

A review of the state of the publishing industry in South Africa and national influences

1. Introduction

The state of a country's publishing industry is of national interest as this industry is the primary means for the dissemination of information in a country as it makes information available in the public domain in the mass media.

Publishers are involved in the business of news items, information and advertising and perform an essential part of the information industry. A country's publications are valuable as they are part of record of its cultural heritage and unique cumulative intellectual output. The library sector is linked to the publishing industry as the custodian of the country's legal deposit record of publications and also makes the publications available to the public..

This paper reviews the state of the formal publishing industry in South Africa and the link to the library sector in the country. The first part of this paper provides a brief explanation of some of the main influences on the information sector in South Africa during the past decade. The second part of the paper looks at current trends in the publishing industry in South Africa. The trends are based on statistics of the publishing industry provided by the South African National Library. These statistics enable the description of the publication patterns of in the publishing industry for the period 1994 to 2001. The trends in the publishing industry are explained in the light of the national socio-economic, political and cultural influences during this period.

2. Global developments in the publishing industry

National and international developments can influence a country's publishing industry. Some of the global trends in the formal publishing industry since the 1970s include:

- the growth of large publishing companies to become larger by assimilating smaller companies;
- at the same time, small publishers are established to fill various subject niches, such as new fiction writers, etc.;
- the companies are downsizing in order to reduce production costs, and often reduce the number of editors on their staff;
- increasingly electronic editing and new technologies are being used in the publishing industry (Rogers 1996: 158-160).

Other global developments are also influencing the publishing industry. These influences are influencing the outlet markets and availability for the purchasing of the publications and include developments such as:

- the development of multimedia and the scattering of information content;
- the increase in volume of grey literature that can be "lost";
- information content and commerce remain the publishers' core business, but the buying and selling thereof is fragmented;
- Key identifiers of publications remain but bibliographic control is lost.

The above four global developments and their influences in the publishing industry are explained briefly below.

(i) The development of multimedia and the scattering of information content

The influences in the publishing industry have changed the media to become a multimedia, leading to an increasing convergence of functions such as desktop publishing, e-books, e-journals and the entertainment industries. The trend towards the convergence of the information for consumption is influencing its availability and distribution, as it is creating a diversified publishing market. The diversity is in essence in the multimedia (the *carrier* of the information) and the electronic networks (*connectors*) connecting the consumer to the multimedia. Together with this trend, we are witnessing an increase in the number of publications in the different carriers of information, making it virtually impossible to search for and find all the relevant published material (on a given subject) (Lotti, 1997). This global evolution is an influencing factor in the search for published and other information materials in the multimedia, making it necessary to have an understanding of technologies, the Internet, the World-Wide Web, online subscription services and e-commerce.

(ii) The grey literature published is difficult to find and potentially easily “lost”

Some publications are not published in the formal publication channels and do not have an international standard number. These publications are generally difficult to trace and are referred to as “grey literature”. Some uncertainty exists with regard to the extent of grey literature production, the reasons for the production of grey documents in preference to conventionally published documents, and also to what extent grey documents are “lost” to researchers and other readers due to the lack in bibliographic control of these resources (Rawlinson, 1986: 113). The grey literature is not indexed in the international indexes. Non-indexed journals affect the awareness of the scientific community of topics published that could be potentially significant (germenis, Kokkides & Stravropoulos-Goikas, 1997: 1).

(iii) Information content and commerce remain the core business of publishers but the buying and selling thereof is fragmented

The evolutionary changes in the communications media and the increase in the publication of grey literature have not changed the core business of the publishing industry. The industry has continued to be in the business of information *content* and *commerce* (Australian Information Industry, 2004: 1). The information content market has, however, become more fragmented than in the past. This has an effect on the sourcing of, awareness of, and obtaining or acquisition of information content material within a very diverse and fragmented market (Info AboutInfo, 2004: 3).

(iv) Key identifiers of publications remain but bibliographic control is lost

As in the past, the identification and acquisition of publications continue to be linked to the author’s name, title of the publication, subject or keywords, date of publication, publisher, and price, in a format as it is available or preferred.

However, grey literature publications do not have an international standard number and this literature may fall outside the scope of national bibliographic control and legal deposit obligations. Legal deposit of electronic documents was still voluntary in Britain in 2001.

In 2001 the British Library received 1 350 electronic voluntary legal deposit copies which was 96 per cent of the number of electronic documents which qualify for legal deposit material (*British Library Annual Report 2001/02*). This indicates that publications seem to continue to be in paper format in preference to electronic format in Western countries. (More recent figures of the British Library than the above were not yet available at the time.)

