 A strong common sense of identity has developed within APNET. There are, however, high expectations, and many stakeholders who are proud to be associated with APNET, but tend to pull it in different directions. The management of APNET (Secretariat and Board) appears to be keen to satisfy as many expectations as possible, which is largely a reflection of the heavy dependency on donor funding. APNET keeps almost all balls in the air, but it does not have the capacity to play all balls in a consistent manner.

### **Recommendation**

1 APNET should be more clear about the role it wants to play. A clearer definition of its role, a stronger common sense of direction, and a higher degree of self-financing, would allow APNET to become more selective in the setting of priorities and in choosing its main partners. In this way, APNET would be in a better position to define strategies and list primary functions as a basis for the preparation of realistic annual work plans and corresponding budgets.

## **III Summary of Results Achieved by APNET**

### ***Networking***

#### **Key findings**

10 APNET has been successful in establishing itself in 27 countries in all parts of the African continent with prospective members in yet another 14 countries. The formation and revitalisation of many NPAs are a direct result of APNET's networking activities, most consistently through person-to-person contact and the publication of the APR.

11 APNET has significantly enhanced the mutual knowledge and trust - and in some cases even brought about business partnerships - among African publishers.

12 The APR is a well-produced and highly appreciated publication. Its recent irregular appearance has been regretted by the APNET partners and constituents.

13 Many NPAs are weak and lack resources and important skills. In the current APNET programme, significant attention is given to capacity building of NPAs, although the budget for this lacks specification.

### **Conclusion**

2 The effectiveness of APNET's networking efforts to a large extent depends on the composition and functioning of the NPAs and the capacity of the Secre-

tariat to ensure a regular exchange of information, primarily through the APR and the Internet.

### **Recommendation**

2 Strengthening of NPAs should continue to be high on the APNET agenda, and a detailed budget should be prepared for this. The APR is an important competence building and networking tool, which combined with a well-designed and updated web site, should function as one of the most important networking mechanisms of APNET.

## ***Training and Capacity Building***

### **Key findings**

14 Over the last four years APNET has conducted over 30 workshops in 18 countries. The main areas of training include i.a. management, editorial and other professional skills, design and production, sales and marketing and electronic publishing. The contents of the training courses follow a training curriculum, developed by APNET in 1996. On average, nearly one-fourth of the course participants have been women, and in some courses female participants have outnumbered male participants.

15 Training of trainers has been organised, but there is little systematic follow up to continue to enhance their capacity and the use of the trainers trained appears to be sporadic.

16 The training, provided by APNET, is meeting genuine needs and is well received by almost all participants. In addition, it has served a useful networking purpose in many countries and regions.

17 The curriculum, which is available in both English and French, is a comprehensive and consistent basis for the training programme, but there is no system in place for the recurrent revision and updating of the curriculum.

18 Training evaluation reports tend to gloss over possible problems and provide little constructive critic, which can feed into the revisions of the curriculum and the improvement of training organisation and management.

### **Conclusion**

3 Training has played an important role in the recurrent upgrading of skills of employees at various levels in publishing firms in Africa. It appears, however, that linkages with the training, which is conducted at more established publishing training institutions, have been limited.

### **Recommendation**

3 APNET should continue to organise training workshops at country and regional levels. To further improve the quality of training and the scope of APNET's training programme, the annual number of workshops organised may decrease. A more comprehensive set of training evaluation tools should be applied and a trainers network should be established. The total responsibility for

the national workshops should gradually be handed over to the NPAs with APNET serving as "a resource" for the NPAs in this respect. In addition, APNET should examine the possibilities for contributing more substantially to competence development among African publishers by establishing regular working relations with publishing training institutions in various parts of Africa.

## ***Trade Promotion***

### **Key Findings**

19 Over the last four years, APNET has attended 27 book fairs world-wide, at most of which APNET has mounted a collective African exhibit. Between 240-250 sponsorships have been granted to African publishers to enable them to attend book fairs. Roughly a third of the delegates have been women. Thematic catalogues have been produced, particularly in the early years. The APR has also served as a trade promotion tool. Most reports of APNET's participation in book fairs are positive and convey good business prospects.

20 The expectations within the APNET membership in the area of trade promotion differ. Some believe that APNET does not have a comparative advantage in this area while others hold that APNET should go further and sell books.

21 There are other actors involved in trade promotion and the sales of African books. The African Books Collective, based in Oxford, is selling books for African publishers in Europe, North America and other parts of the world outside Africa. A Pan-African Booksellers Association has recently been formed.

### **Conclusion**

4 Trade promotion has become a large part of APNET's work, but within the membership there is lack of clarity on the role, goals and functions of APNET in trade promotion. The presence of APNET at various trade fairs serves purposes of exposure and networking, but has little direct impact on trade. While APNET is probably not the most suitable institution for trading in books, in particular because of the potential for conflict of interests, APNET can perform selected, well-defined interventions.

### **Recommendation**

4 APNET should clearly define its objectives with regards to trade promotion and focus on preparing high quality catalogues, promotional materials and collective exhibits and conduct relevant seminars, workshops and meetings at book fairs. The area of publishing rights should continue to receive attention.

## ***Research & Documentation***

### **Key findings**

22 APNET has a research and documentation centre in Harare, which has three collections and a data-base. APNET has not yet made a concerted effort to promote the contents of the centre, as it is still being developed.

23 APNET has conducted or been involved in four research projects since its establishment, and this area is given more emphasis in the current APNET programme.

24 APNET has recently prepared a nicely produced register which lists African consultants within publishing, but so far there is no mechanism for the distribution, usage and the regular updating of the register.

25 The survey conducted by the evaluation team among African publishers shows that they know little about the research and documentation activities of APNET and give them low priority.

### **Conclusion**

5 APNET has exploited its comparative advantage by supporting all-African research on topics highly relevant to the publishing environment. The resource centre is important as a centre of knowledge about African publishing, but not enough thought and work have gone into its management. Furthermore, the centre has potential for being a modest source of income, if information can be accessed, packaged and targeted in appropriate ways.

### **Recommendation**

5 APNET should make the resource centre fully operational, develop its services, including publications, and make a concerted effort to promote and inform members and partners about the centre. APNET should continue to promote research of issues, relevant to African publishers, and ensure that research results are integrated in APNET's other areas of work, training and advocacy in particular.

## ***Advocacy***

### **Key findings**

26 APNET has gained recognition and has contributed to placing African publishing on the map. The good relations, which APNET enjoys with ADEA, have been helpful in this respect.

27 APNET's advocacy activities involve sensitising stakeholders about the concerns of the African publishing industry within Africa and internationally. A good example of effective advocacy is the dialogue initiated by APNET with the World Bank on tenders and provision of textbooks.

28 Capital is a major problem for African publishers, particularly as book publishing is considered a high-risk sector with low and slow returns. Generally, banks have a poor understanding of the book publishing industry. The advocacy efforts of APNET have not yet addressed this problem in a consistent manner.

## **Conclusion**

6 While progress has been made, significant improvements in African representation in international tendering processes for textbook provision in Africa will take time and require a persistent effort over several years. As the voice of African publishers, APNET is in a position to advocate for solutions to the problem of capital and credit.

## **Recommendation**

6 APNET should focus more on the larger policy issues affecting African publishing and book development. It should continue and expand its advocacy efforts to promote the cause of African publishers in a number of well-defined areas. Some areas, like intra-African trade and increased African participation in the tendering for textbooks, require lobbying both at national level and international level. APNET should build the capacity of NPAs to lobby governments at the national level, while APNET's own advocacy efforts should target bilateral and multilateral donors, including the World Bank. To support well documented advocacy efforts, the research programme of APNET should be closely linked to its advocacy efforts. For instance, the issue of capital for publishers requires further examination to arrive at a coherent advocacy strategy.

## ***Building of Partnerships***

### **Key findings**

29 Over the years, APNET has had contact with a range of different partners, with whom APNET has generally enjoyed a good relationship. Many partners see opportunities for mutually beneficial collaboration. However, sometimes opportunities were lost either because APNET was not in a position to plan ahead in a strategic manner or because plans, which were developed by others, did not fit into the programme of APNET.

30 While there are examples of synergy, shared responsibilities for joint activities among organisations concerned with the book industry, there is also a fair amount of overlap of mandates and competition for funds, which at times leads to duplication of work.

31 Some donors, including Sida, wish to maintain a partnership with APNET, which goes beyond the funding relationship. Promoting African publishing in the wider context of book policy and development in Africa, is the foundation of this partnership, which the Bellagio Publishing Network has been instrumental in facilitating.

## **Conclusion**

7 Book development and publishing in Africa has become a crowded arena for concerned individuals and organisations in the North and in the South. The many actors sometimes create a certain amount of confusion among donors and African publishers. APNET's difficulties in planning ahead in a strategic manner, particularly due to funding constraints, and the lack of involvement of APNET in the early stages of project planning has meant that partnerships have not always reached their full potential.

## **Recommendation**

7 APNET should try to institutionalise structured yearly reviews of the co-operation it has with the most essential partners.

# **IV Capacity and Management of APNET**

## **Key Findings**

32 The capacity of APNET comprises a considerable level of voluntary input from members of the Board and the General Council and a relatively small secretariat, located in Harare. With a new Executive Secretary joining at the beginning of 1996 and a new Board being elected in 1997, APNET managed the transition from its first generation of founding members to the second generation of network management.

33 APNET takes upon itself more functions and tasks than it can effectively manage with its present capacity, which at times lead to lack of consistent and timely implementation of programmes and inadequate follow-up. One of the challenges, which the secretariat is faced with, relates to the many different expectations and steering signals coming from not only the Board acting in common, but also from individual members of the constituency, donors and partners. This appears, however, to be an inherent feature of a donor-funded network like APNET.

34 The Secretariat, which has grown from one person to five full-time staff members, is composed of dedicated professionals from different regions in Africa, who combine publishing expertise with experience from NPAs and NGOs. The secretariat can function in both English and French. Each professional member of the Secretariat works in a highly independent manner within his/her area of responsibility, which at times has led to a disjointed way of operating. It appears that the ideas coming from the Secretariat have not always been developed by the professionals working together. The lack of communication and unity within the Secretariat has meant that the different professionals cannot adequately compensate for each other when required. This state of affairs has been addressed by the Board and measures have been taken to improve the situation.

35 A first draft of a staff manual has been prepared with the help of consultants. This manual may be a good beginning for addressing present inadequa-

cies, such as the lack of proper job descriptions which specify the qualification requirements for each position in the Secretariat and a performance measurement system.

36 APNET has rented suitable office premises in the centre of Harare. Gaps exist, however, in computer based communications and data processing skills and equipment.

37 APNET's efforts to promote women in the publishing industry include a good representation of women at the Secretariat level, participation of women in training and trade promotion activities, and a couple of seminars focusing on women in publishing. Furthermore, the Secretariat has kept gender disaggregated data with regards to training and trade promotion initiatives.

38 The financial management of APNET has a clear separation of duties between those who spend the money, e.g. the members of the secretariat, and those who keep the records, e.g. the accountant, who is contracted from an external accounting firm. Cash flow management has been difficult, partly because of the unpredictability of donor contributions and partly due to inadequate systems within the Secretariat.

39 The network's management is depending on functioning communications. Poor communication infrastructure, distances and language barriers are general constraints for effective communications. The installation of e-mail facilities for the Secretariat and Board has improved communications significantly.

## **Conclusions**

8 The relative roles of the Secretariat and the Board are not well defined. The Secretariat has played a pro-active role, and to a large extent also managed the resources. This has no doubt contributed to the achievements of APNET. Some members, however, would like the Secretariat to play a more facilitating and co-ordinating role, leaving more decisions to be taken by the Board and the General Council.

9 While the industry on the whole is dominated by male publishers, and while the Constitution does not make any specific reference to gender, APNET's management shows consideration for gender sensitivity.

10 APNET has a cost-effective financial management system with a fairly high level of integrity. The inadequate cash flow management has been a factor constraining programme implementation. There are also areas in the contract with the accounting firm, which require further attention.

11 The weaknesses related to priority-setting - which are partly due to the funding situation, the lack of management skills, and the independent way the professionals at the Secretariat have been working, have at times resulted in a somewhat disjointed management of APNET.



12 There is a mismatch between the functions of APNET and the strength of the Secretariat. The lack of an Information Officer has been the most critical of the human resource requirements. Recruitment to fill this post is under way. In addition, there is a gap between the programme's demand for administrative support services and the available capacity for the Secretariat to provide such support.

### **Recommendations**

8 The Board should provide the Secretariat with a much clearer mandate and standard procedures for the relationship between the Board and the Secretariat. This would also help the Executive Secretary to develop internal procedures for the functioning of the Secretariat.

9 The Board should develop a human resource plan for the Secretariat of APNET. Considering the mandate and primary functions of APNET, the plan should specify i.a. the requirements of the Secretariat in terms of professional qualifications and skills.

10 APNET should continue to promote women and gender consciousness within the publishing industry.

11 The 3-year programme of APNET should establish the priorities of APNET in a more clear manner. A holistic and integrated programme should be the basis for donor funding and for the preparation of annual work plans.

12 While there is no need for a detailed accounting manual, the integrity of the process of using and receiving funds should be further enhanced by improving systems and documenting established procedures. The contract with the external accounting firm should be examined and improved.

13 APNET should consider upgrading its computer equipment, including suitable software for publishing. Relevant training should accompany this.

## **V Financial Structure and Relations with Donors**

### **Key Findings**

40 Since its creation, APNET has been heavily dependent on support from a handful of donors. APNET hardly generates any income of its own, apart from foreign exchange gains, sales of publications and a few subscription fees.

41 There is awareness and considerable concern within APNET regarding the heavy dependency on donors. This issue has been subject to many discussions. The programme, prepared by the Secretariat, and adopted by the Board, represents a slight move away from this reliance on external funds. As of yet, however, there have been no significant attempts to explore self-financing options. Implementation of this part of the programme, therefore, appears to be lagging far behind.

42 Among publishers in Africa there is a stated willingness to contribute financially to APNET. Almost 90% state a willingness to pay a membership fee to the NPA of which part would go to APNET. In addition, most members are willing to share the costs of the services, provided by APNET, including training and trade promotion, provided that relevance and quality of the services are high. The weak financial base of NPAs and the problem of exchange rates constitute barriers to increasing APNET's own income.

43 With the help of the Bellagio Publishing Network and the Bellagio Secretariat, APNET has established good relations with its donors, based on trust and close inter-personal relations. APNET also enjoys direct relationships with BPN donors as well as other donors. There is a plan to gradually transfer many of the BPN-secretariat's functions to APNET.

44 Three donors provide funding for the core budget of APNET. All other allocations are earmarked contributions for specific activities. Each donor requires separate funding proposals and reporting, which is time-consuming for the Secretariat. About one third of the capacity of the secretariat of APNET is spent on managing the relations with donors. Late submission of funding requests, followed by late disbursements have had negative effect on cash management of APNET.

## **Conclusions**

13 There is scope for cost recovery partly by general contributions from publishers (NPA membership fees) and partly by introducing sharing of costs for specific services. With enhanced professionalism APNET can also generate more of its own income from subscriptions, sales of publications and commercial sponsoring.

14 APNET has relied on a relative small number of donors, most of whom are from Northern Europe. Although donor support has been consistent, the dependence on the personal commitment of many individuals in the donor agencies, involves a risk, as turnover of personnel is high and organisational changes are frequent.

15 The effectiveness of APNET's programme is reduced by the unpredictability of donor funding, the high degree of earmarking and donor requirements to APNET in terms of providing separate funding proposals and narrative and financial reports.

## **Recommendations**

14 APNET should develop a comprehensive and realistic strategy for increased self-financing, which includes sensitising members to this need and a gradual introduction of fees and cost sharing mechanisms. In addition, APNET should capitalise on options at their disposal for income-generation, such as bringing paid advertisements in publications, charging of fees for registering of consultants and non-members' use of the resource centre.

15 APNET should strive to enlarge their donor funding base and insist that all major donors, who want to be considered "friends of APNET" actually contribute to the core programme. The 3-year programme of APNET should serve as a joint funding proposal. Donors should accept reporting, which is common to all, and one audited financial account, where all donor contributions are specified.

16 In order to minimise the risks involved in the transfer of duties from Bellagio to APNET, the Board of APNET should request a 3-year commitment from the donors, which would cover the primary functions of the core programme. In addition, the donors should be willing to commit funds to the function of resource mobilisation within the APNET Secretariat for three years, with a view to gradually integrating this extra cost into the regular budget of APNET after the three years.



# 1 Introduction

In 1992 the African Publishers Network (APNET) was established through a collaborative effort between donors and publishers from 11 different African countries, with a view to strengthen and promote indigenous publishing. Establishing an information network among African publishers, strengthening and consolidating training resources in Africa, accelerating the intra-African trade in books and assisting the creation and strengthening of African national publishing associations (NPAs) were among the main objectives. APNET has developed a participatory management style that consists of a Secretariat based in Harare, a General Council which meets every two years and an active Board. During its first six years of existence APNET has grown to include 27 different African countries, covering all geographical regions as well as linguistic regions (French, English, Portuguese and Arab speaking).

## 1.1 Background

On August 2, 1998 COWI embarked upon an evaluation of the African Publishers' Network (APNET) commissioned by Sida. As laid out by the terms of reference (see annex 1), the purpose of the evaluation is twofold:

1. to provide input for APNET's internal learning with the aim of improving results in the future;
2. to provide information to the funding agencies on how best to serve APNET in their efforts to meet their objectives.

The objectives of the evaluation include summing up and analysing the results achieved by APNET; assessing the effectiveness of donor support for APNET; identifying and analysing negative and positive aspects of the implementation, as well as strengths of the programme; and establishing recommendations for the future. After the inception phase of the evaluation, the terms of reference were summarised as illustrated below:

Describe and analyse:

1. the history of publishing in Africa and the way political, economic and social changes in Africa as well as the new communication and information technologies have affected the publishing environment in various regions of Africa.

2. the mandate, objectives, strategies, primary functions as well as modes and levels of intervention by APNET.
3. the results, which APNET has achieved in the first five years of its existence, in general and in each of its six major areas of work (networking; training; trade promotion; research and documentation and advocacy).
4. the capacity and management of APNET, including the role of the Members, the Board and the Secretariat.
5. the financial structure of APNET and the potential for achieving a greater degree of self-sufficiency.
6. APNET's relationship with partners and stakeholders, their respective roles, and the effectiveness of the relationship with the donors.

The COWI evaluation team has consisted of six members. Mr. Lars P. Christensen, the team leader, Cecilia Magnusson Ljungman and Bodil Folke Frederiksen made up the Denmark-based team. In addition, Simon Matsvai (Zimbabwe), Maïra Sow (Mali) and John Robert Ikeja Odongo (Uganda) contributed to the evaluation activities in Zimbabwe, Mozambique, Guinea, Ghana and Kenya.

## 1.2 Approach and Methodology

Throughout the evaluation, a formative and participatory approach has been used. More specifically, the methodological approach of the evaluation included the following three main elements: (i) collection of information, (ii) assessment of performance and (iii) consolidation of key findings and facilitating learning within APNET. Annexes 2 and 3, respectively, contain lists of people met and material reviewed.

The COWI team has conducted the evaluation in two phases. The first phase consisted of five components:

1. **Mission to the Zimbabwe International Book Fair** for exploratory interviews with APNET members and stakeholders.
2. **Desk study** of documents from Sida, the Bellagio Publishing Network Secretariat, the APNET secretariat and from stakeholders present at the ZIBF.
3. **Start-up meeting** with Sida in Stockholm on August 30th to discuss the scope and expectations of the evaluation as well as the tentative work plan and the selection of country case studies.

4. **SWOT<sup>1</sup> workshop with the Secretariat** and in-depth discussions, as well as interviews with APNET partners in Zimbabwe.
5. **Preparation of an inception report** submitted to Sida and APNET with a summary of preliminary observations and an outline of Phase 2 of the evaluation.

The second phase of the evaluation has been composed of five parts:

1. **Five country case studies:** The purpose of these has been to gather and analyse information that provides a more complete picture of the environment that APNET works within, how APNET is making an impact and whether it is meeting the needs. The aim was to establish (i) an overview of the publishing situation in the country; (ii) an understanding of the key challenges facing the publishing industry; (iii) an understanding of APNET's role in the country with regard to both the NPA and the publishing outfits themselves. Annex 4 consists of the country case study guide used. The studies were conducted in Nigeria, Guinea, Kenya, Zimbabwe and Mozambique. The criteria for the selection included:
  - representation of as many regions and language zones as possible;
  - a combination of small and large countries;
  - a mixture of countries with a relatively developed book industry and others with a nascent industry;
  - a mixture of countries with a book industry dominated by the state, multinational or neither;
  - countries involved with publishing in African languages.
2. **SWOT Analysis Workshop with APNET Board:** At the Ghana International Book Fair a workshop was conducted focused on the strengths, weaknesses, opportunities and threats in relation to achieving results in APNET, as viewed from the APNET Board and present members. Supplementary interviews with the Board, Secretariat and other African publishers were also carried out by the team members at the book fair.
3. **Discussion with partners:** A mission to the UK was conducted to interview Bellagio Secretariat, ADEA, Book Aid International, the African Books Collective and Hans Zell.
4. **Synthesis and analysis workshop:** The Denmark-based evaluation team consolidated and analysed the information gathered during the desk study, interviews, country case studies and workshops.
5. **Preliminary Findings Workshop:** The workshop was conducted with the Secretariat and the Chairman and one more member of the Board in

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<sup>1</sup> Strengths, Weaknesses, Opportunities and Threats Analysis

Harare to discuss the team's preliminary findings, conclusions and recommendations.

Throughout the second phase, the team has conducted a survey of African publishers through a questionnaire (see Annex 4) that was, in part, developed with the APNET Secretariat. In total, the team has collected 49 questionnaires. Publishers have mainly been from Nigeria, Guinea, Kenya, Mozambique, Zimbabwe and Ghana, but also from Côte d'Ivoire, Lesotho and Mali. Although the sampling is sometimes less than 49, as a few questionnaires have not been completed correctly, the figures processed give a general indication of the perspectives of African publishers.

### **1.3 Structure of the Report**

This report consists of an executive summary, six chapters, five annexes and five appendices with country case studies. The following chapter briefly looks at African publishing from an historical perspective, including recent developments and challenges.

Chapter 3 discusses the background which led to the establishment of APNET. It also covers APNET's mission, mandate, structure and strategies.

Chapter 4 covers the achievements of APNET in the areas of networking, training, trade promotion, research and documentation, advocacy and building of partnerships. The chapter also discusses the impact of APNET's achievements and relevant areas that have not been covered by APNET in its first six years.

In Chapter 5, an analysis of the strengths and weaknesses of APNET's management and capacity is offered. In addition, a section is devoted to the financial management of APNET.

Chapter 6 deals with APNET's Financial Structure and Relations with Donors. This includes a discussion on resource mobilisation, an analysis of the effectiveness of donor relations and the prospects of financial sustainability for APNET in the future.



## 2 African Publishing: Past and Present

This chapter provides the reader with a brief historical perspective of the publishing industry in Africa. Recent developments and challenges are analysed to illustrate the conditions in which APNET works. Economic, institutional, cultural and political constraints and opportunities that face the African publishing industry today are discussed.

### 2.1 An Historical Perspective

Historically, publishing in Africa is closely linked to European colonialism. In the view of colonialists, book production for Africans was needed in two areas: Religion and education. Translations of the Bible and Christian hymns began to be printed around the middle or late in the 19th century. Training material and readers in development-related areas such as agriculture, home economics and civics were published from the 1930s and onwards - some in local languages, some in the colonial languages. State Literature Bureaus were set up in the majority of Anglophone countries from the 1940s. The Bureaus were engaged in the production of general literature and fiction as well as religious and training literature.

At independence, around 1960 for most countries, the publishing scene was diversified. The emphasis on primary education in newly independent nations meant that a large market for school textbooks emerged. In the whole of Sub-Saharan Africa the state was the key agent in the provision of books for schools. In Francophone and Lusophone countries the needs were again met primarily by publishers from the former colonial power. In Eastern Africa, Ghana, Zambia, Ethiopia and Sierra Leone, independence led to the establishment of state publishing houses. Thus, the state, in particular the Ministry of Education became a monopolising power within both publishing and distribution. In Tanzania and Uganda, these firms operated jointly with Macmillan.

In Kenya, Zimbabwe and Nigeria, foreign-owned firms like Macmillan, Heinemann, Nelson, Longman and College Press established themselves in the 1950s and 60s. From 1973 the Nigeria military regime decreed that companies should be 60 % locally owned.

In Francophone Africa, the publishing scene continued to be dominated by French publishers such as Hatier, Edicet and Hachette. They had not only the

advantage of size, economies of scale, capital and access to low-cost printing, they were also backed by French aid programmes geared to French export books. This domination is still strong in most of Francophone Africa today.

In Francophone Africa, local language publishing was also less developed as only French was promoted at all levels of the educational system and in the area of general literature. In Anglophone countries, publishing in local languages of fiction and training literature was encouraged by the Literature Bureaux, particularly in Zimbabwe and South Africa - the latter country also has an important pre-bureau tradition of indigenous language literature by mission educated writers. In tune with its tenets of cultural apartheid the medium of instruction in South African primary schools was the local language. Large Afrikaner-owned publishing companies with close links to the National Party Government provided books in several languages directly to government. The East Africa Literature Bureau, which covered Kenya, Tanzania and Uganda, also published titles in local languages such as Luganda and Swahili.

Scattered but important local language books were published independent of colonial authorities in most Anglophone countries. Novels in Yoruba and Hausa appeared in Nigeria, a few Kikuyu publishers brought out fiction and political literature in Kenya from the 1940s, and in Tanzania manuscripts in Swahili in Arabic script have circulated for over two hundred years. In Kenya, Nigeria and Ghana, the 1960s and 1970s saw independent commercial production of a large number of popular fiction titles in English which sold well.

The 1970s was a period of flourishing for African literature. Newly established universities served as catalysts for the production of literary magazines, and African literature in English and French reached a world market and became recognised internationally. Most of the prestigious titles were, however, published in France or Britain.

Readership was narrow. Most titles could only be read by the elite who had been educated in a foreign language medium. The vast majority of people living in Africa had no access to books with the exception of the Bible, because of low levels of literacy, few titles in local languages, and poor distribution of the books which existed. For the large majority of readers, literature was only met with in the educational system, and was linked to practical needs or the need to pass exams. Reading for pleasure or general information was not widespread.

In sum, publishing in Africa until the 1980s was supply-driven, except for textbooks, and closely linked to the state or the church rather than driven by a demand from the general public, whose size was in any case small except for the population of primary schools and Bible readers.

## **2.2 Recent Developments and Challenges: Publishing in the 1980s and 1990s**

### **2.2.1 Economic Constraints**

The constraints of the book industry in Sub-Saharan Africa are most importantly of an economic nature. The general context of book publishing is the marginalisation of African economies, characteristic of the 1980s and 90s. Liberalisation presents dangers as well as opportunities. The Structural Adjustment Programmes of this period have led to devaluation and rising prices of import. Hyperinflation in Nigeria and Kenya, two of the most successful publishing countries, has meant that raw materials for the publishing industry have become unaffordable, and the ensuing high commercial bank interest has considerably narrowed the option of borrowing and overdrafts. Inputs such as paper and machinery, are usually imported and are taxed in most cases. Indigenous publishing firms are under-capitalised and cash flow is a problem in an industry where turnover is long-term, and respite from suppliers of input into the industry is short-term.

At the same time, competition with multinational publishers of textbooks is skewed in favour of publishers from the North who have sufficient capital, whose currencies are stable and whose freight rates are low. The extremely profitable World Bank tenders for textbooks are in the majority of cases won by these publishers. In general, domination by multinational or "non-local" companies is a problem. The large publishing industries in Zimbabwe and South Africa are still divided along racial lines, with big white-owned companies - multinational or local - dominating the market. In Francophone and Lusophone Africa, local book production is less developed and most books are imported. Most textbooks are imported or produced by partnership of French firms and governments. Nouvelles Editions Africaines is an example. The governments of Senegal, Côte d'Ivoire and Togo own 60% of the partnership, five French firms own the remaining part.

Prices of books are high relative to wages and reflect the fact that all links in the book chain have to make a profit from a limited production of books. Markets for books in African countries are small with some notable exceptions like Nigeria and South Africa, because of low literacy in general and in foreign languages in particular, and because of a lack of reading culture. The general purchasing power among the large section of African populations has decreased, and government expenditure on education has in some cases been reduced in tandem with liberalisation and the general cut-back of provision of services. In Nigeria, experts estimated that in some rural areas the situation is so bad that maybe only one child in a hundred has access to textbooks. In some countries, notably Nigeria, pirated books out-compete the legally published books, because they are cheap and can be produced quickly for particular niches.

Intra-African book trade is riddled with problems and barriers. These areas include currency, customs and tariffs, transfer of money, transportation of books, communication and information. Some of these problems are of an economic nature, such as poor transport and communication infrastructure, others are of

an institutional and political nature.

### **2.2.2 Institutional Constraints**

On an all-African scale there is little tradition of institutional and business collaboration between countries. Because of lack of government interest and initiatives there have been few cases of effective book development policies. The absence of national language policies is part of this problem. In many countries, primary education is in crisis in terms of financing and quality. Interest groups among the stakeholders in the publishing industry emerge only slowly, because of mutual suspicion between the industry and government, and among stakeholders such as publishers, printers, book sellers and authors. There is a perception among some writers that publishers take the lion's share of earnings on books, and, on the other hand, publishers complain that manuscripts are not up to a professional standard.

Although many African countries have enterprising and experienced publishers at the top level, middle level staff is often poorly trained and there is a general lack of qualified editors (not least in local languages), designers and illustrators. The publishing firm landscape is unstable, characterised by many short-lived, small firms that only manage to bring out a few titles before they fold. A large number of books are consequently of a poor physical and aesthetic quality, and lack essential information like year of publication and ISBN numbers. Storage is expensive and difficult and many publishers do not keep sufficient back lists.

The links from publishers to distributors are not well developed and serviced. At the same time, marketing is scant which means that too much dead stock is burdening publishers as well as book sellers. Although publishers in some countries are now in dialogue with government departments of education and trade, there is a legacy of undue influence and corruption in the area of textbook provision and production which has to be overcome.

### **2.2.3 Cultural and Political Constraints**

The main cultural constraint in African publishing is language. In which languages should books in Africa be published? Divisions along language lines cross-cut the continent and the individual nations. Interaction between English, French and Portuguese speaking regions is underdeveloped, as are the links between North and Sub-Saharan Africa. The number of local or sub-national languages spoken within each country exacerbates the problem. The dominance of colonial languages, the low literacy in any language, poverty and problems of infrastructure mean that the majority of people in Africa do not have access to written material.

Only between five and ten per cent of any country's book production is in a local language, which means that a large section of the populations is deprived of significant support in developing their language and culture. Eritrea pursues a policy of primary education in the medium of local languages, but has huge problems with provision of written material in these languages. Kenya makes use of two national languages, Swahili and English. Publishers are reluctant to

publish in Swahili for commercial reasons, except for textbooks. The large majority of books published in Africa are published in English.

Another major constraint is political instability and the authoritarian politics of many African countries. This instability creates a climate of fear and insecurity which is neither conducive to economic opportunities nor to intellectual and artistic creativity. Until recently, politically motivated censorship has been a problem for publishing. Both in South Africa, Kenya and Nigeria certain publications have been banned, already published books have been removed from bookshops, and world famous writers like Ngugi wa Thiong'o, Wole Soyinka, Jack Mapanje and the late Ken Saro-Wiwa have been persecuted, jailed, and even killed. Many less known writers and journalists have met similar fates. Whereas censorship of this kind is for all to see, the damage done by self-censorship among writers, publishers and intellectuals is difficult to assess. With the democratic opening up of many African nations in the 1990s, the problem is now less than in the 1970s and 80s. In many countries, however, the government still keeps an eye on the publishing industry and vets school textbooks, not exclusively in relation to quality.

The lack of a reading culture is bemoaned by African publishers and writers. Economic reasons for this lack are obvious, and some seek further explanation in the predominantly oral character of African culture. For a long time, books have competed with the popular radio medium, and lately books have received heavy competition from the visual media, which are becoming increasingly accessible to large sections of the populations in urban as well as rural areas.

#### 2.2.4 Gender Specific Constraints

Gender inequality within the book industry can in part be explained by the fact that literacy rates and school enrolment are everywhere in sub-Saharan Africa lower among women than among men. Although African women writers made their mark in some countries in the first post-colonial generation of African literature, they now seem more muted, with the possible exception of women's writers in Kenya and Zimbabwe. Likewise, studies show that women are generally under-represented in the strategic areas of publishing and the textbook provision process, which would include authorship, commissioning and publishing management, school purchasing and bookshop stocking.<sup>2</sup> Furthermore, for the few women who reach key managerial positions within the publishing industry it is more difficult to be granted bank loans. The authors of *Textbook as an Agent of Change*<sup>3</sup> hold that adopting strategies to include women in the book chain, as a whole, is important as it is likely to "reinforce efforts towards gender awareness in books".

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<sup>2</sup> Brickhill, Paul, Catherine Odora Hoppers and Kajsa Pehrsson. *Textbooks as an Agent of Change: Gender aspects of primary school textbooks in Mozambique, Zambia and Zimbabwe*. Harare and Stockholm: Sida/Department for Democracy and Social Development, Dec. 1996. pp. 8-9

<sup>3</sup> Ibid.

While assessing gender distribution in African readership is difficult, figures from Guinean public libraries show that there are at least six times more registered readers who are boys and men, compared to women and girls. Similarly, Zimbabwean statistics reveal that women make up less than 15% of consumers of reading material<sup>4</sup>.

### 2.2.5 Economic Opportunities

Liberalisation of the economies in Africa has provided many opportunities for enterprising publishers. Most importantly in many African nations the government has loosened its grip on the industry, and private companies now compete with parastatals in the lucrative textbook market, and in the nascent market for general books. Publishers in Kenya have won an important victory in 1998, in that the state monopoly on production of textbooks has been broken. The Kenyan Publishers Association in collaboration with important foreign donors has lobbied the government to reach this goal. The Ministry of Education still approves of syllabi and lists of books, but private firms may now compete with parastatals in the production of textbooks. A similar development is underway in Tanzania. In Kenya, input into the book industry, such as computers, is now free of duty.

African publishers are increasingly aware of the opportunities which World Bank programmes of book provision for Africa provide, and some companies make good use of them. The publishing industry in Nigeria has made successful inroads into the market for textbooks and won important World Bank tenders. Likewise, the Malian publishing industry, with the help of government support, has managed to make headway in breaking French dominance of international tenders for textbooks in Mali. In Tanzania, the situation for the dominant parastatal company has improved because of World Bank insistence that ministries pay their outstanding debts, and through a Pilot Publishing Project of textbooks. Publishing of children's books is supported by donors. The Council for the Promotion of Children's Science Publications in Africa, formed in 1991, which now collaborates with APNET is an example of this. There is a general increase in the market for books for children. The Dag Hammarskjöld Loan Guarantee Programme has assisted indigenous publishers in Kenya, in terms of providing collateral but no grants or interest rate subsidies.

Not all markets in Africa are small. In South Africa and Zimbabwe, literacy is relatively high, and the large school population in Nigeria is a potential book-buying public. In 1984 Nigeria published 1836 titles, in 1991, 1546 titles, and according to 1992-4 figures, one new title was published per 100,000 people in that country in a two-year period, as compared to 52 titles in industrialised countries<sup>5</sup>. In 1991, South Africa published close to 5,000 titles, and Kenya and Zimbabwe each around 230 titles<sup>6</sup>.

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<sup>4</sup> Ibid. p. 9

<sup>5</sup> Human Development Report, 1997

<sup>6</sup> UNESCO Statistical Yearbook, 1995

For the last two or three years, the publishing industry in South Africa has undergone a massive crisis and is now in a situation of transition. Part of the reason is collapse of the textbook market as a consequence of economic and institutional problems in the administration of education at the provincial level. Textbooks which are sold directly to education authorities account for 80% of the industry's turnover. Firms which were earlier profitable now lose vast amounts and between ten and twenty per cent of staff in publishing have been retrenched. Those who benefit are large firms like Maskew Miller Longman which now has 40% of the market. Large companies, many of them with interests in TV and newspapers, buy up small indigenous firms like Skotaville, or small businesses collapse and disappear because of lack of market for their books. However, some companies like Heinemann Publishers are now starting an important new series of literature in indigenous languages, which by the year 2004 will have published one hundred titles with the ambition of furthering multiculturalism in the country.

Nigerian publishers like their counterparts in East and Southern Africa are keen to explore possibilities of intra-Africa book trade and export and have comparative advantages because of their longer experience in locally-owned and dominated textbook production. One Kenyan firm has adapted a local textbook course to the neighbouring Uganda market. The African Book Collective (ABC) has provided an important venue for exporting mainly academic books to Europe and the United States.

In Kenya, private firms such as Heinemann and Longman, which were formerly foreign-owned, are now indigenous. In Nigeria, the majority of the stock of the five large publishing companies which dominate the market is Nigerian-owned.

## **2.2.6 Institutional Opportunities**

In tandem with the growing awareness internationally and in Africa of the close link between the development of human resources and book production, a number of international and local initiatives have been taken to enhance publishing capacity in Africa. A series of conferences have helped establish a forum for discussion on how to improve the context for and internal mechanisms of the publishing industry. Ile-Ife in 1971, Arusha I and II in 1984 and 1996, and the Bellagio seminar on Publishing in the Third World in 1991 have been among the most important. Partly a result of the 1991 seminar, the African Publishers Network (APNET) was set up. It has mainly addressed the institutional and political-cultural challenges of African publishing, but is also promoting book sale and trade.

