Transforming a Publishing Division into a Scholarly Press: A Feasibility Study of the Africa Institute of South Africa

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Abstract

Based on informal discussions with a range of scholars across the African continent, it was felt that there was a need for a scholarly publisher located in Africa, focusing on African content, and targeting an African audience. It had also been expressed by a number of researchers, and was of wider potential interest – given the author's institutional situation and context at the time, as well as management imperatives – that the Africa Institute of South Africa (AISA) could use its existing capacity and strengths in the area of African studies, specifically from a social science and development perspective, and its networks on the African continent, to form a possible institutional base for such a press, through the expansion of its publishing division. But there was no certainty as to whether this was in fact a viable business idea.

Thus, this study carries out a feasibility study, to investigate and evaluate whether a scholarly press focusing on African material would be viable in the current South African, continental and international context. The study takes the form of a literature survey, questionnaire-based empirical survey, and business planning exercise. The key research question that is investigated is: Given the limitations of and challenges currently facing the South African (and wider African) scholarly publishing industry, could a scholarly publisher working according to the above vision be viably set up, and how could this be achieved? Broad support is found for the notion of a new scholarly publisher, and a business plan is developed to show how such a press could be set up, working within certain constraints and assumptions.

Keywords: academic publishing, scholarly publishing, scholarly communication, university press, knowledge production, knowledge generation, African studies, Africa Institute of South Africa

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Chapter 1: Introduction

It is about time we Africans reclaim in earnest our right to tell our own story.
Minister Mosibudi Mangena, 3 May 2005

African publishing has come of age, and the challenge facing us now is to democratize the book so as to make it available, accessible and affordable to all our people. These are the challenges I must now place before our new generation of publishers. You must build on the foundations we have established, take advantage of the liberalized marketplace, and harness the emerging technologies to put African publishing squarely on the world map.
Henry Chakava, 2 August 2004

1.1 Background: Publishing in an African Context

Researchers and scholars world-wide are engaged in generating new knowledge and in communicating that knowledge among themselves. Often, although not exclusively, this knowledge production process takes place at universities or research institutions. But this research is worth very little if it is not disseminated and if people do not have access to it (see Figure 1 for a model of the research process). For this reason, research has always gone hand in hand with publishing – and this is even more the case in the so-called 'information age'.

Houghton (2002: 1) reflects further on the value of disseminating research by noting that, "In the context of the emerging knowledge-based economy, innovation and the capacity of the national innovation system to create *and disseminate* information are becoming increasingly fundamental determinants of national prosperity" (emphasis added). Publishing does more than just disseminate information, of course; it "is important to the success of researchers, their value within the scientific community, and their own personal inroads to either an academic or industrial career" (Zaidi, 1999: 3). All of these statements point to the importance of scholarly publishing in the research or scholarly communication process (see Figures 1 and 2).

Figure 1: The Research Process[1]

Environment
Public   Media   Policy-Makers   Legislation   Funding Agencies   Other Stakeholders

informs

Research Agenda

do applied or basic

research   informs

Researchers
Research Project

conduct

1

Research Project
Define problem   literature review   fieldwork

produce

Research Product / Data

Seminar /   must be repackaged as   **Publications**

Research Outputs

Conference papers   *A.*   (Books and Journals)
                        Reports & Papers

Y

Source: Adapted from Sillence and Sutton, 1998.

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[1] It could be noted in this regard that some difficulty was experienced in locating a model of the research process that adequately took the *environment* into account, rather than just the tasks of research that must be carried out, and that also described the *research outputs* as an integral part of research. For this reason, Figure 1 is derived and adapted from a number of sources, but primarily from Sillence and Sutton, 1998.

Figure 2: The Scholarly Communication Process

REGULATORY FRAMEWORK
Activities: Intellectual property, content, communications and professional regulation
Actors: Governments, regulators, copyright agencies, industry & professional associations

SUPPLY NETWORK	**PUBLISHERS**	**DISTRIBUTION**
Activities: Authoring & editing, materials supply, network provision	Activities: *Peer review* facilitation, editing, selecting, printing, preparation, marketing, distribution / *dissemination*	Activities: Purchasing, acquisitions (libraries), making available Actors: Wholesale & retail, distributors, consolidators, libraries, individual purchasers & subscribers
Actors: Researchers, Authors & editors, