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Publishing After a Decade of Democracy

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1994 – 2004

**Dix ans d'échanges littéraires entre
l'Afrique du Sud et la France**

*Ten years of literary exchange
between South Africa and France*

Numéro special

**Rassemblé et dirigé par Jean-Pierre RICHARD,
Université Paris 7, en collaboration avec
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*collated and edited by Jean-Pierre RICHARD,
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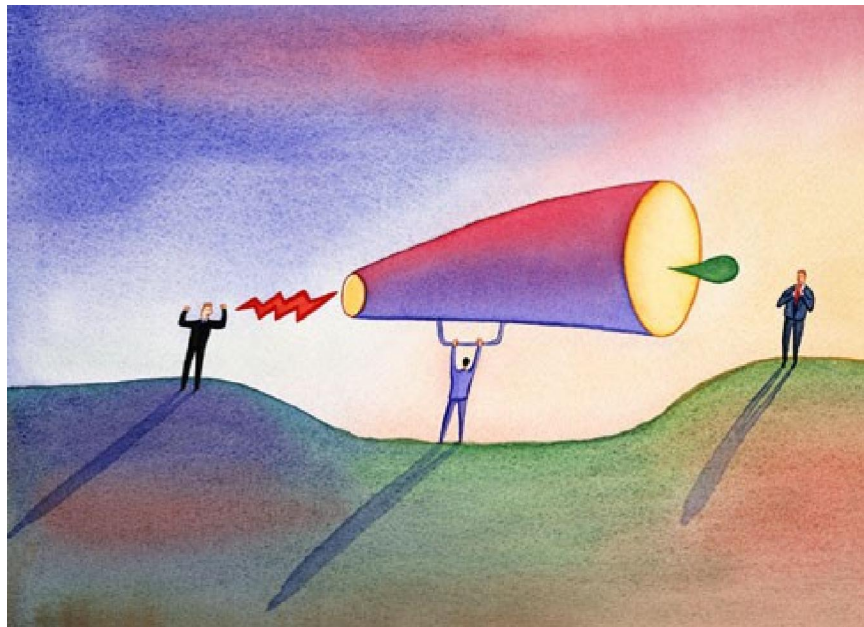
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Publishing After a Decade of Democracy

Brian Wafawarowa

Abstract

Ce texte se présente comme le témoignage d'un acteur majeur du monde de l'édition sud-africain. L'auteur retrace les grands changements intervenus dans cet univers depuis 1994. Son constat d'ensemble demeure relativement pessimiste dans la mesure où il insiste sur l'incapacité de ce secteur à se transformer pour permettre à la fois aux Noirs d'accéder à des postes de responsabilité mais également à un corpus d'œuvres, particulièrement en langues africaines, d'être publiées. Il prône une politique beaucoup plus interventionniste de la part des pouvoirs publics sud-africains.

I would like to thank the organisers of this very important event that has successfully established itself as a very important part of the book and reading calendar.

Before proceeding, I feel I must warn you that I can only present my perception of the industry. Whilst I have used statistics which I believe to be reasonably accurate, very little is known about this enigmatic industry, even by publishers themselves. Attempts to get vital statistics over the years have not been successful. Another attempt is being made now. The book chain is diverse and there are many interdependent components. I have concentrated on the publishing sector itself as opposed to other parts like writing, reading and distribution yet it is very difficult to have a proper scientific analysis of the issues without delving into the other factors on which publishing depends. I have therefore decided to look primarily at what the role of the publishing industry itself has been and should be rather than the role of those other sectors.

The question “where are we after 10 years of democracy?” solicits different answers from different people, depending on one’s view point. My view is not that of a mainstream publisher but an account by a publisher who saw a major opportunity to participate in this important sector after 1994. However, I do feel that my reflections will strike chords among a number of publishers, authors and readers who find themselves on the fringes of the sector.