APNET is a network of national publishers' associations, and its creation has helped to establish, revitalise and strengthen such institutions in its member countries. One of APNET's strengths is that it works across boundaries - both national and linguistic. Its contribution to documentation and dissemination of information on publishing in Africa via the African Publishing Review has strengthened publishing initiatives on the continent significantly.

APNET, in conjunction with the ABC, has enhanced the knowledge and prestige of African publishing internationally. The effects of APNET on institutional strengthening in member countries and individual firms are dealt with in subsequent chapters of this report.

APNET and ABC are two examples of beneficial donor support to African publishing. Others are Book Aid International (BAI), initiatives by the Dag Hammarskjöld Foundation and Bellagio, and several initiatives by UNESCO and the development agencies of Germany, Holland and the Nordic countries.

For over ten years Zimbabwe International Book Fair has been central in the international and Africa-continental exposure of African books. It has now been followed by book fairs in Ghana, Nigeria and Kenya among other countries, notably the important Pan-African Children's Book Fair which was first held in Nairobi in 1992 which gave rise to CHISCI. National book weeks have been tried out in several places.

### **2.2.7 Cultural and Political Opportunities**

The recent opening up of the political climate and progress towards democracy in several African countries is a significant opportunity for publishers. An increasing level of education in some countries is an opportunity which has to be cultivated by a more aggressive promotion of books and of a reading culture. Increasing media flows enlarge the knowledge base, particularly among young people, and the publishing industry in collaboration with producers of other media products is in a position to take advantage of a growing thirst for knowledge and information.

New technology plays a role in two areas which are important for the publishing industry. Firstly, information technology in the form of fax machines and increasingly e-mail is available to the majority of well established publishers. Smaller firms also have access to these services on payment. Intensified streams of information and communication will greatly enhance marketing and trading arrangements within Africa and with countries in the North. Secondly, publishers also increasingly make use of computers in the production of books. Whereas digital printing is not widespread, book manuscripts, covers and illustrations are increasingly being transported on diskettes, and editing takes place on computers. Within the next few years the use and further development of information technology will intensify. The main constraints are institutional factors and reliable telephone lines, electricity, and not least, costs due to the frequent lack of local Internet service providers<sup>7</sup>.

Abundant writing talent is present in many African countries. Publishers receive more manuscripts than they can deal with. Whereas it is difficult to say in

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<sup>7</sup> The lack of a local Internet server implies that international dialling rates are charged for every minute the computer is hooked up. *The Electronic African Bookworm: A Web Navigator* by Hans Zell (ABC 1998), provided free of charge to book professionals in Africa saves on-line time and expense by facilitating off-line browsing.



exact quantitative terms how much publishing in Africa has increased over the last decade, it is safe to say that book production has reached a level in terms of both quantity and quality that suggests an expansion of the industry in the near future. This optimistic scenario is likely to come about under the following conditions: if the political environment does not worsen; that the economic environment shows some improvement; if carefully targeted international support continues, and if all-African and national institutional improvements and collaboration are kept up or intensified.

### **2.2.8 Gender Specific Opportunities**

Women writers were prominent in Nigeria in the 1970s and 80s, and are on the increase in Kenya and Zimbabwe. Women also make their mark in publishing. In Zimbabwe, a women writers' association has been established and has played an important role in advance women writers. In Kenya, six major companies are headed by women, and women form a significant part of middle level editorial and managerial staff. Of the national publishing associations with secretariats, half are headed by women. It seems that women publishers are especially poised to take advantage of computer technology, maybe because as secretaries, women in Africa are often the most computer literate. In fact, within a large number of publishing outfits visited, the computerised aspects of publishing were mainly carried out by women staff. Furthermore, in three of the four APNET courses held in electronic publishing, women participants outnumbered men.

As the enrolment of girls in primary and secondary schools is gaining ground in most countries, and has in countries such as Nigeria overtaken that of boys at secondary level, there are prospects for a larger female readership in coming generations.



## 3 APNET's Aims and Functions

### 3.1 Background

Before APNET was formed, African publishers were isolated entities and the only communication was usually in the direction North-South.

*Publishing industries on the continent were islands unto themselves. So insular were their operations that, by and large, each publisher acted as if their problems were peculiar to themselves.*<sup>8</sup>

A series of conferences and initiatives in the 1980s and 1990s brought African publishing significantly forward. These included i) the setting up of the African Books Collective, ii) the 1985 Frankfurt International Book Fair theme on *Publishing in Africa* and iii) a colloquium in Bamako under the theme *Edition en Afrique* in 1988. It was, however, the conference *Publishing in the Third World* hosted by the Rockefeller Foundation in Bellagio (Italy) in 1991, to which some African publishers were invited, that yielded the most encompassing and durable results.

At the 6th Zimbabwe International Book Fair in 1991, a group of African publishers representing nine countries, four regions as well as Anglophone, Francophone and Lusophone Africa, came together to discuss a strategy for co-operation within the publishing sector in Africa. Training was considered a crucial issue, but it was also recognised that promotion of intra-African trade and not least communication among publishers were important. Supported by donor representatives, consensus was reached about the centrality of indigenous publishing as "the main vehicle of publishing development". Furthermore, to sustain the organisational structure being created, the direct participation of and joint action of national publishing associations were given emphasis. Thus, the foundation for APNET was laid and the network began functioning in 1992 when its secretariat was established in Harare.

While the dedication of African publishers was crucial to the creation of the network, the donor recognition of the strategic importance of publishing as part of the development programmes as a whole was an important component. Between 60-70% of books purchased in Africa are textbooks funded by donors

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<sup>8</sup> Woeli Dekutsey. *The Story of APNET*. (Harare: APNET Secretariat) p. 2.

in one way or another. During previous decades, donors supported state publishing monopolies, but as development policy had shifted to supporting liberalised and open economies, this practice was no longer considered viable. A publishing network representing African publishing outfits was therefore an attractive opportunity to support that corresponded with modern development co-operation.

### 3.2 APNET's Mission

The APNET mandate has an explicit focus on the promotion of indigenous publishing, which directs the attention of APNET towards African-owned publishing firms. On the whole, APNET has avoided falling into the trap of becoming a club of affluent publishers. APNET is catering for both small and large publishing houses, including publishers linked to multinational publishing companies. There is no bias in APNET's constitution in favour of small publishers or women publishers.

APNET's mission is perceived differently by different stakeholders. Below are some of the interpretations:

1. **A Network:** The majority of APNET's members view networking as the most important activity of APNET.
2. **An association:** Some see APNET as a trade union or association for a sub-sector. This view is in part supported by the Constitution which focuses on the interests of its members - information, training, trade, advocacy as well as strengthening indigenous publishing in Africa. The Constitution also clearly states that APNET should "*work towards the formal establishment of an African publishers association noting that APNET is the interim body of such a union*".
3. **A centre of excellence:** Some expect APNET to a centre of excellence for publishing in Africa. An important part of this mission is conducting research and running a well-functioning resource and documentation centre.
4. **A consultant:** Recently APNET has functioned as a consultant for a donor-funded study regarding textbook policy.
5. **An implementing agent:** The UNESCO-APNET project called KAWI, is aimed at promoting science reading through the production of popular science material. It gives APNET the role of being an implementing agent. While the project is certainly important, it may not be highly relevant to members of the network. The project is thus not a result of a membership-driven process.
6. **A donor:** The team has come across a few publishers who view APNET as a donor or at least a donor liaison body, from whom it is possible to solicit funds.

7. **A trading organisation:** Many members hold that APNET can and should sell and market African books for the African market.

In practice, APNET's role so far has more likened a multi-purpose network linking publishers in various parts of Africa and maintaining contacts with partners in the North. In 1997, APNET's Board and other members developed the following mission statement at a reflections meeting held in Kenya:

*Our vision is the transformation of African peoples through access of books. Our mission is to strengthen African publishers associations through networking, training and trade promotion to fully meet Africa's need for quality books relevant to African social, political, economic and cultural reality.*

This mission statement encompasses more than being just a trade association representing the specific trade interests of its members.

The different roles that APNET is made to play, may partly mirror that its members and partners, including donors, seem to be satisfied and proud to be associated with APNET. The management of APNET has tended to try to satisfy as many expectations as possible, which is largely a reflection of the heavy dependency on donor funding. While APNET has managed to keep most of the balls in the air, it does not have the capacity to play all the balls in a consistent manner. Furthermore, the different roles end up competing for resources and attention.

APNET should be more clear about the role it wants to play. A clearer definition of its role, a stronger common sense of direction, and a higher degree of self-financing, would allow APNET to become more selective in the setting of priorities and in choosing its main partners. In this way, APNET would be in a better position to define strategies and list primary functions as a basis for the preparation of realistic annual work plans and corresponding budgets.

### 3.3 Mandate and Structure

APNET's mode of operating is regulated by a Constitution that defines objectives, statement of principle, membership, structure and financial affairs. The Constitution was revised in 1997, accepted by the General Council the same year, presented to legal experts, but a new version has not yet been published. The following section is thus based on the original Constitution.<sup>9</sup>

The objectives of APNET as outlined by the Constitution include:

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<sup>9</sup> The changes include:

1. Setting terms of office for Board members
2. Clarifying the responsibilities and tasks within the management structure, especially regional representatives and project committees
3. Clarifying the rights and obligations of members, and admissions to and termination of membership
4. Defining new regions and including their representation on the Board
5. Creating the post of vice-chairman

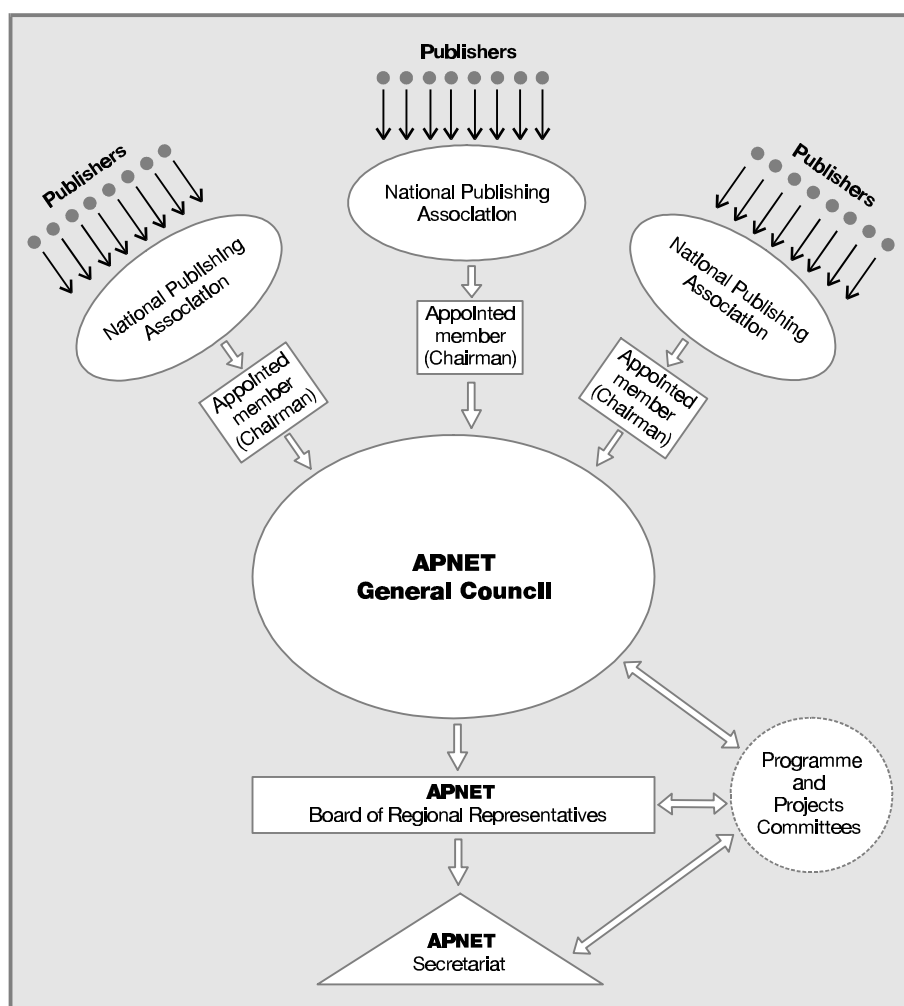
1. Establishing an information network among African publishers
2. Producing a newsletter in three languages for African publishers and partners around the world
3. Strengthening and consolidating training resources in Africa
4. Accelerating the intra-African trade in books, including licensing and intra-African co-operation within the book industry
5. Initiating and developing policy studies relevant to African publishing and formulating strategies "*that can be employed by governments, donors, banks and lenders, overseas partners and African publishers and their associations*"; and counteracting stakeholders seen as counterproductive to the interests of indigenous publishing in Africa
6. Assisting the creation and strengthening of African national publishing associations (NPAs)
7. Strengthening indigenous publishing in Africa including protection and promotion

The last objective compromises working towards the establishment of an African publishers association, with APNET serving as the interim structure. The objective also encompasses connecting Africans publishers, representing their interests, serving as a forum of exchange of ideas, promote book trade events, influencing legislation "*which promotes the free flow of books across borders and to urge implementations of the said conventions and standards*", representing African publishers nationally and internationally at seminars and conferences.

**Full membership** in APNET is only granted to bona-fide national publishing associations and to the 13 founding members. They are the only members with voting rights. **Founding membership** has been introduced and granted to the founding members of APNET. **Associate membership** is conferred by invitation to "*individuals, institutions or corporate entities who 'have both sufficient interest in the objectives of APNET and a proven record of support for African books and publishing'*". Meanwhile, institutions, corporate entities or individuals can apply for **affiliate membership** if the General Council finds they have "*sufficient interest in the objectives of APNET*". Today APNET has over 20 affiliate members. The Constitution also specifies that membership in general "*shall attract subscriptions*".

The structure of APNET consists of a General Council, the Board of Regional representatives, the Secretariat and the Project Committees. The General Council is the "*supreme authority of APNET*" and is made up of representatives nominated by each national publishing association. Its functions include appointing or removing members from the Board, the Project Committees and the Secretariat. It can approve new members and appoint or remove an additional representative from each country. The Council meets every second year, although this is dependent on the availability funds. At the General Meeting, the Board is elected, policy is discussed and formulated, and the budget and reports are presented and approved. Responsibilities and duties may be delegated to the Secretariat and the Project Committees by the Council and auditors may be appointed as deemed necessary.

Figure 3.1 APNET Structure



The Board of Regional Representatives meets at least twice a year and is responsible for the implementation of all policy decisions of the General Council. Initially it consists of one representative for five different regions: Anglophone Southern Africa, Anglophone East Africa, Anglophone West Africa, Francophone Africa and Lusophone Africa. Since the Third General Council Meeting in 1997, the Board has been expanded to include a representative from Central Africa and Northern Africa. The Secretariat handles the day-to-day business of APNET and is headed by an executive secretary. It has the power to employ staff, provided previous approval by the General Council. Project Committees, according to the Constitution, should consist of not less than three persons and should be formed by the General Council *"for a specified purpose and with a specific objective"*.

### 3.4 Strategies

APNET is currently in its third cycle which spans 1997 to 2000. The previous cycles stretched from 1992-95 and 1995-97. Programme documents guide the activities for each cycle. The *APNET Programme of Activities for 1997-2000* is the guiding document for the current cycle. Developed in a more participatory

manner than previously, involving a large part of the APNET constituency, its contents are also based on a reflections meeting held between the Secretariat, Board and some members.

Training, trade promotion and information are areas that APNET has been involved in since the beginning and continue to feature in the current cycle. The *Programme* intends to consolidate its strengths and successes in these areas building on earlier experience. The most significant new initiative in the *Programme* is the focus on capacity building of NPAs which was previously limited to "membership development". Thus, more than attracting new members and keeping up membership relations, APNET intends to strengthen its membership. This aim seems to correspond well with the general aim of strengthening indigenous publishing in Africa.

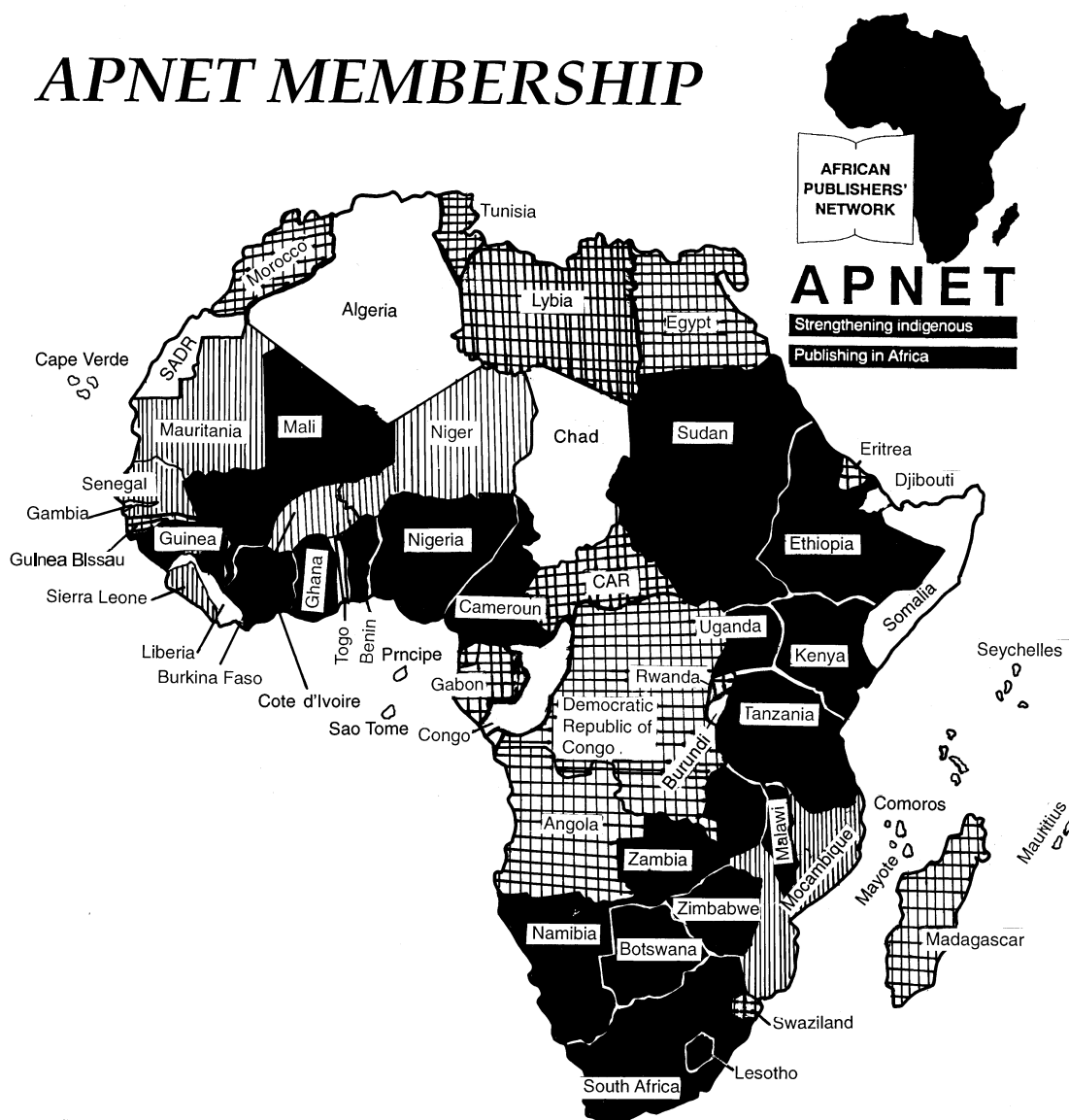
A second new feature in the *Programme* is the joint UNESCO-APNET three-year KAWI project.

On the whole, the *Programme* is a well-structured, comprehensive and professional document. It provides a background and rationale for each programme and then details objectives, strategies, activities, implementation and expected output. Some programme areas are quite well-defined, such as "Information", which gives the reader a clear understanding of what, why, where, when and how. Other areas, such as capacity building of NPAs, could benefit from a more precise presentation with a detailed budget.

What is missing in the document, and in APNET's modus operandi in general, is strategic integration and priority setting. Firstly, APNET should establish priorities for programmes and activities. If, for instance, training was not carried out for one year, this would have several negative consequences. However, if information activities are not carried out for the same period, the effects are more drastic for the well-being and sustainability of the Network. Thus in line with this argument, information is a more strategic activity and should be given priority. This type of analysis does not entail that some of APNET's activities are not important - on the contrary. It is simply a way of establishing a guiding set of principles. Secondly, APNET could strengthen its operation if it maximised the linkages between the programmes. For example, the research and documentation programme can be strategically linked to enhance training by e.g. providing material. Research activities could be linked to i) advocacy efforts to provide established facts, and ii) trade promotion by supporting instance marketing research. Trade promotion could be linked to training by sharing weaknesses discovered during trade promotion activities.



# APNET MEMBERSHIP





## 4 APNET's Achievements

In this chapter, APNET's five areas of work are assessed, namely networking, training, trade promotion, advocacy and building of partnerships. The achievements are based on interviews, revision of documents and in particular the APNET programmes of activities. In addition, results from the survey of publishers have been processed to give an indication of the "user" perspective. The penultimate section discusses the problem of financing for publishers, an area in which APNET has not been active. Finally, impact and future direction are analysed.

### 4.1 Networking

*APNET is, of course, first and foremost, a network facilitating contact between hitherto isolated African publishers to get to know each other, and to feel part of a family<sup>10</sup>.*

Networking is inherent to several APNET activities. Networking is regarded as the most important APNET activity by the publishers interviewed during the survey. Training, trade promotion, research and documentation, advocacy and building of partnerships all contain networking elements to a greater or lesser extent. The expansion of APNET membership from 12 countries in 1992, to 27 in 1998 in addition to 14 prospective members, is testimony to APNET's networking activity. Of these 27 members, 20 are represented by national publishing associations<sup>11</sup>, at least five of which have been created during APNET's lifetime. The other 7 members<sup>12</sup> are represented by a nominated representative with the responsibility to form an NPA in their country.

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<sup>10</sup> Chief Victor Nwankwo. "The network is working" Chairman's report to the APNET General Council, Nairobi 1995.

<sup>11</sup> This includes Benin, Cameroon, Ethiopia, Ghana, Guinea, Kenya, Lesotho, Malawi, Mali, Namibia, Nigeria, South Africa, Sudan, Tanzania, Uganda, Zambia and Zimbabwe.

<sup>12</sup> This includes Botswana, Burkina Faso, Côte d'Ivoire, Mauritania, Mauritius, Mozambique, Niger, Senegal, Sierra Leone and Togo.

*Table 4.1 Publishers' Views on APNET's Areas of Work*

	<b>Very Important</b>	<b>Important</b>	<b>Not So Important</b>
Networking	71%	25%	4%
Training	75%	19%	6%
Trade Promotion	47%	43%	10%
Research & Documentation	40%	38%	22%
Advocacy	46%	30%	24%

APNET has played an important direct and indirect role for many NPAs. For example, APNET has served as a channel for NPAs to share experience and information amongst each other. APNET has also played an important role in the creation of the Guinean NPA, REPROLIG, particularly by providing training. In addition, APNET contributed significantly to the revival of the Kenya Publishing Association (KPA) that had been somewhat moribund during a period of many years. Training programmes, sponsoring of exhibitors at book fairs, and dissemination of information (African Publishers Review) are ways in which APNET has supported the members of the KPA.

The roles of the NPAs are crucial as nodes in the APNET network. In fact, the survey shows that an important majority of publishers use their NPA as the primary source of information about APNET. With this in mind, the networking abilities of APNET are dependent on the capacity of the NPAs as nodes in the system.

*Table 4.2 Publishers' Sources of Information about APNET*

	<b>Main source</b>	<b>Sometimes</b>	<b>Rarely</b>
National publishing association	64%	27%	9%
African Publishing Review	61%	27%	12%
Book fairs	25%	58%	17%
Secretariat	23%	36%	41%
Board members	21%	36%	43%

As stated during the reflections meeting in 1997, NPAs are the vehicle to "strengthen the existing capacity in Africa to produce quality books in adequate quantities and at affordable prices". The "Programme of Activities for 1997-2000" states that if NPAs are strengthened, "they hold the key to APNET's growth and its material, financial and technical sustainability". On the whole, NPAs are rather modest set-ups, often weak, lacking both resources and important skills. For example, only six NPAs (all Anglophone) have their own secretariats. Since 1996, only three countries have produced a "Books in Print".<sup>13</sup> Although the NPAs were the publishers' most important source of information about APNET, in all countries visited there was evidence of APNET information **not** being passed on. In the current project cycle, a pilot project aimed at building up the capacity of NPAs has

<sup>13</sup> Hans M. Zell "A Bibliography of Publishing and the Book Chain in Sub-Saharan Africa 1997 and 1996. London: ADEA Working Group on Books and Learning Materials.

been introduced and constitutes the largest line in the budget. While the *Programme of Activities for 1997-2000* sets a framework for this project, a detailed operations plan and elements such as a specified budget are required. Although this project is strategic for the long-term development of APNET and the book publishing industry in Africa as a whole, the project has not received substantial funding.

*Table 4.3 APNET's Membership Development from 1992*

	<b>1992</b>	<b>1995</b>	<b>1998</b>
NPA members	8	12	20
Countries with appointed representatives as members	4	9	7
Prospective members	0	3	14
Total members	12	21	27

Another core networking activity is providing information and channels for exchange through the African Publishing Review (APR). This publication has been prepared by APNET since 1992 and is specifically referred to in the Constitution as an objective in itself. In the first year, four issues were completed. Since then, APNET has tried to produce a new issue every two months. A few issues have also been produced in French and certain issues contain key articles translated into three languages. The APR contains sections for features, news, country reports, notices, conference reports, book reviews and letters. Currently, there are roughly 2,400 on the English mailing list, and another 450 on the French list. All members receive the APR free of charge.

The survey shows that the APR constitutes the second most important source of information for publishers (after NPAs). It is also the most frequently used APNET service. Partners of APNET and publishers alike have a high regard for the publication, which is well-produced. Only five publishers expressed dissatisfaction with the APR. Their discontent was either due to the irregularity or due to the fact that the APR is mainly an English publication and French and Portuguese issues and articles have been few.

*Table 4.4 Usage of APNET Services by APNET Members*

	<b>% Not used</b>	<b>% Used a little</b>	<b>% Used some</b>	<b>% Used a lot</b>
Training	32%	13%	32%	23%
Trade Promotion	23%	27%	32%	18%
African Publishers Review	23%	14%	19%	44%
Resource Centre	76%	11%	13%	-
Research	81%	7%	12%	-
Networking	26%	35%	15%	24%
Consultants Register	77%	7%	16%	-

In the last two years, APNET has not had an information officer. The duty of editing the APR has instead been assumed by a founding member who has edited the publication from Namibia on a voluntary basis. She, however, resigned in September 1998 and the recruitment process for a new editor has been slow.

While the quality of the APR has remained high throughout, the Secretariat's lack of capacity in this area has had a marked effect on the regularity of the APR. Sometimes when the APR has been lagging behind in production, smaller newsletters have been sent out. Even the regularity of these has, however, been lacking. Particularly the lack of Lusophone and Francophone editions have been regretted. Some Francophone publishers interviewed strongly recommended the Secretariat to make use of the linguistic and technological capacity in Côte d'Ivoire in the publication of French issues of the APR.

The APNET Secretariat and Board use e-mail to communicate and network. APNET is also developing a web site that can play an important networking function, not least outside of Africa. While the use of e-mail and the Internet is growing, it will take time before this technology becomes a standard means of communication within Africa. Many countries in Africa cannot access the Internet without having to pay the price of an international phone call. Not including Board members, the survey showed that less than 15% of publishers used e-mail as a tool to communicate within the network. Nevertheless, APNET's decision to develop its networking by use of information technology is commendable. Through a web site, there is potential to weave together several of APNET's activities and thus further enhance information-sharing and networking.

Networking can be a difficult activity to measure. However, publishers on the whole recognised that the face-to-face possibilities of contact that some of APNET's activities (notably training and book fair activities) create, provide exchanges of experiences. While seen as important, publishers acknowledged that they may not bear fruit immediately:

*Meetings at APNET, organised training programmes and seminars ... serve as foundations on which future beneficial relationships can be built on.*

In interviews with publishers, over half believed that APNET had played a direct or indirect role in linking them with other players in the industry, and 36 examples of linkages were cited. Most of these linkages consisted of contacts. Some had resulted in business partnerships, co-publishing and licensing agreements.

*(The linkage in which APNET has played a role has been useful...) to improve on our quality so as to qualify us to be Southern African Distributors of UN University Press.*

*The linkage (has) led to the exchange of published works for distribution in our respective countries. It has been quite useful as one such linkage helped beef up our submissions for pre-qualification in a World Bank programme.*

*(The linkage) has been useful. We have created awareness about our publications in many African countries and there are potential business opportunities.*

Clearly APNET has played an important networking role. The constraints the Network faces are language barriers, access to affordable translators, the weak communications infrastructure in Africa, the capacity of the Secretariat and not least the capacity of NPAs. Furthermore, APNET's contacts in member countries are largely management level personnel who are likely to receive, but not circulate, information within their company or with other publishers. One explanation offered for this is the industry's tendency to guard facts and information "jealously" from competitors.

The lack of an information officer has also significantly affected the networking ability of APNET. Steps have been taken to rectify the situation by proceeding with the recruitment of an information officer. Given that networking is considered the most important activity by APNET's members, the long gap without this position filled suggest a lack of a sense of priority.

## **4.2 Training and Capacity Building**

APNET's training programme is also known as the African Publishing Institute (API). One of the first undertakings of APNET in this area was to commission a study to look into the training needs, opportunities, and outlets in Africa in 1992. The study revealed that only three countries (Kenya, Uganda and South Africa) offered training at university level, although the courses did not appear to address the needs of the industry. Furthermore, while training was sporadically organised in some countries, they were seldom known outside. APNET's Constitution therefore set out the objective of investigating training needs in Africa, "*formulate and implement policy and strategy on the co-ordination and consolidation of training resources, curricula, infrastructure and funding throughout Africa*" organise and co-ordinate donor funds and guide "*the implementation of training in Africa*".

Initially, training was co-ordinated from Nairobi for Anglophone Africa, and from Lomé for Francophone Africa. From 1994 to 1996, training workshops were held covering country-specific training needs assessment, training of trainers (four in total) and textbook management. It became clear that a review of lessons learned and experiences gained was important for future effectiveness. A curriculum was therefore developed in 1996 based on past experiences of API as well as of NPAs. The curriculum, which has also been translated into French, is highly regarded and offers the following courses: Foundation Course; Professional Skills for Publishers; Editorial Functions and Procedures; Design and Production; Electronic Publishing; Marketing, Sales and Distribution; Publishing Management; Growing your Company; and Legal Aspects of Publishing.

With the introduction of the training curriculum, it was decided that co-ordination at the continental level would be more effective than two centres in

East and West Africa. As a result, the Secretariat was enlarged to include a bilingual Training Co-ordinator.

Over 30 workshops have made use of the curriculum on both the regional as well as national level. NPAs apply for a training course via the Training Co-ordinator at the Secretariat, who aims at portioning out the training resources equally among member countries. When new national publishing associations have been formed, they have often taken advantage of APNET's foundation course.

On average, nearly one-fourth of the APNET training course participants have been women. In some cases, female participants have out-numbered male participants. These include the electronic publishing courses held in Kenya, Namibia and Zambia and the "training of trainers" courses held in South Africa and Zimbabwe. Generally, the average female participation in training courses is lower in West Africa.

Initially there were plans to arrange scholarships for African publishers to attend publishing courses offered on the continent or outside. There were also discussions of internships or "attachments" which were to consist of sending a publisher as an intern to another company in Africa. Once the system was rolling, internships with companies based outside of Africa would be explored. So far, neither of these areas have made progress, although both activities are mentioned in the *"Programme of Activities for 1997-2000"*.

The survey conducted during this evaluation shows that after capital, lack of human resources with adequate knowledge and skills is the most common cited challenge. Training is regarded almost as important as networking and is an area of work for which the willingness to share costs is high<sup>14</sup>. Training is also the most used service of APNET. Practically everyone interviewed was satisfied with the training offered.

At the Reflections Meeting in 1997, it was agreed that APNET's training programme was *"unquestionably the one most successful and advanced project"*. Certainly, APNET's training initiatives have played an important role in the recurrent upgrading of skills of employees at various levels in publishing firms in Africa. This is confirmed by the case studies in Kenya, Guinea and Nigeria.

There is, however, room for improvement. Training evaluation reports tend to gloss over possible problems and provide little constructive criticism. Such criticism could be one way to revise and update the curriculum, an objective stated in the current *Programme of Activities for 1997-2000*. The follow up of training of trainers has not been optimal. Many trainers have not been used and have had no contact with APNET since the training course, which they resent. This may however be addressed by the *Programme of Activities for 1997-2000*, which speaks of developing a database and a resource pool of APNET

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<sup>14</sup> A few publishers not willing to share costs for training explained that they did not want to pay for something that they view as "already funded".



trainers. APNET, and in particular the Training Co-ordinator, should also consider taking a step further by playing a facilitating role for an informal network of APNET trainers. The resource centre should also be maximised with regard to training, by, for example, making relevant contents known to APNET trainers.

To further improve the quality of training, a more comprehensive set of training evaluation tools should be applied such as in-depth interviews and periodic follow-up of workshop participants. Over time, the future development of APNET's training programme should be to gradually allow the NPAs to take over the day to day management of training. The annual number of workshops organised may thereby decrease. APNET's focus should instead be of a more strategic nature and thus become a resource for upgrading skills by feeding information into training outfits. In addition, APNET should examine the possibilities for contributing more substantially to competence development among African publishers by establishing regular working relations with publishing training institutions in various parts of Africa. Introducing the API curriculum within these institutions and establishing a system for accreditation could prove beneficial.

Table 4.5 APNET Training Workshops during 1997 and 1998

DATE	VENUE	ACTIVITY	PARTICIPATION	PARTICIPANTS			IMPLEMENTATION	BUDGET
				M	F	TOTAL		
February 1997	Namibia	Electronic Publishing for Southern Africa	Regional - S. Africa, Botswana, Malawi, Zambia	7	7	14	J. Kajavivi, M. Orford	\$ 17,675
May 1997	Ghana	Growing Your Company	National	19	3	22	GBPA	\$ 3,800
June 1997	Kenya	Book Marketing	National	12	6	18	KPA	\$ 3,800
June 1997	Cameroon	Foundation Course in Publishing	National	20	1	21	J.C. Tita	\$ 3,800
June 1997	Mali	Marketing and Sales Distribution	Regional - APNET Mali, Cameroon, Benin Cote d'Ivoire, Togo, Senegal	9	3	12	H. Konate, A. Fasemore	\$ 17,420
August 1997	Tanzania	Book/Promotion	National	11	1	12	PATA, A. Fasemore	\$ 3,800
August 1997	Nigeria	Financial Management for Anglophone West Africa	Regional - Sierra Leone, Ghana, Nigeria				V. Nwankwo, Akin Fasemore	\$ 16,000
August 1997	Tanzania	Book promotion	National	11	1	12	PATA	\$ 3,800
September 1997	Tanzania (Arusha)	Bk Trade Barriers (East)	Regional	18	2	20		\$ 16,000
September 1997	Kenya	Book Marketing / Sales and Distribution for Eastern Africa	Regional - Ethiopia, Tanzania, Uganda, Kenya				H. Chakava, A. Fasemore	\$ 16,000
September 1997	Nigeria	Sales Representation and Marketing	National	20	2	22	NPA, A. Fasemore	\$ 3,800
October 1997	Guinea (Conakry)	Foundation Course	National	8	2	10	M. Sow/A. Fasemore	\$ 3,800
October 1997	Zambia (Lusaka)	Electric. Publ. (South)	Regional	8	7	15		\$ 16,000
October 1997	Nigeria (Enugu)	Electric. Publ. (West)	Regional	13	2	15	V. Nwankwo	\$ 16,000

DATE	VENUE	ACTIVITY	PARTICIPATION	PARTICIPANTS			IMPLEMENTATION	BUDGET
				M	F	TOTAL		
December 1997	Mozambique	Foundation Course	National				S. Matola, A. Fasemore	\$ 3,800
November 1997	Kenya (Eldoret)	Electronic publishing	National	6	5	11	KPA	\$ 3,800
October 1997	Zambia	Electronic publishing	National	8	7	15	BPAZ, A. Fasemore	\$ 3,800
February 1998	Uganda	Basic Sales and Marketing	National	15	5	20	UPA	\$ 3,000
April 1998	South Africa	Training of trainers	Regional	8	9	17		\$ 18,000
April 1998	Benin	Management of a Publishing Business	National	21	2	23	ASEDIB/O. de Souza	\$ 3,000
May 1998	Kenya	Editorial Process	National				KPA	\$ 3,000
May 1998	Guinea	Design and Production	National	7	2	9	M. Sow, Dieng Thiung	\$ 3,000
May 1998	Nigeria	Editorial / Production	National	14	3	17	NPA	\$ 3,000
August 1998	Zambia	Commissioning & legal aspects of publishing	National	*	*	*	BPAZ	\$ 3,000
August 1998	C. Africa	Book Marketing & Distribution in C. Africa	Regional	*	*	*	F. Nagandu	\$ 18,000
September 1998	Angola	The Publishing Process	Regional - Lus. Africa	*	*	*	A. Fasemore, A. Isabel	\$ 18,000
September 1998	Botswana	Publishing scene in Botswana marketing issues	National	*	*	*		\$ 3,000
September 1998	Tanzania	Readership Promotion	Regional - E. Africa	*	*	*	PATA	\$ 18,000
September 1998	Ghana	World Bank Bidding Processes	Regional - Anglophone W. Africa	*	*	*	World Bank	\$ 18,000
November 1998	Cameroon	Managing Production Costs	National	*	*	*	F. Ngandu	\$ 3,000

\* Not available at time of writing

### 4.3 Trade Promotion

With regard to intra-African trade, the APNET Constitution states that its objectives are:

*to accelerate the process of intra-African trading in books, in printing and in licensing and of direct trading co-operation and collaboration between publishers in different African countries.*

In 1993, the Accra General Council Meeting agreed that APNET should undertake the following activities to promote intra-African Trade:

1. Establish a clearing house for distribution of trade
2. Develop thematic catalogues of selected African titles
3. Mount collective exhibits of African books at book fairs
4. Actively promote and assist in licensing agreements between African publishers
5. Develop showrooms of African titles within Africa for librarians, book-buyers, students and others
6. Develop a trade promotion office for intra-African trade in books

Since 1994, activities revolving around book fairs have been the most important part of APNET's trade promotion activities (see Table 4.6). For most book fairs in Africa, APNET has tried to organise a collective exhibit, sponsoring of exhibitors and a programme of seminars and/or workshops for the benefit of its members. In four years, 240-250 participants, of whom roughly a quarter are women, have been sponsored to 14 different African book fairs, notably the Pan-African Children's' Book Fair (PACBF), the Ghana International Book Fair (GIBF), FILDAK in Senegal and the Zimbabwe International Book Fair (ZIBF). APNET usually seeks funds separately for each book fair. In 1998, lack of funding has meant that no members were sponsored to the PACBF and the GIBF, and no seminars were conducted. Collective exhibits of sizes varying between 120-550 titles have, however, been mounted at all these book fairs.

APNET has also sent representatives to international book fairs. Collective exhibits have been displayed at book fairs outside of Africa. The New Delhi World Book Fair (twice), the Frankfurt International Book Fair (twice), the Association of Caribbean Universities Research and Institutional Libraries and most recently in Paris at the Salon du Livre de la Plume Noir. At the London International Book Fair, ABC has regularly represented APNET at its stand. While African publishers gain exposure and, to some extent, networking opportunities through APNET exhibits abroad, the amount of business generated from these efforts are minimal. Of the publishers surveyed, only one mentioned that APNET's presence outside of Africa had gained him a possible business opportunity.

There have been other trade promotion activities over the years. In 1993-1995, three thematic catalogues were produced, one for agricultural books, another for children books and the third was a rights catalogue. In addition, the booklets "African Rights Indaba", "APNET Seminar: Intra-African Rights Seminar", "Library Acquisition of African Books" and the APNET membership directory were published. Since 1995, published materials for trade promotion consist mainly of book markers, banners and brochures, although a 1997 rights catalogue has also been produced. APNET has, however, begun advertising new titles in the APR. At first these appeared as lists, representing 10-30 publishers. As of 1997, half-tone photo images of book covers and catalogue covers have appeared, though in total, a lesser number have been represented.

An important trade promotion activity was the buyers/sellers meeting at the ZIBF in 1998, co-hosted with ITC which was considered successful by the organisers and participants alike.<sup>15</sup>

In the "Programme of Activities for 1997-2000", the following objectives are listed:

1. to enhance marketing skills, export sales and promotional capacities of members;
2. to improve the quality of APNET promotional materials;
3. to draw upon the experiences of Asia in marketing and producing quality affordable books as well as exploration of trade opportunities in India and the Caribbean;
4. to foster dialogue and closer collaboration with Europe-based sales outlets such as African Books Collective and other initiatives in the North promoting trade in African books;
5. to promote new titles in the APR and other publications;
6. to mount APNET collective exhibits at strategic meetings and conferences on education, knowledge and change.

The activities include sponsoring exhibitors to African book fairs, producing promotional materials, conducting seminars at book fairs to build member capacities for sales and marketing, participating at exhibitions on education, knowledge and development and strengthen links with distributors in Europe, America etc. Thus, there is a greater orientation towards the world outside of Africa. Rights and licensing have been taken out of the objectives. Unlike most of the other programme areas in the document, no evaluation mechanism is introduced.

The expectations of APNET in the area of trade promotion among publishers differ depending on each publishers interpretation of trade promotion. Some hope for increased book sales and therefore give the area importance. Others

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<sup>15</sup> Some of the comments noted down during the consultant's attendance at the meeting include "valuable", "should be organised yearly", "an eye-opener", "very informative and useful" and "a strength was the openness and friendly atmosphere".

send books to collective exhibits so that the shelf with their country's name is not empty - without expecting many sales. Others believe that APNET should be minimally involved in trade promotion because this is not the network's area of comparative advantage. It is regarded as the third most important APNET activity (see Table 4.1) and along with networking, it is the third most used APNET service. When publishers were asked in the questionnaire to tick whether they were satisfied with the usage or not, around 25% claimed they were dissatisfied. Follow-up interviews suggest that part of the problem is expectations, where publishers hope that APNET will be able to ensure future sales. A couple of respondents believe that a more strategic marketing effort should be applied by APNET. Some believe that APNET should establish an "ABC for Africa" (see discussion below). Another respondent said that while he valued the networking possibilities that his sponsorship to a book fair gave him, he would prefer the equivalent of the funds used for his air-ticket and per diem as capital, even in credit form, to produce another book:

*I need to have good books before I can sell any at book fairs.*

The survey also showed that trade promotion is the service that, along with training, most publishers are willing to share the cost of, which may be due to the fact that marketing, distribution and trade are all identified as among the foremost challenges by many publishers.

APNET's efforts in the area of buying and selling rights (including seminars, information and assistance) is seen as a particularly important trade promotion issue and APNET is considered a suitable forum to discuss these issues.

*Rights are an area of prospect - this way there is no volume being moved around, only paper work.*

Implementing the trade promotion programme has not been simple, as feedback from publishers has not always been forth-coming. Publishers have not always been particularly responsive to Secretariat communiqués. This includes, for example, APNET's requests for books for collective exhibits. In addition, at the 1995 General Council meeting it was noted that the Secretariat's attempt to establish a clearing house for distribution of trade catalogues and promotional material of members was hampered by the fact that members did not send in material. Only about 40% of the sponsored exhibitors submit reports to APNET on the outcome of their participation as required. APNET is now trying to enhance the feedback by asking publishers to report back according to a standard format.

Within the APNET membership, there have also been discussions of the need for an "ABC for Africa", i.e. a collective marketing and warehouse structure for African books to be sold within Africa. The arguments for this would be the need to improve marketing of African books within Africa and to promote intra-African trade. APNET's trade promotion officer also cites the difficulties APNET has when showing its collective exhibit because visitors would like to buy the existing copies. If orders are placed, which has only occurred a handful of times, they have not always been serviced by the publishers. This has in turn

reflected badly on APNET. However, it would probably not be appropriate for APNET to fulfil this function as dealing with sales runs the risk of drawing suspicion of favouritism upon itself. Furthermore, APNET does not have the marketing capacity for such a project. Some therefore advocate for an independent structure to which APNET would be loosely tied and whose revenue will help finance part of APNET.

It should, however, be borne in mind that for ABC, every new title costs ABC around £300.00, which is part of the reason ABC is not yet self-financing. Furthermore, if you can ship books to a centre in Africa, which then ships the book to another destination in Africa, the question arises why the books could not be sent to the final destination from the beginning? Naturally, ABC-styled collective catalogues are an advantage for potential buyers and sellers. Catalogues are, however, something that APNET has produced and aims at continuing. Linking trade promotion to research and documentation has been suggested by several publishers as there is a need for market intelligence reports. This is also something that could appropriately become a task for APNET. This is not to say that the idea of an "ABC for Africa" is not worth exploring further but the responsibility for this should probably be placed outside of the APNET context. The experience of ABC in Oxford could be drawn upon and the systems it has developed could be adopted as appropriate. The endeavour, however, would require significant dedication<sup>16</sup> from the founders and would probably require an in-depth feasibility study.

In sum, APNET participation at book fairs, particularly in Africa, is important. It opens opportunities for its members and enhances networking. Over the years, participation at book fairs in the form of collective exhibits and sponsored exhibitors has been given priority over the production of promotional material such as catalogues. As a result, catalogue production has declined. APNET, however, has a comparative advantage with regards to the production of catalogues and other promotional materials.

APNET's comparative advantage is not to sell books, apart from its own publications and catalogues. It does, however, have several opportunities to enhance trade promotion in Africa without engaging directly in sales. In view of the differing expectations of APNET in trade promotion, clarifying APNET's objectives and expected outcomes in this area is recommended. Its focus should appropriately cover the following areas:

1. **Promotional materials:** APNET should aim at enhancing its skills and resources for the regular production of professional, well-designed, informative and well-structured catalogues and promotional materials for exhibits<sup>17</sup>. Such catalogues would be beneficial for all book fairs but also serve as useful

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<sup>16</sup> ABC founders contributed £1,000 in hard currency as "shares" when the collective was established.

<sup>17</sup> Today only 3% of the 1997-2000 trade promotion budget of US\$ 458,900 are dedicated to promotional material

buying and reference tools for librarians and other book buyers and would be useful material for exhibitions outside of Africa.

2. **Collective exhibits:** APNET's collective exhibits are usually much admired by its members. Continuing this activity and continuously developing the type of marketing skills required for such an exhibit is likely to benefit the publishing sector in Africa.
3. **Publishing rights and licensing:** The area of publishing rights and licensing has received less prominent attention in the current "Programme of Activities for 1997-2000". Although it is foreseen that rights workshops and catalogues will still be funded under this budget line, rights and licensing warrant attention, particularly as many African publishers are not very familiar with these areas and have ended up selling rights to their disadvantage.



Table 4.6 APNET's Presence at Book Fairs 1994-1998

BOOK FAIR	DATE	REPRESENTATION	PARTICIPANTS	APNET ACTIVITIES
1 11th New Delhi World Book Fair	Feb. 1994	Collective Exhibit: 2000 titles, 13 countries	6, 6 countries, (1 woman)	Networking: 70 meetings
2 Pan-African Children's Book Fair	May 1994	Collective Exhibit	Secretariat	Meeting on World Bank Funded Programme, 40 publishers attended
3 Zimbabwe International Book Fair	Aug. 1994	Collective Exhibit: 487 titles, 14 countries	44 from 20 countries (13 women)	APNET stand constructed, meetings on monopolies in African publishing, African Children's Publishing, African Rights Seminar (w/ ZIBF)
4 Singapore Book Festival	Sept. 1994	Representation: Rights catalogue distributed	Secretariat	APNET attended workshop on Asia-Africa trade; presented "Growing African Market for Books". Networking.
5 Norwegian Book fair	Oct. 1994	Representation only	Secretariat	APNET representative visited institutions & presented papers
6 Pan-African Children's Book Fair	May 1995	Collective Exhibit: 215 titles	30 from 20 countries (6 women)	General Council Meeting / meeting on World Bank tenders
7 Zimbabwe International Book Fair	Aug. 1995	Collective Exhibit: 350 titles	22 from 16 countries (4 women)	APNET co-hosted seminars: "Books for Millions" and "Intra African Rights Trading"
8 Dakar Book Fair	Dec. 1995	Collective Exhibit: 340 titles	2 from Ghana	
9 12th New Delhi World Book Fair	Feb. 1996	Collective Exhibit: 500 titles	3 from Secretariat and Board	Networking: 93 meetings
10 London International Book Fair	Apr. 1996	Representation through ABC	None	
11 Pan-African Children's Book Fair	May 1996	Collective Exhibit: 225 titles, 54 publishers, 17 countries	9 from 8 countries (3 women)	Networking: 32 meetings
12 Association of Caribbean Universities Research and Institutional Libraries (ACURIL 26)	May 1996	Collective Exhibit: 150 titles	Secretariat	Attended meetings for librarians
13 Zimbabwe International Book Fair	Aug. 1996	Collective Exhibit: 666 titles, around 100 publishers, 20 countries: 138 recorded visitors	27 from 15 countries (6 women)	"Publishing in African Languages: Creating a Literate Environment for Development" (w/ DSE); "Supporting Women's Publishing in the South" (w/ Kali for Women, India)
14 Ghana International Book Fair	Nov. 1996	Collective Exhibit: 550 titles	31 from 15 countries (6 women)	APNET seminars: "Scholarly Publishing" & "Francophone and Anglophone Co-operation"
15 London International Book Fair	Apr. 1997	Representation through ABC	None	

<b>BOOK FAIR</b>	<b>DATE</b>	<b>REPRESENTATION</b>	<b>PARTICIPANTS</b>	<b>APNET ACTIVITIES</b>
16 Pan-African Children's Book Fair	May 1997	Collective Exhibit: 138 titles	8 from 6 countries (4 women)	APNET Forum: Strategies for strengthening National Publishing associations
17 Zimbabwe International Book Fair	Aug. 1997	Collective Exhibit: 800 titles	27 from 14 countries (8 women)	NPA forum on "Towards a Stronger Indigenous Publishing Industry in Africa: NPAs as Centres for Communication"
18 Frankfurt International Book Fair	Oct. 1997	Collective Exhibit: 130 titles, 23 publishers, 9 countries	Secretariat	Networking: 68 meetings
19 Dakar Book Fair	Nov. 1997	Collective exhibit: 120 titles, 24 countries	24 from 14 countries (6 women)	Rights Trading, APNET Forum on Strengthening NPAs
20 Cairo International Book Fair	Feb. 1998	Representation only	N. Africa Board Representative	Introduced APNET to N. Africa
21 13th New Delhi World Book Fair	Feb. 1998	Representation only	Secretariat	Representation only
22 London International Book Fair	Apr. 1998	Representation by ABC	None	
23 Pan-African Children's Book Fair	June 1998	Collective exhibit: 132 books, 53 publishers, 16 countries	Secretariat	14 meetings
24 Zimbabwe International Book Fair	Aug. 1998	Collective Exhibit: 340 titles	21 from 18 countries (5 women)	Indaba and NPA Forum
25 Frankfurt International Book Fair	Oct. 1998	Collective Exhibit: 135 titles	Secretariat	Meetings
26 Salon du Livre de la Plume Noir	Oct. 1998	Collective Exhibit: 55 titles	Secretariat	Meetings
27 Ghana International Book Fair	Nov. 1998	Collective Exhibit: 164 titles, 25 countries	Secretariat	Forum "Women in publishing" canceled due to lack of funds. Official launching of the "Consultants Register".

## 4.4 Research and Documentation

APNET has conducted or been involved in the following research projects since its establishment:

1. Sources of Indigenous Language Publishing in Africa (commissioned by the International Federation of Library Association)
2. Economics of Publishing Educational Material in Africa (with ADEA)
3. The Story of APNET (commissioned by UNESCO)
4. Intra-African Trade Study (commissioned by ADEA)

An important research activity, which APNET usually presents as part of training is "*Towards and African Publishing Institute: An investigation of existing publishing, a survey of African publishers' training needs and a proposed five-year plan for an African Publishing Institute*" that was completed in 1992. This study was crucial for the establishment of APNET's training programme. The "*Development Directory of Indigenous Publishing*" published in 1995, is usually not listed as one of APNET's "research" activities. The publication is nevertheless an important resource and as an activity, wholly corresponds to APNET's comparative advantage as a network to promote African indigenous publishing. Another such work is the *Textbook Management Manual* by Ian Montagnes, which APNET has not been able to publish in the last three years since it was completed.

APNET's "*Programme of Activities for 1997-2000*" has a strong focus on research, with four of the five research and documentation activities focusing on research.

APNET has also established a Resource and Documentation Centre in Harare which at the moment includes three collections - the Hans Zell collection (roughly 800-1000 items), the collection of books from constituents that are used for book fair exhibits (roughly 2000 books) and the "ARDC" collection which contains books, reports and seminar papers (in all almost 400 items). Work is still being carried out to register all items in the database. At present, it is estimated that about 70% of the exhibit collection is registered in the database. Meanwhile, efforts are being made to integrate the Hans Zell and the ARDC collections which currently have separate databases. In the centre there is also a database of consultants specialised in the book sector. Recently, this information was compiled to produce the *Consultants Register*.

Moving to new premises has meant that the resource centre now has more space. However, as recognised by the Secretariat, the centre is not fully operational. The database still has several glitches and improvements can be made in shelving the books.

The demand for services provided by the centre so far has not been significant. APNET has not made a concerted effort to promote the contents and databases of the centre as it is still "under construction". APNET's research and documentation activities are among the least prioritised areas by publishers, according to the questionnaires. Only one in five had used the resource centre, and of those, one in five was dissatisfied. Generally, there was little knowledge

about APNET's research and documentation. Few knew that research had taken place. Those who knew about the intra-African trade study often believed it was the only research endeavour undertaken. The name "resource centre" was considered confusing by some.

The resource centre has potential to become a leading centre on African publishing. If built up properly and if made operational, the centre could represent an invaluable resource for African publishing as a whole, and not least for APNET's other activities (networking, training, research and advocacy). It appears, however, that commitment to the centre has not been as strong as to other APNET activities. There also seems to be a lack of vision for the centre. The "*Programme of Activities for 1997-2000*", for instance, focuses mainly on new research activities and does not outline the aims of the centre. For the centre to achieve its potential excellence, efforts need to be made to define what the resource centre should do and identify how it should do it. For example, if the centre is to service requests, there is a need for information about the library's contents through, for instance, annotated bibliographies. To service requests, APNET would need, inter alia, skilled documentalists, a suitable photocopy machine, an e-mail connection from the database computer, an adequate budget for acquisitions and a systematised way of receiving resources and information. Target groups need to be defined and mailing lists prepared. Concerted efforts would be needed to promote the centre and inform constituents about the centre using for example NPAs, book fairs, the APR and the Internet. APNET may want to consider calling it a library or documentation centre ("The Library of African Publishing") to clarify what the centre actually is.

In sum, APNET has so far made use of its comparative advantage by supporting all-African research on topics highly relevant to the African publishing environment. Research projects should continue to aim at this and results should be integrated into APNET's other areas of work to strengthen them. For example, the results of the intra-African trade study should be integrated into trade promotion, advocacy, information sharing and training - as relevant.

APNET has not made the most of the centre's potential. Part of this problem is the lack of timely funds. If the centre is able to provide information, packaged and targeted in appropriate ways, there is even a possibility of modest cost coverage by users. The centre could not only aim at becoming one of the most important resource libraries for African publishing, it could provide support to all of APNET's activities, particularly training, research and trade promotion. Its services could be developed, including publications of bibliographies. Efforts should be made to grab opportunities such as the publication of, for example, the *Textbook Management Manual* or the follow-up of the *Development Directory of Indigenous Publishing*. When fully operational, efforts could be made to promote the centre among members, partners and the public.

## 4.5 Advocacy

From a broader perspective, advocacy for indigenous publishing can be regarded as particularly important considering the link between literary devel-

opment and the building of democratic civil societies based on African tradition and values. As an organisation representing the interests of a sub-sector, i.e. the publishing industry, advocacy activities are an integral part of APNET's work. APNET has succeeded in gaining recognition and has placed African publishing firmly on the map. Allegedly, multinationals who were initially unruffled by the emergence of APNET now view the network with respect.

The APNET Constitution states advocacy as an aim:

*to influence legislation which promotes the free flow of books across borders and to urge implementations of the said conventions and standards.*

*to take all measures deemed necessary to support, promote and protect indigenous African publishers*

However, this is later contradicted by the statement:

*APNET shall not carry on propaganda or otherwise attempt to influence legislation*

While the latter statement is referring more to political campaigns, i.e. the organisation should be apolitical, the Constitution is nevertheless unclear on this point.

Within APNET, advocacy activities involve sensitising stakeholders about the concerns of the African publishing industry within Africa and internationally. The Bellagio Publishing Network and its Secretariat have also played a complementary role in advocating on behalf of African Publishing. Advocacy is considered an important part of the dialogue with the donor community and with governments, in order to influence book policies. The good relations that APNET enjoys with the Association for the Development of Education in Africa (ADEA), which represents donors, multilateral agencies and African ministries of education, have been helpful in this respect. ADEA's Biennale in Dakar in 1997 provided a platform for APNET. As a direct result of this meeting, Ghanaian publishers' association was able to establish a rapport with the Ghanaian Minister of Education.

A large part of APNET's advocacy has focused on the World Bank. The World Bank is the largest source of finance for education in Africa with a current annual average of over \$2 billion. As textbook components have increased within education projects (72% in 1995), the World Bank efforts in book provision are the single largest in Africa<sup>18</sup>.

Consistent efforts on behalf of APNET have yielded results in terms of a greater understanding among World Bank staff members. Below is a chronology of APNET's lobbying efforts:

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<sup>18</sup> Walter Bgoya "The Development and Future of Publishing in Africa: 12 Years after Arusha I" Development Dialogue 1997:1-2 p.24.

1. December 1993: Five-man APNET delegation to the World Bank in Washington DC.
2. May 1995: Seminar on *Introduction to World Bank Procurement Procedures* in Nairobi. This was attended by 48 publishers from 24 countries.
3. November 1996: World Bank Country Studies were conducted and APNET members were called upon to document the interventions in education and textbook provision in their countries. Reports were compiled and synthesised.
4. September 1997: APNET members presented papers on the review of procurement policies and procedures at the *World Bank Publishing Seminar* held in Washington D.C.
5. September 1998: APNET held a regional workshop for Anglophone West Africa on *World Bank Textbook Procurement Procedures*. This was attended by 21 publishers from Nigeria, Sierra Leone and Ghana and two resource persons from the World Bank.

As a result of the dialogue, APNET has been in a position to send out World Bank monthly operational summaries to the NPAs, which provide information and possible opportunities for African publishers. In the APR article *Winds of Change at the World Bank*, following his participation at the *World Bank Publishing Seminar*, Henry Chakava wrote:

*The Bank is not only listening, it is now talking a different language.... If the recommendations that emerged from the seminar are adopted as Bank policy and a programme of action is put into place for their implementation, local publishing in the developing world will undergo a sea-change and the World Bank will emerge as a strategic partner in the new deal.*

Countries such as Nigeria and Mali have managed to ensure the participation of indigenous publishing houses in the World Bank pre-qualification process for textbook tenders. Mozambican and Guinean publishers have had a much tougher time with this, even though publishers in both countries claim to have the support of their governments. Several attempts have been made by COWI to contact the World Bank for its comments on i.a. i) its relationship with APNET, ii) changes in World Bank policy regarding procurement of textbooks for African countries, and iii) the varying success rates of African publishers winning World Bank tenders, but the Bank responded by stating that its policy is only to comment on actual reports.

APNET does not usually advocate at the national level. This is the responsibility of the individual NPAs. However, pursuing APNET membership status with the Organisation for African Unity is specifically mentioned in the *Programme*. Achieving this is likely to give APNET clout and thereby help it strengthen the NPAs lobbying efforts.

In Guinea, the NPA believes that APNET could maximise its advocacy by (a) rotating regional training workshops more and (b) bringing a Board representative to all regional meetings/workshops/book fairs and using the local network to create publicity for the organisation and its aim. For example, if a regional workshop is held in Guinea, the NPA could take advantage of the situation and contact the media, or maybe even set up meetings with key governmental personae. This would not only inform the government about APNET, it would also sensitise them regarding the issues affecting African publishing.

APNET's task of advocacy is one of the least prioritised by African publishers. Paradoxically, when asked how APNET can solve some of the challenges they face, advocacy, in one form or another, is the most cited response. The most cited challenge is capital (mentioned 30 times), although regarding this particular issue, only a few suggested that advocacy could have an impact.

Below are some of the other responses that concern lobbying, advocacy and promoting the interests of African Publishers that respondents believed APNET could address:

1. Promote the interests of African publishers generally (6 respondents)
2. Lobby the World Bank and other development banks (4 respondents)
3. Sensitise and lobby banks (1 respondent)
4. Advocate for credit from donors (2 respondents)
5. Advocate for funds from donors (4 respondents)
6. Advocate for aid schemes for paper from donors (1 respondent)
7. Lobby the printing community (1 respondents)
8. Advocate against piracy (2 respondents)
9. Lobby governments on:
  - trade and fiscal policies (5 respondents)
  - textbook policies (2 respondents)
  - provision of infrastructure (2 respondents)

This list indicates that the expectations of publishers are very high. At the same time, the Strengths, Weaknesses, Opportunity and Threats workshop with the Board, revealed the following views with regard to APNET's lobbying clout:

- *"inadequate lobbying skills"*,
- *"lobbying of government to effect changes in African publishing is weak"*
- *"politically ineffective"*

The *Programme of Activities for 1997-2000*, however, offers a more realistic approach to advocacy, by focusing on key international bodies. With the contacts and network that APNET has built up, it has a comparative advantage with regard to advocacy. Furthermore, it has the potential to strengthen the advocacy efforts with research findings, such as the results of the intra-African trade study.

APNET should focus more on the larger policy issues affecting African publishing and book development. It should continue and expand its advocacy efforts to promote the cause of African publishers in a number of well-defined areas. Some areas, like intra-African trade and increased African participation in the tendering for textbooks, require lobbying both at national and international level. APNET should build the capacity of NPAs to lobby governments at the national level, while APNET's own advocacy efforts should primarily target bilateral and multilateral donors, but also relevant international and regional organisations. To support well-documented advocacy efforts, the research programme of APNET should be closely linked to its advocacy efforts.

## 4.6 Partnerships

Over the years, APNET has worked together with over 30 partners. Some of its most important partners include the Bellagio Publishing Network, Book Aid International, the African Books Collective, Association for the Development of Education in Africa (ADEA) - Working Group on Books and Learning Materials, Pan-African Children's Book Fair (PACBF), Zimbabwe International Book Fair, Pan African Writers' Association, Pan-African Booksellers Association, the International Publishing Association and UNESCO.

Other partners include the Afro-Asian Book Council, the International Trade Centre, the Canadian Organisation for Development in Education, the National Book Trust of India, International Federation of Library Associations, the International Publishing Partnership of Canada, the Centre for Agricultural Technology, the International African Institute, the Dag Hammarskjöld Foundation, the Council for the Development of Social Science Research in Africa and the Council for the Promotion of Children's Science Publications in Africa (CHISCI).

Over the years, APNET has had contact with a range of different partners, with whom APNET has generally enjoyed a good relationship. For example, through APNET the PACBF has been able to gain access to a large number of publishers who enrich the book fair in various ways.

*APNET has the full picture. For us, they have been critical.*

Another African partner stated:

*If APNET is strengthened, we all are strengthened.*

Some donors, including Sida, wish to maintain a partner relationship with APNET that goes beyond the funding. Promoting African publishing in the wider context of book policy and development in Africa, is the foundation of this partnership, which the Bellagio Publishing Network has been instrumental in facilitating.



The partnership with the African Books Collective (ABC) has led to ABC representing APNET at the London book fair over the years. This allows for greater width of APNET's exposure without much added cost.

Book Aid International has developed a programme to supply books about publishing to African publishers and for them APNET has played an instrumental role:

*I cannot see how we would have worked without them  
(APNET).*

Although partners are sensitive to APNET's insufficient funding which has constrained its ability to consolidate partnerships, many APNET partners see more opportunities for mutually beneficial collaboration. More frequent communication, more dialogue concerning comparative strengths and weaknesses and joint strategic planning could enhance co-operation. For example, the organisers of PACBF believe that planning together in advance would allow them to pick out important issues and foster them within their joint framework.

APNET is slightly wary of ending up in disadvantageous relationships. This issue was discussed at the reflections meeting in 1997 at which experiences with the British Voluntary Services Overseas and UNESCO were analysed. One of these relationships was viewed as a powerful organisation exploiting the network for credibility and resource mobilisation.<sup>19</sup> At other times, APNET has not been included in the project preparation, but has been presented with a proposal that may not have fitted into its programme. APNET has therefore decided to analyse opportunities and threats before embarking on joint projects with international organisations.

The mandates of many of the organisations overlap. For instance, the ZIBF and ABC are, like APNET, involved in the promotion of trade in African books, though from different angles<sup>20</sup> and these partners see their activities as non-competing and mutually reinforcing. CHISCI and APNET's KAWI project with UNESCO both aim at promoting science reading in Africa. The Pan-African Booksellers Association which was recently created and is structured very much like APNET, has decided to conduct training for its members (some of whom also are APNET members as some publishers run bookshops as well as publishing outfits) in marketing. While the organisations themselves tend to be geared more towards co-operation than competition, most of these organisations are searching for funds from the same donors.

*We are all knocking on the same donor doors.*

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<sup>19</sup> *A Time to Reflect*. Report of the review of APNET's mission, programme and strategy. March 1997.

<sup>20</sup> ABC focuses on promoting African books in the North, ZIBF focuses on facilitating the market place through organising the Book fair event yearly, whereas APNET aims at promoting and strengthening intra-African trade.

While the array of organisations may complicate the donors' tasks, it sometimes confuses publishers. Some misinformed publishers who did not understand its objectives, saw ABC as a threat to African publishing and APNET.

Book development and publishing in Africa has become a crowded arena for concerned individuals and organisations in the North and in the South. The many actors sometimes create a certain amount of confusion among donors and African publishers. While there are examples of synergy, shared responsibilities for joint activities among organisations concerned with the book industry, there is a fair amount of overlap of mandates and competition for funds which at times lead to duplication of work. Many partners see potential possibilities for joint action. However, sometimes these opportunities are lost because APNET has not been able to plan ahead in a strategic manner. At the same time, APNET is concerned by being taken advantage of by large international organisations. APNET's difficulty in planning ahead in a strategic manner, particularly due to funding constraints, and the lack of involvement of APNET in the early stages of project planning, has meant that partnerships have not always reached their full potential. To improve co-operation, APNET should try to institutionalise structured annual reviews with its most essential partners.

#### 4.7 Capital: A Pending Issue for APNET

As seen in the above section on advocacy, access to capital is the greatest problem faced by African publishers. This has also been put forth by, amongst others, Thomas Kamugisha in 1995 and Walter Bgoya in 1997:

*In most African countries the availability of finance for the publishing sector has been one of the major impediments to the development of the indigenous publisher.<sup>21</sup>*

*The major problem for African publishing houses is the lack of investment and working capital finance. Without finance there can be no ownership and no freedom to control policies and to manage complex issues of an editorial, production or administrative nature<sup>22</sup>*

Henry Chakava of East African Educational Publishers and F.A. Adesanoye of Ibadan University Press both stated in separate interviews that the top two challenges for African publishers are "one, financing and two, also financing".

Problems of attaining loans from banks in Africa are many. To begin with, publishing is considered a high risk sector with slow and low returns. Secondly, banks generally tend to have a poor understanding of the publishing in-

<sup>21</sup> Thomas A.R. Kamugisha "National Publisher's Associations in Africa" in C. Priestley ed. *Development Directory of Indigenous Publishing 1995*. Harare: APNET 1995. p. 26.

<sup>22</sup> Walter Bgoya "The Development and Future of Publishing in Africa" *Development Dialogue*. Uppsala: 1997:1-2. p.17.

dustry. Thirdly, the high level of interest rates in many countries in Africa (Kenya, Tanzania and Nigeria to name a few) is prohibiting. Fourthly, in some countries, like Nigeria, even if a publisher was willing and able to pay the high interest rates, the bank will not lend as loan repayment cannot be guaranteed within a six month period.

A system that creates donor and subsidy dependence among African publishers is of course not desirable. There are, however, different mechanisms for financial assistance to the private sector that, if applied correctly, can be regarded as sustainable. Providing guarantees/collateral for loan schemes with market-based interest rates would be one way. There are also several methods used in successful micro finance schemes that i.a. involve different types of collateral substitutes. Naturally, a prerequisite for a publisher to pay back a loan is that the products are demanded and can be accessed by the market.

There is also the possibility of establishing a window for soft loans to the publishing sector, which can, for example, provide the critical impetus needed for many publishing firms. Considering that the strategic importance of publishing for educational, political, cultural and long-term socio-economic development, means that the publishing industry in many other parts of the world often receives some sort of direct or indirect economic support from the government, such type of support can be argued for.

During the country case studies, the only financing scheme for publishers encountered was the Loan Guarantee Programme in Kenya started by the Dag Hammarskjöld Foundation. While the scheme has had a few difficulties, particularly in the beginning, and the lending sums have been small and Kenyan interest rates high, it is considered by many to be a relatively successful endeavour. While the scheme may not be replicable in all other countries, particularly in those where interest rates are inhibiting, it certainly shows that the problem can be addressed and favourable results achieved.<sup>23</sup>

Addressing the issue of financing is not identified as an objective per se by APNET's Constitution, and nor has it been dealt with by any of the APNET programmes. APNET is, however, in a good position to advocate for the financing needs of African publishers, and, for example, explore the availability of finance for publishers, such as micro-credit funds and schemes for micro-, small- and medium-sized enterprises. A research initiative to gain experience and knowledge to subsequently define strategic interventions in this field is a way APNET could start to address this issue. This research initiative could be developed in collaboration with donors who share the concerns of APNET in this important area.

## 4.8 Impact and future direction

APNET has successfully built a network of African publishers and is recognised as a key player in the area of book development in Africa. APNET has with

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<sup>23</sup> See the Kenya Country Case Study in the appendix.

certainly been the most important factor contributing to the increased flow of information among African publishers, who previously had minimal contact. APNET has achieved, as seen above, results in training, trade promotion, information flows, advocacy and the building of partnerships. APNET has also played a decisive role in the creation of new NPAs across the continent. Furthermore, the membership of NPAs have grown during the existence of APNET. In Ghana, for example, the NPA grew from 14 to 60 members from 1992 to 1997. Walter Bgoya writes:

*There can be no question that the appearance of APNET on the publishing scene has been one of the most significant events for publishing in Africa from a continental perspective. APNET has not only mobilised African publishers to come together in order to work for practical solutions to common and concrete problems . . . It has done more. In a very tangible way, it has begun to address the continental context in which publishing is or is not happening. Through various actions at the level of individual governments and through alliances it has created with international donor organisations and multilateral institutions that carry considerable influence with African states and statesmen, African publishers and publishing has moved to centre stage and their many years of isolation in the past appears to be over.<sup>24</sup>*

To actually measure the impact of APNET's activities on publishing in Africa is problematic due to the lack of baseline material. Have more books been produced? Has the quality of books improved? Are there more publishing outfits? Are they better off? To what extent are improvements a result of APNET's activities? The evaluation team has anecdotal evidence that is strong enough to say that APNET has made a difference, but to what degree is difficult to establish in quantitative and qualitative terms.

For a future monitoring of APNET's impact, baseline data are required. This would require a comprehensive initial study followed by a continuous collection of information on a selected number of indicators, and would require significant resources. APNET could, for example, conduct such monitoring as an activity within the Research and Documentation programme. As this is an extensive exercise, APNET's Board and donors must reflect on whether over-all impact monitoring is required or whether achievements in relation to programmes are a sufficient monitoring method.

As discussed in Chapter 3, APNET's strategic integration and priority setting are important for the improved impact of APNET's programmes. In the long run, when NPAs have become stronger entities, APNET's comparative advantages are likely to be networking, information-sharing, policy development, capacity building and advocacy.

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<sup>24</sup> Walter Bgoya "The Development and Future of Publishing in Africa: 12 Years after Arusha I" Development Dialogue 1997:1-2, p.23.



## 5 Capacity and Management

### 5.1 Mode of Operation: Strengths and Weaknesses

#### 5.1.1 Strengths

APNET has developed a participatory management style that is generally highly respected by its members. Despite language barriers and distances, the network management is perceived as inclusive. With a new executive secretary joining in 1996 and a new Board elected in 1997, APNET managed the transition from its first generation of founding members to the second generation of network management.

While the Constitution provides APNET with a **good organisational structure** with a framework of aims and a general *modus operandi*, it does not provide much guidance for management systems. As a result, management systems have been developed during the course of the network's existence. The **participatory style** of the APNET management has allowed for dialogue along the way. The reflections meeting in 1997 provides an example of the participatory style, the acknowledgement of problems, action taken and the **open dialogue** as illustrated below.

- The Board, Secretariat and specially invited resource people met to jointly reflect on APNET's mission, programme and strategy.
- It was acknowledged that the future orientation of APNET was weak. The causes were identified as the process of self-discovery; lack of clear objectives, benchmarks, evaluation mechanisms and time frames for implementation; and the Board being under too much pressure for strategy formulation.
- Decentralisation to local and regional levels while strengthening the Secretariat was agreed on. This included specific recommendations on the roles and responsibilities for Regional Representatives, Board Members, Committees, the Chairperson and Executive Secretary and a revised version of the Constitution. These issues have been followed up in both the structuring of the *Programme of Activities for 1997-2000* and the most recent Board Meeting in Accra in November 1998.

Another important strength of the network is **the people involved**. The voluntary input from the Board as well as other APNET members is considerable. The Secretariat, which has grown from one person to five full-time staff members, is composed of dedicated professionals from different regions in Africa, who combine publishing expertise with experience from NPAs and NGOs. The secretariat can function in both English and French. To date the Secretariat has played a pro-active role which has no doubt contributed to the achievements of APNET. In addition, the Secretariat has received support and guidance from a committed Board.

**Regional representation** within the Board is a strength that enhances credibility and confidence among members. Regional representation has also been maintained in the Secretariat which is made up of one Zimbabwean, one Nigerian and one Kenyan as full-time staff. In addition, there is a Zimbabwean project manager on a two-year contract.

APNET's management shows consideration for **gender sensitivity**. While the industry is on the whole dominated by male publishers, and while the Constitution does not make any specific reference to gender, APNET has made an effort to promote women within the industry. Within the Board, one of seven are women. Within the Secretariat, three of the four professional staff members are women. Articles in the APR<sup>25</sup> discuss women in the book industry and several contributors have been women. Female representation has, almost always been assured in the sponsored exhibitors programme and the training initiatives (see Table 4.5 and Table 4.6). Furthermore, APNET has been keeping gender disaggregated statistics for these activities. In 1996, a seminar was held at the ZIBF entitled "Supporting Women's Publishing in the South". This year at the Ghana International Book Fair, APNET had intended to sponsor twenty indigenous women publishers from twelve member countries and organise a special forum on "Women in Publishing". However, none of APNET's donors were forthcoming with funds to support this, and the project was therefore cancelled at the last minute.

Gender equality within the trade is an issue that APNET has the capacity to develop within its advocacy work. Should the interest exists among African women publishers, APNET could also consider playing a facilitating role for an informal network of professional women involved in the publishing trade.

APNET has over the years established functioning **monitoring systems**. Reports are sent with relative regularity to Board members and some of the Programme Committee Chairmen. Reports are also prepared regularly by the programme managers, and activities such as training workshops require reports before funds are released. A user survey of the APR has been conducted and

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<sup>25</sup> Akoss Ofori-Mensah. "Women in Publishing: Profiles from Ghana". *APR*: Vol. 6 No. 5 Sept/Oct., Margie Orford. "Recounting our Views of the World: Women's Writing in Namibia". *APR*: Vol. 6 No. 5 Sept/Oct. There has also been the article by the Forum for African Women Educationalists. "Educating Girls and Women for Development". *APR*: vol. 5 No. 4 July/August 1996.

another is envisaged during the current programme cycle. The system established allows the programme to adjust to changing circumstances. As there is an accumulation of learning, APNET's management could improve on documenting the lessons learned. Furthermore, monitoring and lessons learned could be enhanced by further developing indicators to measure the progress of APNET's activities as well as the organisation as a whole. Such a system would also provide a basis for relating results to costs in a systematic way.

Another important strength of APNET's management is the fact that the all Board members and the Secretariat are connected on e-mail, which allows for **efficient communications**. The Secretariat has also managed to arrange **suitable premises** in the centre of Harare for a reasonable price. The location of the Secretariat in Harare has the advantages of access to relatively well-functioning services regarding communications, banking, computer technology, printing and design. In addition, the existence of the ZIBF in Harare, billed as the biggest international book fair in sub-Saharan African, is also convenient for APNET. Furthermore, proximity to South Africa can be seen as an advantage, considering that a large percentage of books are printed there and the country has the continent's most developed publishing sector. The disadvantages include a negative socio-economic climate, a publishing industry with a generally lukewarm attitude towards APNET, and a lack of political support to the publishing industry. There is also a cumbersome and non-supportive government bureaucracy in relation to the granting of work permits, licensing and importation of goods, and protocol for regional status of organisations.

### 5.1.2 Weaknesses

One of APNET's most important weaknesses is **an unfocused programme**, which has resulted in a lack of priority-setting. While focus has improved over time, particularly after the reflections meeting in 1997, this remains an issue to be dealt with. As discussed in section 3.4 above, an example of this problem is the fact that although information flow has been regarded as central to the network<sup>26</sup>, this function has not been given adequate attention for more than a year.

A second weakness is the fact that APNET has **taken on more tasks than it can effectively manage** with its present capacity. This has, at times, led to insufficient planning, lack of consistent and timely implementation of programmes and inadequate follow-up. For example, the consultants register took several years from the time that potential consultants were contacted until the register was produced. The training of trainers workshops have not been followed up sufficiently, which has created some frustration among those trained.

The two weaknesses mentioned above are related to the Secretariat's challenge of receiving different steering signals from the Board, the individual members of the constituency, donors and partners. This is, nevertheless, an inherent fea-

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<sup>26</sup> As shown in Table 4.1 Publishers' Views on APNET's Areas of Work, this was also confirmed by the survey.



ture of a donor-funded network and management systems must, therefore, be adjusted to face such a reality.

The **lack of unity** within the Secretariat has been a weakness. Each professional member of the Secretariat works in a highly independent manner within his/her area of responsibility, which has led, at times, to a disjointed way of operating. It appears that the ideas coming from the Secretariat have not always been developed by the professionals working together. The lack of communication and unity within the Secretariat has meant that the different professionals cannot adequately compensate for each other when required. This state of affairs has been addressed by the Board and measures have been taken to improve the situation.

The **programme and project committees** have not been able to work as effectively as intended, in particular because there have been no available funds for them to meet on a regular basis. The purpose of these bodies are to monitor and develop APNET's programmes and projects. They are composed of interested publishers from the membership at large, which increases participation and representation within the network. However, as the committee members reside across the continent, meetings are rare, which limits the effectiveness of the committees. Some committees have, however, had impact, in particular the training committee. The availability of funds allowed this committee to meet and develop the APNET curriculum. In addition, the head of the training committee and the training co-ordinator at the secretariat have been in touch regularly, sharing reports and feedback. In view of the past experiences, a more suitable alternative to standing committees could be that ad hoc activity-focused working groups or task forces unite when there is an important issue to analyse.

Another weakness is the **shortage of staff** in the Secretariat, which is partly linked to funding constraints. There is thus a mismatch between the functions of APNET and the strengths of the Secretariat. The lack of an information officer has been the most critical of the human resource requirements. Recruitment to fill this post is, however, under way. In addition, there is a shortage of administrative support.

APNET has **no human resources plan**. A significant step forward, however, is the first draft of a staff manual that has recently been prepared with the help of consultants. This will help define the foundation for a transparent and equitable management of human resources. Yet several basic elements for human resource management are missing. To begin with, there are **no adequate job descriptions**. These should be produced for each position within the secretariat, and should state the level of educational, professional and other attributes required. They should not be pegged according to what the current incumbents have but what can be realistically regarded as the minimum for someone to perform the job competently.

APNET also has no **system to measure performance of staff**. The available management tools to measure staff performance are i) clear work

plans which indicate expected outcome and ii) activity reports produced regularly by all programme staff. It is imperative for APNET to measure performance and perhaps link it to identification of areas of need for staff development and remuneration. Human resources development has not received much attention in the absence of a human resources development plan. The main gaps exist in management skills, computer-based communications and data processing skills, documentation skills as well as skills to organise specific aspects of the support functions in the office.

While there are basic computer hardware and e-mail facilities at the Secretariat, the **equipment should be upgraded**. There is a need for updated and suitable publishing software if APNET is to increase its production of publications. Naturally, relevant training should accompany this. The resource centre will also require equipment such as an e-mail connection and a more robust photocopier if it is to service demands in a serious way.

Poor communications infrastructure in Africa, distances and language barriers are general constraints to **effective communications**. While e-mail connections have facilitated the flow between the Secretariat and the Board members, the weak telephone lines still create problems. There is not always the capacity within the management to translate all documents and there are usually no funds available for interpreter services at meetings. These are all external constraints. Within the management all parties admit that communication practices could be better. Documents are sometimes sent out late and replies are sometimes tardy. However, improvements are being made.

## 5.2 Financial management

### 5.2.1 Financial monitoring

Annual budgets are prepared by the Secretariat based on a three-year budget. The annual budget is the means by which APNET responds to the funding levels actually committed for the year. Participation in the preparation, implementation, monitoring & review of budgets is satisfactory. It includes the Secretariat that prepares annual and quarterly budgets that are ultimately approved by the General Council and Board respectively. The quarterly reports include actual income and expenditure, in addition to activity reports that outline what has been achieved and what not. This is followed by regular monitoring during implementation by Board members through the approval of expenditure and shared signing responsibilities.

### 5.2.2 Accounting

There is no internal accounting capacity within the Secretariat. Instead an accounting firm in Harare handles APNET's accounts and performs financial reporting functions for internal and external purposes, including preparation of the basic information that is used for reporting to donors according to their requirements. The firm has an accountant that is designated to process APNET's accounts on a two-year retainer basis. The cost of provision of this total package

is USD 1 200 per month, escalated by 2.5% at the end of the first year. Considering the cost of hiring, of accounting software and other personnel related costs, this option is a cost-effective and suitable arrangement.

Key procedures in the accounting cycle of APNET have a high level of integrity, particularly regarding receipts and payments. This is established by a clear separation of duties between those who spend the money, i.e. the Secretariat, and those who keep the records, the accountants. There is a shared responsibility for accountability regarding the use of programme funds between management and the various projects personnel. The shared responsibility allows the programme officers to be accountable for their budgets while allowing the Executive Secretary overall monitoring responsibility in the expenditure approval process. The involvement of the programme staff members and their level of accountability could be enhanced if there was a requirement for their direct first level approval of expenditure on their respective programmes. The Executive Secretary would then give final approval after they indicate theirs first.

A gap exists between the KAWI project budget and that of the Secretariat's services budgets in the classification of expenditure. The KAWI project may not be contributing towards the recovery of Secretariat overheads because there has been no policy and procedure defined on how to access such services and how the overhead can be shared.

However, management accounts based on presentation of actual income and expenditure compared to budgeted income and expenditure and the variance between the two would provide a better insight into budget and programme implementation but these are not prepared. The APNET accountants agree on the need to introduce this type of reporting for better monitoring.

While the overall contractual arrangement with the accountants are satisfactory, there are some grey areas which need further attention. These include the following:

1. "*(Open), manage, report and advise on foreign currency accounts*" is too wide. The opening of bank accounts is the responsibility of the Board and management. The accountants agree that this issue should be amended.
2. The provisions for termination of contract are inadequate in relation to circumstances warranting termination and the period of notice required. This is critical given the need for orderly and complete hand-over / take-over of financial records in the event of termination. There was no proper hand-over from the previous accountants that dealt with APNET and this created difficulties.
3. Key deliverables and delivery times are not spelt out which makes it difficult to monitor delivery of the contract. For example, the annual schedule for the production of annual and quarterly budgets, cash-flows, management accounts, donor reports and preparations for external audit could

provide a basis on which both the accountants and APNET could monitor the performance of their relationship.

4. There is no reference made to the escalation of accounting fees. It is assumed these will be negotiated annually and the basis of such review is conjecture. This year it was based on what APNET offered, i.e. 2.5%. However, a more rational basis is required, such as the rate of inflation in the contract currency (US dollars).
5. Documentation of the accounting policies and procedures still lags behind. The exception is the documentation of procedures regarding use of funds for training workshops disbursed from the Secretariat. A specific budget completed in a predetermined format is the basis for these disbursements and reports have a prescribed format and supporting documentation required is specified. What remains is to document the agreed policies and procedures in one accounting policies and procedures document which will be updated as new decisions are made.
6. In view of the cash flow difficulties that APNET has faced, the contract clause "cash-flow forecasts in a manner consistent with your proposed plan" is not enough. The preparation of monthly cash budgets should be included.

Because the accounting function is performed externally, there is no need for a detailed accounting manual. What is required is policies and specific procedures for the Secretariat, the Board, the General Council and any other persons involved in the expenditure of funds of the network. This is a critical credibility factor for the network. The integrity of the process of receiving and using funds can be enhanced in this way since the funds are received in Harare but disbursed throughout the continent and spent by various persons.

### 5.2.3 Cash flow management

Cash flow problems have been serious for APNET. In the Spring of 1998, the situation was so critical that the Secretariat's phone lines were cut. A Secretariat staff member recalled this period:

*We were not sure when the phone rang if we should answer it in case it was a supplier claiming a debt. We were ready to close shop.*

Cash flow management has been particularly difficult due to the unpredictability of donor contributions. However, the problem has also been a lack of systems. The existing procedure consists of the Secretariat estimating its quarterly cash requirements based on the budget. The Board gives approval of the planned expenditure. However, expected inflows and outflows are not estimated beforehand. Thus, there is no way to gauge how much the deficit or surplus will be, and no system in place to deal with any anticipated financing deficit. This is exacerbated by the budgeting system's inability to take into ac-

count the non-financed expenditure from the previous quarter, which needs financing during the current quarter, thereby effectively reducing the cash actually available for expenditure during the current period. The system creates a false impression of available cash.

Likewise, the financial reporting that follows at the end of the quarter does not provide a comparative picture of what was achieved in terms of cash inflows and outflows. This is a reporting gap which misses out on the important link between the programme implementation and financial performance.

It is also important that a procedure is established that no new project is implemented before funds have been committed to the project.

Internal cash management practices can be improved as there is sufficient capacity within the accounting firm to produce the budgets and reports that meet both management information and donor funding requirements. As discussed in section 5.2.2 above, preparing monthly cash budgets would resolve part of the problem.

## 6 Financial Structure and Relations with Donors

### 6.1 Resource mobilisation

Since its creation, APNET has been heavily dependent on support from donors. These include Sida, the Dutch Government, the Rockefeller Foundation DANIDA, NORAD, UNESCO, Heinrich Böll Foundation, Centre for Agricultural Technology (CTA), Finnida and ADEA. The initial donors of APNET played a key role in supporting the establishment of APNET.<sup>27</sup> These donors have since the beginning been members of the Bellagio Publishing Network (BPN), which has enhanced the dialogue amongst them and with APNET. APNET has generated a minor income of its own from sales of publications and subscriptions to the APR and favourable foreign exchange situations have also contributed to its income, resulting in a total self-generated income of US \$26,125 in 1997 and US \$17,952 in 1996.

Taking into account how APNET functions, it is apparent that there are significant contributions in terms of voluntary input by members and the Board that are not reflected in the accounts. Such contributions are vital to the functioning of the organisation including the implementation of the donor funded programme activities. The APNET budgets quantify the voluntary contribution of the members of the General Council and Board. This contribution is estimated at about US\$ 100,000 a year for the period 1997-2000. The total is broken down by Board, committee and General Council meetings, meeting with partners, travel time and routine administration. Discussions with the Secretariat, Board, committee chairmen and the chairman of the Board suggest that the calculations in the programme budget correspond realistically with actual time spent over a period year. Each day's input is valued at \$ US100. The recognition of the contribution of members is commendable - organisations often fail to recognise that voluntary contributions have a value. It might, however, be worth considering paying a modest honorarium annually to *the companies* employing the Chairman, Treasurer or even the whole Board, as a small compensation for the amount of time they spend on APNET business.

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<sup>27</sup> See section 3.1 above.

Table 6.1 APNET Source of Income for 1996-97 in US Dollars

<b>Funding for 1996/97</b>		
<b>Annual Budget 1996/97</b>		<b>593000</b>
Sida	Core activities, Secretariat	154000
Rockefeller Foundation	Core activities, Secretariat	98000
NORAD	Core activities, Secretariat	56000
Netherlands	Regional training workshops	106000
Danida	Trade Promotion	36860
Heinrich Böll	National training workshops	60000
ADEA	Research and Documentation	10000
CTA	Networking: book fair seminar	6000
UNESCO	KAWI	9000
<b>Total funding</b>		<b>535860</b>
Deficit		54140

<b>Funding for 1997/98</b>		
<b>Annual Budget 1997/98</b>		<b>1457000</b>
Sida	Core activities, Secretariat	95245
Rockefeller Foundation	Core activities, Secretariat	75000
NORAD	Core activities, Secretariat	64960
Netherlands	Trade Promotion	16000
France	Trade Promotion	9765
Danida	Networking, meetings, travel	14980
Heinrich Böll	Training and e-mail	103960
ADEA	Research and Documentation	32550
UNESCO	KAWI	81585
International Publishers Association	Copyright symposium in Tokyo	5000
<b>Total funding</b>		<b>499045</b>
Deficit		957955

Conversions from Zimbabwean dollar at \$US 1 = \$Z 15.00

## 6.2 Effectiveness of donor relations

Over the years APNET has, on the whole, continued to have a good relationship with its donor community. It has enjoyed direct relations with all donors and has managed to increase its funding base slightly over the years. Although donor support has been consistent, the dependence on the personal commitment of many individuals in the donor agencies, involves a risk, as turn-over of personnel is high and organisational changes are frequent.

As an informal association of donors, African publishers and others committed to strengthening indigenous publishing and book development in Africa, the Bellagio Publishing Network has played a significant role in supporting APNET, for example, by providing a forum for discussion and collaboration.

For the donors, the network provided "safety in numbers" and a way of co-ordinating aid to APNET. Thus, there does not appear to be any "over-

funding" in any one of APNET's programme areas. The fact that only one evaluation of APNET (i.e. this current one) is being carried out is also evidence of co-ordination among donors. The BPN also keeps the donors talking and exchanging information. The BPN has helped ensure some continuity by introducing the representatives to the issues from the Network's point of view when new representatives have been appointed within donor agencies. Furthermore, when an unfounded accusation of misconduct within the APNET Secretariat was presented in the Zimbabwean press, the BPN served to circulate correct information, instil confidence and thereby avoid a crisis. In addition, the funding of the research into intra-African trade was a direct result of discussions held at a Bellagio meeting. The network has, however, failed to bring about standardised reporting from APNET to the donors, although the issue has been addressed in several meetings.

The Secretariat of the BPN has also played a helpful role with regards to APNET. While the Secretariat is not working closer with the donors than APNET, nor acting as a clearing house for grant applications, the Secretariat has played a facilitating role by relaying information to and from donors, particularly when communication lines have been difficult. When APNET has been facing funding problems, the Secretariat has been able to help. For example, the Secretariat was involved in attaining bridging contributions from Danida and Sida in between the current and former funding cycles.

At the last Bellagio meeting, it was proposed that the functions of the Bellagio Secretariat should be transferred to APNET. While this suggestion had been discussed among donors before the meeting, the suggestion came as a complete surprise to APNET who regarded it as abandonment. Since then, the dialogue concerning this issue has progressed and there is a more positive attitude in the management of APNET towards the transfer. It is felt that APNET has reached a level of organisational maturity that it can gradually take over the tasks currently performed by the Bellagio Secretariat. Donors view the proposal as more cost-effective and more empowering for APNET. In order to minimise the risks involved in the transfer of duties from Bellagio to APNET, the Board of APNET should request a three-year commitment from the donors, which would cover the primary functions of the core programme. In addition, the donors should be willing to commit funds to the function of resource mobilisation within the APNET Secretariat for a period of three years, with a view to gradually integrate this extra cost into the regular budget of APNET.

The effectiveness of APNET's programme is reduced by the unpredictability of donor funding. Part of the problem has been the fact that the Secretariat has not always been consistent in producing timely programmes, financial requirements and follow-up material. For example, APNET presented its programme for the current cycle (1997-2000) only weeks before the new programme was to begin<sup>28</sup>. Worsening the situation is that donors have sometimes taken a long

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<sup>28</sup> There are explanation for this, such as the fact that the voting in of the new Board was delayed.



time to reply, with many months and sometimes the better part of a year before the funds actually arrive.

Donor requirements in terms of providing separate funding proposals and narrative and financial reports also have an impeding effect. Managing relations with donors is time-consuming; about one-third of the Secretariat's capacity is spent on managing relations with donors. APNET prepares separate budgets, financial reports and even proposals according to the requirements of each donor. In several situations, it has been necessary for APNET to maintain regular contact with the donors in the capitals and at the embassies in Harare. Donors should accept a common reporting system and one audited financial account, where all donor contributions are specified. The 3-year programme of APNET should serve as a joint funding proposal.

The high degree of ear-marking has also had a bearing on APNET's effectiveness. Among the donors, Sida, the Rockefeller Foundation and NORAD are the only ones that contribute to the core budget of APNET without earmarking. All other allocations are earmarked contributions for specific activities. This is disempowering in that what is funded ends up being prioritised. APNET should insist that all major donors, who want to be considered "friends of APNET" actually contribute to the core programme. This would also require the commitment on behalf of APNET not to engage in ad hoc soliciting of funds which is presently the case. The programme and budget should adequately foresee, for example, sponsoring of exhibitors, seminars and the like.

Finally, depending on the response of the present groups of donors to APNET's request for core-funding, APNET should strive to enlarge their donor funding base. In addition, the possibility of corporate sponsorship from companies in the non-publishing sector should be examined.

### **6.3 Financial sustainability**

There is awareness and considerable concern within APNET regarding the heavy dependency on donors. The survey showed that over 90% of publishers were concerned by APNET's dependency on donor support for funds. Among APNET members there is a strong feeling that donors will one day abandon them. This issue has been subject to many discussions.

In the 1993-1995 budget, APNET had hoped to raise some contribution to its own financing. It shows a forecast of a 29% contribution to total expected income over two years. The major sources were expected to be affiliate member fees (22% of total expected own income); API scholarship development programme (53%) and API fee paying students (8%). Other sources included African publishers' fees to trade promotions, their participation in scholarly book exhibits, distribution of APNET research, subscriptions and advertising revenue from APR as well as subscription and research for the resource centre.

For the current 1997-2000 cycle, APNET still expects to contribute to its own funding through registration fees at workshops, sale of publications, subscrip-

tions, and membership dues (though with reduced expected levels compared to the earlier cycle). A new expected source of funding is through providing consulting services, though no advertising revenue is anticipated.

As of yet, however, there have been no significant attempts to explore self-financing options and how they can be practically introduced. Implementation of this part of the programme, therefore, appears to be lagging far behind. For instance, there is not yet a plan on how to gain revenue from consulting services. Likewise, a cost-sharing strategy for training workshops has not been developed.

Among publishers in Africa there is a stated willingness to contribute financially to APNET by sharing the costs of the APNET services **provided that relevance and quality of the services are high.**

*Table 6.2 African Publishers' Willingness to Pay for APNET Services*

	Pay nothing	Pay something	Less than 10%	Less than 50%	More than 50%	100%
Training	20%	80%	35	33	5	7
Trade Promotion	12%	88%	46	28	7	7
African Publishers Review	25%	75%	42	20	10	3
Resource Centre	42%	58%	45	10	3	0
Research Activities	41%	59%	40	9	8	2
Consultants Register	40%	58%	39	17	0	2

As the table shows above, over 50% of publishers were willing to contribute to all six APNET services. Trade promotion, training and the APR received the highest percentage of willing publishers. Payment for usage of the resource centre and research activities is high, considering that few had actually used these services or knew anything about them. Interestingly, some of those not willing to contribute to training gave the reason that as the service was already funded, why should they contribute!

Below are some suggested areas in which APNET could implement cost-sharing or otherwise generate income:

- The APR is a highly regarded publication that could bring in funds if aggressively marketed to overseas libraries and book trade markets.
- APNET has a comparative advantage when it comes to producing catalogues and bibliographies, which may bring in funds, if marketed well, particularly overseas.
- Services relating to research and documentation for non-members, in particular the resource centre, could bring in a modest income.
- APNET could introduce paid advertisements in publications. In Nigeria, all publishers said they would be willing to pay for advertisements in the APR.

One publisher expressed that this would offer an excellent opportunity for other African publishers to see their products and could thus lead to buying and selling of rights. In Guinea, the members of the NPA were not willing to pay for advertisements in the APR because the issues are not regular or frequent enough. Nor were they willing to bear any cost of the APR as the French issues have been few.

- Training workshops offer prospects for cost-sharing. Participants in training workshops could pay 25%-50% of the cost.
- The consultants register could generate income by requiring consultants to pay a fee to be entered into the publication.
- With the high interest rates prevailing in Zimbabwe, with permission from the donors, APNET could use interest rate earnings to build a reserve fund.
- Several publishers held that they would consider a higher level of cost-sharing if it could be carried out in local currencies. APNET accounts with each NPA to allow for payment in local currencies might be worth exploring.

Creating independent income-generating subsidiaries linked to APNET, such as consulting services<sup>29</sup> or possibly some form of an "ABC for Africa" to sell books across the continent are also possible options. Before embarking on such grand new projects feasibility studies should be carried out and all the pros and cons should be carefully analysed.

Regarding membership dues, the APNET Constitution expressly states:

*Membership shall attract subscriptions to be determined from time to time by the General Council.*

The survey of publishers showed that almost 90% state a willingness to pay a membership fee to the NPA of which part would go to APNET. Although the willingness to pay for APNET's structures and/or services appears relatively high, some experienced APNET members maintain that this willingness to pay may not necessarily be translated into practice and, therefore, suggest that actions towards payment should proceed slowly. Past experience with payment within NPAs shows a difference between intent and action. Nevertheless, the Pan-African Booksellers Association has allegedly been relatively successful in collecting membership fees, even though booksellers are generally less wealthy as compared to many publishers. Membership fees are also likely to further enhance the sense of ownership of APNET amongst publishers.

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<sup>29</sup> Recently, APNET has managed to earn a modest sum by acting as a consultancy for a donor-financed Ministry of Education assignment regarding the preparation of a strategy for textbook provision in Zimbabwe. APNET identified consultants and was responsible for quality control. APNET seems to have a comparative advantage for this task as it has a pan-African understanding of the book industry as well as the resource centre at its disposal.

The weak financial base of NPAs is an important barrier to increasing APNET's own income. Some NPAs, like the one in Guinea, have not managed to put its own system of membership dues into practice. In Guinea, the government members within the association were not able/prepared to pay a share, leaving only a handful of the members to bear the weight. Other countries, such as Mozambique, do not have an NPA and therefore have even greater difficulties in collecting dues.

There are certainly prospects for membership dues, cost-sharing and income generation, but introducing such mechanisms requires that a comprehensive and realistic strategy be developed. All APNET services must, therefore, be of a standard, quality and relevance for which potential users are willing to pay. The main channel, however, for enhancing the financial sustainability of APNET is by generating growth within the African publishing sector so that publishers have increased earnings and NPAs have a greater level of income.

## **Annex 1: Terms of Reference**



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## **Terms of Reference for evaluation of African Publishers Network - APNET**

### **1. Background**

The African Publishers Network (APNET) was established in 1992 through a collaborative effort between donors and publishers from 11 African countries, with the view to strengthen and promote indigenous publishing. The priorities outlined at that time were information sharing, training and trade promotion. APNET have today presence in 27 African countries. Its general council consists of representatives from all member countries. The Board has seven members, with representatives from French-, English- Portuguese and Arab speaking Africa. APNETs secretariat is in Harare, where the executive secretary is placed.

An active network between publishers in Africa has been established, and training within a number of fields have been carried out regularly. Marketing is carried out through different channels, where participation in book fairs, production of newsletter, book catalogues covering different fields and participation in different international forums are the main ones. APNET also carries out research in different field such as inter-African distribution, analysis of demand etc.

APNET receives support from a number of agencies. These are mostly grouped together within the Bellagio Publishing Network (BPN), which co-ordinates the working partnership between donors and African Publishers, with APNET as the major partner. The partnership aims to facilitate funding, share information and strengthen lines of communication between south and north where appropriate. Some funding agencies, for example Sida and Rockefeller Foundation, have given their contribution in the form of budget support. Others, such as NORAD, Danida, Heinrich Boll Foundation, ADEA, CTA, Netherlands Ministry for foreign Affairs, Hivos and UNESCO have tied their support to specific activities. Funding from external agencies has varied between approximately 60 -90% of APNETs total budget, during the years 1995-1997.

In 1997, APNET completed its second project cycle (1995 - 1997) and the third phase is planned to start in 1998, up to 2000. The reason for the evaluation is that an analysis of result is needed as a guiding instrument for APNET and donors in order to further improve results.

The purpose of the evaluation is two folded, (i) the first and the major one is to provide input for APNETs internal learning with the aim of improving results in the future, (ii) the second one is to provide information to the funding agencies on how to best serve APNET in their efforts to meet their objectives.

## **2. Objectives**

### **The objectives of the evaluation**

- 2.1 to sum up and analyse the results of achieved by APNET in terms of impact, cost-effectiveness and sustainability,
- 2.2 to assess the effectiveness of donor support for APNET,
- 2.3 to identify and analyse negative and positive aspects of the implementation, as well as strengths of the programme,
- 2.4 to make recommendations for the future.

## **3. The Assignment**

The evaluation shall be carried out in two steps following the work plan and time table suggested by COWI in the tender, dated 25 June 1998 and amendment to tender, dated 13 July 1998.

The tasks should be sub-divided into three steps: to describe, to analyse and to conclude/recommend. The analysis should be problem-oriented and distinguish those factors that have been within the control of the organisation from those external but which have affected the implementation of the project.

Gender relations should be analysed through out the study. Different relationships should be clarified at each stage of analysis, i.e. internal, intra-continently and internationally<sup>1</sup>. As the Programme is spread all over Africa, descriptions and analysis should highlight this when relevant, i.e. regional/sub-regional/national differences or similarities regarding objectives, solutions, problems, actors, target groups etc.

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<sup>1</sup> The internal relationship refers to secretariat, board and members, the intra-continently refers to other book related organisations and the international refers to relationship with partners as well as to public contacts.



The evaluation shall cover, but not necessarily limit itself to:

**(i) describe and analyse**

- 3.1 the original objectives of APNET, any amendments to these objectives over the period 1992 -1997, and the degree to which the programme has been able to meet its' objectives at different levels. The analysis should differentiate between short and long term effects. If other results than the planned ones have been reached, positive and negative ones, these should also be described and analysed,
- 3.2 the programmes planned, principal approaches and strategies employed to meet the objectives.
- 3.3 the indicators used by the Board and the Secretariat for monitoring APNET's performance,
- 3.4 the overall mission, the organisation, management, capacity and co-ordination of the programme in relation to the stated objectives and planned programmes. The analysis should also assess the internal efficiency,
- 3.5 the competence building taking place. What were/are the perceived training needs of indigenous publishers in terms of technical, financial and infrastructural capacities and has Training carried out by APNET responded to these needs?
- 3.6 the target group of the programme compared to the beneficiaries. Have the intended group been the beneficiaries?
- 3.7 the various components of the programme, their relative cost, and means of funding. Do the achievements justify the use of resources?
- 3.8 communication at international, regional, sub-regional and national level, i.e. involving NPAs<sup>2</sup>, regional representatives, secretariat, donors and partners,
- 3.9 the impact of external factors upon the programme,
- 3.10 the strategies adopted by the Board and the secretariat in order to ensure maximum sustainability<sup>3</sup>,
- 3.11 the co-ordination between the different funding agencies, their demands on reporting, monitoring, channelling of funds etc. The analysis should include impact on APNETs performance, ownership, capacity building.
- 3.11 the history and philosophy of the relationship between APNET and BPN and in light of this, explore the nature and effectiveness of working relationship between (i) APNET - BNP, (ii) APNET - Bellagio secretariat,
- 3.12 the owners of the programme. Who has been involved in the different stages; planning, implementation, monitoring etc.,

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<sup>2</sup> NPA stands for National Publishers Association

<sup>3</sup> Sustainability is in this context not only focusing on financial sustainability, but also focusing on policy changes with relevant fields in the different countries, the development of NPAs etc.

- 3.13 the funding base; strong/weak funding base, usage of different funds, implication on ownership, self-sustaining, management?
- 3.14 active promotion of gender equality both in APNET's secretariat and in its training programmes and other activities,
- 3.15 APNET's contribution to book policy development in a sample of different countries,
- 3.16 other active actors within the fields, collaboration and complementarity between these and APNET such as; ABC, Zimbabwe Book Fair, ADEA Working Group on Books & Learning Materials, World Bank, multinational publishing companies etc.
- 3.17 the extent to which APNET has succeeded in fostering the nascent publishing industry in parts of Africa where publishing is in its early stages,
- 3.18 the political and social factors and the economic climate in Zimbabwe, when relevant to APNET's work,
- 3.19 other factors, beside the ones mentioned above (internal/external), which has had a significant impact on the programme.

#### **(ii) Conclude and recommend**

Conclusions and recommendations should emerge from, and be supported by, the analysis of the issues listed above. General strengths and weaknesses of the project should be highlighted, as well as recommendations for the future.

### **4. Methods**

The methodology suggested by COWI in the tender, dated 25 June 1998, shall be used.

The evaluators should identify and clarify sources of data, written and verbal, including background information on the publishing industry in Africa pre-dating APNET, (ii) information provided by and about APNET, (iii) information on the African publishing industry, dating from APNET's birth to the present, but not directly related to APNET. Analysis of impact should be made on empirical evidence as far as possible and not only based on general discussions and available reports. External factors, such as the history of African industry, the colonial and post-independence economies, government support to the development of indigenous industry and African NGOs, shall be analysed when relevant.

A focused and more limited ToR will be developed for the second part of the evaluation based on the key findings identified during the desk study.

### **5. Consultants**

The team shall consist of Lars P. Christensen (team leader), Bodil Folke Frederiksen and Cecilia Magnusson Ljungman.

COWI shall use local consultants as stated in the tender, dated 25 July 1998, and amendment 13 July 1998. Local consultant(s) shall have adequate qualifications and experience for the assignment. Before contracting local consultant(s), Sida shall be informed and given the possibility to react on COWI's choice of local consultant(s). Sida will pay fees for local consultants to COWI in accordance with agreed budget, Sida's Standard Conditions for Short Term Consulting Services and this Terms of Reference for the Evaluation of APNET. Any additional costs and costs other than those presented in the work plan and agreed budget, arising from use of local consultant(s) will be covered by COWI.

## **6. Time frame**

The evaluation is scheduled to be carried out in August - November 1998, during a period of 30 manweeks, including planning and report writing.

## **7. Reporting**

An oral summary should be delivered to APNET's secretariat in Harare, if practical. 3 copies of the draft report shall be submitted to Sida, 2 copies to APNET and one copy each to the concerned donors, within 14 days of the completion of the mission and no later than 30 November. Within 2 weeks after receiving Sida's, APNET's and concerned donors' comments on the draft report, a final version in 10 copies and on diskette shall be submitted to Sida. Subject to decision by Sida, the report will be published and distributed as a publication within the Sida Evaluations series. The evaluation report shall be written in Word 6.0 for Windows or a compatible format and should be presented in a way that enables publication without further editing.

The reports shall be written in English and have a length of 30 (minimum) to 60 (maximum) pages, out of which the executive summary shall be 4-6 pages.



## **Annex 2: List of Persons Met**



## **List of Persons Met**

### **APNET Board**

Richard Crabbe	Chairman, Anglophone West Africa (Ghana)
James Tumusiime	Vice-Chairman, East Africa (Uganda)
Hamidou Konaté	Treasurer, Francophone West Africa (Mali)
M. Moshoeshe Chadzinwa	Southern Africa (Lesotho)
Samuel Matola	Lusophone Africa (Mozambique)
Medani Ahmed	Northern Africa (Sudan)
Ngandu Tshimanga	Central Africa (Cameroon)

### **APNET Secretariat**

Gillian Nyambura	Executive Secretary
Tainie Mundondo	Trade Promotion/Membership Officer
Akin Fasemore	Training Co-ordinator
Emmie Wade	KAWI Project Manager
Debra Chindiya	Receptionist
Godfrey Mpunga	Office Assistant
Ruvimbo Mudede	Accountant
Mr T. Mudede	Accountants

### **APNET Founding Members**

Chief Victor Nwankwo*	Fourth Dimension Publishing Co. Nigeria
Henry Chakava*	East African Educational Publishers, Kenya
Woeli Dekutsey	Woeli Publishing Services, Ghana
Paul Brickhill	Former Executive Secretary
Roger Stringer	Zimbabwe

### **Sida**

Anita Theorell	Head, Culture & Media Division, DESO
Sigrid Halvarsson	Education Division, DESO
Helen Nordensson	Culture & Media Division, DESO
Katharina Zinn	Culture & Media Division, DESO

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\* Telephone interview

## Publishers and NPAs and Country Case Study Resource Persons

Conde Abdouramane	Responsable Service National d'Alphabétisation
Gbenro Adegbola	Bookcraft Ltd. , Nigeria
Amos A. Adeniyi	A. A. Adeniyi Commercial Enterprises, Nigeria
Mobolaji Adenubi	Author
F. A. Adesanoye	Ibadan University Press, Nigeria
Kola Osunsanya Agunlote II	Kola Sanya Way to Success Ent. Nig. Ltd, Nigeria
Chii Akporji	Minaj Publications, Nigeria
Dayo Alabi	Nigerian Booksellers Association, CSS Limited
Chief G. A. Alawode	Signal Educational Services Ltd, Nigeria
Ms M. Arends	UNESCO-Education Expert (Mozambique)
C. N. C. Asomugha	ABIC Books & Equipment Ltd, Nigeria
El Hadj Salamy Ba	Trainer for APNET (part took in training of trainers)
Ayoyinka Babatunde	Secretary, Nigerian Publishers Association
Mr. Bankole	University of Lagos Press, Vice Chairman NPA
Mr de Barca	Editora Escolar, Mozambique
Abdoulaye Beye	General Manager CASTEL, secrétaire aux relations extérieures REPROLIG
Ondugo Brown	Jacaranda Design Ltd.
Ouigo Camara	Chef de section Editions scolaires, division manuels scolaires à l'Institut national de recherche et d'action pédagogique (INRAP)
Mr J. Cartoze	Coopimagem, Mozambique
Mr S.J. Chifunyise	Zimbabwe Writers Union-Harare Chapter
Mr S.J. Chifunyise	Secretary for Education, Sport & Culture
Mr Chipunza	Chairman Zimbabwe Library Association
Emeka Latz Chukwukelu	New Generation Ventures Ltd., Nigeria
Lazarus N. Chukwukelu	New Generation Books, Nigeria
Mohamed Hamirou Conté	Directeur Général Festi-Kaloum
Mr F. Couto	Ndjira/Caminho, Mozambique
Mme. Elisabeth Degou	Bibliotecque Franco-Guinéenne
Addourahaiane Pella Diallo	Chef du Projet de developpment d'un réseau bibliothèques publiques
Bailo Televel Diallo	Director, Department of Culture
Ibrahima Ninguelande Diallo	Directeur Général, l'Institut national de recherche et d'action pédagogique (INRAP)
A. O. Echebiri	Longman Nigeria PLC, Former Chairman of NPA
Marie-Agathe Amoikon Fauquembergue	CEDA, Côte d'Ivoire
Mohamed Fawaz	Président Directeur Général Imprimerie Papeterie Moderne



Omari Gichogo	Secretary and Editor Nairobi University Press, Treasurer KPA, Kenya
Wairumi Gichohi	Executive Officer KPA, Kenya
J. G. Githenji, Publishing Manager	Kenya Literature Bureau
Ben J. Hanson	Fidallyn Productions, Zimbabwe
Edeman Igbinosun	Spectrum Books Ltd, Nigeria
Arlindo Isabel	INALD, Angola
Mme. Salimata Kaba	Service National d'Alphabétisation, Trésorière REPROLIG
Nancy Karimi, Publishing Manager	Jomo Kenyatta Foundation, Kenya
David K. Khayo	Jomo Kenyatta Foundation- Educational publishers & printers, Kenya
Kitwana Kizua	Kizua Publications, Tanzania
Pamela Kola	Writers Association of Kenya
O. U. Lawal-Solarin	Literamed Publications Ltd. Chairman NPA.
Evelyn M. Leigh	African Universities Press
Mr Luphahla	College Press, Zimbabwe
Mr Luphahla	Zimbabwe Book Publishers Association
Mr Machingaidze	Ministry of Education, Sport & Culture
Mr D. Mackenzie	Longman Zimbabwe
Mrs Madondo	Zimbabwe Publishing House
Samuel M. Maitha	Deputy Director, Kenya National Library Service, Member of the Board, Kenya Book Development Council
Ms A. Majome	Zimbabwe Women Writers Union
Jimmy Makotsi	Publishing Manager, East Africa Educational Publishers, Kenya
Mrs Mathathu	Popular Education Collective, Zimbabwe
Mr G. McCullough	Academic / Baobab Books Zimbabwe
Stephen Mirero	Kenya Rural Enterprise Programme
Mr A. Muhamed	Leia Commercial, Mozambique
David N. Muita	Managing Director (MD), Macmillan Kenya Ltd. President of KPA
Ray Munamwimbu	Zambia Educational Publishing House
Mr D. Mungoshi	Zimbabwe Writers Union-Midlands Chapter
Mr F. Mupamhadzi	Confederation of Zimbabwe Industries (as the Secretarial service providers to the ZBPA)
Mr S. Mutetwa	University of Zimbabwe Publication
Serah Mwangi	Focus Publications Ltd, Kenya
Mr Navarro	National Writers Union
Chief Victor Nwankwo	Fourth Dimension Publishing Co. (Former Chairman of APNET)

Bachir Niane	Secrétaire d'Edition SAEC, secrétaire à la communication, REPROLIG, Guinea
Janet W. Njoroge	General Manager, Longhorn Kenya Ltd.
Mr Nyamangara	Zimbabwe Book Sellers Association
Yinka Obatuyi	Nelson Publishers Limited, Nigeria
Professor Thomas R. Odhiambo	Dag Hammarskjöld Foundation
Akoss Odori-Mensah	Sub-Saharan Publishers, Ghana
Ayo Ojениyi	Heinemann Educational Books (Nigeria) PLC
Law Okonkwo	University Press PLC, Nigeria
Bankole Olayebi C	Bookcraft Ltd., Nigeria
G. O. Onibonoje	Onibon-Oje Publishers, Nigeria
Oluronke O. Orimalade	University of Lagos Bookshop
Mr M. Ouane	Dinamee Editorial Division, Mozambique
Robert J. Palmeri	ASSEDI, Côte d'Ivoire
Dr Pfukani	Ministry of Education, Sport & Culture
André Proctor	Juta and Company, South Africa
Frank Segbawn	Sedco Publishing Ltd. Ghana
C. D. Shah	Textbook Centre, Nairobi
Mr Mohammed Sheikh	Trans Africa Book Sellers, Kenya
Shade Shinkaiye	Longman Nigeria PLC
Saïdou Souare	Coordonnateur National du Programme d'Ajustement Structurel de l'Education (PASE)
Mamadou Aliou Sow	Directeur Général of Editions Ganndal and chairman of REPROLIG, Guinea
Ms I. Staunton	Academic / Baobab Books Zimbabwe
Harriet Tagoe	Readwide Ltd. Ghana
Mr W. Tekede	National Archives of Zimbabwe (ISBN section on authorship data)
Mr Bhowa Tendekai	UNESCO (Resource Centre)
Saïkou Yaya Dieng Thiung	Director of Librairie de Guinée
Amine Toure	Directeur Financier Festi-Kaloum
Bandian Traore	Assistant Director, Department of Culture
Gacheche Waruingi	Phoenix Publishers Ltd, former KPA President, Kenya
K. Sam-Woode	Sam-Woode Ltd. Ghana

### **APNET Partners and Consultants**

Miriam Bamhari/Mrs. Ndebele	Executive Secretary and acting ES for the Zimbabwean Book Development Council
Emiel de Bont	Royal Netherlands Embassy, Harare
Mary H. Bugembe	Co-ordinator Pan African Children's Book Fair
James Currey	James Currey, England

Abdi Foum	First Secretary, Swedish Embassy, Harare
Mary Jay	African Books Collective
Rob Kohlmann	ITC
Kurt Kormarek	GTZ Ghana
Marie Laurentin	Les Joie Les Livres
Ruth Makotsi	Consultant/ Intra-African Trade Study
Tricia Mbanga	ZIBF
David Membrey	Book Aid International
Mulekeni Moyo Ngulube	UNESCO Zimbabwe
Catherine Nicholson	Book Aid International
Carol Priestley	ADEA-WGBLM
Hendrik Roelofsen	Senior Regional Trade Development, Advisor, ITC
Katherine Salhani	Bellagio Secretariat
Ros Sherwin	African Books Collective
Kelvin Smith	Book Aid International
Carew Treffgane	ADEA-Working Group for Books and Learning Materials
Rachel Wiggans	Bellagio Secretariat
Hans Zell	Hans Zell Publishers



## **Annex 3: List of Materials Reviewed**



# List of Materials Reviewed

## Articles and Books

1. Adesanoye, Festus Agboola. "The Book in Nigeria." Ibadan: *University Press*, 1995.
2. Altbach, Phillip G. *Publishing and Development in the Third World*. London: Hans Zell Publishers, 1992.
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4. Bamhare, Miriam. "Zimbabwe Celebrates its Second Annual National Book Week." *African Publishing Review*, Vol. 5 No. 4 July/August 1996.
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3. Report on APNET Meetings Held in Nairobi, 8 - 13 April 1995.
4. Minutes of the Second General Council Meeting of the African Publishers' Network, 25-26 May 1995.
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6. "Report to General Council Meeting" Thursday 25th May, 1995, Second APNET General Council Meeting: Nairobi, 25th-26th May 1995.
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8. Report from the APR Project Committee: May 1995.
9. "Library Acquisition of African Books." Report presented by Murray McCartney at the APNET Open Forum, Harare, 2 August 1995.
10. "Enhancing African Coverage in International Databases." Report from a Workshop, Zimbabwe, African Publishers' Network, AAAS Sub-Saharan Africa Programme, August 1995.
11. Activity Report 1995/96.
12. 1996/97 Programme, Projected Activities and Budget.
13. "Establishment of the APNET Research and Documentation Centre", Report to ADEA Books and Learning Material Work Group, October 1997.
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17. APNET Membership Map.
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### **APNET Training**

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2. API Mission Statement - A Project of the African Publishers Network
3. API National Training Workshops.
4. API Semi-annual Report (October 1997 - March 1998).
5. API Training Schedule 1998.
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7. APNET Memorandum: Training Priorities for 1998.
8. APNET Training Programme Aug. - Dec. 1997.
9. "Book Marketing", Report on the Workshop on Book Marketing, Kenya Publishers Association and the African Publishing Institute, 11-13 June, 1997, Nairobi.
10. Des éditeurs africains à l'école du marketing, Les Echos No. 746 du 18 juin 1997.
11. Guidelines to NPAs on API-sponsored Training Workshop.
12. Financial and Narrative Report for the Financial Management Workshop for West Africa, Accra, Ghana, 3-5 November 1996.
13. "Material of Development Project of the African Publishing Institute (API)", A Project of the Training Programme 1998-2000.
14. Orford, M. "Workshop Report on Using Computers as a Tool in Publishing", 17-21 February 1997, Windhoek.
15. Programme de Formation, Institut Africain d'Édition.
16. "Publishing Training Project." The Publishers' Association of South Africa, Report to the APNET General Council.
17. "Regional Workshop on Electronic Publishing", 18th-21st November, 1996, APNET.
18. "Sales, Marketing and Distribution", Financial & Narrative Reports of training held in Ethiopia 16-19 September 1996.
19. Status Report of Training Workshops for 1997.
20. Textbook Publishing Management Workshops.

## **APNET Trade Promotion**

1. Report on the 11th New Delhi World Book Fair, 5th - 13th February 1994.
2. Report on the 9th Zimbabwe International Book Fair, 3rd - 7th August 1994.
3. Growing African Market for Books.
4. Report on Singapore Festival of Books and Book Fair 3-11 September 1994.
5. APNET Report on Trade Promotion, April 1993 to April 1995, An overall Rundown of Events
6. APNET Permanent Exhibition Price List, 1995.
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9. Zimbabwe International Book Fair, Harare 29 July - 3 August 1996, Report. African Publishers Network
10. African Publishers' Network 1996 Price List for ZIBF.
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27. "Promoting Intra-African Book Trade: Proposals for a Long-Term Strategy". Richard Crabbe, Chairman African Publishers Network and General Manager/Publisher, African Christian Press, Ghana, 1998.
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3. The Report on APNET Seminar on World Bank Procurement Policies and Procedures, Held on Saturday, 27 May 1995, Nairobi, Kenya.

### **Bellagio Publishing Network**

1. All e-mail and fax correspondence with APNET from October , 1993 to July 1998.
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3. Book Fair Bulletin, Number 17/July 1998

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2. "Kenya Country Report." David Muita, Kenya Publishers Association, 3 August 1998, Zimbabwe
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4. "Towards a Sustainable Readership - A Publishers Interpretation." Abdullah Saiwaad, the Publishers Association of Tanzania. Presented at the Writers' Workshop, ZIBF 1998.
5. "Booksellers and Publishers Association of Zambia". Presented at APNET Forum, Zimbabwe International Book Fair, 1998.
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### **ADEA**

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4. Working group on Books and Learning Materials (pamphlet).
5. Information Note
6. Partnerships for Capacity Building and Quality Improvements in Education, Proceedings of ADEA Biennial Meeting, Dakar Senegal (14-18 October 1997)
7. Minutes of ADEA Books WG Technical Meeting, ZIBF, 1998

## **Annex 4: Questionnaire**



## Questionnaire/Interview Guide for Publishers

**Name**

**Name of publishing outfit**

*(The name of the publisher is for the evaluators' use only. The evaluators will not mention any publisher by name in the report nor share the completed questionnaire forms.)*

**Number of  
Staff**

**Year  
Established**

**Type of Publishing (general, fiction, textbooks, children's books, etc.)**

**Range of published materials produced and rough percentage estimates of each** (e.g. books=70%, maps=15%, magazines=15%, etc.)

**Main languages published** (rough breakdown by percentages e.g English=85%, Swahili=15%)

**Main destination of sales:**

Local Market		Export Market	
% to urban areas	% to rural areas	% to Africa	% outside Africa

Does your business include book distribution? **YES / NO**

1. Please indicate below how you view APNET's major areas of work:

	Very Important	Important	Not so important	APNET should do more	APNET meets the need	APNET should do less
<b>Networking</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Training</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trade Promotion</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Research &amp; documentation</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Advocacy</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Please indicate below how you have used APNET services:

	Not Used	Used a little	Used some	Used a lot	Satisfied with usage	Not satisfied
<b>Training</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trade Promotion*</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>African Publishers Review</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Resource Centre</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Research Activities</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Networking</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Consultancy Register</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

\* Including sponsorship programme, the collective APNET exhibit at book fairs, book fair seminars, catalogues, etc.



3. a) What are your four greatest problems as a publisher? List in order of priority.

b) Are the problems you have listed of the nature that is beyond the control of APNET or could APNET address these problems if its priority setting was different? Please explain.

4. Which of the following ways do you get informed about APNET and its activities/services? How do you communicate and how often? If you tick "other", please specify.

**APR**  
**APNET Secretariat**  
**Board Member(s)**  
**NPA**  
**Book Fairs**  
*Other*

Frequency				Means					
Main source	Sometimes	Rarely	Never	Face to Face	E-Mail	Fax	Telephone	Post	Courier

5. a) Has APNET played a role in linking you with other publisher/publishing associations in other countries? **YES / NO**. If yes, **indirectly** / **directly** (please specify)?

b) What form has this linkage taken?

c) Has this linkage been useful? Please explain.

6. a) Are you concerned by APNET's total dependency on donor support for funds?

**YES / NO**

b) Would you be willing to pay a membership fee to your NPA of which part would pay for APNET's infrastructure? **YES / NO**

c) Would you be willing to contribute to APNET's funds by paying for some of the services provided by APNET? **YES / NO**

d) If so, which ones and how much of the cost?

	Nothing	Less than 10%	Less than 50%	More than 50%	100%
<b>Training</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Trade Promotion</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>African Publishers Review</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Resource Centre</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Research Activities</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Consultancy Register</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Are there services that APNET does not currently provide that you think APNET should pursue in order to become more financially sustainable? Please explain.

## **Annex 5: Abbreviations**



## List of Abbreviations

ABC	African Books Collective
ACURIL	Association of Caribbean Universities Research and Institutional Libraries
ADEA	Association for the Development of Education in Africa
APNET	The African Publishers Network
APR	African Publishing Review
BAI	Book Aid International
BPN	Bellagio Publishing Network
CTA	Centre for Agricultural Technology
CHISCI	Children's Science Publications in Africa
Danida	The Danish Ministry of Foreign Affairs
DSE	Deutsche Stiftung für Internationale Entwicklung
FILDAK	Foire Internationale du Livre et du Matériel Didactique de Dakar
Finnida	The Finnish Ministry of Foreign Affairs
GBPA	Ghana Book Publishers' Association
GIBF	Ghana International Book Fair
KPA	Kenya Publishing Association
NORAD	The Norwegian Ministry of Foreign Affairs
NPA	National Publishing Association
PACBF	Pan-African Children's' Book Fair
PATA	Publishers' ssociation of Tanzania
REPROLIG	Réseau des Profressionels Guinéens du Livre
Sida	Swedish International Development Co-operation Agency
UNESCO	United Nations Educational, Scientific and Cultural Organization
ZBPA	Zimbabwe Book Publishers' Association
ZIBF	Zimbabwe International Book Fair



## **Appendix 1: Nigeria Country Case Study**





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**Evaluation of APNET:  
Nigeria Country Case Study**

Final Report

January 1999



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**Annex 2: References**

# 1 Introduction

The purpose of the Nigerian country case study is to gather and analyse information that can provide a more complete picture of the environment that APNET works within, how APNET is making an impact and whether it is meeting the needs. The main aim is to establish (i) an overview of the publishing situation in Nigeria, (ii) an understanding of the key challenges facing the publishing industry; (iii) an understanding of APNET's role in the country with regard to both the Nigerian Publishers Association and the publishing outfits themselves.

This case study is one of five<sup>1</sup>. While obviously every publishing industry has its unique features, Nigeria represents one of the largest and most well-established African publishing industries. Population-wise, Nigeria is larger than all the other West African countries put together and its two biggest cities (Ibadan and Lagos) are the largest in Sub-Saharan Africa. This of course implies not only a large market, but also an enormous number of children of school-attending age. Nigeria also distinguishes itself by being a country that has seen a down-turn in publishing, as opposed to a continual development. Furthermore, Nigeria, along with South Africa, is faced with the problem of piracy, which many fear will be a problem for other African publishing industries in the years to come.

This case study is based on:

- books, articles and other documentation<sup>2</sup>
- in-depth interviews with the Nigerian Publishers Association (secretariat, president, vice president and former presidents) publishers, printers, writers, the book sellers association, book shops, and representatives from Government ministries<sup>3</sup>
- questionnaires
- a workshop with chief executives from member firms in the Nigerian Publishers Association

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<sup>1</sup> The other four are Guinea, Kenya, Zimbabwe and Mozambique

<sup>2</sup> See annex 1 for list of references

<sup>3</sup> See annex 2 of list of persons interviewed

Most of the interviews were conducted during a mission to Nigeria carried out by Bodil Folke Frederiksen and Cecilia Magnusson Ljungman between October 7 and October 15, 1998.

Eighteen different Nigerian publishers filled out a standard questionnaire that was prepared for all five country case studies. These eighteen publishers covered a range of different outfits including small, large, indigenous, multinational, old, new, scholarly, general, textbook and African language publishers. The sampling represents about half of the active members of the Nigerian Publishing association. It does not represent non-members of the NPA. Sometimes the sampling is slightly less than eighteen as not all questionnaires were completed correctly.

The chapters that follow provide a short historic perspective of publishing in Nigeria; a profile of the book environment; an overview of publishing in Nigeria and its main challenges; a description of the Nigerian Publishers Association; an examination of piracy in Nigeria; an analysis of the interaction between the book industry and government actors and a discussion on the role and impact of APNET in Nigeria.

## 2 Historic Perspective of Publishing and Book Policy

The earliest book publishing in Nigeria came with the Christian missions in the middle of the last century. In Calabar and Lagos, printing presses were set up to provide Bible translations. During the first half of the 20th century publishing was still on the whole associated with the colonial power and their Literature Bureaus, although the highly productive printing and book trading facilities in the Eastern regional centre of Onitsha were independent of colonial intervention. In the 1960s, indigenous publishing spread to other regions, particularly Yorubaland. With the Government policy of free primary education for all, introduced in 1972, the industry experienced a boom which is yet to be equalled. However, though millions of textbooks were produced for the Nigerian market it was mainly multinational firms like Longman, Evans Brothers, Macmillan, Oxford Press and Heinemann that benefited from the vast spate of book production. The decisive step towards making book publishing an indigenous Nigerian industry came with the 1976 policy of "Nigerianisation" of companies. From that year foreign companies were only allowed to own 40 percent of a company's capital.

The 1960s and 1970s saw the finest flowering of Nigerian literature. The high standing of world famous writers like Chinua Achebe, Wole Soyinka and Flora Nwapa created a world-wide interest in Nigerian literature and Nigerian literary criticism. Nigerian writers provided set books for syllabi in the whole of Africa and parts of Europe, but many of the best titles continued to be published externally.

From 1976 and onwards the 'big five' of Nigerian publishing continued their activities in the highly profitable textbook market - now with books written and produced in Nigeria. The aim of the government was that a hundred percent of books for primary and secondary schools, and fifty percent for tertiary education should be produced in Nigeria. University Presses in Lagos and Ibadan also has some success in the 1970s, and still publish books for tertiary education. Indigenous companies such as the successful Spectrum Books and Literamet were set up at this time, and others like Fourth Dimension in Enugu and Onibonoje in Ibadan, the capital of publishing, had their heyday. Publishing was helped along by an environment which was conducive: A proliferation of newspapers and magazines, a middle class which was dynamic and development oriented, and an expanding educational sector, which emphasised not only primary

but also secondary and tertiary education. On the other hand, governments were mostly highly repressive military regimes and censorship was ever present. Although more writers and journalists than publishers were affected, at least one publisher went into exile for political reasons in the 1990s.



## 3 Overview of the Book Environment

### 3.1 Components of the Book Environment

Apart from the Nigerian Publishers Association (see chapter 5), the Nigerian book environment consists of a range of various trade associations as well as federal and state government agencies:

- **Government bodies:** The Nigerian Educational Research and Development Council (NERDC) is the body that prepares the syllabi for primary and secondary education in Nigeria. All states in Nigeria follow the same syllabi but the educational programme varies from state to state. Thus, the state ministries of education play an important role.
- **The Nigerian Book League:** This is an umbrella organisation of the five main trade associations of the industry in Nigeria - authors, publishers, printers, booksellers and librarians. The aim is to influence government decisions and policy regarding book production, procurement, and tariffs on printing materials. Efforts have been made to strengthen the league in recent years.
- **Nigerian Book Foundation (NBF):** Launched in 1991, the NBF aim is to bring together "the major professional groups in the book industry, the relevant ministries /Agencies and non-governmental organisations ... to take a holistic (rather than the usual fragmented) view of book development in Nigeria, plan for its orderly growth, monitor the components of the book chain, and take appropriate action".<sup>4</sup> According to the NPA secretariat, the NBF, as an NGO has problems implementing its decisions.
- **Nigerian Booksellers Association (NBA):** Established 35 years ago, this association virtually ceased to exist in the 1980s. The main problems were the economic slump and the fact that governments bought books from publishers directly. The Nigerian Publishers Association has played a key role in resuscitating the booksellers' association by agreeing to certain discount rates at which books will be sold to booksellers which in turn enables them to sell at published

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<sup>4</sup> Nigerian Book Foundation: APR May/June 1994.

prices. In the last couple of years the association has returned with force, and organised a three-day book exhibition, workshops for its members and become an important member of PABA, the Pan-African Booksellers Association. There is also a Nigerian University Booksellers Association although most of Nigeria's 24 federal and 12 state universities never had or no longer have bookshops. According to the chairman of this association, Mrs. Orimalade, Ibandan, Ife and Lagos University bookshops are about the only functioning university bookshops.

- **Association of Nigerian Authors (ANA):** consists mainly of creative rather than academic writers.
- **Printers Association of Nigeria (PAN):** There are no less than 5000 printing houses<sup>5</sup> operating in Nigeria.
- **Nigerian Librarians Association:** This is the only association in the Nigerian book industry where individuals as opposed to corporate bodies are members.
- **Scholarly Publishers of Nigeria (SPAN):** SPAN looks after the interests of institutional publishers, in particularly the university presses. Lagos, Ife and Ibadan University presses are the most prominent.

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<sup>5</sup> D. Folorunso Elaturoti, Abadina Media Resource Centre, University of Ibadan, "The Publisher" Volume 4, No. 1, September, 1996.

## 3.2 Facts about the Nigerian Book Environment

### 1. Population

120 million  
 Grow rate 3.05%  
 Fertility rate 6.17 children born/woman  
 Age structure 0-14 years: 45%  
 Pop. in primary school: 23 million  
 Pop. in secondary school: 9 million  
 Pop. in tertiary level education: 2.5 million

### 2. Literacy rate - age 15 and over can read and write

Total population	57.1%
Male	67.3%
Female	47.3%

### 3. Languages English (official), Hausa, Yoruba, Ibo, Fulani

### 5. National publishing association

Members	70
Age	35

### 6. Training facilities related to publishing industry

A newly established two-year course at Yaba polytechnic (Lagos) which interacts with the publishing industry through internships and external examiners. Publishing is an elective within the communications courses at Ibadan and Lagos Universities.

### 7. Trade and sales statistics

Imports	US\$ 6.4 million (estimate 1997)
Exports	US\$ 140,000 (includes e.g. books printed in Nigeria for Beninois market)

### 8. Readership

Public libraries: 32

Sources: APR Vol. 4, No. 6, 1995.; CIA fact sheets, Nigerian Customs, UNDP.



## **4 Publishing in Nigeria**

### **4.1 An Overview**

Nigerian publishers cover books ranging from primary, secondary and tertiary level textbooks, children's books, scholarly books, Christian literature, fiction and general books. The vast majority of books are published in English though most publishers encountered published a few books in Nigerian languages. Typically publisher produces between 1% to 20% of their books in Nigerian languages. Publishers encountered by the team usually published in Yoruba, Igbo and Hausa. French is also a language that is becoming increasingly common, though mainly for language instruction.

The so-called "big five", Longman Nigeria PLC, University Press PLC, Macmillan Publishers Nigeria, Hienemann Educational Books Nigeria and Evans Brothers Nigeria Publishers Ltd. are seen as the companies that have traditionally set the pace of publishing in Nigeria. They tend to publish the full range of books and produce an average of 20 titles a year, with Longman leading at 40. While considered "multinational", not more than 40% of the shares of these outfits are owned by foreigners as a result of a deliberate governmental policy in the 1970s. Evans Brothers, while still referred to as a multinational, is in fact 100% Nigerian owned. Yet all of the "multinationals" benefit from the links with the mother company, particularly in terms of expertise and sale of rights. Other publishers are all considered indigenous. A few of these are as large or larger than the "multinationals".

Almost all publishers are privately owned except University Press Plc and Longman Nigeria Plc. While the former went public twenty years ago, Longman went to the market for capital only two years ago, the result of which was a reduction of the percentage of foreign owned shares to 28%. Its experiences so far include that the shares have risen slightly and that it has had to restructure its organisation to provide transparency to its some 5000 shareholders. The university presses, although they may be run like a private company (notable Lagos University press), are owned by the universities.

The Nigerian market is by far the most important for Nigerian publishers. However, one publisher encountered sold more books abroad (60%) than within Nigeria and one of the university presses earned more from (though sold a smaller quantity of) exported books. Of 15 publishing houses who responded to the question in the questionnaire, 12 outfits exported books, although sales from exports amounted to less than 10% among three-quarters of this group.

### Export Activity among 12 Nigerian Publishers

Exports only Europe / N. America	3/12
Exports only Africa	2/12
Exports to both Africa and Europe / N. America	7/12
Exports less than 10% of sales	4/12
Exports equal to 10-19% of sales	5/12
Exports equal to 20-29% of sales	1/12
Exports equal to 30-39% of sales	1/12
Exports equal to more than 40% of sales	1/12
Equal sales to Africa and Europe / N. America	5/12
Greater % sales to Africa than Europe / N. America	3/12
Greater % sales to Europe / N. America than Africa	4/12

Within Nigeria, the majority of sales are to urban areas, though several publishing outfits estimate that about a third of their sales are to rural areas. Furthermore, some publishers pointed out that while sales may actually take place in urban areas, they may be bought by people actually living in rural areas.

## 4.2 The Challenges

The recent change in the political climate in Nigeria has prompted a unmistakable feeling of optimism among publishers. Furthermore, the World Bank and the Petroleum Trust Fund (see chapter 6) is injecting capital into the publishing industry through their support to the educational sector. Nevertheless, challenges faced by Nigerian publishers are considerable.

While Nigeria used to be, inter alia, the most prominent fiction-producing nation in Africa, publishing in Nigeria has seen a significant stagnation over the years. According to publishers questioned, this is closely related to economic decline that Nigeria has seen during the past decades (foreign exchange problems, lack of capital, poor infrastructure, declining disposable incomes, etc.). Economic recession has meant that the output of children's literature, fiction and books of general interest has decreased. For example, a publisher such as Longman, produced over 60 titles a year in the 1970s and today the company is struggling to produce 40. While always being the most lucrative type of publishing, the dwindling market for other types of books has meant that textbooks, of which the demand can be guaranteed to

a greater extent, has gained an even more prominent role. The vast majority of books produced, are thus educational books.

As many as four out of five of the publishers questioned, recognised **capital** as one of their main problems, and of this group, 4/5 placed the problem as their number one challenge. Bank loans are allegedly not easy to come by. Apart from the fact that interest rates are high (over 25%), the main constraint was that banks (who "*do not understand the business of publishing*") are unlikely to grant loans to any project that does not provide returns in less than six months.

The reliance on imported "**raw materials**" for printing was also seen as a main problem (by more than half of the publishers), particularly since this requires foreign exchange upon which there are restrictions. One publisher, who established his outfit in the 1990s, mentioned that devaluation of the naira led to the fact that his initial start-up capital decreased to a quarter of its value in his first year of publishing. Paper, glue, and thread are to a large extent imported. Paper accounts for some 85% of the total book production costs in Nigeria<sup>6</sup> and this commodity is almost always imported. Apart from the foreign exchange issue, publishers and printers are also faced with paying duty on all imported materials.

One way of overcoming high paper and printing costs has been to print Nigerian books abroad and then re-import them. Paper and printing are cheaper in some other countries and in line with the Florence Accord of 1953, books can be imported duty-free into Nigeria. The prevailing economic situation has also led to that many of the publishing houses have diversified their activities to be able to ensure a level of return that allows them to publish less profitable books. These activities include:

- Printing non-book material for anyone interested by publishing houses that own their own printers
- Producing magazines
- Engaging in "contract publishing", where books are produced for a fee and handed over to the client
- Expanding into the educational sector
- Engaging in "special" or "vanity" publishing.

The latter publishing activity appears to be unique for Nigeria. Prominent people, often chiefs, write a book or commission a "consultant" to do so. The book is published in a small print run of a couple of thousand. The publishing house and the dignitary invite people to a so-called book launch to which the guests are invited to "contribute". A sort of bidding process takes place where the guests pay high sums for the book to prove themselves respectful and loyal to the dignitary. Supposedly the dignitaries do not traditionally accept money directly and the book offers a means of accepting money gracefully. The book is virtually only sold during the launch and afterwards the publisher and writer split the proceeds. The books are often of low quality and to a certain degree

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<sup>6</sup> Ibid

never intended to be read. Some publishers therefore see this type of publishing as an activity that degrades the industry.

Access to **modern equipment**, in particular good printing machines was seen as a major concern by nearly three out of five of publishers encountered. Few publishers, even among some of the more prominent houses, used computers in their editing work. While some publishers had their own printers, only one recently established publisher (who is part of a larger multi-media company) owned modern equipment. The poor quality of printing has led many publishers to print their books in Singapore, India and lately in Mauritius.

Availability of **well-trained personnel** was considered a main problem by over half of the publishers encountered. The NPA has held training courses over the years with varying intensity, even in the years prior to APNET's existence. Publishing is available as an elective at the universities in Lagos and Ibadan as part of the communications and information science courses. At Yaba Polytechnic in Lagos a two-year publishing course has been established. The course is relatively new. It interacts with the industry through internships and external examiners.

**Marketing and distribution** was regarded as an important problem by nearly 4/5 of the publishers surveyed. Resources and expertise within marketing is generally considered lacking. Bookstores are poor marketers and often not knowledgeable about the books they sell. Marketing and distribution within Africa was considered particularly difficult due to trade barriers, foreign currency and communications constraints. Among some members of the NPA, a need for a marketing structure for Nigeria that could be used by all interested Nigerian publishers has been discussed and attempts to study this option have also been made.

Buying and selling of rights, poor infrastructure and communications systems, political instability, lack of co-ordinated government policy regarding publishing, lack of government understanding of the publishing industry, lack of a reading culture and piracy<sup>7</sup> were all mentioned by two or more respondents as one of four main problems faced by the publishing outfit.

Censorship is an issue that has also affected the Nigerian publishing sector but has not been considered as a main problem area. Wole Solinka was censored as an author which led to all his books being taken off bookshelves. In addition, Ken Saro-Wiwa's *Sozzaboy*, which has previously been a set text for secondary schools, was removed from course lists. Generally, however, publishers have practised self-censorship to avoid falling out of favour. The current political change has resulted in the re-emergence of Wole Solinka's literature, as well as of books that had previously only circulated clandestinely. However, some self-censorship still applies, particularly regarding issues related to Nigeria's military.

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<sup>7</sup> See section 5.1



## 5 National Publishing Association

It is estimated that 900 large-scale publishing houses existed in 1988<sup>8</sup>. Based on ISBN numbers, Chief Victor Nwankwo, regarded by some as a father of Nigerian publishing, believes that as many as 1900 publishing outfits may exist, though a majority have only published one or a just a handful of books. He estimates that within the country there are 200 publishers that "were around yesterday and will be around today and tomorrow".

Meanwhile, there are around 75 publishers who are members of the Nigerian Publishing Association, of which about half are active. Non-activity among members is considered a result of the depressed economic situation. Membership is corporate and companies are usually represented by chief executive officers, only one of whom is a woman. Over 95% of its members are from the southern region of which two-thirds are from the Southwest. According to Victor Nwankwo, who has previously been the chairman of the NPA, this regional concentration in the south reduces the ability of the NPA to advocate and lobby state governments. Furthermore, he maintains that a chicken-and-egg situation exists, as publishers in the north are not involved because they do not know what is going on and they do not know what is going on because they are not involved. The publishing houses in the east have however made an attempt to organise themselves on a regional basis.

The NPA was established in 1965. It has had a total of 15 presidents who has each, according to the current president, Mr. Lawal-Solarin, contributed his own style to the development of the organisation. While certain activities, such as the publications of "The Publisher" of the NPA have been less frequent during certain periods (often a result of lacking funds or political instability), the organisation has still managed to play a role. In fact, the NPA has continued to be the most important player among the book industry associations. The age of the organisation is itself a strength and a testimony that its members feel it is important enough to support.

Since 1991 the NPA has had a Code of Conduct which also includes the memoranda and articles of association. It has been updated a couple of times with the latest amendments made in 1996. The aim of the organisation is to serve as a medium of exchange for publishers and to

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<sup>8</sup> D. Folorunso Elaturoti, Abadina Media Resource Centre, University of Ibadan, "The Publisher" Volume 4, No. 1, September 1996.

promote and protect the interests of the publishing industry. The activities it sets out to fulfil are promoting training courses, scholarship grants and prizes, to "collaborate as appropriate with the Ministries and other educational bodies", to provide facilities, including a library, for research into the area of publishing. The Code obliges adherence to the Nigerian copyright law. It further stipulates uniform sales discount, book exhibition and textbook review fees and that policies and activities within member firms should aim at stimulating other member firms. The Code also requires members to engage in proper relationships with authors so as to encourage authorship. A separate chapter deals with disciplinary issues and sanctions include a maximum fine of 500 naira (equivalent to 5 US\$ at current day's exchange rates), suspension and two year expulsion. In practice, the organisation does not enforce discipline except by threatening to do so.

The association has seven elected executive council members. General Meetings are held annually. Its main operational committees have been the Anti-Piracy Committee, Trade Practices Committee, the Professional Training Committee and Editorial Committee. Funding is entirely through membership, classified on the basis of turnover. However, the NPA has found it difficult to get members to disclose their actual turnovers and thereby demand a corresponding contribution. Contributions are also collected for special activities such as if the NPA decides for example to participate at an African book fair. In the 1980s before the currency was devalued, the NPA exhibited at Frankfurt and London.

The secretariat currently consists of eight full-time staff including an executive secretary, and operations manager, a secretary an accounts clerk, two guards, a driver and a gardener. For about ten years the executive secretary of the NPA has always been a university graduate with working experience. Only since April 1998 has the secretariat had its own premises, which have been given to the organisation by the state government of Oyo.

The main activities of the NPA include conducting training, advocacy, mitigating piracy, producing publications and providing information. Advocacy has focused on negotiating favourable terms for the Petroleum Trust Fund and reducing value added tax on paper, although the current president estimates that on the whole the outcome from lobbying has been fairly insignificant due to the difficult political environment in the country. The NPA has also served as a forum of discussion in which issues such as discounts to booksellers and pending World Bank tenders have been considered. The association has four publications - the *Code of Conduct*, *Nigerian Books in Print*, *The Publisher* and *The Newsletter*. Financial constraints have led to that none of these publications have been produced in 1998. In fact, the first two publications have not be published since 1996. Both the *Nigerian Books in Print* and *The Publisher* are sold by the NPA while the other two are distributed free of charge. *The Publisher* can be compared to APNET's *African Publishing Review* in that it contains reasonably long and

analytical articles about the publishing environment that seem to be highly relevant to the publishing community.

The NPA would like to develop its new premises, which it has named "Book House", by adding equipment such as a computer with e-mail linkage. It would also like to acquire equipment that will enable the premises to be used for training. Furthermore, the NPA would like other book industry organisations such as the Nigerian Booksellers Association and the Nigerian Librarians Association to set up offices within the NPA premises. The NPA feels that this would be an advantage from its point of view as it can ease communications. The response of the other associations, despite the obvious advantage of economies of scale, has so far been lukewarm.

## 5.1 Piracy

In one sense pirating of books is an intelligent response to a situation in which the market cannot supply the books that are demanded, or can only do so at prices which are too high. "Nature abhors a vacuum", was how one publisher expressed it. Imitation and piracy played an important role in the flourishing of the Onitsha Market literature and other popular writing. The notion of individual rights is fairly new in a Nigerian context. The size of the market and the business culture among sections of the population mean that there are good chances of quick profits in being able to quickly deliver for instance a pirated copy of a text book which may be sold out or too expensive. The quality of the pirated books is extremely poor, according to publishers interviewed. The book would come apart or be illegible after a few times' use, making pirated school text books useless. Some publishers seemed to admire and envy the flexibility of pirates who have extremely low overheads, but at the same time they see pirates as one of the greatest threats to their success or even survival.

"Today, the key "competitor" to any publisher's textbook is no longer to be found from amongst other publishers versions of the same textbook... but in the storerooms of pirate printers and booksellers ... around the country". Thus the press release from the NPA, September 1995. The statement followed raids carried out by the NPA in collaboration with the Copyright Council and the Police, where several printing presses were seized. The drawn out litigation, however, had stalled the efficacy of the campaign against piracy. Slightly less than a third of the publishers mentioned piracy as one of the four main problems for publishers. A popular textbook will be pirated in a low quality version and sold at half price to hard up parents of school children. Nigeria's progressive Copyright Law which opens up possibilities of seizing property and sealing of shops has made a difference, but as several publishers reported, "implementation is the problem". Apart from physical enforcement the NPA is conducting and supporting education of the public on rights and the dangers of piracy.

NPA collaborates with the international copyright organisation on the question of rights.