In South Africa the new *Legal Deposit Act* (Act No. 54 of 1997) extended the scope of the legislation to materials other than books and printed materials to include audio-visual, broadcast and electronic media (Lor, 2000: 12). The bulk of the African publishing literature is still primarily in print format (Zell, 2002).

3. National developments in the publishing industry

The publishing industry in a country is influenced by past and current economic, social, cultural, political, and organizational developments. The impact of these influences define aspects such as the information content, its commercial development and channels of distribution. A review of the state of a country's publishing industry thus needs to link its publications, size and development of the market, channels of distribution of the publishing industry to the economic, social, cultural, political, and organizational developments in the country. The analysis can be conducted by using the structure set out in **Table 1**. The table lists the four categories of influences which may impact on the publishing sector.

Table 1. *Influences on the information sector*

(i)	Economic conditions (and technological changes and physical variables such as limited resources)
	This includes macro-economic issues: "... defining and analysing the information sector, measuring the size and growth of the information sector, international comparisons, infra-structural investment, knowledge centres as determinants of economic growth, investment in human capital".
(ii)	Social and cultural forces
	The following social issues are included: "... the requirement to provide information to consumers, reliability, objectivity and quality of information, extent of unmet needs, ways of meeting the needs, levels of literacy and numeracy, educational requirements, alternatives to print, role of information and advice services, division between the information rich and information poor".
(iii)	Political and statutory variables (and international forces)
	This variable includes legislative and regulatory issues, such as "... copyright, data protection, privacy, freedom of information, information as a tradable commodity, legal liability for information, international trade in information services, trans-border data flows, self-regulation by industry, standardisation".
iv)	Organisational issues
	This includes the: "... use of information as a management resource, relationship between information and productivity, need for new approaches to management, new skill requirements for managers, division of labour and the emergence of new information specialists".

(Source: Menou, 1991: 58)

The publishing sector is concerned with the following eight issues which are influenced by the above economic, social, cultural and organizational activities in a country:

- Availability of information;
- Access to information;
- Information privacy;
- Management of information;
- Creation of information;
- Market structures for handling information;
- Pricing of information;
- International considerations (Bushkin & Yurow, 1997: 1753-1755).

The eight issues are relevant to the publishing industry in South Africa.

4. National influences on the publishing industry in South Africa

A brief analysis of the economic, social, political and cultural influences on the information sector in South Africa over the period 1994 to 2004 (based on the outline provided in **Table 1**) reveal the following:

- Economic conditions, technological changes and physical variables such as limited resources

The South African economy has shifted from relying on commodities and manufacturing to services over the past 20 years. A services economy is more knowledge intensive, but South Africa has a shortage of skills and is not equipped for a knowledge economy (Wray, 2004). The first democratically elected government came into power in South Africa in 1994. South Africa functions very much as a Third World country with the inequality in the current income distribution, high levels of poverty and unemployment (Lehohla, 2002; Mde & Jepson, 2003: 6). It has a relatively good infrastructure. The country experienced limited economic growth during the period 1994 to 2004 and reported a growth rate of 1.9 per cent in 2003 (West, 2004), with an average growth rate of 2 to 3 per cent on average over the past number of years (Wray, 2004).

- Social and cultural forces

The period since 1994 introduced a more free society leading to more cultural interaction in South Africa. Access to information continues to be a problem amongst disadvantaged communities with little or no formal education due to illiteracy, low levels of interest in reading, economic constraints and limited or no access to community centres or public libraries (Smetherham, 2003). Poor literacy levels and differences in the levels of education continue to influence the flow and availability of information in the country. These are not new problems but now there is a greater awareness of them. The number of official languages in South Africa was changed under the new government from the previous two, to nine, calling for increased language proficiencies but also empowering more language and cultural diversity.

- Political and statutory variables (and also international forces).

Under the previous government censorship and the denial of free political participation adversely affected society at large by inhibiting the natural flow of information, leading to an unquestioning society (Merrett. 2000: 55, 56). In the 1990s the newly elected government formulated many policies on matters concerning constitutional matters, health, economics, agriculture and the media. Under the new government, legislation protects society's right to be informed. Merrett sums the situation up with regard to the main governmental initiatives in its legislation: "The legal foundation of freedom of expression and information in the new South Africa is provided by the Constitution, Bill of Rights, the Truth and Reconciliation Commission, new Archives and Film and Publications Acts and the Open Democracy Bill" (Merrett, 2000: 57). Other legal issues continue to be relevant, such as copyright, data protection, privacy, freedom of information, information as a tradable commodity, legal liability for information, international trade in information services, trans-border data flows, self-regulation by industry and standardisation. The South African media is a "highly regulated industry" and Print Media SA has expressed the concern that the "South African media is in danger of becoming a highly regulated industry which could be vulnerable to political pressure from a number of institutions or quarters" (Media Institute of Southern Africa, 2001). Other complex issues include growth in electronic data production and e-commerce.

- Organizational issues

Worldwide the publishing industry has seen an increase in the publishing of electronic scholarly journals, on-line periodical subscriptions and an increase in the volume of gray literature being published. Local conditions include the governmental restructuring on national, provincial and local levels, changes in the Department of Education and education policy, and changes in the private sector.

The above socio-economic characteristics form the backdrop for the review of the current state of the information industry as described in the following section.

5. Information sources accessed through the media

The media include the radio and television networks, newspapers, publishers, and information material made accessible through the library services or other information centres. The media generally aim to meet a number of criteria in their provision of information to consumers. Ideally, this information needs to be made available reliably, objectively, be information of quality; information which meets the needs of the consumers; presented according to the ways necessary to meet these needs; and in accordance with the levels of education, literacy and numeracy of the consumers; and aim to bridge the divide between the information rich and information poor.

5.1 Information in the mass media (radio and television) in South Africa

The media plays a central role in the social process of public debate as the media provides the platform for the process of public debate and encourage public debate. The media needs to

encourage public debate as “... Engagement is the name of the game; debate is the public process; and publication is the forum for both mutual engagement and debate” (Tomaselli 2000: 92) . The media performs three main social functions: to inform people about their environment, to link different parts of the society, and to transmit social values and norms. It is, therefore, not unusual for governments to use the mass media for nation-building (Mytton 1983: 32). The government of South Africa has also used the media to influence the public, on television, radio and in the press (Maud 2004: 5; February 2004: 9).

During the first two years since 1994 South Africa’s media policy debate centred around the re-regulation of the previously state-controlled the South African Broadcasting Corporation (SABC). The SABC has since transformed itself to a public broadcaster (Duncan 2000:52). The Broadcasting Act formulates the path for the SABC to become self-sufficient by commercialising itself. The Independent Communications Authority of South Africa Act, No 13 of 2000, merged the IBA and SATRA and tasked the Independent Communications Authority of South Africa (ICASA) with the regulation of the communications industry in South Africa. ICASA takes over the functions of the former IBA and will accordingly administer and regulate the broadcasting services frequency bands (Lesame, 2000: 32). ICASA also needs to regulate electronic commerce (e-commerce) and all sectors of radio broadcasting. It is also responsible for the regulation of satellite broadcasting.

The SABC news and television news departments were merged into one cross-media operation (Duncan. 2000: 56). Subsequently radio and television presenters and programmes are used interchangeably (Duncan. 2000:56). There are more than four million licensed television households in South Africa. Access to and consumption of the mass media, radio and television, has grown over this decade (Duncan, 2000: 55; South African Yearbook 2000/01, 2001: 213). The SABC offers six television channels in 11 languages. South Africa has the largest television audience in Africa (South African Yearbook 2000/01, 2001: 213).

The radio sector has risen and its listenership is now reported to be 27,4 million (Bloom, 2004). The broadcasting regulator, ICASA, has agreed to amend the restrictive ownership laws in broadcasting as they “... stifle the commercial viability of radio stations” (Katz, 2003) and it will grant additional commercial radio licences (Masango, 2004: 14).

The major broadcasting owners include Nail, Primedia, Kagiso Media, African Media Entertainment, Makana Trust, SA Clothing Textile Workers Union Investment Grouping, Mineworkers Investment, Sabido Investments, Zerilda Investment, The Union Housing Trust, Johnnic Communications, Thebe Convergent Technologies, Ingoma Trust, Siphumele Investment and Mopani Media (Katz, 2003).

5.2 Information content (content services such as newspapers, book publishing and library services) in South Africa

These services provide information mostly in a readable form to the public. The main content services covered here include access to information by newspapers, the book trade and library services.

5.2.1 Information made accessible in the newspapers

In December 1994 the Newspaper Press Union, The Magazine Publishers' Association, the Provincial Press Association and the Specialist Press Association combined to form the Print Media Association of Southern Africa (PMA). The four constituent bodies retained their separate identities while the PMA became the principal representative body of the industry. The combined body represents more than 500 publications, ranging from national newspapers and consumer magazines to small country newspapers (Sapa, 1994). The print media industry is bound by a set of six **Codes of Practice** which include:

- (i) Press Ombudsman's Code of Practice
- (ii) The Advertising Standards Authority Code of Conduct
- (iii) The preamble to the Memorandum of Undertaking with GCIS regarding the formation of the Media Development and Diversity Agency
- (iv) The King Committee's Second Report on Corporate Governance
- (v) The provisions of the Employment Equity legislation
- (vi) The provisions of the Skills Development legislation.

These six documents "frame the philosophical and legal framework within which the industry works" (Print Media South Africa, 2002). The purpose of the framework is to achieve transformation in the industry. Legislation aimed at transforming the media industry was enacted in the Bill which established the Media Development and Diversity Agency (MDDA). The government, the media industry and other donors respectively are expected to contribute R20-million per year towards its proposed budget of R300-million. (Bill on media transformation to Parliament, 2002).

The **ownership** of the print media in South Africa has undergone some changes since the 1990s - for instance, the transfer of the *Sowetan* from the then Argus Group to New Africa Investment Limited, and the promotion of black editorial control in several newspapers which used to be predominantly white (Tsedu, 2001: 8). The *Daily Sun* was launched in 2002 by NasPers as a new daily newspaper, in competition with the *Sowetan*. The *Sowetan* sells 123 000 copies per day, compared to the *Daily Sun*'s 235 000 (Du Venage, 2004).

Since 1994 press ownership has become more centralised. The major newspaper groups are Independent News Media, NasPers, Caxton and Times Media Limited through Johnnic (South African Yearbook 2000/01, 2001: 213). The biggest English media house is the Independent News Media which is wholly foreign-owned (Tsedu, 2001: 8). Independent Newspapers owns 75% of all English language paper sales. This includes all copies of newspapers sold in Cape Town and Durban and 75% of those sold in Gauteng. Times Media plays a similar monopolistic role in the Eastern Cape (Merrett, 2000: 63). Caxton / Penrose currently controls some 94 newspaper titles and Naspers owns a number of strong titles in areas such as the Western and Northern Cape, the Free State, Gauteng and the North West. Many of the 450 community newspapers belong to the community press division of the Print Media Association of South Africa. The editors formed the Forum for Community Press Editors in 1990 (Duncan, 2000: 55).

The **media debate**, launched in 1990 in South Africa, was strongly influenced by the political climate of the 1980s. Louw (1993: 251) describes the quality of the media workers during the latter years of the *Apartheid* government as "generally of a poor quality". Censorship and narrow conservative reporting chased many reporters out of the 'mainstream' media. The type

of reporting was narrow and not very informative. This resulted in a spiral of declining standards, with the South African media consumers accepting all reporting as factual without critical content assessment. An example of such narrow reporting is also reflected in the Independent Newspapers, which has centralised political copy in its reporting on Parliament. This implies that all reporting on Parliament in the newspapers belonging to this group will be similar in content (Duncan, 2000: 56). The media reports on the work done by the Parliament, but February (2004: 9) reports that the Government is in the process of moving the media out of its traditional Parliamentary offices. The media will not be in a position to report on the functioning of the Parliament once it is moved out of Parliament.

The South African press is increasingly driven by a profit motive. Concern has been expressed regarding the quality and depth of reporting in the South African press (Altenroxel, 2001: 3; Sapa, 2001; Asmal, 2004). The alternative or independent press has almost totally disappeared under the new government, as the funding that they previously received from abroad under the old *Apartheid* government has dried up (Merrett, 2000: 63).

Between 1990 and 1996 newspaper circulation shrank from 19% to 17%. However about 640 000 more newspapers are currently sold than in 1998 and approximately four million South Africans are buying newspapers on a regular basis (Bloom, 2004: 17).

5.2.2 Information made accessible through publishers of magazines and research publications

There are about 300 consumer magazines and more than 500 trade, technical and professional publications in South Africa (South African Yearbook 2000/01, 2001: 219). The magazine industry has been in a decline for a number of years (Wessels, 2004; South African Yearbook 2000/01, 2001: 219).

5.2.3 Information made accessible through publishers of books

South Africa's book publishing industry is comparatively small (McCutcheon, 2003) with approximately sixty-two publishing houses. The country's publishing industry is the largest in Africa and according to Gray it has the capacity to contribute to educational and cultural growth in Africa (Gray 2000: 3). This contribution is more likely to be in sub-Saharan Africa as publishing in this region tends to be Anglophone, while central Africa is more francophone and North Africa lusophone. Approximately 700 book publishers are currently reported to be active in Africa (Zell, 2002).

Most publishers in South Africa belong to the Publishers' Association of South Africa (PASA) and 65 publishers were members of this association in 1995 (Directory of Book Publishing in South Africa, 2001).

The book publishers can be divided into the educational book publishing sector and general publishing sector.

5.2.3.1 Educational book publishing

Educational publishing forms the strongest market in the publishing industry. In 1996 the educational publishing dispensation consisted of: two paper manufacturers, about 10 book printers, about 50 educational publishers, 195 book sellers, and approximately 25 000 schools (McCallum, 1997: 13). Educational publishing was influenced considerably as shown in the fluctuation in the publishing figures for the period 1994 to 2001 due to changes in the education book publishing market during this period as formal education in the country was moved from the former seventeen different education departments to one centralized education department (**Table 2 Figure 1**).

Table 2 Educational book publishing: 1994 - 2001

	1994	1999	2001
Reprints - primary school books	9,048,000	3,287,271	1,802,447
Reprints - secondary school books	7,749,728	1,078,045	1,280,630
New primary school books	173	283	153
New secondary school books	99	23	161
Total no of school books	16,797,728	4,365,316	3,083,077

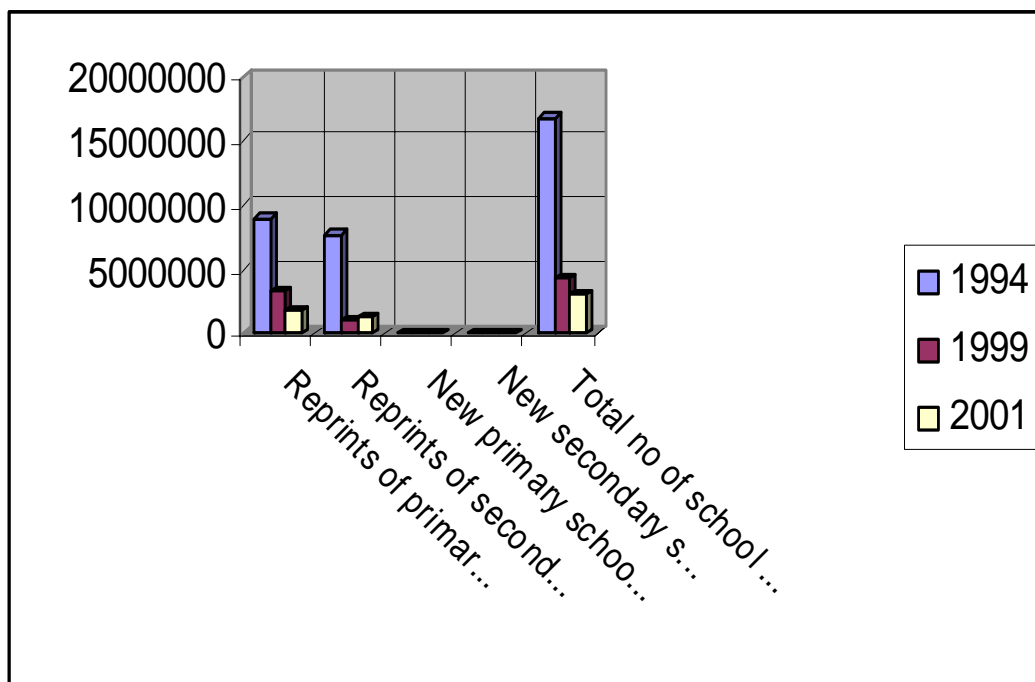


Figure 1: Educational book publishing: 1994 - 2001

5.2.3.2 General book publishing in South Africa

Book sales in South Africa has been declining over the past 30 years, with fewer books being sold on average in 1994 than in 1984 (Van Rooyen, 1994). Steinberg also observed a decline in the number of book sold by local book sellers by comparing the copies sold in the 1980s and the early 2000s (Steinberg, 2001).

Ownership in the book trade is dominated by publishers such as Naspers, Caxton, Primedia, NAIL and Johnnic, Exclusive Books, Struik Publishers and Heinemann. Naspers, owns seven publishing houses, namely Nasou, Via Afrika, Human & Rousseau, Tafelberg, Jonathan Ball Publishers, Kwela and J.L. van Schaik. They also own the biggest academic book retail chain, Van Schaik, and the country's largest book club, Leserskring / Leisure Books. In 1994 they purchased HarperCollins S.A., a major importer and distributor of books in the country.

Statistical data of the total number of new titles printed were used to establish current trends in the South African publishing industry. The data includes statistics from 1994, 1999 and 2001, covering a period of seven years (**Table 3 Figure 2**). (The most recent data available is that of 2001.)

Table 3 South African publishing statistics: 1994-2001

	1994	1999	2001
Titles published (books & pamphlets)	7,754	5,010	4,622
Titles of pamphlets published	2,132	1,708	4,622
Titles of new books (1st ed) published	2,549	2,260	2,287
Total number of copies of books	4,899,664	38,276,672	8,119,870
Total number of pamphlets published	1,600	1,300	1,158
Total number of copies of pamphlets	3,073,311	1,347,845	4,016,526
Total copies (books & pamphlets)	37,565,109	45,407,851	14,489,921

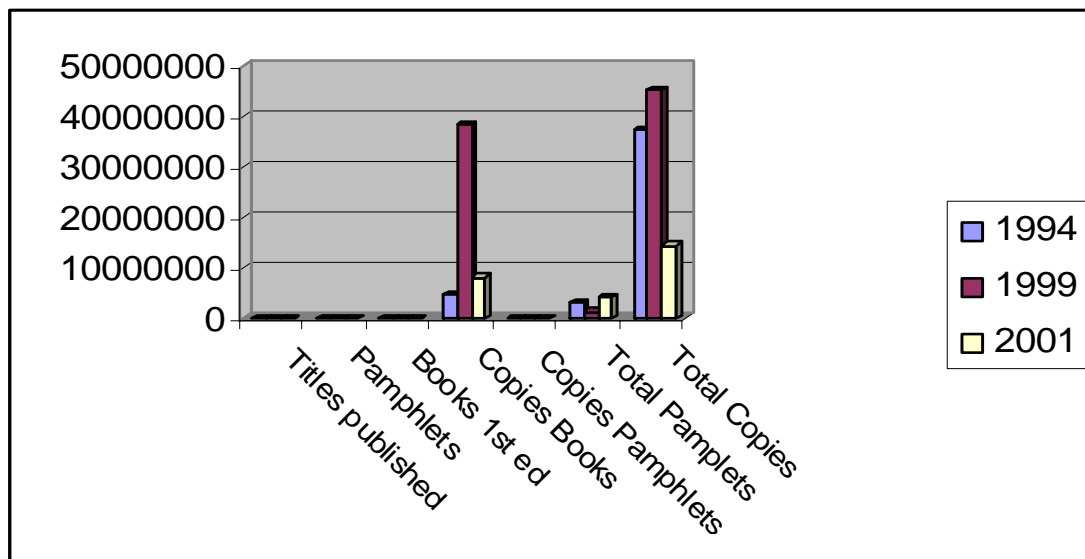


Figure 2 South African publishing statistics: 1994-2001

5.2.3.3 New titles in general book publishing

Literacy and African writing in the vernacular can be traced from 1826 when the Lovedale Press was established in the Eastern Cape. From here onwards, leftist papers and pamphleteering, either in English or the vernacular, developed. Poetic writing developed since the 1970s with the Black Consciousness Movement (Mphahlele 2004: 9; Gray 2004: 6). However, the comparison of the number of new titles of books published in over the period 1994, 1999 and 2001 indicate that comparatively few books were published in the nine official African languages of South Africa (**Table 4 Figure 3**). Some of the reasons for the limited number of books published in South Africa in the indigenous African languages are: the insufficient number of authors, cutbacks in library purchases due to limited budgets, and

the lack of a reading and book purchasing culture (Fredericks & Mvunelo 2003: 137, 138), and the illiteracy in the country (Gordimer 2004: 11). Much work will have to be done to develop the publishing in African languages of the country and to promote literacy and reading. In this regard Nadine Gordimer explains the value of literacy and reading for the country and its development:

“... may literacy for all in the new decade bring this basic human right, this essential for developing the economy, for any working life, and for lifelong revelation and joy of reading, to all. May we create the libraries, and nurture the new historians, poetry, prose and play writers to fill the shelves with what we have been, what we are, how we are making the present and how we see the future of our country.”

Table 4 *New titles printed in 1994, 1999, 2001*

	1994	1999	2001
Afric lang school books (titles)	1,349	442	462
Other school books (titles)	777	421	299
Afric lang books (excl school) (titles)	830	402	296
Childrens books (all lang.) (titles)	695	502	371
Government publications (titles)	231	368	211
Book titles 1st edition (titles)	2,549	2,260	2,287
Pamphlet titles 1st edition (titles)	1,600	1,300	1,158
Other book titles (repr & re-ed)	3,073	1,042	4,002
Other pamphlet titles (repr & re-ed)	532	408	160
Total no titles published	7,745	5,010	4,622

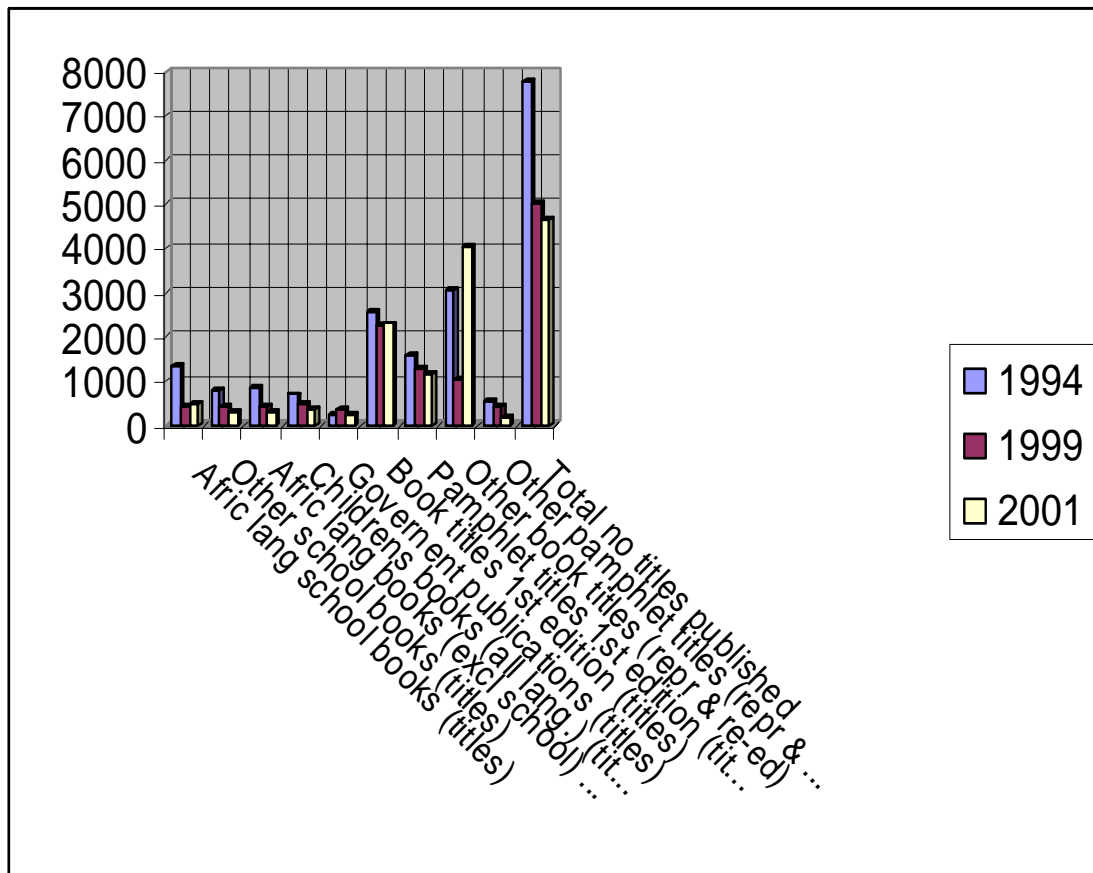


Figure 3 *New titles printed in 1994, 1999, 2001: Summary*

6. Library services and the link to the publishing industry in South Africa

The library sector is the custodian of the publications published in or on South Africa and preserves these documents as part of the country's national heritage. Different groups or types of library and information agencies are operational in South Africa. It is possible to differentiate between approximately eight different types of library with specific, allocated major functions, serving different groups of users. The eight types are listed below, followed by a brief description of the function and role of each type within the information services sector.

6.1 National Library of South Africa (NLSA)

The most important library is the National Library of South Africa (NLSA). The NLSA is responsible for building up a complete collection of documents emanating from South Africa, mainly by legal deposit. The NLSA also compiles a national bibliography of South African publications. It also promotes access to the holdings of other libraries through interlending. The interlending resource sharing has about 700 member libraries in seven SADC countries and is run by the Pretoria Division of the NLSA (Lor, 2000: 11).

6.2 Legal deposit libraries

The five legal deposit libraries in South Africa previously included those in the list below, but this list has since been changed with the introduction of nine provinces:

- the NLSA (Pretoria Division) serves as the national bibliographic agency;
- NLSA (Cape Town Division) serves as the national preservation agency;
- the Library of Parliament (Cape Town) serves the information needs of parliamentarians, politicians and legislators;
- the Natal Society Library (Pietermaritzburg) serves as the legal deposit library for the province;
- Bloemfontein Public Library serves as the legal deposit library for the province.

6.3 Public libraries and provincial libraries

Under the previous government each of the four provinces had a provincial library service. In 1990 these four provincial library services provided services to 670 affiliated public libraries and an additional 1 029 service points. Traditionally, the affiliated public library was the joint responsibility of the local authority and the provincial library service. In addition to the affiliated public libraries, there were ten independent public libraries. These public libraries were controlled by the larger municipalities, Cape Town, Port Elizabeth, Durban, Johannesburg and Pretoria.

These larger municipalities were recently restructured into greater metropolitan areas (Hansen, 1999: 14). In Pretoria, the capital city in South Africa, the existing public library was amalgamated with two townships, Mamelodi and Atteridgeville in 1994. This increased the population served by 110 % , but no additional funding was provided to operate the additional centres. No library budget is provided in the original Pretoria public library. The Tshwane Metro Council in Gauteng intends to provide one library for every 60 000 residents in Tshwane (Hlahla, 2004). The Gauteng Provincial Government only provides library material to previously government affiliated libraries in the townships (Hansen, 1999: 14).

In terms of the number of books held, the public libraries hold almost three quarters of the national book stock. These libraries not only serve the public at large, but are also well used by students who make “heavy demands on public library services” (Witbooi. 1997: 31). Since 1994 the public libraries became community libraries and information services (comLIS).

Public libraries are currently positioned between national, regional and local structures. These libraries have to prove that they are of value to the communities served. These libraries do not receive adequate funding from the government. In terms of the South African Constitution and subsequent legislation, the provision of public community libraries is a provincial matter, but there appears to be uncertainty concerning the involvement of the provincial and local governments (National Library of South Africa, 2002: 1).

Hansen (1999: 12) explains the current situation of the public libraries as follows:

“...at a time when communities are crying out for information and education, local authorities find themselves in the position of not being able to render these basic services, because of a shortage of funds. “A serious lack of library facilities and resources results in the overcrowding of existing services and the over utilisation of material and personnel. The exorbitant costs of linking libraries and information services to the information network and computerising in-house services, as well as the high fees levied by Telkom SA for the rental of datalines, prevent libraries from rendering quick, up-to-date and cost-effective services.”

The inadequate funding is forcing many of the public and school libraries to offer limited services or even close down (Tise, 2000: 57).

6.4 Academic libraries

In 1990 there were 88 university, college and technikon libraries in South Africa. These libraries support the study, teaching and research functions of these academic institutions. These institutes have been restructured and re-grouped to reduce the number of academic institutes in the country. Their libraries are also being restructured.

6.5 Special libraries

In 1990 there were 456 special libraries of various types. Most of these libraries are maintained by the private sector, such as mining houses and financial institutions. Special libraries support the research and development tasks of their institutions. Some of these institutions are parastatal organisations, such as the CSIR, HSRC, museums and art galleries.

6.6 Government libraries

In 1990 there were 91 government libraries. These libraries support the technical and professional duties of their departments. The number of government libraries have changed as the government departments have changed under the new democratic government of 1994.

6.7 Resource centres

In 1990 it was estimated that there were approximately 120 resource centres serving various organisations and communities. The funding of these rather informal information centres is coming to an end owing to the political changes in the country. The function of these resource centres may be passed on to the more formal information service centres.

6.8 School libraries

In South Africa it is currently accepted that each school should have its own school library which should be stocked with a “relevant and adequate collection of materials ... staffed by a trained librarian”. However, not all schools have school libraries. Most

schools in townships have no library facilities (Hansen, 1999: 13). In the absence of school libraries, public libraries also serve to support schools by providing information to scholars and teachers.

Vermeulen (1997: 36) explained the situation, stating: "...South African departments of education seem to have been paying mainly lip service to modern educational principles. School libraries ... are either lacking in schools, under-achieving, or in decline".

7. Summary of trends

The above analysis of the information sector reveals the following main points of the state of the publishing industry in South Africa:

7.1 Global trends

Similar trends are observed in the publishing industry as those listed in this paper. The impact of the growth in the multimedia and the scattering of information content on the formal publishing sector is uncertain.

7.2 National influences on the publishing sector in South Africa

The South African economy is increasingly driven by its services sector but the country has a shortage of skills and is not equipped for the knowledge economy. Socially and culturally the country is experiencing huge challenges with regard to addressing illiteracy, education and language proficiencies. Political changes and media regulations are influencing the media, as well as restructuring in the library sector.

7.3 Information in the mass media - radio and television

Broadcast and communication channels - This sector is experiencing a growth in listenership nationally. The strict regulations regarding the allocation of broadcasting licenses are to be eased allowing for further growth in radio broadcasting channels.

7.4 Information made accessible in the newspapers and magazines

Newspaper circulation figures are indicating a growth in the industry and more people are buying newspapers. Magazines are less popular and the market is in decline in South Africa. The newspaper industry is highly regulated and facing rising costs and decreased advertising expenditure Newspaper reporting is not always of a high standard.

7.5 Information made accessible through publishers of books

The number of educational books published locally has dropped substantially. The total number of books published in South Africa has dropped over the years 1994 to 2001.

Fewer people are buying books.

South Africa lacks a culture of reading.

7.6 Library services and the link to the publishing industry in South Africa

The library sector has been considerably restructured and is struggling with limited funding making it less effective to provide books for readers and promote a culture of reading in the country. This sector is struggling to find funds to purchase books that are published locally or internationally.

Conclusion

An awareness of the state of the publishing industry and its strengths or the weaknesses can help to identify growth areas or areas in need of development and government support. The country's publications form part its national heritage. Growth and development in its publishing output can be linked to national development and growth. Much work will have to be done in the interest of the country to stimulate the publishing sector in South Africa.

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