There is very little the publishing industry can really brag about regarding progress made since 1994. If this were a baby, we would be worried that at ten it has not yet even started sitting up and start considering some drastic intervention. We shall be taking a critical and candid look at the progress made by the publishing industry in the areas of broader participation, linguistic diversity, ownership and many other indicators before looking briefly at the way forward.

The departure point is that an ideal publishing sector is one in which people of all races and cultural persuasion have the space to participate in the various aspects of the book sector, a sector where the knowledge pool is enriched by the diversity of the literature that is available and where the population indulges in reading beyond reading – for – instruction purposes in institutions of learning. In a nutshell it should be a sector where all these elements of the book sector reflect the demographics of the people

living in the land. It should be an environment where the book is a readily available commodity on the market and in homes across the whole society. It should be an environment where different authors from different racial and cultural backgrounds can write with the certainty that if their work is good in a language of their choice, it will be published, and where publishers feel that any good publication that they choose to do may be available to the market through the distribution chain. Otherwise one is dealing with a censorship that, while not as overt as the apartheid one, is just as vicious and as effective. In an age where the freedom to publish is being upheld worldwide and freedom of expression is so well upheld in South Africa, this subtle censorship is a major disaster.

After 1994, many doors were opened for the publishing industry, thanks to the freedom of expression enshrined in the constitution. Publishers became free to publish without harassment, several books were unbanned and authors were free to write what they wanted. Sadly I believe that despite this enabling environment, the participation of the majority of the population of this country has remained dismal and in some cases has even dwindled. There are many reasons for this. One is the mere conservatism of an industry that has always been very secretive about what it does, an industry that has, because of its closed nature, eluded the attention of the regulators because little is known about it. The other reason is the sheer financial requirement for entering the sector and the reluctance of financial institutions to participate in a sector that they do not regard as a viable business. Yet the counter-reasons are the pre-conditions of literary and economic empowerment that would enable the industry to take off. One cannot under-estimate the barriers to entry that are strategically erected by the established participants through cutthroat and elimination competition, including acquisitions for market consolidation and anti-competitive behaviour.

Publishing before 1994

Before 1994, despite the repression of apartheid, participation in publishing was quite diverse. The impetus of apartheid and protest spurred people to write and publishers to publish beyond the mainstream. Publishers like Ravan Press, Lovedale Press, David Philip and Skotaville published books that appealed to a broader population. These books provided some decent reading beyond the state - sponsored education publishing. The publishing philosophy of these companies was driven by the real desire to see change through content that appealed to a broader base. Sadly, these companies disappeared with the withering of that impetus.

The period immediately after 1994 was pregnant with promise. Many young and new players were recruited into the industry. Yet even that early, one felt uneasily that many publishers were driven by fear of the new order. Many companies feared that they would be excluded from participating in the lucrative schoolbook business and that failure to comply with the requirements of the new curriculum would lead to the exclusion of their books. One did not feel that the publishers' practice was informed by a genuine conviction that participation in the transformation of the country, upholding the principles of democracy, reaching out to the broader population and tapping into the broader knowledge base of the population would create good business. Prior to this, even African language publishers were almost exclusively white.

The industry geared itself up for an anticipated boom. Many new people were recruited, especially in African languages and in marketing positions. This was mainly meant to bring in government business. Apart from white senior executives who directed operations from the office, the marketing forces in education publishing became entirely black. The major companies appointed senior black men

to strategic positions. Were it not for the fact that the majority of these people had nothing to do with the editorial policies and the administration of the companies, one could have been excused for feeling that real change was taking place. The trade publishing sector, which was not affected by state business, remained lily white. It closed-in the laager and continued to publish for the very small white middle class. Statements like “black people do not have a culture of reading” were recklessly and inconsiderately thrown about. This small, exclusive market has been able to sustain the established publishing houses but it cannot accommodate new writing and new players.

Very soon, even the education publishers realised that it was business as usual. The state market was big enough to sustain them and no one really bothered about staff composition as long as “respectable black people were sent to talk to their brothers for business and black marketers were sent to sell the books.” The industry continues to elude regulators because most of the companies have very few internal staff and rely on freelance capacity. Such companies elude the net of the regulators.

When state funding collapsed in the year 1997/98, companies were forced to downsize. In most cases the last in, first out principle applied and many of the young black publishers were dropped by the industry. The many new publishers still trying to enter the lucrative schoolbook market disappeared too. The established companies gobbled those that survived, like helpless turtles hatched on the hot dry sand dunes, before they reached the safety of the water. Financial exhaustion from investing over several years without returns, which characterises the education publishing industry, accounted for the demise of many. Financial institutions generally do not regard the publishing industry as a viable business sector. Borrowing money to finance the full implementation of the curriculum was not an option. Traditional companies that had benefited from the huge and corrupt monopolies of the apartheid state had built huge coffers that could comfortably see them through the implementation of the new curriculum. Very anti-competition behaviour like dumping huge quantities of free copies on the market also ensured that the new entrants could not come in. It is therefore not very surprising that out of the more than ten new publishers established then, only one managed to get into mainstream education publishing.

Education Publishing Today

Today, the two multinational companies that dominate the book sector everywhere on the continent account for more than 60 percent of the schools market. The other three multinational companies command approximately 20% of the market. The African Publishing Network (APNET), whose mission is the development of indigenous publishing in Africa, is gravely concerned about the unhealthy domination of the book sector by the multinational companies, especially in Southern Africa and South Africa. The traditional local white companies command approximately 15%, leaving less than 8% for local black players. There is no accurate statistic on the industry because publishers are reluctant to release information. However these figures are reasonably accurate and are based on yearly information released by the Department of Education when it places its orders. This means that ownership and economic participation by black people in the industry is dismal and continues to dwindle, even ten years after freedom. Local participation is dismal too. Black people remain confined to selling and publishing African languages. It is ironic that while publishers found it possible that white people could exclusively publish African languages prior to 1994, the majority of them do not feel that black people, even with higher degrees in the English language, can handle second language publishing for learners. At the senior executive level, a significant number of black people remain at the top but are not at all involved with the operations and decision-making in the companies. Because

of the volume of business that the big monopolies command, they sometimes battle to fulfill their business needs, which sometimes results in learners going without books for the early part of the first school term.

Despite commanding approximately 95% of the book market on the continent and more than 75% of the book market in South Africa, education publishing or reading alone cannot be used as a measure of a country's development. The health of a publishing sector and the country's reading level is better determined by the general publishing and reading sector. In the African Publishers' Network's submission to the World Bank in February 2003, the bank was encouraged to direct its effort also at general books in its book acquisition programme. It is true that education publishing, state tender business and World Bank programmes can harm the trade publishing industry by killing off stock-holding general bookshops, discouraging general parent participation in book acquisition and diverting attention from general publishing. This is mainly because state and donor tender business is seasonal and tends to divert attention from general books. The permanent book infrastructure like bookshops collapses because alternative and seasonal distribution systems are utilised. Given the significance of trade publishing in the development of a sustainable reading culture and the establishment of permanent book infrastructure, I will dwell a bit on the trade publishing and reading sector.

The trade-publishing sector also provides the creative space that publishers and authors need because it is not constrained by the prescriptions of the curriculum. Mature reading communities and economies also indicate a healthy ratio of trade to education publishing. For example, the research done by APNET and ADEA in 2000 indicates that the education publishing sector in Europe averages 35% education publishing to 65% trade publishing while in Africa we average 95% education publishing to 5% trade publishing.

And it is in the trade-publishing sector that the least progress has been made. Today, we are reliably informed that of every four books sold in South Africa, three are from the UK. If one considers other countries like the United States whose books are also sold here in significant quantities, one can have a better picture of how dire this situation is. A walk into any of the major bookshops gives visual confirmation of this scenario. From the time that the Rand collapsed dramatically some three years ago, there has been an increase in the output of locally written books by the companies that rely heavily on distributing imported books. This happened because they could no longer rely exclusively on imported books that had become very expensive locally. However, this development is still in its infancy.

Racial participation in the publishing industry is still almost exclusively white. I have worked very closely in this industry for a number of years, yet I know of no more than three professional publishers who work above the level of editor. This means that black people are not involved in any meaningful way in deciding what is published in the industry, even among the little that is published locally. In this sector it is also very rare to come across a black sales representative. It is very disturbing that in a country where the majority of the population is not English-speaking, one cannot go into a bookshop and buy a book in an African language. There is virtually no African language publishing for adult reading in the trade publishing sector. Nor can one walk into a shop and expect to find such a book on the shelves. In very rare cases one may stumble upon children's storybooks in African languages, mainly meant for library purchases. In terms of ownership I know of no more than two small black-owned trade publishing companies, commanding between them no more than 5% of the market share.

This state of affairs has far reaching implications for the cultural development of the country and democracy. Despite the free environment that we publish in, a new curtain of censorship is descending

on the South African publishing industry. The 10% or so are dominantly white part of the population that reads is so powerful that it begins to dictate what publishers should publish. Over the years, we have seen the emergence and collapse of many new and old bookshops. The industry is left with one dominant chain. While the chain has done the best it can, it remains one chain. Efforts like Exclusive Books' Local Brew programme has helped but it happens once a year. The fact that there is a need to intervene this way confirms the problem that I am trying to expose here. Publishers have to consider seriously if a book that will not make it in the dominant chain will be worth publishing and the answer is no. As a result of this dictatorship of the small and exclusive market, publishers have tended to direct their publishing at the white middle class and suburban population. A bigger more diverse reading and distribution community would encourage more diverse and sustainable publishing.

There is also danger in the fact that the industry tends to regard this shocking scenario as normal and continues to develop along the same lines. Examples of this complacency are manifest when multinational publishers and those that represent these interests argue that the development models of the publishing industry should reflect the fact that out of every four books purchased locally three are from the UK and that copyright protection structures should be based on the fact that more than 75% of books that are copied in South Africa are not published here. Such fundamentally flawed arguments and planning shows that this very strange set-up is quite settled among the captains of the industry. Despite being relatively less developed in publishing industries, other African countries are sectors that the majority of the population can identify with and participate in.

The way forward

If the publishing industry had any capacity to regulate and transform itself, it would already be happening and the situation would not be as dire as it is today. While the publishers' Association can be trusted to ensure that the sector works well within the status quo, I do not think that members who represent their companies in the Association can champion the cause of transformation beyond the immediate interests of their employers. It is therefore very clear that a push needs to come from outside the industry as well. The same laws that regulate the broader media sector and the objectives of these laws need to be applied to the publishing industry. The state and the relevant departments need to recognise the centrality of the publishing industry to national development and play a more proactive role. This should include targeting the industry for transformation and development, and curbing developments that militate against national strategic interests in the sector. Certain sectors of the publishing industry, like African language publishing, should be targeted and stimulated by programmes like library buy-back schemes to attract writing, publishing and reading in such sectors. To enhance more diverse professional participation, the sector education and training authority should spearhead training programmes aimed at placing more black professionals in the industry through internships while at the same time creating opportunities for these interns to be absorbed by the industry through the creation of publishing programmes, going beyond the mainstream of the publishing industry. An example of this is the community publishing initiative of the Centre for the Book. Most importantly, development finance schemes need to be put into place to provide borrowing facilities for new entrants and for investors who want to establish alternative book distribution chains in communities that have no such facilities.

There is a limit to the willingness majority in this country to knock on the door of the publishing industry before giving up and resigning themselves to the fact that the adamantine rock gates will not open. The industry will then drift back into being the discredited sector it was before 1994, an

exclusive club that is not relevant to the needs of the majority of the country. As the industry fails to attract the majority of the population, it will remain stagnant and in real terms shrink due to natural attrition. The post-1994 expectations have eluded the industry in the first 10 years and very little, today, suggests that this will change significantly.

The opinions expressed here are made in my personal capacity and as such should not be attributed to the organisation that I work for nor those that I am associated with.

Durban, 26 March 2004