## **6 The Government's Relationship with the Book Environment**

### **6.1 Book Policy Development**

For Nigeria's many governments over the decades, most of which have been of a military character, book development and the role of books in education and national culture have not been a priority. There is no effective official book policy in Nigeria. Attempts have been made over the years to co-ordinate the efforts of the important players, i.e. the NPA, Association of Nigerian Authors, Association of librarians and booksellers. In the 1980s a Book Development Council was set up at the recommendation of a Book Congress, and it later changed into the Nigerian Research and Development Council, but informants agreed that the organisation has no significance. In the 1990s, a short lived Nigerian Book League got together NPA, librarians, printers and book sellers and later a private initiative was launched, The Nigerian Book Foundation. It meets regularly and has conducted book weeks since 1994 but does not seem to have the backing which is necessary to bring together the actors. NPA has undertaken some activities in bringing together stakeholders, but government is yet to show interest in promoting a favourable book environment. According to the Vice President of NPA such an environment would be characterised by "freedom to trade, freedom to create, freedom to experiment and freedom to compete on equal terms"<sup>9</sup>.

### **6.2 Educational Sector**

The Federal government's policy of free primary education for all came before "Nigerianisation" of the industry in the 1970s. Consequently, millions of schoolbooks were conceived outside of Nigeria, and as a result multinational firms benefited greatly from this policy. At present books are usually paid for by parents, though throughout the decades this policy has changed a few times and varied from state to state.

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<sup>9</sup> S. Bodunde Bankole, University of Lagos Press: "The Need for a Nigerian Book Policy" The Publisher, Vol. 5 no. 1 1997.

There are an estimated 23 million primary school students and 9 million secondary school students in Nigeria. The ratio of books to students varies from school to school and region to region. The situation is generally worse in the northern parts of the country where the ratio can be as low as 1 to 200. The Federal Ministry of Education through the Nigerian Education Research and Development Council (NERDC) develops the curriculum for primary and secondary education. The Directorate of Curriculum of the Ministries of Education follow the federal syllabus but set out their own programmes. Publishers produce books based on the federal curriculum. Several books for each subject are approved so that teachers are given a choice in selecting their course books. Every three years the ministries establish a committee to review the books. Publishers pay a fee of 1000 naira (roughly US\$10) to have their books reviewed by each state. Publishers lobby the ministries, school authorities and teacher associations to get their books accepted.

### **6.3 Recent Bidding Processes**

Since 1993, the World Bank has launched three bidding processes (twice in 1998) for English textbooks in Nigeria covering a range of subjects. The Nigerian government insisted that the bidding be limited to suppliers of textbooks currently in use. As a result, the World Bank sent out teams to identify which books were used in the schools.

For this project, the World Bank was mainly in discussion with the federal government. This led the publishers to complain. They were also unhappy at the level of bid securities required (2.5%) which the NPA argued should have been set at 1%. Furthermore, the World Bank allegedly discouraged the publishers from meeting within the NPA to discuss the project.

The latest bid also involves the actual distribution of books to the schools and only upon completion of this phase will publishers be fully remunerated. Pupils will pay a nominal fee roughly equivalent to five percent of the costs, for the books.

The Nigerian Petroleum Trust Fund is also expected to support the textbook sector in the coming months by subsidising all books by fifty percent. The production of books for this purpose has already started but as yet the publishers have not received the money.

## 7 The Role and Impact of APNET

### 7.1 Activities and Results

The Nigerian Publishers' Association has been a member of APNET from the beginning. Furthermore, one of APNET's founders and its first president of the board was from Nigeria. Some of the publishers in Nigeria have followed APNET's development quite closely and are aware of its activities, strengths and challenges. Others have limited knowledge, though seem to have a basic understanding. Not only did the knowledge of APNET vary from outfit to outfit, even within the same publishing house, views and understanding could be very different. Generally, the senior staff members/general managers had a more strategic understanding of APNET and the African publishing scene.

The most prominent activities of APNET in Nigeria are **training** and the **African Publishing Review**. The APR was received by all but two publishers, one of whom had stopped receiving the publication after a change of address. Of those who received the APR, 3/5 claimed to use it a lot. In addition, Nigeria has been one of a handful of member countries that have frequently and regularly submitted articles about its book industry.

A total of 5 training workshops have been held in Nigeria. These include a regional training of trainers workshop(1996), a regional workshop on electronic publishing (1997), a national market and sales representation workshop in 1997 and 1998, and a national foundation course on editorial production in 1998. When the APNET training curriculum was prepared, the Nigerian publishers maintain that substantial input was provided by Nigeria based on its own experiences of training in the years. The training of trainers' workshop has provided a resource base among Nigerian publishers. However, to date, no one encountered has been drawn upon by APNET. The two workshops held in 1998 followed the outline laid out by the API curriculum. Of the publishing outfits surveyed, 14 had benefited from one or more of the APNET funded training workshops.

A few publishers have been sponsored by APNET to attend book fairs. Only one publisher met said he sent books regularly to the APNET trade promotion collection.

Very few of the Nigerian publishers were aware of APNET's **research and documentation** activities. The NPA has been involved in APNET's research activities by contributing a case study of Nigeria for the APNET/ADEA study of intra-African trade. As this study has not yet been presented, less than a handful of the publisher met were aware of it.

The most important **source of information** about APNET is through the NPA, followed by the APR. The secretariat and book fairs are also ways in which Nigerian publishers receive information about APNET. Contact with board members has also been a way of receiving information about APNET. However, this means was mainly used when Victor Nwankwo was president of APNET board and almost exclusively consists of face-to-face contact. In fact, the postal system followed closely by face-to-face contact are the main means of transmitting information. Telephone and fax are used to a lesser extent. Only one publisher surveyed used E-mail (in correspondence with the APNET secretariat).

## 7.2 Publishers' Experiences and Views of APNET

Publishers who have an interest in APNET, also seem to have a better understanding of the general issues facing African publishing. This group of people is also more likely to send in articles to the APR. It would seem that Nigerian publishers would have reasons to feel "close" to APNET - for example, the first president of the board was Nigerian and Nigeria has had an important influence over the API training curricula. Yet, most publishers expressed that APNET feels "*very far away*". Some pointed out that Nigeria is itself so big that "*an APNET within Nigeria*" that tied all the states together (the NPA consists mainly of publishers from a few states in the south of the country) seemed a priority before a continental network. Furthermore, it is also the case that many of the problems Nigerian publishers face are best dealt with by the NPA.

The responses the team received from Nigerian publishers indicate that they find that all the five areas of APNET's work important. With the exception of one publisher who viewed research and development as "less important", all other responses saw networking, training, trade promotion, advocacy and research/documentation, as "very important" or "important". All publishers agreed that networking was "very important". A majority also replied that they think that APNET should do more within each area of work.



### Nigerian Publishers' Views on APNET Activities

	Very Important	Important	Not so Important
<b>Networking</b>	17		
<b>Training</b>	15	2	
<b>Trade Promotion</b>	12	5	
<b>Research &amp; Documentation</b>	10	5	1
<b>Advocacy</b>	11	5	

**Training** was considered an area where much more could be done (i.e. more training workshops) although publishers were satisfied with the standard of the training so far. The overwhelming positive opinions towards training can in part be explained by the fact that "any training is better than no training" - the demand is so great that anything is better than nothing. Some of the experienced publishers admitted that training could be improved and it was also suggested that the board member heading the training committee should regularly monitor APNET's training activities. These publishers also mentioned that staff members that had participated were no doubt better equipped after the training workshops attended. The NPA secretariat felt that it took APNET too much time to send the money it promised for training. The NPA had to first organise and implement the training session before APNET released the funds. A photo and a report were required afterwards and even then it took several months before the NPA was reimbursed.

**APR** is highly appreciated by the publishers in Nigeria. Those not pleased, are those who do not receive it. One publisher suggested that APR should feature more articles to promote itself and another wanted to see more articles about publishing in other African countries. Several suggested that APR should be more frequent and more regular.

Certain publishers expressed that they thought APNET was doing "very well" with regards to **advocacy**. This was considered a crucial issue by a number of publishers. That APNET receive a Pan-African status via the recognition of the OAU was considered a priority. At the same time, a few publishers failed to fully grasp advocacy as an activity and its potential. For example, an upper (but not top) management employee could not comprehend why it should be APNET's role to lobby the World Bank and was doubtful that it could achieve anything. The person did not see the "Nigeria & World Bank" relationship as something that could be seen in a broader "Africa & World Bank" context.

As seen above, the **networking** role of APNET was regarded as the most important APNET activity. The networking "tools" that APNET provides were identified as the APR, seminars, sponsorship of exhibitors at book fairs and training courses. APNET's efforts in the area of buying and selling rights (including through seminars, information and assistance) was seen as a particularly important networking issue and APNET was considered a suitable forum to discuss these issues.

*Rights are an area of prospect - this way there is no volume being moved around, only paper work.*

Roughly a third of those met mentioned buying and selling rights for publishing and/or distribution as examples of how APNET has facilitated networking.

*(APNET) meetings at book fairs through sponsorship of exhibitors (has led to) buying of rights to publish books and distribution in the West African sub-region*

*The linkage (has) led to the exchange of published works for distribution in our respective countries. It has been quite useful as one such linkage helped beef up our submissions for pre-qualification in a World Bank programme*

The face-to-face possibilities of contact which some of APNET's activities (notably training and book fair activities) provide permits exchanges of experiences. While seen as important, it was recognised that they may not bear fruit immediately:

*Meetings at APNET, organised training programmes and seminars ... serve as foundations on which future beneficial relationships can be built on.*

*It has been useful to exchange ideas and experiences with other publishers, mainly from Ghana and Sierra Leone*

In all, half of the publishers surveyed maintained that APNET has played a role to link them with other publishers in other countries.

Knowledge of APNET's **resource centre** and research activities was poor, even within the NPA secretariat. While no one expressed disinterest, no one declared specific interest in the centre either. A few did however see the **consultants** database as a potentially useful facility.

**Trade promotion** was an activity about which a moderate criticism was voiced. Publishers maintained that there were few results in this area. There was little knowledge of the fact that APNET sometimes publishes the titles of books it receives from publishers for its collection. Very few send examples of their new books to APNET with regularity although some had given their remaining stock to APNET after exhibiting at book fairs. The APNET stand was however praised by several publishers. As one publisher put it:

*APNET is not doing enough trade promotion. Not all facilities to sell books have been explored.*

The issue was discussed at lengths with several publishers. The majority advocated a new independent APNET structure modelled upon the African Books Collective to market books in Africa. This issue is treated in greater detail in section 7.4.

The **NPA secretariat** would like to see closer collaboration with APNET. It saw itself as a "model NPA" and other African publishing associations could come to Nigeria to learn from their experiences. The NPA also felt that it could play this role more efficiently if APNET provided funds to improve its structure. This would include a computer, e-mail facilities and some basic training equipment. It explained that from its perspective it viewed APNET as a donor.

### 7.3 APNET's Ability to Assist

The results of the questionnaires suggest that as a whole, expectations regarding APNET are high. While some respondents were realistic about APNET's ability to assist, others believed that foreign exchange, finding appropriate authors to publish, printing quality, reading culture and awareness of books were within the control of APNET if its priority setting was different. Advocacy was seen as important:

*APNET could be useful in sensitising government in the provision of infrastructural facilities and to maintain stable and favourable educational and fiscal policies*

*APNET can assist....by creating more awareness (among) banks*

A few publishers maintained that not only could APNET address more if its priority setting was different, but also if it contained sub-regional structures:

*APNET is helping with training but this can be more effective if greater or stronger activities (were held) at the regional level. In fact Nigeria with the size of its publishing industry should constitute a zone on its own!*

*Perhaps a decentralised APNET will be better equipped to provide more assistance in (the areas of human resources, distribution and access to information).*

About 2/5 of the publishers believed that APNET could play an important role in the area of distribution and marketing across the African continent, the second greatest challenge identified by the publishers. Human resources, also considered a considerable problem, could also be relieved by APNET through training. Availability of capital and piracy were also issues that several publishers thought APNET could address.

## 7.4 Financial Sustainability

All of the publishers encountered answered that they were concerned with the financial sustainability of APNET. All but one publisher were prepared to let part of their fee to the NPA be used to pay for APNET's infrastructure. Some publishers gave conditional answers-

*Yes, but not immediately, as our publishing house is not yet empowered financially*

All but one publisher would be willing to pay for at least one of APNET's services (this was not the same publisher that did not want part of his NPA membership fee to finance APNET).

### Publishers willingness to pay for APNET services

	Nothing	Something	Less than 10%	Less than 50%	More than 50%	100%
<b>Training</b>	2	14	8	6		
<b>Trade Promotion</b>	3	13	9	3	1	
<b>African Publishers Review</b>	5	11	5	5		1
<b>Resource Centre</b>	9	7	5	2		
<b>Research Activities</b>	10	6	4	1	1	
<b>Consultants Register</b>	8	8	5	3		

As the table above illustrates, a majority would be willing to contribute to training, trade promotion and the APR. Half would pay for usage of the consults register. Two out of five would pay for usage of the resource centre or for research activities. The figures related to the latter mentioned services should, however, be regarded with caution, as few seemed to fully grasp their content.

As with the membership fee, there were a few conditional answers. One such condition regarded currency, a problem viewed as a major obstacle - most publishers would be more willing to pay for services if this could be done in local currency. Another publisher expressed that if the services of APNET "*are brought nearer to the regions and if charges are within reach*", he would be willing to pay more.

Those not willing to pay anything for training explained that they did not think they should pay for something that is already covered by donors. While nearly a third were not willing to pay for the APR, **all** publishers said they would be willing to pay for advertisements in the APR. One publisher expressed that this would offer an excellent opportunity for other African publishers to see their products and could thus lead to buying and selling of rights.

Among Nigerian publishers, the willingness to pay for APNET's structures and/or services appears relatively high. However, experienced members of the NPA maintained that this willingness to pay may not necessarily be translated into practice and therefore suggest that actions towards payment should proceed slowly. Past experiences with payment within the NPA suggest a difference between intent and action.

As mentioned in section 7.2, several publishers saw the need for "an ABC for Africa" - that is a structure based on the African Books Collective that would sell and market African produced books within Africa. Particularly publishers with experience of ABC advocated this idea. They believed that a separate and independent body with skilled marketing personnel and its own board should be established. With the help of catalogues and other marketing techniques, the structure would serve all member countries. The APNET secretariat should be given a percentage of the profits. Some publishers saw such a structure as the only viable trade promotion activity. Criticism of this idea was put forth by two publishers - one believed that the structure could give rise to suspicion (*"why is so-and-so's books from country x selling so many books?"*); the other believed that the trade barriers within Africa are too great that no matter what structure was put in place, these problems could not be overcome easily. A representative of the Nigerian booksellers thought that the task of marketing and selling books should be done via booksellers.



## 8 Conclusions

Nigeria is second only to South Africa in the number and volume of books produced. It is a country with a long and strong literary tradition. Economic mismanagement at the national level has however led to a backward development in book production, with significantly less books being produced today compared to 15 years ago. The risk of this development and the high prevalence of piracy should be lesson to be learned by publishing industries and authorities in other African countries.

Nigeria's vast size and autonomous spirit makes it unique. With an enormous market within its borders, Nigerians are more likely to look within its borders for market opportunities than to explore elsewhere on the continent. There is therefore a tendency among some Nigerian publishers to concentrate on the Nigerian publishing industry and its specific problems, first and foremost, which makes the rest of the continent and APNET seem distant. Thus, the networking of all of Nigeria's publishers could be seen as a priority before networking with the rest of the continent.

The size of Nigeria and its publishing industry and its many specific problems makes the role of the NPA as an APNET node all the more pertinent. Furthermore, closely followed by the APR, the NPA is the most important source of information about APNET. Whereas the NPA board and prominent members of the association are well-informed about APNET, the NPA secretariat seems to lack some insight and even claims to regard APNET as a donor. Considering that at a membership level, the NPA secretariat has a greater number of constituents than APNET, its capacity is significantly inferior. However, it also enjoys lesser expectations and acts more as a trade association.

APNET and Nigerian publishers have mutually benefited from each other and ties have been relatively close, not least due to the fact that the former APNET chairman is Nigerian. Training and networking are seen as the most important activities. While some Nigerian publishers see avenues for improvement, most express a positive attitude towards APNET. In addition, virtually all Nigerian publishers are sufficiently satisfied to in theory be willing to pay a membership fee (via the NPA) for APNET, and most are willing to cover some of the user costs for APNET services.





## Annex 1: List of Persons Met

Gbenro Adegbola	Bookcraft Ltd
Amos A. Adeniyi	A. A. Adeniyi Commercial Enterprises
Mobolaji Adenubi	Author
F. A. Adesanoye	Ibadan University Press
Kola Osunsanya Agunlote II	Kola Sanya Way to Success Ent. Nig. Ltd.
Chii Akporji	Minaj Publications
Dayo Alabi	Nigerian Booksellers Association, CSS Limited
Chief G. A. Alawode	Signal Educational Services Ltd
C. N. C. Asomugha	ABIC Books & Equipment Ltd
Ayoyinka Babatunde	Secretary, Nigerian Publishers Association
Mr. Bankole	University of Lagos Press
Emeka Latz Chukwukelu	New Generation Ventures Limited
Lazarus N. Chukwukelu	New Generation Books
A. O. Echebiri	Longman Nigeria PLC
Edeman Igbinosun	Spectrum Books Ltd
O. U. Lawal-Solarin	Literamed Publications Ltd.
Evelyn M. Leigh	African Universities Press
Chief Victor Nwankwo	Fourth Dimension Publishing Co. (Former Chairman of APNET)
Yinka Obatuyi	Nelson Publishers Limited
Ayo Ojeniyi	Heinemann Educational Books (Nigeria) PLC
Law Okonkwo	University Press PLC
Bankole Olayebi	Bookcraft Ltd.
G. O. Onibonoje	Onibon-Oje Publishers
Oluronke O. Orimalade	University of Lagos Bookshop
Shade Shinkaiye	Longman Nigeria PLC



## Annex 2: References

### Books

*Code of Conduct*, Nigerian Publishers' Association, July 1996

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*The Publisher*, Volume 4 No. 1, September 1996

*The Publisher*, Volume 3 No. 2, January 1996

*The Publisher*, Volume 3 No. 1, January 1995

### **Reports**

Ayoyinka Babatunde, *ADEA/APNET Pilot Study on Intra-African Book Trade, Issues, Factors and Barriers of Intra African Book Trade*,

## **Appendix 2: Guinea Country Case Study**



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# **Evaluation of APNET: Guinea Country Case Study**

Final Report

January 1999





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# 1 Introduction

The purpose of the Guinea country case study is to gather and analyse information that can provide a more complete picture of the environment that APNET works within, how APNET is making an impact and whether it is meeting the needs. The main aim is to establish (i) an overview of the publishing situation in the Guinea, (ii) an understanding of the key challenges facing the publishing industry; (iii) an understanding of APNET's role in the country with regard to both the national publishing association (REPROLIG) and the publishing outfits themselves.

This case study is one of five<sup>1</sup>. While obviously every publishing industry has its unique features, Guinea represents a small nascent African publishing industry. Until the mid-1980s, the state performed and controlled all publishing. As a former French colony, Guinea also faces many of the same challenges felt by other Francophone publishing industries in West Africa.

This case study is based on:

- books, articles and other documentation<sup>2</sup>
- in-depth interviews with publishers, printers, NGOs, book shops, and representatives from Government ministries and agencies<sup>3</sup>
- questionnaires<sup>4</sup>
- a workshop with the Guinean book network

Most of the interviews were conducted during a mission carried out by Cecilia Magnusson Ljungman and Maira Sow to Guinea between October 14 and October 21, 1998.

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<sup>1</sup> The other four are Nigeria, Kenya, Zimbabwe and Mozambique

<sup>2</sup> See annex 1 for a list of references

<sup>3</sup> See annex 2 for a list of persons interviewed

<sup>4</sup> The standard questionnaire developed for all the five case studies was used although statistical analysis has not been pursued as there are only two publishing houses in Guinea.

The chapters that follow provide a short historic perspective of publishing in Guinea, an overview of the book environment, a description of the Guinean book network, an analysis of the interaction between the book industry and government actors and a discussion on the role and impact of APNET in Guinea.

## 2 Historic Perspective of Publishing

When Guinea was granted independence from France in 1958 there was no publishing structure within the country, no libraries and virtually no book shops. Unlike neighbouring Senegal and Côte d'Ivoire, Guinea had only been colonised for sixty years and thus the presence of missionaries was minimal. As a result there were no missionary structures (schools and libraries) left behind and the French literary influence was therefore poor. There was however other literary activities. Since the 18th century, the cattle-raising and Koran preaching Peuhl had been using Arabic letters to write their language Pulaar. In addition, an intellectual of the Malinke group constructed a unique alphabet for his language. The alphabet, called Nko, is still in use today, in particular by local merchants, and is spreading to neighbouring countries such as Mali.

The works produced in the Communist era (1958-1984) under Sekou Touré, consisted mainly of ideological propaganda used to prop up the regime. The planned economy set up during this era resulted in a minimal private sector. The distribution of books was wholly in the hands of the state. Thus, neither publishing outfits nor book shops existed. Once in a while the state structure (LIBRAPORT) imported French pocket books which were subsequently rationed out. Ideological works and books were distributed free of charge. However, the demand usually exceeded the irregular supply. French, Senegalese and Ivorian works were clandestinely obtained but were illegal as they came from "capitalist" countries. In 1968, national languages became the medium of instruction. While the state produced textbooks in these languages, their quality and content were poor.

When Sekou Touré died in March 1984, state structures and economy were liberalised. Educational policy was also changed and French was reintroduced as the language of instruction.

The legacy of the former regime was one factor that contributed to the slow growth of the private sector. However, by 1990 the publishing house Société Africaine d'Editions et de Communication (SAEC) was established by the renowned Guinean historian and writer Djibril Tamsir Niane. Two years later Mamadou Aliou Sow, a former employee within the national research and scholastic institute, established Les Editions Ganndal. Since then there have been no newcomers within the sector of publishing, which the publishers believe is due to the many constraints faced by the industry.



### 3 Overview of the Book Environment

The Guinean book environment is small but contains a range of actors, many of them governmental. Several of them are members of the national book network (REPROLIG) that was formed earlier this year. The network was formed instead of a national publishers association, as there are only two publishers in the country.

#### 3.1 Components of the Book Environment

- **Publishers:** Guinea's two publishers, Société Africaine d'Editions et de Communication (SAEC) and Les Editions Ganndal employ five staff each and publish general books, children's literature and textbooks. Most of the works are in French although SAEC is in the process of producing a book in English and Ganndal has previously produced two works in Pular. SAEC estimates that exports amount to 15% of its turnover and two-thirds of the books are destined to other African countries. Ganndal exports amount to 38% of which 80% is exported to other African countries. Both publishers have book shops although the businesses are run separately.
- **Government Actors:** There are four main governmental bodies that interact with the book industry. Three, namely the national research and scholastic institute (INRAP), the national literacy service (SNA), the National Department of Culture and the department within the Ministry of Education that is concerned with the structural adjustment programme for education (PASE). The first three of these bodies are members of REPROLIG. A more detailed discussion of these actors is presented in chapter 6.
- **Guinean Writers Association:** This organisation is a member of REPROLIG. The publishers report that they receive several manuscripts every week, often poetry, though the publishers rarely do have the means to publish their work. Unpublished works are sometimes presented on the radio by the cultural NGO Festi Kaloum.
- **Printers:** There are an estimated 15 printers in Guinea, though only three are equipped (though modestly so) to produce books. Two of them are members of the national book network (REPROLIG).

- Distribution:** In Conakry, there are two book shops (both linked to the two publishers), a few Islamic centres that sell religious texts and a general store that sells books. La Librarie de Guinée is the largest with a total of about 3000-4000 books. Roughly 2/3 of the books are African. Schoolbooks are also sold, mainly to parents with children in private schools. There are no book shops in the interior. However, small-scale merchants sometimes have agreements with the book shops in the capital and thus sell minimal quantities from the stands in the interior. Usually additional textbooks are sold via this means. The school book distribution, basically a logistics task, was carried out by the state until recently. Today a wholesaler, one of the publishing houses and a general store in Conakry, carries it out. Each are affiliated with a French publisher, a condition laid down by the French.
- NGOs:** The most important NGO for the book chain is Festi-Kaloum. It was established by civil servants from the Department of Culture as a response to the lack of state structures to support and sustain Guinean cultural activities. Through sponsoring, Festi-Kaloum organises book launches, round-table discussions about books and prepares book reviews in the press and media. Its partners include the national museum, the national radio and television network, the national writers association, the publisher Ganndal, the Franco-Guinean Alliance and UNICEF. They are supported by Agence de la Francophonie and Afrique en Création. Ganndal and the national writers association consider that the assistance provided by Festi-Kaloum to reach out to the Guinean public is valuable and important.

**Libraries:** No libraries were established under Sekou Touré's regime. In 1990, the Department of Culture with the help of French bilateral assistance embarked upon a project to set up libraries in each prefecture. While most prefectures now have libraries (some have two), the project has faced several difficulties ranging from adequate buildings and qualified and motivated librarians. There are libraries in 20 prefectures, and in total there are 30 libraries (some prefectures have several libraries). Each library has on average 1000-2000 works. Some of the African literature is bought from the Guinean book shops. All other works are bought from French wholesalers.



### 3.2 Facts about the Guinean Book Environment

<b>1. Population</b>	7,405,375
Grow rate	1.1%
Fertility rate	5.66 children born/woman
Age structure	0-14 years: 44%
Pop. in primary school age	564000 (50% of age group)
Pop. in secondary school	140000 (17% of age group and 3/4 are male)
<b>2. Literacy rate - age 15 and over can read and write</b>	
Total population	35.9%
Male	49.9%
Female	21.9%
<b>3. Languages</b>	French (official), each tribe has its own language: Pular 40%, Maninka 30%, Sos 20%, smaller languages (kpele, kissie and lomaghoi) 10%
<b>5. National publishing association</b>	
Number of members	11
Age	6 months
Yearly budget	0
<b>6. Training facilities related to publishing industry</b>	Nil
<b>7. Trade and sales statistics</b>	Not available
<b>8. Readership</b>	Mostly urban. According to library statistics, borrowers are young (70%) and less than 15% are women/girls.
<b>9. Book distribution and book sellers</b>	
Number of bookstores	3
estimate urban	3
estimate rural	0

Sources: Jeune Afrique No 1940, 1998; CIA Fact Sheets, UNDP

### 3.3 Constraints Faced by the Book Industry

The Guinean book industry faces several challenges. To begin with, access to financing (including bank facilities) is limited, technical staff are under-qualified, the cost of raw materials are high (import duty is 30% and value added tax amounts to 18%), and the capacity of local printers is weak (a maximum of 10,000 copies can be produced at a time). In the eight-year of their existence, the Guinean publishing houses have published less than 50 works (average of 3 books per outfit a year). The local publishing houses have not had access to the lucrative textbook production, which is dominated by French publishers (See chapter 5). Furthermore, the market is limited, mainly

due to the high level of illiteracy (around 64%), the weak purchasing power<sup>5</sup>, the absence of a functioning distribution network and the lack of a reading culture.

Readership is mainly confined to the capital Conakry which has a population of over 1 million. There are 15 weeklies (no dailies) that circulate in Conakry. However, poor distribution systems means that newspapers are hardly available in the interior of the country. As mentioned above, there are libraries in 20 of the 33 prefectures. Two-thirds of their books are geared towards a younger reading public. Statistics from the library project show that the libraries have an average of about 175 members. As few as 15% of the adult readers are women and less than 15% of the young readers are girls.

<b>Registered Readers</b>	
Men	587
Women	89
Boys	1837
Girls	311
<b>Total</b>	<b>2824</b>
<b>Average per library</b>	<b>176</b>

<b>Frequency of visitors</b>	
Men	42121
Women	6937
Boys	80810
Girls	17368
<b>Total</b>	<b>147236</b>
<b>Average per library</b>	<b>8661</b>
<b>No. visits per reader</b>	<b>52</b>

<b>Home Borrowing</b>	
Adult fiction	7068
Young fiction	4939
Adult non-fiction	3983
Young non-fiction	3094
Periodicals	1708
<b>Total</b>	<b>20792</b>
<b>Average per library</b>	<b>1299</b>

Consumption of books in national languages is particularly low, particularly with the absence of national languages in the school curricula. To date, only two works have been published in local languages. The national literacy service and some NGOs are working with communities on this issue and among other things produce bulletins and booklets in national languages.

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<sup>5</sup> In 1997, Guinea was ranked 9th from the bottom regarding human development (UNDP Human Development Report, 1997), which also gives an indication of the country's comparative poverty.

## 4 Guinean Book Network (REPROLIG)

In 1997, the Guinean publishing house Editions Ganndal and APNET prepared a training course for Guinea based on APIs foundation course. As there are only two publishing houses in the country, the training course also included printers, the Guinean authors association, book shops, a cultural NGO, INRAP (the government institute responsible for textbook conception and school curricula), the national literacy service and the cultural department of the Ministry of Communications and Culture (responsible for the promotion of national readership). The course joined the actors of the book chain and gave impetus to the creation of an association encompassing the entire book chain. The following year, another APNET funded course concerned with design and production was held. This occasion provided the opportunity to formalise a set of statutes that became the base for *Réseau des Professionnels Guinéens du Livres* (REPROLIG). The members of the network consider REPROLIG as "*an economic and cultural tool for the partners in the book chain*". There is also a consensus that the problems faced by the industry can only be resolved through united action, which is why great importance is given to the integrated approach of the network in which "*all links are represented*". The primary aims of REPROLIG are to:

1. Establish a forum for the publishing and book development
2. Promote reading culture in Guinea
3. Devise a national book policy encompassing all partners in the book chain
4. Develop training programmes for all parts of the local book industry
5. Facilitate the availability and accessibility of books

In the short term, the priorities are to (a) reinforce the human capacity of the partners through training and (b) lobby the government with the aim to establish a national book policy. REPROLIG maintain that a national book policy would clarify the roles of the government structures (national education, finance, culture, communication and trade), the private sector (publishers, printers and distributors), NGOs and donors. The policy would also provide an appropriate framework for collaboration and could help formulate policy regarding national languages.

REPROLIG meets every three months and the board meets in theory every month. The issue of fees has not yet been resolved. Demanding a fee from the governmental members is posing a problem.



## 5 The Government's Relationship with the Book Environment

The Guinean publishers and REPROLIG relate to the government on several levels. Education and culture are the areas in which interaction is strongest.

### 5.1 Educational Sector

There is no national book policy in Guinea and to date government policy has not taken into consideration issues affecting the publishing industry in the country. In fact, the current policy disfavours indigenous publishing. Of this decade's estimated US \$15 million worth of donor funding to school textbooks in Guinea, nothing has benefited the national publishing industry. Furthermore, as pointed out by REPROLIG, these funds are to a large extent, loans the citizens of Guinea will be paying off for many years to come.

Primary and secondary school books are financed by the World Bank, the African Development Bank, French and American bilateral aid. The conditions of each donor differ.<sup>6</sup> The government agency INRAP (Institut National de Recherche et Action Pédagogique) is responsible for the contents of the curricula. INRAP is also responsible for the technical content of World Bank tenders. So far the World Bank has financed 400,000 textbooks (5 to 6 titles) at secondary level and 600,000 textbooks (four titles) at primary level. PASE, (Programme d'Adjustement Structurel de l'Education) is the government body responsible for the World Bank tenders for education. The two bidding processes were of international nature and were French publishers won both tenders. The main arguments for the international procedures were the quantity of books, the urgency and the supposed low capacity of the national publishing industry.

The books chosen in the World Bank tenders were mainly selected from existing stock. As a result, about 30% of the book content actually corresponds to the Guinean secondary school curricula. The Ministry of Education (PASE) assures that the primary school textbooks are more (though not wholly) in line with the national curriculum. Another problem with these and other book

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<sup>6</sup> For example, books provided by the development banks are "rented" to the pupils while the French government gives books for free but require the textbooks to be bought from French textbook suppliers.

orders is distribution. An estimated 20%<sup>7</sup> of books do not arrive at their final destination. As many of the books also used in neighbouring Senegal and Côte d'Ivoire were selected by the Ministry of Education, it is believed that some of the books find their way to the black market in these countries where they fetch a higher price.

Both Guinean publishing houses have produced textbooks. However, none of the locally produced books have been selected for usage within the educational system. Furthermore, the authorities and donors have told publishers that they are not capable of producing the products required. With a small grant from L'Agence de la Francophonie, Ganndal set out to produce a biology textbook that was not only locally made, but that also corresponded 100% to the curriculum set out by INRAP. All donors and the government have praised the resulting book.

The current president of REPROLIG, Mr. Mamadou Aliou Sow has actively lobbied the various government structures and the donor community to sensitise them about the importance of promoting Guinean actors within the book chain. The above-mentioned biology book has been an important tool in the advocacy efforts as it proves the capability of the local structures. According to Mr. Sow, the consciousness among donors and the government has been raised and they are beginning to lend an ear to the concerns of REPROLIG. For example, the Ministry of Education has decided to let Ganndal, in collaboration with INRAP, produce exercise books. These books will be subsidised (with funds from Agence de la Francophonie) and sold to pupils at nominal costs. Furthermore, the government has agreed that a significant part of the proceeds (roughly 45%) will be used to establish a fund for future Guinean publishing ventures in the area of education. The advocacy of REPROLIG has come at an opportune moment as private sector consciousness within the government's policy is increasingly gaining support.

The present situation in Guinea, in which virtually all schoolbooks are produced abroad, can be compared to Malian education sector prior to 1991. Since then, the Malian government has established a national book policy and launched national, as opposed to international, bidding processes for textbook production. As a result, the textbook sector is shared between the different Malian publishers. REPROLIG's strategy in the months to come is to lobby the government at the level of the Prime Minister's office. If the importance of a national book policy can be achieved at this level, then all sectors (education, trade, communications, culture and industry) will be encompassed.

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<sup>7</sup> REPROLIG, In the 1998 USAID report on the educational sector in Guinea also discusses the problem of missing books (based on the evaluators' own survey).

## 5.2 Culture

The national department of culture, a member of REPROLIG, is responsible for public readership. It has therefore embarked on a few ventures with Guinean editors. At present, a coffee table book about Guinea funded by the European Commission is being produced. Ganndal and a French publishing house will co-publish the book and the department of culture has negotiated an 80% distribution right for Ganndal. Secondly, the library project financed by France and under the responsibility of the department of culture also involves interaction with the Guinean publishers as their works are bought for the 30 odd libraries that have been set up in the interior of the country.

## 5.3 Other Sectors

Another sector in which the publishing industry relates to the government is the social sector. Editions Ganndal is working with the ministry social planning to provide pre-school curricula.

Through advocacy activities, REPROLIG interacts with the ministry of finance. Guinea has not signed the Florence Accord, which means that the government does not consider books as cultural goods and thereby exempt from tax and duty. In addition, publishers and printers are faced with duty and tax on raw materials, all of which are imported. At present, duty amounts to 30% for each component (ink, paper, glue, etc.). Furthermore, value added tax is 18%. The price paid by consumers is thus considerable. Once in a while, the printers in Conakry manage to receive a reduction in duty to 6%. The fact that this has been possible on occasion has given REPROLIG hope that a reduction in duty and even VAT can be achieved once and for all.





## 6 The Role and Impact of APNET

### 6.1 Activities and Results

APNET's activities in Guinea consist of two training workshops, advice about the formation of the Guinean book network and the sponsorship of exhibitors at the Zimbabwe International Book Fair. Furthermore, one Guinean is listed in the Consultancy Registry, a few Guinean articles have been published in the APR (about the Guinean book industry and publishing in national languages) and the APNET collection in Harare contains Guinean works from both publishers.

According to the members of REPROLIG, training is a very important issue -

*If the human capacity is not adequate, a generous funding situation would not help in the production of books. If there is an adequate human capacity and no funding, trained people are at least equipped to find solutions*

As mentioned in the previous chapter, APNET has sponsored two training sessions in Guinea. The first was a foundation course in publishing held in 1997 and the second dealt with design and production and was held in 1998. Each training session lasted six days. The curricula were defined according to the outline provided by API and then adjusted to specific situation in Guinea. In addition, APNET sent two Guineans to the training of trainers' workshop in Lomé in 1995. These trainers subsequently helped conduct the workshops in Guinea.

The main source of information about APNET in Guinea has been the APR, the APNET Secretariat (via telephone, fax, e-mail and post) and the first training workshop during which APNET's training co-ordinator gave a presentation about APNET during a morning. The sponsored exhibitor programme has also been a way for the publishers to learn about APNET. One of the publishers has on rare occasions been in touch with APNET board members.

### 6.2 Publishers' Experiences and Views of APNET

REPROLIG is satisfied with the relationship that it has had with APNET:

*APNET listens to us- that is important.*

REPROLIG has found the APNET supported **training** sessions useful and a crucial element in the establishment of their association. Finding trainers locally has however not been that easy - someone may be able to lecture about marketing, but may not have the specific experience needed with regards to books. Identifying trainers for future specialised courses (such as electronic publishing) would be particularly difficult.

REPROLIG has also found the **networking** possibilities that APNET offers to be very useful. Both Guinean publishers are discussing co-publishing with other publishers in the region. One of the publishers has used its contacts gained through APNET for distribution. A weakness in the networking function of APNET is the **African Publishing Review**. REPROLIG finds that the issues in French are not often enough. The Guineans are particularly interested in receiving information about APNET and its ongoing activities. Furthermore, if the APR was published more frequently and with regularity, it would be a more useful networking tool. REPROLIG strongly suggests that APNET publish its French editions from Abidjan where there is sufficient infrastructure and translation capacity to perform this task.

**Trade promotion** is an area that the Guinean publishers either know less about and/or value less than the other APNET activities. As mentioned earlier, both publishers send books to the collective exhibit. The main motivation to do so is so that the Guinean shelves in the exhibit are not empty. Both publishers believe that their benefit from APNET's displays is, in business terms, minimal.

The Guinean publishers felt they knew little about APNET's **research and documentation** activities. They also felt they would benefit from more information about APNET's **advocacy** endeavours. REPROLIG believe that APNET could maximise its advocacy by (a) rotating regional training workshops more and (b) bringing board representatives (preferably the president) to all regional meetings/workshops/book fairs and using the local network to create publicity for the organisation and its aim. For example, REPROLIG maintains that if a regional workshop is held in Guinea, REPROLIG could take advantage of the situation and contact the media, or maybe even set up meetings with key governmental personas. This would not only inform the government about APNET, it would also sensitise them regarding the issues affecting African publishing.

REPROLIG believes that once the **consultancy** database is operational, it could be used to find specialised trainers when necessary. It maintains, however, that the database should include non-Africans as well - a Canadian with experience of Guinean publishing may be a more suitable trainer than for example, an Ivorian who is not familiar with the Guinean context.

### 6.3 APNET's Ability to Assist

REPROLIG's members maintain that APNET has an important role to play regarding networking, training and advocacy. While the members that have benefited from the exhibitor-sponsorship programmes recognise that this has been useful, **they would, given a choice, prefer to use the money (for tickets, hotel and per diem) to produce a book.**

*We need assistance to produce more books. It is not worth sending publishers to book fairs if they produce only one book every three years!*

REPROLIG believes APNET can have a role to play in the following areas:

- (a) Help sensitise donors to provide funds for education projects that specifically include a component to promote the local publishing industry
- (b) Pressuring government so that the Guinean publishing industry can take part in the text book production for the country's schools
- (c) Arrange voluntary service programmes in which volunteers from donor countries can spend several months in an African publishing house, with the aim of building capacity. Ganndal in particular maintains that this type of facility could be extremely valuable. Ganndal is however not aware of any mechanisms for such programmes.
- (d) Create a fund for viable publishing projects deemed as particularly important or strategic.
- (e) Assist publishers to prepare project documents for donors.

REPROLIG does not think that APNET should sell the books of its members, even if it were through an independent structure (the "ABC model"). It would prefer that PABA, the Pan-African Booksellers Association and APNET devise a common plan to assist publishers and booksellers in the marketing and selling of books across the African continent. The buyers and sellers meetings organised by ITC at the last ZIBF could also evolve into a viable marketing instrument at future book fairs.

### 6.4 Financial Sustainability

The Guinean publishers maintain that it is important that APNET support NPAs in becoming "strong". Being a network of national associations, REPROLIG believes that this is the best way to assure APNET's future financial sustainability in the long term. In theory, the publishers had no problem with paying a fee to their organisation of which part would pay for APNET's infrastructure. In practice however, the issue of fees within REPROLIG has not been sorted out. The government members within the organisation are not able/prepared to pay a share, leaving only a handful of the members to bear the weight.

The two Guinean publishers agreed that they were willing to pay less than 50% for trade promotion but were not willing to bear any cost of the APR. Nor were any of the members of REPROLIG willing to pay for advertisements in the APR, particularly because the issues are not regular or frequent enough. One of constraining factors for any type of payment for services was the foreign exchange issue. The Guineans claim that any payment would actually turn out to be much greater due the cost of acquiring foreign exchange to pay for APNET's goods and services. Paying in local currency would be less of a problem but no one could see how this could be arranged in practice.

## 7 Conclusions

Guinea has one of the less developed publishing industries in Africa. Its market is small outside of the textbook production for the educational sector. At the moment, the local publishers do not have access to this market, though advocacy has led to improved attitudes. As textbooks are largely paid for by donors, the Guinean industry sees donor agencies playing a crucial role in the development of the industry. There is a belief that an injection of donor funds, even on a loan basis, would do wonders to set the industry rolling.

The Guinean model of bringing together all the actors in the book chain into one network is unique among the members of APNET. As there are only two publishing houses in Guinea, one could argue that that the Guineans had no other choice. However, the effort is commendable and results in a structure that has unique advocacy opportunities as it speaks for the entire book chain. Furthermore, the structure seems appropriate for the future book development in Guinea, a country that is in the early stages of developing a book industry. The small size of the industry has the advantage of facilitating a dialogue among the actors. At the same time, the size is a constraint: Editions Ganndal, which assumes the chairmanship of REPROLIG finds itself in the awkward position of advocating at government and donor levels for the publishing industry in Guinea, which consists of itself and one other publisher. This is a difficult balancing act that can easily be misinterpreted.

APNET has played an important part in the development of REPROLIG and the support is highly appreciated by the Guineans. APNET has also played an important role in connecting the Guinean publishing industry with other African publishers. Generally, the Guineans feel that APNET's advocacy, networking and training functions are the most important. They would like to see a greater commitment from APNET to its Francophone members and a more important and active role in liaising with donors on its members' behalf. Contributions to APNET's financial sustainability would be a problem taking into consideration the weakness of the publishing industry and the fact that REPROLIG has not been able to crack this nut within its own network.



## **Annex 1: List of Persons Met**

Conde Abdouramane, Responsable Service National d'Alphabétisation

El Hadj Salamy Ba, trainer for APNET (part took in training of trainers)

Abdoulaye Beye, General Manager CASTEL, secrétaire aux relations extérieures REPROLIG

Ouigo Camara, chef de section Editions scolaires, division manuels scolaires à l'Institut national de recherche et d'action pédagogique (INRAP)

Mohamed Hamirou Conté, Directeur Général Festi-Kaloum

Elisabeth Degou, Bibliotecque Franco-Gionéenne

Addourahaiane Pella Diallo, Chef du Projet de developpement d'un réseau bibliothèques publiques

Bailo Televel Diallo, Director, Department of Culture

Ibrahima Ninguelande Diallo, Directeur Général, l'Institut national de recherche et d'action pédagogique (INRAP)

Mohamed Fawaz, Président Directeur Général Imprimerie Papeterie Moderne

Salimata Kaba, Service National d'Alphabétisation, Trésorière REPROLIG

Bachir Niane, Secrétaire d'Edition SAEC, secrétaire à la communication REPROLIG

Saïdou Souare, Coordinnateur National du Programme d'Ajustement Structurel de l'Education (PASE)

Mamadou Aliou Sow, Directeur Général of Editions Ganndal and chairman of REPROLIG

Saïkou Yaya Dieng Thiung, Director of Librairie de Guinée

Amine Toure, Directeur Financier Festi-Kaloum

Bandian Traore, Assistant Director, Department of Culture





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## **Appendix 3: Kenya Country Case Study**



Sida

# **Evaluation of APNET: Kenya Country Case Study**

Final Report

January 1999



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# 1 Introduction

The purpose of the case study is to provide information on and analyse the book environment in Kenya in which APNET works, to assess APNET's impact, and discuss to which extent it meets needs of the publishing industry. The study gives an overview of the history and present publishing situation in Kenya, discusses challenges facing the industry, and analyses the activities and impact of APNET.

Kenya has the largest publishing industry in East Africa, and developments in the book environment of Kenya have immediate impacts in neighbouring Uganda and Tanzania. Kenya is the leader in publishing books for schools and exports books to several countries in Eastern and Southern Africa - notably Uganda and Botswana. Like in other African countries capital is a main problem. The publishing industry is not attractive to banks because of the long term character of the publishing process and because of uncertain returns and lack of collateral. The latter problem has been addressed by the Dag Hammarskjöld Loan Guarantee Scheme.

The case study is based on secondary literature -articles and monographs, primary material, and in depth interviews with representatives of the Kenya Publishers Association (KPA), Dag Hammarskjöld Foundation, Kenya Rural Enterprise Programme, government bodies (Kenyatta Foundation, Kenya Literature Bureau, Kenya National Library Services), the Kenya Book Development Council, Writers' Association of Kenya, booksellers and -distributors. Finally ten key publishers have been interviewed which constitutes more than half of those active in the KPA. Ten questionnaires covering questions of a quantitative as well as qualitative nature have been administered.

The chapters that follow provide a short historic perspective of publishing in Kenya; a profile of the book environment; an overview of publishing in Kenya and its main challenges; a description of the Kenyan Publishers Association; an examination of the credit scheme operation in Kenya, an analysis of the book industry in relation to government and a discussion on the role and impact of APNET in Kenya.



## 2 Historic Perspective on Publishing

In Kenya, like in most African countries, missionaries were the first to print books. They printed translations of the New Testament and hymn books in various indigenous languages. Missions also established the first schools and started publishing education material and set up book shops. Charles Richards of the Church Mission Society was a key figure. In 1948 he was asked to set up a publishing house and library service which was to cover the whole of East Africa, the East African Literature Bureau, on the background of research into needs and possibilities carried out by Elspeth Huxley. The Bureau was to tackle "the problems of providing and distributing general literature, textbooks for schools, textbooks for adults on agriculture and technical subjects; magazines; giving assistance to African authors." Books were published in the major East African languages. In Kenya the Kenya Literature Bureau (KLB) was established in 1977 to carry out the tasks after the East African Literature Bureau dissolved.

The missionaries and government thus contributed to creating a book demand that they failed to satisfy. The needs were met by British firms which entered Kenya in the 1950s and 60s. Longmans & Green, Heinemann, Oxford University Press, Evans Brothers, Nelson and Cambridge University Press set up local offices, and the first three mentioned established their own Kenya subsidiaries. In the 1980s and 90s most of these firms were fully "Kenyanised".

Indigenous Kenyan publishing also started in the 1950s. Small outfits owned by Kenyan nationalists published newspapers, books and leaflets in Kikuyu and English. The most important indigenous publishing houses were East African Publishing House established in 1964, and Equatorial Publishers. The commercial publishers have multiplied since then, and currently there are around 60 publishing houses, not including several others that have not been officially registered as publishers.

Kenya Institute of Education was responsible for the production of educational books which were published by Jomo Kenyatta Foundation and Kenya Literature Bureau. In tandem with the general liberalisation of the economy during the 1990s, and because the parastatals were inefficient and unable to meet the needs, text book production has moved increasingly to the private sector, although the government still approves of firms and titles.



### 3 Publishing and the Book Environment

Kenya has one of the fastest growing book industries on the continent. New publishing firms are being established each year. It has been estimated that the total annual income of publishers in Kenya is well above ksh. 1 billion, not including bookselling and the distribution business<sup>1</sup>. Around 200 titles were published in 1993 and 350 titles in 1995 (APR), which is double the number produced in 1990. The book industry comprises multinational firms, indigenous publishers, parastatals, publishing arms of NGOs and international organisations, printers, wholesalers and retail book sellers. Several former multinationals have now become Kenyan owned. Longman is now Longhorn and Heinemann is East African Educational Publishers. There is only a low key representation of foreign firms like Heinemann, Longman, Evans and Cambridge University Press. Oxford University Press is still foreign owned. The former situation with hostility between locals and multinationals is no longer there, but some publishers thought that multinational firms were on their way back.

There are two parastatal firms, namely Jomo Kenyatta Foundation (JKF) and Kenya Literature Bureau (KLB), which collaborate closely with the Kenya Institute of Education. JKF has a back list of 270 titles and publishes around ten new titles each year. KLB has a back list of more than 700 titles and publishes twenty new titles per year. Both have a staff of more than 250 people and are worried about the shrinking market which is the consequence of liberalisation. Academic publishing is going on at Nairobi University Press, at publishing units at Moi and Kenyatta universities and fairly new and not always long-lived firms like Academy Science Publishers, African Council for Communication Education and African Centre for Technology Studies.

There are around ten big publishers, between 30 and 50 middle sized ones and some 120 registered publishers in all. The 1997 Kenya Books in Print lists books from 38 publishers. Books are sold to book shops at a discount of around 30% - it used to be 20 % 25 years ago.

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<sup>1</sup> Ruth Makotsi "Intra-Africa Book Trade: Kenya Report" unpublished, 1998.

Kenya is well known for producing popular fiction in English and Swahili. Series such as Spear Books (Heinemann) and Pacesetters (Macmillan) are aimed at young people and have been moderately successful - print runs of 4000 will mostly sell out in a two-year period. One title in the Spear Book series, *My Life in Crime* has sold an exceptional above 100.000 copies. The popularity of fiction is reflected in the yearly output of titles, and confirmed by statistics provided by the Kenya National Library Services which show that between one third and half of the titles borrowed were fiction.

Text books constitute 60 % of books published and are the mainstay of most publishers. Primary school population is 5.5 million in 16.000 schools. There is a fairly high degree of competition in certain areas such as courses in maths, English, Swahili and students' guide books, while other areas are underdeveloped. The production of childrens' books is expanding. Roughly 70-80 % of books published in Kenya are in English with Swahili, the national language, coming next. Only one out of the ten publishers interviewed publishes up to 30 % in the local languages.

Another feature of the Kenyan situation is the presence of self- and informal publishers who write, produce and sell their books themselves. They may publish because there is a gap in the market which they can fill, because their book has been rejected, or because they feel that publishers take an unfair part of the earnings. Characteristics of books from this sector include: No vetting and editing, no ISBN numbers and low prices. Vanity publishing exists in Kenya, but not to the extent it does in Nigeria (see Nigeria case study).

There is a good deal of writing talent in Kenya, but there is a need to develop skills and professionalism. Publishers often do more editing than they should ideally do. Editors especially in Swahili are few, and so are illustrators. Degrees and courses in publishing have been established at Moi University and the School of Journalism, Nairobi University.

Women are making their mark both in writing and publishing. At the moment six publishing houses are headed by women (Sasa Sema, Jacaranda, Lake Publishers, Horizon, Focus, Longhorn) and many women are employed in intermediate positions in publishing firms.

Marketing is said to be the weakest link in the chain of publishing in Kenya. Publishers use reviews, inspection copies, exhibitions at fairs and sales visits as means of promotion, but not effectively. Little market research is carried out and there is a lack of information and statistics on the industry. Sales outlets consist of book shops, libraries and schools. There are five distributors in Nairobi and eight outside. There are 2400 registered book shops, around 6-800 are active.

In terms of services and materials for publishing, Kenya is relatively well equipped, which means that high quality books can be produced. In addition, there are extended credit facilities for publishers at many local printing firms and significant discounts are granted on printing charges.<sup>2</sup> Kenyan transport services are reasonably well-rated in Africa, which facilitates exports.

Kenya exports books. While 80 % are consumed locally, 20 % or so are exported<sup>3</sup>. Africa takes the biggest share with books going to South Africa, Uganda, Malawi, Lesotho, Botswana, Namibia, Zimbabwe, Tanzania, Nigeria, Southern Sudan and Ethiopia. Buying and selling of rights is a new development limited at the moment to textbooks. One firm adapted existing formats and produced text books directly to the Ugandan market. Kenya books go to Europe through the ABC. The one academic publisher interviewed exported 25 % of his books in all, and 20 % of those to Europe through the ABC. Asia has shown interest in books from Kenya too. Bidding procedures in connection with World Bank tenders are not very well known in the industry. Around a third of publishers interviewed were aware but added that the procedures are far too technical and elaborate.

There are three main book events in Kenya that aim at promoting reading and the book trade: The Pan-African Children's Book Fair (since 1992), the National Book Week and recently, the KPA's Nairobi International Book Fair.

There are a number of associations involved with the book chain. Apart from the Kenya Publishers Association (KPA), which is dealt with in the following chapter, there is the Christian Book Publishers Association, the Kenya Booksellers' Association and the Writers Association of Kenya. In addition, there is the Kenya Book Development Council (KBDC), which is a private non-profit company that brings together the KPA, booksellers, printers, writers, librarians, representatives of government and UNESCO with the aim of promoting readership and the links in the book chain. It has organised a national book week, which was supported by Sida.

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<sup>2</sup> Makotsi, Ruth "Intra-Africa Trade Study: Kenya" Unpublished 1998.

<sup>3</sup> Of the publishers interviewed, all but one exported between 5% and 25% of their books. Only one publisher encountered exported outside of Africa.

### 3.1 Facts about the Kenyan Book Environment

<b>1. Population</b> (1989 Census)	21,443,636
Male	10,628,368
Female	10,815,268
Estimate 1998	28 million
<b>2. Literacy rate - age 15 and over can read and write</b>	
Total population	69.00%
Male	75.00%
Female	63.00%
<b>3. Languages</b>	English (official), Swahili is national language There are at least 40 main languages
<b>4. Number of Publishers</b>	
Multinational	7
Indigenous	113
<b>5. Kenya Publishing Association</b>	
Size	40 members
Council	5 men 2 women
Established	1971
Secretariat	2 women
<b>6. Book-related training facilities</b>	
Kenyatta University	
University of Nairobi School of Journalism	
Moi University	
Kenya Polytechnic	
Daystar University (Journalism)	
<b>7. Trade and sales statistics</b>	484.8 tons of books Exports to S. Africa, Malawi, Lesotho, Botswana, Uganda, Nigeria, USA
<b>8. Book Distribution</b>	
In Nairobi	5 distributors
Outside Nairobi	8 distributors
Booksellers	2400 registered
<b>9. Libraries</b>	
Libraries	300
Public libraries	16
These exclude school libraries	
<b>12. Writers Associations</b>	2
<b>13. Titles per year</b>	Average 270



## 4 National Publishers Association

Kenya Publishers' Association (KPA) was established in 1971. In 1982 it split into two - one for indigenous publishers, called the Society of Kenya Publishers, which has since lost importance. KPA was not very active in the 1980s, but was revived at the end of the decade and recognised by the International Publishers Association in the early 1990s, at a time when APNET's presence and activities started to make an impact.

The Council of KPA consists of the Chairman, the Vice Chairman, the Treasurer, the Secretary and three members. Two women are currently members of the Council. The Executive Secretary heads the KPA secretariat. She is assisted by an office assistant. Sub-committees are appointed according to tasks. At the moment four are active, in charge of book fairs, exhibitions and events; training; publications and public relations; finance and fund raising. There is an annual general meeting at which reports of the year's activities and the audited accounts are presented to members.

KPA has three kind of members. Publishing houses that carry out production and distribution of books are entitled to full membership. Firms that limit their activities to representing and distributing the publications of their principals, and NGOs interested in promoting book publishing in Kenya are entitled to associate membership. Members pay entry fees and an annual subscription. At the moment publishing houses which have published more than twenty one titles pay KSh 25.000. Mostly the big publishers pay and have influence. Currently there are 45 members of whom between 15 and 20 are active.

The Association carries out the following activities: Participation in book fairs and meetings locally and internationally, training of its members<sup>4</sup>, desk top publishing at a commercial basis, consultancies and assistance to members in matters relating to trade. An important achievement is the bi-annual "Kenya Books in Print", which in part entails data collection about the industry. At present research in publishing and the book trade in Kenya is also being conducted by the KPA. This year the KPA organised the first ever Nairobi International Book Fair.

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<sup>4</sup> KPA conducts at least three training workshops a year, with assistance from APNET and the British Council.

The key issues cluster around the following activities: policy making and implementation, capacity building and skills development, and promotion of book trade locally and internationally. The KPA lobbies the government on issues of importance to its members. It has tried to impress upon the government that the book industry is crucial to the education sector. It has successfully lobbied the government on lowering of tariffs on raw materials for the publishing industry and removal of VAT on books. Textbook policies have been put in place which ends the monopoly enjoyed by parastatals. KPA holds regular meetings and joint seminars with government bodies whose activities are relevant to the book industry, i.e. the Ministry of Education, the Trade Department and the Kenya Institute of Education.

Training programmes usually last one week and are based on the APNET Publishing Institute curriculum. Needs assessments are carried out before training. KPA ensures that its members are present at as many trade fairs as possible. It gathers and circulates information on fairs to its members, asks for titles to be presented, and solicits funds from members or donors for costs of participation in the fairs.

#### **4.1 Relationship with APNET**

APNET with its services and support has been vital to the revival of the somewhat moribund KPA. Over the years the association has benefited in the following ways: receiving funds for its training programmes, paying for members to participate in some international book fairs, promised establishment of e-mail services, dissemination of information, mostly through APR, and mostly to members of the KPA Council.

There was a feeling that APNET does not always co-ordinate its activities with the NPAs. Sometimes the KPA would be bypassed and APNET would deal directly with individuals. This was viewed negatively and had been discussed with the Secretariat in Harare. Some progress had been made. Dissemination of information on markets and opportunities could be more regular and effective.

## **5 Publishing Industry's Relationship with Government**

### **5.1 Book Development Policy**

Over the years a good understanding has existed among the larger actors in the book industry in spite of the lack of a formal national book policy. In September 1997 Kenya finally registered a Book Development Council, brought about by private sector rather than government initiative. This is an achievement and has been in the cards internationally since 1968 and in Kenya since the 1980s.

The Council comprises KPA, booksellers, authors, printers, librarians, UNESCO, and plans to include representatives of Government. The objectives of the Council are to:

- encourage literary creation
- establish and appropriate legal framework for the protection of authors' rights
- provide fiscal, credit and administrative incentives for the publishing industry
- facilitate nation-wide distribution and free international circulation of books
- establish national library networks
- introduce new methods for teaching of reading
- train human resources in the different skills involved in the book sector.

It is still early days for the Council, which like the KPA is being criticised for being dominated by big firms and over representing certain ethnic groups. The effects of the new body in the direction of establishing a favourable book environment remain to be seen.

### **5.2 Textbook Policy**

In September 1998 the Ministry of Education launched the new liberalised textbook policy for Kenya after negotiations and lobbying involving the KPA

and the Dutch Government. The new policy is a departure from the past when parastatals enjoyed a monopoly position in the production of textbooks. The Ministry of Education still approves of books for syllabi but private publishers now compete with parastatals.

### **5.3 International Tenders**

There is a general feeling that opportunities of international bidding come too late to Kenyan publishers, often through the Ministry of Education, but only after the information has been available to publishers in the North. Publishers felt that APNET could do more in this area through training, and by ensuring that the information comes direct to KPA as early as possible.

## 6 Credit Scheme

The Loan Guarantee Programme for the development of autonomous publishing capacity in Kenya (administered by The Dag Hammarskjöld Foundation) is the only loan guarantee scheme for publishers in Kenya. Its aim is to provide access to loans from banks through providing security. The scheme is administered by Kenya Rural Enterprise Programme (K-REP). Since its inception in 1989, when a grant of US Dollars 300.000 was given to the Dag Hammarskjöld Foundation (DHF) by Ford Foundation to provide a guarantee sum, eleven indigenous publishers have benefited.

Through our desk study and interviews with representatives from K-REP DHF and beneficiaries, we found that the exercise has been, and still is successful, although the scheme faced many problems especially in the first years. Preparation was lacking in the beginning. Some publishers feel that information was not disseminated effectively and did not make it entirely clear that the scheme did not provide grants. Its aim was to enable publishers to obtain credit at the market rate. At present the interest rate in Kenya approaches 30 % which is prohibitive to publishers. Similarly it seems that research into the publishing outfits which applied was not thorough; the record on marketing and distribution by one publisher was notoriously bad; another successful applicant had not published any books and was a book consultant rather than a publisher. Both have had problems in paying back the loans.

In the early days of the scheme the DHF attempted without much success to get together beneficiaries to make a joint plan of action in the key areas of marketing and distribution. Collaboration with K-REP has worked well. Applicants have been promised confidentiality, and the secrecy was extended to not letting involved publishers know that some money had been forwarded to the bank to cover part of the debt owed by the scheme's three defaulters. While this seems a problematic lack of transparency, the secrecy was important for the credibility of the programme. If the availability of funds to cover defaults was widely advertised, the incentive to repay the loan would have been affected. Although a serious attempt was made to include the participating bank in the scheme, relations between publishers and banks have been characterised by suspicion rather than collaboration.

All the same, the scheme can show some successes: a loan provided one Kenyan publisher with seed money to eventual purchase the remaining foreign shares so that his company is now wholly Kenyan; another fairly new and small

publisher who specialises in finding and supporting new authors was carried through a difficult phase by the loan guarantee scheme; a third larger company now has access to the necessary capital without the guarantee provided by the scheme, "I have now outgrown Dag Hammerskjöld", we were told. Three publishers have paid back their loans, two are doing well and expanding, three are struggling with their loans and three are defaulters. A good number of books have been published as a result of the programme. DHF is seen as a very responsible donor. However, at the moment the high rate of interest seems to be a key problem for publishers in Kenya, and that problem is not solved by providing a form of collateral.

## **7 The Role and Impact of APNET**

### **7.1 Activities and Results**

One member of the KPA Council summed up what he saw as the key APNET activities as follows: Capacity building, trade promotion, networking, meetings, exposure and publicity. APNET's most important achievement in Kenya is probably that it has contributed significantly to the revival of the KPA. It has supported KPA training programmes on trading and World Bank bidding. Kenyan trainers have been trained but not used. It has provided information on the publishing situation and markets in other African countries, though less so lately. Trade promotion has mostly occurred through exposure of books at fairs. Research and documentation did not seem to filter through to Kenya.

### **7.2 Publishers' Views of APNET**

Aggregating the views of the Kenyan publishers interviewed created the following ranking of APNET activities:

1. Networking
2. Training
3. Trade promotion
4. Advocacy
5. Research and documentation

All publishers found training "very important" or "important" and all except one have used the activities sometimes or a lot, and were satisfied. Networking was also rated as "very important", and in one case as "important", although not more than two thirds had made use of APNET in this connection. Most found trade promotion "very important" or "important" and around half have used it sometimes or a lot. Some felt that APNET should have done more, for example encouraging and facilitating intra African trade, not as a trading organisation but by supplying information on different markets and opening national APNET subsidiaries. Many publishers have regularly sent a selection of books to book fairs at which APNET was present, and although they were happy to do this there was a feeling that nothing much which was tangible came out of the exercise. One publisher suggested that APNET should advise on the books which were suitable for particular fairs. Advocacy was on the whole rated as "important" though not as "very important". Most of those interviewed thought that APNET should do more in all the above areas.

Research and documentation was not regarded as important by more than two who had also made use of it.

All interviewed used APR as an important source of information. The KPA came next as the most important source - a few had contacts with the Board and Secretariat and half had had information in connection with book fairs.

APNET's role in facilitating information and seminars on World Bank bidding procedures was appreciated, but the matter was seen as complicated, and not enough had been done. One publisher suggested that APNET should provide a leaflet which explained the matter in fairly simple terms and told of experiences with bidding in countries belonging to the network.

Publishers noted that communication with APNET had slackened - no APR has been received for a long time - although there has been some improvement recently. Training of trainers in 1994 had not been sufficiently followed up, which caused some frustration. Some remarked that APNET needed to demystify itself. This however, could be a reflection of the KPA's ability to relay information about APNET to publishers. The relationship between some Kenyan publishers and APNET was viewed as clubby by other publishers. Many felt that it was odd that life membership was guaranteed to named founding members of APNET in the revised Constitution.

A common view was that APNET "is trying, it has not been around for very long, and it should go on trying." APNET should be more visible and practical. Its strength up to now had been mainly in training and networking. Several publishers and personnel working at the middle level did not know of the existence of APNET. One publisher suggested that APNET should be more active in furthering the role of women in publishing e.g. by setting some goals to be achieved by NPAs. One publisher expressed the view that reduced funding to APNET helped it to grow and make priorities. With more funding, he argued, the mission was too big and the aims and activities tended to be diffuse.

### **7.3 Financial Sustainability**

Only one or two publishers saw no alternative to donor funding. All of those interviewed expressed a willingness to let a part of their membership fee to the KPA be used to support APNET's infrastructure. Some even suggested that part of this APNET "membership fee" should be part of a revolving fund with other contributions from cost sharing and payment for services. Publishers might then apply for loans from that endowment. Most were willing to pay for services rendered by APNET, two thirds would pay between 10 and 50 % for training, the rest, except one, less than 10 %. One fourth would pay more than 50 % for trade promotion, the rest except two between 10 and 50 %. Most were willing to pay more than 50 % and two would pay the full costs for subscription to the APR.



## **7.4 The Kenyan View of APNET's Governance**

Many Kenyan publishers believed that the capacity of the APNET Secretariat was too small. They also found APNET too Harare-centric. Some felt that APNET had a tendency to work through personal links rather than through the prescribed structures, which resulted in a "clubby" relationship between some publishers. Other publishers did not think this was the case and gave examples to support their view. These differing views may reflect a certain amount of professional jealousy within the publishing sector in Kenya.



## **8 Conclusion. The Challenges of the Book Industry in Kenya and the Potential of APNET to Address these Challenges**

The problems that publishing in Kenya faces may be clustered as economic, technical and cultural: Lack of capital, poor infrastructure, declining disposable income, outright poverty, lack of quality printing, small market size, talented but not very professional authorship, low readership, and lack of reading culture. The two parastatals saw a shrinking market as the biggest problem and two of the commercial publishers saw the market size and the customers' buying power as their main problem.

Almost all publishers we interviewed talked of lack of capital and cash flows as the biggest problem and pointed to the high commercial rate of interest as prohibitive. Few publishers are expanding and most barely survive. Suppliers do not give long-term credit. Some suggested that credit forms such as revolving funds be looked into. Reduced disposable income means reduced purchase of books. Prices of books are high and reflect the many links in the book production and distribution chain, which all have to profit from to sustain themselves. Kenya produces paper but at a higher cost than that which is imported. On the other hand, most other inputs for the publishing industry are free from tariffs and customs.

Few resources and fairly low skills in the areas of marketing and distribution, coupled with infrastructure which favours urban areas is a problem. Both publishers and sellers have too much dead stock. Rural book shops have little capital hence a small stock, and are not efficient. Many publishers sell direct to schools and local authorities. Many authors and some publishers are regarded as not professional. One academic publisher complained about the lack of high quality manuscripts. This is reflected in the informal book production. International bidding opportunities and procedures were not well known and understood. One district, Laikipia, called for a tender based on textbook lists selected by schools in collaboration with the District Education Officers. This was an advantage for small publishers.

The solution of many of these problems are beyond the capacities of APNET. There is a general feeling that the network has done well in its chosen areas of activity, but that it needs to become more visible, more practical, and to operate in a manner which is less dependent on personal contacts, and which

actively seeks to address problems not only of big publishers but also of small publishers.

The following strengths were found:

- APNET has been instrumental in reviving the KPA.
- APNET has promoted publishers at book fairs.
- APNET has facilitated contacts to the World Bank and supported co-publishing and IT initiatives.
- APNET has strengthened and brought together African publishers and NPAs.
- APNET has done good work in training and the curriculum is of a high quality.
- APNET has disseminated useful knowledge, mainly through APR and individual contacts.
- APNET has heightened the status of African publishers in Africa and in the North.

The following weaknesses were found:

- APNET has not kept up effective communication and information. The infrequent appearance of APR is regretted.
- APNET has tended to bypass KPA - something that was considered contrary to what had been intended.
- APNET does not have the capacity to manage all its programmes.
- APNET has let certain activities hang in the air, such as training of trainers and the Consultants' Register.
- Research and documentation do not reach Kenya.
- APNET has not done enough in looking for alternative ways of securing capital and expanding trade for publishers.

## **Annex 1: List of People Met**

Ondugo Brown, Jacaranda Design Ltd.

Omari Gichogo, Secretary and Editor Nairobi University Press, Treasurer KPA

Wairumi Gichohi, Executive Officer KPA

J. G. Githenji, Publishing Manager, Kenya Literature Bureau

Nancy Karimi, Publishing Manager, Jomo Kenyatta Foundation

Pamela Kola, Writers Association of Kenya

Samuel M. Maitha, Deputy Director, Kenya National Library Service, Member of the Board, Kenya Book Development Council

Jimmy Makotsi, Publishing Manager, East Africa Educational Publishers

Ruth Makotsi, Consultant

Stephen Mirero, Kenya Rural Enterprise Programme

David N. Muita, Managing Director (MD), Macmillan Kenya Ltd. President of KPA

Serah Mwangi, MD, Focus Publications Ltd

Janet W. Njoroge, General Manager, Longhorn Kenya Ltd.

Professor Thomas R. Odhiambo, Dag Hammarskjöld Foundation

C. D. Shah, MD, Textbook Centre

Mr Mohammed Sheikh, MD, Trans Africa Book Sellers

Gacheche Waruingi, MD, Phoenix Publishers Ltd, former KPA President



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# **Appendix 4: Mozambique Country Case Study**



Sida

# **Evaluation of APNET: Mozambique Country Case Study**

Final Report

January 1999



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# 1 Introduction

The purpose of the Mozambique country case study is to gather and analyse information that can provide a more complete picture of the environment that APNET works within, how APNET is making an impact and whether it is meeting the needs. The main aim is to establish (i) an overview of the publishing situation in Mozambique, (ii) an understanding of the key challenges facing the publishing industry; (iii) an understanding of APNET's role in the country.

This case study is one of five<sup>1</sup>. While obviously every publishing industry has its unique features, Mozambique represents a very small nascent African publishing industry without an established publishers association. As a former Portuguese colony, Mozambique is Lusophone. Years of war ending in 1992 has set back the industry on several fronts. At the same time, liberalisation of the economy has resulted in the emergence of private publishers.

This case study is based on:

- books, articles and other documentation<sup>2</sup>
- in-depth interviews with publishers, book shops, and government representatives and agencies<sup>3</sup>
- questionnaires

Most of the interviews were conducted during a mission to Mozambique carried out by Simon Matsvai between October 19 and October 25, 1998.

The chapters that follow provide a short historic perspective of publishing in Mozambique, information on textbook supply and production, an overview of the nascent book environment, an analysis of the interaction between the book industry and government actors, and a discussion on the role and impact of APNET in Mozambique.

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<sup>1</sup> The other four are Nigeria, Kenya, Zimbabwe and Guinea

<sup>2</sup> See annex 1 for a list of references

<sup>3</sup> See annex 2 for a list of persons interviewed





## 2 Historic Perspective of Publishing and Book Policy

Mozambique is a low-income country that used to be classified as the poorest country in the world. It has been devastated by war: first in the armed liberation struggle, and then in a civil war that only ended in 1992 with the Rome Peace Accord. During the civil war, nearly 60% of the schools were closed during a twelve year period. Mozambique has, however, been successfully moving from a system of central planning - despite a devastating civil war - to a democratic and private sector economic system. Peace, along with profound structural reforms, has generated significant momentum for growth, particularly in the rural areas. Real GDP growth rose from an average of 6.9% a year in 1993-96 to 12.4% in 1997. The informal sector is still the mainstay of the economy. The country has had an external debt of USD 5.286 billion of which 80% was written off in 1997.

Unlike some of its neighbouring countries, a book industry never existed in Mozambique in the colonial era. Few books were imported, and those that were, served almost exclusively the colonial settlers. At the time of independence, illiteracy was at 97%.

Independence in 1975 gave rise to a publishing industry of sorts, albeit within the framework of the centrally planned economy. State participation in the industry has since been a major feature. Governmental bodies were established and given responsibility for the production and distribution of educational materials in the early years of independence. In addition, the National Institute for the Book and Record (INLD), was created with the aim of promoting publishing. INLD was a key player in the industry, first as part of the Ministry of Information, and since 1989, as part of the Ministry of Culture, Youth and Sport. While most materials for publishing were imported, INLD was seen as relatively successful in terms of quantities of book produced. From 1976-1989, 700 non-school titles were published<sup>4</sup>. In the early 1980s, the Soviet Union was not only a political ally of Mozambique but was also of significant assistance in book trade. They accepted the purchase of books in meticaïs (the Mozambican currency).

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<sup>4</sup> Samuel Matola "The Book in Lusophone Africa: An Unreal Reality" in ed. C. Priestley *Development Directory of Indigenous Publishing 1995*. Harare: APNET 1995.

The reform programme to liberalise the economy started in the late 1980s, but picked up in earnest after the peace accord in 1992. Mozambique has been developing a free market economy with donor funding from the World Bank, IMF and other bilateral and multilateral funding agencies. This young market economy is highly dependent on donor funding with up to 60% of government expenditure being donor funded.

The economic reform process in Mozambique has had implications for the publishing industry. To begin with, the educational materials sub-sector has been restructured, with the aim of promoting market economy principles. Other companies are now, in principle, free to establish themselves and compete with the existing entities. A concerted effort has also been made to decentralise procurement of textbooks to the provincial and district levels. Likewise, the existing commercial network is used for textbook distribution at these levels. These measures, which contribute to an enabling environment for the publishing sector, are discussed in greater detail in the following chapters.

### 3 Textbook Supply and Production

The National Institute for the Development of Education (INDE) under the Ministry of Education, has and continues to be responsible for curriculum and syllabus development in schools. In 1980, a unit within the institute called the Editora Escolar (EE) was established and charged with publishing school books. Virtually all primary school textbooks are in Portuguese. From 1982 to 1984, 8 million school books were published annually by the state publishing agency, consisting of 85 titles. This has dropped dramatically since then, although the current figure is not known. Six years later, a state-owned school materials distribution company, DINAME, was created, partly with the help of Swedish funds.

In 1993, when the liberalisation process had already begun restructuring several sectors of the economy, it was decided to merge EE with DINAME. This would, in theory, give EE a greater control of the book production process, including contact with the schools. Sida has provided technical and financial support to the new merged DINAME. In the report "Towards a National Policy for Educational Material", the authors claim that this merger has not strengthened the Editorial Division enough.<sup>5</sup> Furthermore, since the mid-eighties, EE has not published any basic education textbooks. The company is, at present, in the process of being privatised, which is hoped will bring about an injection of competence in commercial publishing. As yet, there have been no local investors available and attempts to get regional investors have not yet been successful.

One of the most innovative aspects of textbook supply in Mozambique is the Caixa Escolar, a consumer subsidy system that was developed in the 1990s. A relatively flexible system that can respond to the needs of disadvantaged pupils on a school-by-school basis, it also entails a substantial decentralisation of funds and responsibility to the provincial and district levels where the books are normally bought through the regular network of trades. Swedish and other international support has been redirected from subsidising textbook provision to supporting demand through this mechanism. Unfortunately, the World Bank, that initially indicated possible support to the Caixa Escolar, established a parallel system that did not correspond to the new Mozambican school book policy. The Bank instead printed books outside the country and distributed

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<sup>5</sup> Brickhill, Paul and Bengt Lindahl. "Towards a National Policy for Educational Materials in Mozambique", April 1998.

them free of charge and thus counteracted the ideas underpinning the consumer subsidy system of the Caixa Escolar. Nevertheless, the Caixa Escolar has made it possible to attain a 95% coverage of textbooks among first and second grade pupils.<sup>6</sup>

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<sup>6</sup> "*Sida Support to Educational Materials Programmes - A review of experiences and current strategies*"  
Department for democracy and Social Development. Sida, December 1996. p. 10.

## 4 The Nascent Publishing Industry in Mozambique

Given i) the Euro-centred development of Mozambique during the colonial era when it was regarded as a province of Portugal; and ii) the former political instability and the destruction of the national infrastructure by wars; iii) the centralised economic structures that, until the late 1980s, prohibited publishing outfits to establish themselves; iv) the current young market economy; it may not be surprising that of all of APNET's members, Mozambique has one of the least developed publishing industries.

The government is, however, making efforts to enhance the growth of the industry. Mozambique is opening the market for school books to commercial publishers. This has been preceded by the efforts to decentralise textbook purchasing, as described in the previous chapter. The new textbook policy is expected to define the rules of the game as well as the respective roles of the commercial publishers and the government.

Private sector publishing started in 1987 when private participation in the industry was allowed. In the past ten years there has been growth in terms of the establishment of private publishers, which today number around 14, although only three are recognised as full-fledged publishers. The growth in terms of the number of titles published per year and print-runs has, however, diminished. Foreign currency shortages, which still exist, and the small size of the market, have been constraining factors. The few publishers that exist have been sustained to a large extent by engaging in other business activities. In addition, they have sometimes relied on support from donor-funded projects for the production of books and materials.

NGO publishing has been seen as a significant avenue through which to provide the necessary published materials for both urban and rural development initiatives as well as for the general provision of education to the disadvantaged. The NGOs have had easier access to foreign currency than the publishing outfits through the donations they receive.

Mozambican publishers cite the small market as one of the top three problems they face. The market size for books is estimated to be 35,000 readers out of a national population of 16 million people<sup>7</sup>. This is exacerbated by the absence

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<sup>7</sup> Navarro, Julio "The Book World in Mozambique". APR: Vol.6 No. 2. 1997. p. 10.

of any major national reading promotion campaigns. Furthermore, there has so far been little scope for any government-funded initiatives for reading promotion or book provision schemes. Book prices are currently prohibitive with one book costing about 50% of the national minimum wage. Linkages with the other Lusophone countries in Africa are under-developed and thus there is no exchange or expansion of the market.

Mozambique does thus not export books and very few are imported<sup>8</sup>, aside from textbook consignments from abroad. In general, intra-regional trade is a problem due to Mozambique's insignificant market size. The Zimbabwe Publishing House has been involved in selling language books to Mozambique but with mixed results due to market size constraints.

Distribution is problematic issue in Mozambique. Destroyed infrastructure and land mines sometimes hamper efforts to bring books to rural areas. Of the 10 booksellers, only one has some rural coverage.

There is neither a national publishers association nor a booksellers association in Mozambique. However, the National Institute of Books and Records has acted as a kind of proxy. INLD's main functions include developing and implementing a national book policy, improving the performance of publishing houses by providing whatever support necessary, representing the country internationally at publishing events, compiling national bibliographical data and licensing publishers.

There are currently efforts supported by APNET to form a national publishers association. Due of the small number of publishers, a consensus has been established to include booksellers as members in the association. There are seven booksellers in Maputo and three in Beira, making 10 for the whole country. It is anticipated that by the end of 1998, the Mozambican NPA will have been formed.

Key informants listed the following main issues that they expect the new NPA will address:

- human resources development in relation to editing and designing;
- mobilisation of investment into the local industry from foreign joint venture partners;
- readership promotion to sustain future publishing activities;
- re-establishing a national book distribution network.

Currently, an official from the National Institute of Books and Records represents Mozambique and Lusophone Africa on the APNET Board. While this well-connected individual has been seen an appropriate representative for the time being, he is not a publisher. Mozambican publishers are therefore concerned about the prospects of finding a suitable chairman for their association once it is formed.

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<sup>8</sup> Imported books are almost exclusively from Portugal.

The Mozambican writers association plays an important role in stimulating growth in the sector. In 1996 there were 69 authors of which 7 are women (10 authors have died since and some more have emerged). Roughly half of these authors also write in local languages.

## Facts about the Mozambican Book Environment

<b>1. Population</b>	16,000,000
Grow rate	2.6% (1997 est.)
Fertility rate	6.11 children born/woman
Age structure	0-14 years: 45%
Prim. school enrolment ratio	75% boys, 54% girls (1990s)
Sec. school enrolment ratio	9% boys, 5% girls
<b>2. Literacy rate - age 15 and over can read and write</b>	
Total population	40.1%
Male	57.7%
Female	23.3%
<b>3. Languages</b>	Portuguese (official), 13 local languages. English is gaining popularity.
<b>5. National publishing association</b>	None.
<b>6. Training facilities related to publishing industry</b>	None.
<b>7. Trade and sales statistics</b>	100 % of sales are to the local market, most of which is urban.
<b>8. Readership</b>	Estimated at 35,000, taking into account literacy and income.
<b>9. Authorship</b>	Over 60 authors
<b>10. Book distribution and book sellers</b>	
Number of bookstores	10, all urban

Sources: UNICEF, UNDP, CIA Fact Book 1997, Interviews, World Bank





## **5 The Publishing Industry's Relationship with the Government**

Mozambique has no book development policy as such. One of the functions of the National Institute of Books and Records is, however, to develop such a policy. Nevertheless, the educational sector is a priority area in the Mozambican state budget and, as mentioned previously, recently a textbook policy has been developed.

Those interviewed believe there is generally a harmonious relationship between the state and publishers. The policy environment is in support of local publishing. While issues such as the removal of duty and tax on paper is important, the publishers' main advocacy concern is the conditions of supply of books under the multilateral funding schemes. It is felt that local publishers have not been given an opportunity to do at least a portion of the production locally, while they claim they have the capacity to do so. Furthermore, it is held that the government and publishers need to advocate strongly in favour of the recognition of local capacity in future funding schemes. The current textbook policy is hoped to serve as an opportunity to entrench national interest in the design and handling of future textbook provision schemes.

Until now, large book provision tenders have been awarded to foreign publishers, who then export to Mozambique. These have constituted significant support to boost the supply of books in the country. Two examples of large textbook schemes in which local production has not played a part are the World Bank's and the Canadian government's programmes. Under the World Bank scheme the tender was awarded to an Indian publisher in 1996. It is argued by the local players in the industry that they had the capacity to deliver on this contract and they never received a satisfactory reason why the tender was awarded to a foreign company. The winning bidder failed to deliver on the tender and there have been litigation proceedings initiated against the company since then. Meanwhile, the Canadian project stipulated that only Canadian printers would be illegible for the tender submission. Production will therefore be carried out in Canada and the finished books will be shipped to Mozambique. Like in the World Bank case, the local players believe this is based on a false assumption that there is no local capacity to produce the books in Mozambique. DINAME estimates that at current capacity levels, between 6 and 7 million books per year could be produced in Mozambique, notwithstanding that there is need to upgrade the available technologies.



## 6 The Role and Impact of APNET

The main contact that the Mozambican publishing industry has had with APNET is through the Mozambican board member and book fairs. One publisher has sent books to the APNET collective exhibit twice in recent years. A training workshop was held in the last year but because of lack of interest, the workshop opened up the participation to youths involved with publishing magazines. The youths were highly appreciative of the workshop. Communication between APNET and the publishers is viewed as weak. Most do not use the APR, which is rarely published in Portuguese, and the one publisher that uses it has not received a copy for over a year. The absence of an NPA may also be a factor affecting communications.

**Networking** is generally regarded as important by Mozambican publishers but has not brought about the strategic linkages which publishers wish to have, especially with foreign investors or donors for the direct support to book provision, and with the rest of the Lusophone world.

The APR has not been received during the whole of 1998; and it is felt that the secretariat has ignored advice from Mozambique regarding the need to have the correct translation of the title in Portuguese, the inclusion of Portuguese articles and an offer to help in the production of such articles. Most of the publishers encountered did not use the APR.

**Training** was also considered as important, though it is viewed that it is not carried out often enough (only one training workshop so far) and attendance by real publishers has been poor. Participants in the training workshop were not publishers but youth involved with magazines. There is potential to do much more in training with some cost recovery as well. However, lack of human resources was not mentioned by any of the Mozambican publishers as a main constraint.

Most of the Mozambican publishers had made some use of APNET's **trade promotion**. Several publishers had been sponsored to book fairs and have sent books to APNET's collective exhibit. One publisher can point a linkage with a publisher outside of Mozambique that has come about through APNET-related activities. Trade promotion is judged as APNET's third most important activity. Some Mozambicans, however, see this activity as irrelevant to the current needs of Mozambican publishers because there are no serious buyers or sellers yet. It is felt that efforts could have been made to promote the

Lusophone linkages and thereby expand the market; if not market expansion, at least opportunities for selling copyrights even to Anglophone or Francophone countries could have been identified.

**Research and documentation** is regarded as "not important" by most of the publishers and they believe APNET should do less of this. Likewise, **advocacy** is seen as irrelevant at the national level because there is joint understanding with the government that Mozambique has sufficient capacity to meet printing and publishing requirements of large international tenders for Mozambique. Advocacy was therefore regarded as "less important"

On the one hand, Mozambican publishers hold that the key problems they face cannot for the most part be addressed by APNET, such as the small market and high production costs. On the other hand, expectations are very high regarding the capacity of APNET to link the Lusophone world and to attract foreign investors and donors to Mozambique.

## 7 Conclusions

The major problems facing the nascent industry in Mozambique are the lack of:

- capital, and
- a viable market for books to support and sustain growth.

Macro-economic development as spearheaded by the state is a critical precondition for the future sustainability of the publishing industry. There is need for a market for books and this requires in turn general economic growth in Mozambique and in the region. In this respect, Mozambique seems to be moving in the right direction considering the positive economic indicators for the country in general. In addition, the book market is being boosted by the government decisions to i) open the textbook market to commercial publishers and, ii) decentralise textbook procurement.

Stimulating readership is also critical to ensure growth in the future market for the industry. This can be achieved by supporting the establishment of more grassroots-oriented book development and readership promotions. APNET can not address this issue but could play an advisory role in this regard.

The Mozambican publishing industry sees the injection of foreign capital as crucial for its growth and sustainability. Linking local publishing capacity with foreign investment to provide the necessary financial and technological injection to strengthen the nascent industry is seen as a priority intervention. While several Mozambican publishers believe that APNET can play a role here, it is difficult to see what this would be. What APNET can do, however, is to advocate for bilateral and multilateral agencies to support the growth of the Mozambican book industry.

Mozambican publishers expect APNET to link the Lusophone world, in and outside of Africa. This is one of the few ways they can see their market expanding, but this linkage has not occurred. This is a difficult task for APNET as all the APNET Lusophone countries represent nascent publishing industries, struggling to survive. Furthermore, APNET's knowledge and capacity of the Lusophone world industry is less than that of the Anglophone and Francophone publishing industries in Africa. However, when the Mozambican publishing association is established, APNET's networking capacity and collective experience will constitute an important support.



## **Annex 1: List of Persons Met**

Ms M. Arends, UNESCO-Education Expert (Mozambique)

Mr de Barca, Editora Escolar (Holding Company for DINAME)

Mr J. Cartoze, Coopimagem

Mr F. Couto, Ndjira/Caminho

Mr S. Matola, APNET Board Member

Mr A. Muhamed, Leia Commercial

Mr Navarro, National Writers Union

Mr M. Ouane, Dinamee Editorial Division





## Annex 2: References

Brickhill, Paul, Catherine Odora Hoppers and Kajsa Pehrsson. *Textbooks as an Agent of Change: Gender aspects of primary textbooks in Mozambique, Zambia and Zimbabwe*. Stockholm and Harare: Sida 1996.

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## **Appendix 5: Zimbabwe Country Case Study**



Sida

**Evaluation of APNET:  
Zimbabwe Country Case Study**

Final Report

January 1999



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# 1 Introduction

The purpose of the Zimbabwe country case study is to gather and analyse information that can provide a more complete picture of the environment that APNET works within, how APNET is making an impact and whether it is meeting the needs. The main aim is to establish (i) an overview of the publishing situation in the Zimbabwe, (ii) an understanding of the key challenges facing the publishing industry; (iii) an understanding of APNET's role in the country.

This case study is one of five<sup>1</sup>. While obviously every publishing industry has its unique features, Zimbabwe represents an African country with a strong multinational dominance.

This case study is based on:

- books, articles and other documentation<sup>2</sup>
- in-depth interviews with publishers, book shops, and government representatives and agencies<sup>3</sup>
- questionnaires

Most of the interviews carried out by Simon Matsvai in Zimbabwe between October 15 and October 30, 1998.

The chapters that follow provide a short historic perspective of publishing in Zimbabwe, an overview of the book environment, an analysis of the interaction between the book industry and government actors and a discussion on the role and impact of APNET in Zimbabwe.

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<sup>1</sup> The other four are Nigeria, Kenya, Mozambique and Guinea

<sup>2</sup> See annex 1 for a list of references

<sup>3</sup> See annex 2 for a list of persons interviewed



## 2 Historic Perspective

The publishing industry in Zimbabwe dates back to the colonial era when several British and other foreign multinational publishing houses were established in the country. In this period, the missionary influence was also high, which resulted in the development of an orthography for Shona and Ndebele as bibles were published in these languages.

In 1954 the government established the Literature Bureau whose main function was to encourage authorship in local languages. As local languages was considered high risk by publishers, the government agreed to sponsor the publishing of these books. The Bureau still exists and has to date helped over 400 authors publish over 700 titles.

Until 1980, the field was entirely dominated by Macmillan and Longman. While some of the multinationals have become slightly more African, it was only quite recently that these subsidiaries stopped sending back all profits to their mother companies. While some indigenous publishers have emerged since independence, they have not made much of a dent on the multinational dominance of the industry. The ownership structure of the industry is still by and large divided along racial lines with the whites in the majority ownership and control of the industry.



### 3 The Book Environment in Zimbabwe

Zimbabwe has a one of the most developed book industries in Africa. A wealth of writing talent, good lay-out and design capacities, a well-developed infrastructure (in terms of desktop publishing, Internet facilities, printing and other technical services), a large number of bookshops and, by African standards, a sizeable amount of books produced every year. A major development in the past decade or so has been the emergence of sectoral and sub-sectoral associations to cater for the interests of various stakeholders in the industry. Virtually all key players in the industry have an industry association of their own such as a publishers association, a booksellers association, a master printers association and four writers associations. The book development council acts as an umbrella organisation and aims at promoting readership.

#### 3.1 Publishers

There are an estimated 64 publishers in Zimbabwe of which half produce at least one title a year. In total, roughly 300 titles are produced every year. All but three of the publishing houses in the Zimbabwe Book Publishers Association are Zimbabwean owned. Two of the three, Longman and College Press, control about 85% of the textbook market in Zimbabwe.<sup>4</sup>

There are five large well-established publishers namely Academic Baobab Books, Longman, College Press, Zimbabwe Publishing House and Mambo Press. Of these, the first four focus on textbooks while the fifth is more into general and religious books. It is also perhaps the oldest and biggest publisher in local languages.

There are other medium-scale publishers who are into textbooks and general publishing. This group includes Juta, SAPES Books, Harper Collins, Modus, University of Zimbabwe Publications and others.

The third tier of the structure of the publishing industry is made up of occasional publishers. Their core business is not publishing and they do not depend on it. Usually these have been linked to NGOs. Examples include Zimfep, WLSA and ACT.

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<sup>4</sup> Muani Samuel Mtetwe. "ADEA/APNET Intra African Trade in Book Study: Zimbabwe report. Unpublished". 1998.

Publishing in indigenous languages has been limited to fiction and religious publishing in both the pre and post independence eras. Indigenous language publishing in other areas has been a slow process due to the country's underdeveloped language policy.

The main challenges for the Zimbabwean publishing industry are the following:

- There is a strong dominance of multinational/non-indigenous publishers whose interests are not necessarily a broad growth of the industry.
- There is a general lack of adequate markets to support the large local production capacity. One of the biggest publishers indicated that they are operating at 25% of capacity due to lack of markets.
- Indigenous firms in particular have difficulties in acquiring capital for investments.
- The price of raw materials is high and the production, marketing and distribution costs are currently prohibitive with the recent devaluation of the Zimbabwe dollar to three times lower than two years ago.
- Government expenditure is under heavy siege as the government is under pressure to reduce its spending under the IMF conditions for balance of payment support. This has affected the level of government spending on book provision in schools, the mainstay of the publishing industry in Zimbabwe. The situation has been salvaged by the injection of donor funding for book provision under Dutch funding. This has had the effect of doubling the amount of money available for the purchase of books to Z\$48 per child per year with a bias towards rural primary schools.

## 3.2 The Market

Sales are predominantly to the local market. The bulk of the sales are school textbooks and tertiary books. The estimated size of the primary and secondary textbook market at about Z\$132.27 million based on the enrolment figures for 1998. This however excludes the expenditure financed by parents annually on the purchase of books for their children especially in secondary school.

Assuming six textbooks on average per pupil per year in secondary school with an average cost of Z\$100, the total volume is Z\$507.6 million annually. For primary school, on average a pupil may have four or so textbooks. It is assumed that this is what is provided under the Dutch funds and government per capita grants for rural primary schools. However, even at primary school there is still some direct expenditure by parents on schoolbooks for their children. All in all, the volume of production in monetary terms could be at least Z\$639.87 million annually.

Potentially there are 10,2 million Zimbabweans who are able to read and write in at least one language based on the national literacy rate of 85% of 12 million people. The number is growing because of the high enrolment rate into schools

with most children staying in school for at least seven years of primary education, by which time they are able to read and write in at least one major local language and English. There are also national literacy programmes that have been running since independence. There is a national readership promotion campaign run by the Zimbabwe Book Development Council (ZBDC) and various writers' organisations. The major handicap is the low income of the potential readers hence their inability to purchase books for consumption.

The actual readership level is much lower than the potential, although there are no accurate figures. Based on information on the estimated number of general books sold by all publishers annually, one could estimate the national readership level at 12000 people buying books every year. Circulation figures seem to indicate that perhaps one copy of a widely read book is read by between 15 and 23 people on average. Based on this, there could be a national readership of general books of about 180 000 to 276 000 readers. Yet, the annual level of book purchases is much less. Some of the factors are due to:

- Reading and books are associated with school exams
- The economic downturn in Zimbabwe puts books out of the household budget
- There are many other consumer goods competing with books for the middle income earner's disposable income
- Parents and children have grown up under the impression that books are provided for free as a result of the government policy of so called "free" education introduced soon after independence

Zimbabwe exports a reasonable volume of books and its publishers are involved in co-publishing arrangements. Most of the trade is with other African countries and South Africa constitutes an important market for several exporting firms. Large multinationals such as Longman Zimbabwe trade with their sister companies in for example Botswana, Zambia and South Africa.

### **3.3 Authorship**

Zimbabwe has produced internationally recognised and award-winning authors. There is, however, no national list of authors in Zimbabwe. Based on figures available to publishers it is estimated that there are 200 textbook authors in the country of which between 10% and 30% are women. Meanwhile, the majority of children's book authors are women. Publishers have noted that while only 5% of unsolicited manuscripts are from women, the quality of women's manuscripts tends to be higher.

### 3.4 Distribution

There is a highly developed book selling infrastructure covering not only the large and small urban centres in the country but also rural growth points and rural service centres. Accessibility of these areas for book distribution is high throughout the year due to the fairly well developed road network. The Zimbabwe Booksellers Association is reported to be the only one in Africa that is a full-fledged organisation with a full-fledged secretariat running the association. It is run on funding from its members.

The Booksellers Association was formed 41 years ago and used to operate very closely with the publishers. With the advent of independence in 1980, the sector has been "indigenised" and with this there has been an estranged relationship with the non-indigenous publishers. Around 75% of the booksellers are indigenous operators defined by the booksellers association as being owned and controlled by Black Zimbabweans and operating in Zimbabwe. At independence in 1980, the ownership structure was reversed. There were a total of 105 in 1997. Of these 97 paid up members of the association, 20 booksellers are operating in rural areas at growth points or rural service centres.<sup>5</sup>

The majority of booksellers are small and have no access to the textbook market. This effectively eliminates them as significant players in the market and they become marginal players dealing with general books and stationery and other non-book products. Financial results are disappointing hence the business failure rate of almost 10% annually.

### 3.5 The Zimbabwe International Book Fair

The Zimbabwe International Book Fair (ZIBF) has been held annually since 1982 and is the most important book event in Africa. In 1998, almost 300 exhibitors and 500 trade and professional visitors from over 50 countries participated. The book fair provides an opportunity for trade among countries, which is particularly important for Zimbabwean publishers who are on the continuous quest for export-led growth. Within Zimbabwe, the book fair plays the role of linking the key players in the sector including writers, publishers, booksellers, the book development council and other actors. The "Indaba", or forum, takes place during each book fair during which issues relevant to all stakeholders are discussed. The collaboration between the ZIBF and APNET is significant. ZIBF is an associate member of APNET and each year APNET sponsors a number of exhibitors to the fair.

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<sup>5</sup> A growth point is a business centre in the rural areas designated for industrial development as part of the strategy to decentralise industrial development to rural areas; a rural service centre is smaller and designated for commercial development.



## Facts about the Book Environment

<b>1. Population</b>	12,000,000
Grow rate	1.26% (1997 est.)
Fertility rate	3.94 children born/woman
Age structure	0-14 years: 43%
Sec. school enrolment ratio	53% boys, 41% girls (1986-93)
<b>2. Literacy rate - age 15 and over can read and write</b>	
Total population	85%
Male	90%
Female	80%
<b>3. Languages</b>	English (official), Shona (67%), Ndebele (15%). Nda, Venda and Tonga are important as they are spoken in the southern African region.
<b>5. National publishing association</b>	
Members	21
Age	17
<b>6. Training facilities related to publishing industry</b>	None.
<b>7. Trade and sales statistics</b>	
	Sales are to the local market, but books are exported to Southern and East Africa.
<b>9. Authorship</b>	
	In the hundreds. Mainly in English but also in local languages.
<b>10. Book distribution and book sellers</b>	
Number of bookstores	Over 100: Urban-based      79%
	Rural-based      21%

Sources: UNDP, UNICEF, CIA Fact Book 1997, ZBPF, Zimbabwe Booksellers Association



## **4 The Effect of Multinational/ Non-Indigenous Publishers on the Development of the Publishing Industry**

The ownership and control structure of the publishing industry, is defined along racial lines with white ownership and control being dominant. Trading relations, service and partnership preferences are still by and large defined on racial lines in the Zimbabwean economy.

The publishing industry is dominated by less than five large foreign owned or locally-owned, but not indigenous, corporations. The issue of what can be considered indigenous is contentious and respondents were usually either dismissive of the notion of indigenous or not keen to discuss it and its implications on development of publishing in Zimbabwe and in Africa as a whole. APNET is perceived as marginalising the large publishers by tending to focus on indigenisation of publishing as a development priority. While there is no agreement on what is indigenous, the balance of views (for those willing to discuss the topic) is that indigenous refers to local, black ownership and control of the publishing outfit. To go with this would also be the core of socio-cultural values characterising the content of the published materials. It was argued that the materials from an indigenous publisher would also strive (within the limitations of culture, policies and practices of the time) to carry indigenous content which could extend to include other African materials and values and mores as part of the scope of indigenous materials.

The racial undercurrent, which in effect is an issue of power and control, is contentious in most sectors of Zimbabwean society. One of the ways in which the issue is reflected in the publishing industry is the lukewarm relationship the "non-indigenous" Zimbabwean publishers have with APNET, which is seen as an organisation for which is not for them. The effects off the multinational and non-indigenous dominance of the Zimbabwean publishing sector are several. They include the following:

1. The expansion of publication of indigenous materials reflecting the values, lives and issues that affect the majority of the people in the country has been slow. In school books, for example, there are usually no more than changes in English/European names to Shona or Ndebele names.

2. The development of indigenous publishers has been thwarted by the multinational dominance of the textbook sector. This is where the important accounts are. As small indigenous publishers have limited or no access to finance for investment, they can not break into the textbook market.
3. The development of the industry has also been affected negatively at the level of authorship where it has been felt that the established publishers, mainly of a multinational ownership, tend to focus on a few accomplished authors to maximise their earnings and have not gone far enough to promote a broader growth of the authorship base within the industry.

## **5 The Publishing Industry's Relationship with the Government**

The Ministry of Education, Sport and Culture has primary responsibility in regulating the publishing industry in relation to textbooks and other educational materials. The Ministry of Information regulates the industry in relation to the publication of magazines, journals and newspapers. There is a Censorship Board which regulates the publication of all materials and importation of printed materials among other things.

### **5.1 Book Policy Development**

There is no book development policy in Zimbabwe. An initiative was made at one of the past Zimbabwe International Book Fairs to discuss the development of a book development policy. These efforts fizzled out and there appears to be no current efforts at resuscitating the development of such a policy.

Members of the book industry in Zimbabwe express a need for a book development policy. It is hoped that this will address issues constraining the development of publishing in relation to production, costs especially duty or sales tax on books, funding issues and others. It was also felt that the responsibility for spearheading the development of a book development policy should be assumed by the government. This is because of the need for such a policy to address issues such as diversity of languages and culture, the multiethnic and multicultural nature of Zimbabwean society and accessibility of books for the general population.

### **5.2 Textbook Production**

Textbook production is by and large governed by the national educational policy, in terms of both the production and distribution of educational materials. The Zimbabwean government provides funds for 95% of all book purchases. The local publishing industry is able to provide over 90% of the needs for years 1 to 14. While local textbook authors are often commissioned to write books according to the syllabus, it is also common that textbooks licensed from foreign publishers are used, or adapted. This type of arrangement favours the multinational publishers.

The Ministry of Education, through its Curriculum Development Unit (CDU), develops the curricula and syllabi for subjects at all levels. The unit reviews books and manuscripts and subsequently "approves" (i.e. the book can be used as a core textbook), "recommends" (i.e. the book can be used as a supplementary text) or rejects them. The review and approval follow set and agreed procedures that focus on implementing qualitative controls in relation to i.a. values, teaching methodology and illustrations. The clarity of the review and approval criteria is however no guarantee that only quality books find their way into the system. Because textbooks are the mainstay of publishing, there is a very high degree of vested interest among publishers in the book review and approval process.

Schools are responsible for choosing textbooks and purchase books directly from publishers. As revised syllabi cannot be introduced without books, close co-operation between the CDU and the educational publishers is a necessary precondition.<sup>6</sup> Publishers have considerable influence in the textbook provision system, both with regards to the CDU and the final sales to schools.

### 5.3 International Tenders (World Bank)

The World Bank has not introduced tenders in Zimbabwe, according to available information. Others say that even if there were tenders floated in Zimbabwe, it would be difficult for any one publisher to bid because of the difficult bidding procedures, the requirement for hefty pre-qualification deposits which may be required, and which will be very expensive for a Zimbabwean publisher to obtain due to expensive foreign currency. Publishers feel that APNET can play a critical regional and continental role for the promotion of local publishing industry, particularly by providing information on current tenders.

### 5.4 Publishers' Lobby Activities

There is no harmony between the state and publishers much the same as there is no harmony between the state and the rest of the private sector. Businesses believe that government is not promoting their interests in relation to taxation; import duties on raw materials for publishers and printers; export incentives and the high inflation macro-economic environment, making it difficult to obtain funds for business expansion or acquisition of new technology. As a result, the major publishers lobby issues are focused on fiscal management as they impact on overall publishing business performance.

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<sup>6</sup> Paul Brickhill, Catherine Odora Hoppers and Kajsa Pehrsson. *Textbooks as an Agent of Change: Gender aspects of primary school textbooks in Mozambique, Zambia and Zimbabwe*. Harare and Stockholm: Sida 1996.

## 6 National Publishing Association

Zimbabwe Book Publishers Association (ZBPA) was established in 1982. It has a membership structure with a representative board giving overall policy direction and representing the industry in various fora. The members, who number around 20, elect the board at the annual general meeting. Membership is in two categories, full and associate member. Associate members cannot vote and cannot be elected on the board. The association has sub-committees tasked with specific areas, such as the Education Sub-Committee for liaison with the curriculum development unit within the Ministry of Education and the chief-executives sub-committee that deals with the book procurement unit of the Ministry of Education and donor agencies.

The ZBPA has no secretariat. The reason given is to keep the overhead base of the association low. All secretariat functions are performed by the Confederation of Zimbabwe Industries (CZI) which is a national representative body for all Zimbabwean industry sectors. One person is allocated to handle APNET work including keeping records, communicating with members on behalf of the Board when asked to do so and other duties as defined by the board.

The main activities of the association have included:-

- Representing members on issues affecting the publishing industry with government and any other relevant authority;
- Publishing a books in print publication for Zimbabwe in 1997 and 1998;
- identifying and sponsoring annual literary awards in partnership with booksellers and printers;

Key informants felt that among the key issues the NPA should address are human resources development in relation to editing and designing, assist publishing consortia to bid and deliver on World Bank tenders in the region and promote the interests of the sector through advocacy. Advocacy should focus on lobbying the government to promote the development of the publishing industry by addressing the major problem of the high cost of raw materials including reducing import duties, sourcing paper in partnership with the NPA, introducing sales tax exemption for books and other educational materials. Better access to finance is also considered important area for advocacy. Furthermore, lobbying to increase market prospects is given importance and would include the development of a regional market spearheaded by the government through the removal of trade barriers.



## **7 The Role and Impact of APNET**

### **7.1 Activities and Results**

Considering the geographical location of APNET Secretariat in Harare, one would expect a reasonably close relationship between the local publishers and APNET. Contact between APNET and the Zimbabwean publishers is generally limited. The most common main source of information about APNET was the APR and APNET activities at book fairs.

Slightly more than half of the publishers interviewed used the APR. Most had made use of APNET's trade promotion, even if only a little, making it the most frequently used service. Almost half had found APNET had directly or indirectly linked their outfit to other publishers in other countries. This had mainly occurred through buyers and sellers meetings and by APNET taking books to book fairs. Two publishers had made use of the resource centre and two had also made use of APNET's research activities.

Only one person interviewed had participated in an APNET training workshop. Training initiatives in Zimbabwe have been few and planned workshops have not taken place. Zimbabwean publishers have been sponsored to the Pan-African Children's Book Fair in Nairobi and the book fair in Dakar. Five Zimbabweans are listed in APNET's consultants register.

### **7.2 Publishers' Experiences and Views of APNET**

The Zimbabwean publishers interviewed had very varied views on APNET. The number of publishers that responded that "APNET should do less" is higher in Zimbabwe than in the other countries surveyed. Two respondents, for example, thought APNET should do less training. Both respondents represented established publishing houses and had access to alternative and/or in-house training facilities. One publisher strongly criticised APNET's training concentrating on beginners - *"as if the majority of publishers are beginners when they have been in the business over five years"*.

All respondents that have made use of APNET service were however satisfied, with the exception of trade promotion, where slightly less than half were not satisfied. A sizeable number believed APNET should do more within its areas of work. In sum, training was given the greatest amount of importance. This was followed by networking, research & documentation, and finally trade promotion and advocacy jointly in fourth place. Those using APNET for networking had made contacts in other countries but so far only one such contact had generated business. One publisher complained that at the last buyers and sellers meeting, everyone wanted to sell and nobody was prepared to buy.

Generally respondents were ill-informed about APNET and its relationship with the national publishing association. There was also a definite feeling by most of the publishers of technical and professional superiority over APNET. They generally accepted APNET's existence but could not find much use for it. The major reason cited was shortage of time to attend to NPA or APNET related issues because it is said that Zimbabwean publishers tend to be involved in everything from shop floor work to managerial work.

The ZBPA says it lacks the time and resources to organise training on its own in fulfilment of its mandate from its members and hopes APNET will fill this gap. On the other hand, some ZBPA members feel that APNET is usurping a National Publishers' Association function. This could inhibit the growth of the ZBPA. ZBPA was compared to the South African publishing association, which is said to identify training needs and offers quality programmes to publishers from the region, including those from Zimbabwe.

The Writers' association has resented APNET's alleged involvement in discussion concerning the provision of the so called standard contract between publishers and writers.

A couple of respondents had doubts about the direction of APNET's advocacy activities. There is a questioning of the position of APNET on the thrust for indigenous publishers and the apparent assumption by APNET that all publishers who are not indigenous are "enemies of indigenous people". Furthermore, it was expressed that APNET should only focus on regional as opposed to national level advocacy.

### **7.3 Financial Sustainability**

All but one of the respondents was concerned about the high dependence of APNET on donor funding. They were willing to pay a membership fee to the NPA, which they already do, part of which may be used to partly finance APNET, on the condition that such fees are not too high because of the financial difficulties the publishers are facing.

The willingness to pay a percentage of the cost of APNET's services was relatively high. Despite some of the negative views on APNET and training, training was still the activity for which the greatest total willingness to pay was expressed. This was followed jointly by trade promotion and the APR. Research activities and the resource centre were also seen as worth paying for. Nobody was willing to pay to use APNET's consultants. One publisher stated that the consultants should pay to be registered. Another felt that there already were adequate consulting facilities in Zimbabwe.

Publishers' suggestions of services APNET should pursue to become financially more sustainable included:

- Selling information
- Developing an initiative for African books to be used by African institutions and charge a percentage of the business generated
- Recover full costs for training
- Lobby for reprographic rights and collect revenue as a partner.

Additional suggestions included to exploit the continental network of APNET to mount lobby and resource mobilisation activities which will lead to a direct contribution to business growth. APNET could claim percentages of the resources that are mobilised this way. It is argued that this will make publishers more viable and if this is the case, APNET can be sustained through the payment of a portion of the funds mobilised through its efforts.



## 8 Conclusions

The potential market size of 10.2 million readers out of a national population of 12 million people is a major opportunity for growth; this is however constrained by the low levels of disposable income to spend on books. The lack of an ingrained reading culture is also seen as a constraint on the market size. It is believed by some observers that the current efforts by the Zimbabwe Book Development Council need much greater support from the publishers themselves rather than donors, to sustain a reasonable momentum which will see an marked increase in the size of the market in future.

There are mixed feelings about the relevance of APNET services to publishers in Zimbabwe and in some cases the relationship between Zimbabwean publishers and APNET seems tense. This may be due to the nature of publishing in Zimbabwe, which is dominated by non-indigenous firms. On assessing the priority issues of concern for the publishers, there is a tendency to expect APNET to play a role that will directly promote the growth of the industry through various lobbying initiatives to promote intra-African trade and access to resources, through for example, World Bank tenders.

There is a general indication that APNET needs to do more to ensure that the publishers have the correct understanding of APNET and its functions. The relationship with ZBPA must be managed carefully. On the one hand, there is always a risk that APNET is accused of favouring the ZBPA due to geographical closeness. On the other hand, some members of the ZBPA actually accuse APNET of usurping ZBPA's responsibilities by providing training services.

There is a general consensus on the need to pay for some of the services provided by APNET to varying degrees. The overriding consideration seems to be that the relevance and quality of the service will determine whether one is willing to pay or not, and if so, what proportion of the cost.



## **Annex 1: List of Persons Met**

Mr P. Brickhill, Founding Member of APNET & Former Secretary

Mr S.J. Chifunyise, Zimbabwe Writers Union-Hre Chapter & Secretary for Education, Sport & Culture

Mr Chipunza, Chairman Zimbabwe Library Association

Mr A. Fasemore, APNET Harare

Mr Luphahla, Zimbabwe Book Publishers Association

Mr Luphahla, College Press

Mr Machingaidze, Ministry of Education, Sport & Culture

Mr D. Mackenzie, Longman Zimbabwe

Mrs Madondo, Zimbabwe Publishing House

Ms A. Majome, Zimbabwe Women Writers Union

Mrs Mathathu, Popular Education Collective

Ms T. Mbanga, Zimbabwe International Book Fair

Mr G. McCullough & Ms I. Staunton, Academic / Baobab Books

Mr T. Mudede & Ms Ruwimbo, APNET accountants

Mr D. Mungoshi, Zimbabwe Writers Union-Midlands Chapter

Mr F. Mupamhadzi, Confederation of Zimbabwe Industries (as secretarial service providers to the ZBPA)

Mr S. Mutetwa, University of Zimbabwe Publications Unit

Mrs Ndebele, Zimbabwe Book Development Council

Mr Nyamangara, Zimbabwe Book Sellers Association

Ms G. Nyambura, Executive Secretary, APNET Harare

Dr Pfukani, Ministry of Education, Sport & Culture

Mr R. Stringer, Founding Member of APNET

Mr W. Tekede, National Archives of Zimbabwe (ISBN section on authorship data)

Mr Bhowa Tendekai, UNESCO (Resource Centre)

Ms E. Wade, APNET Harare





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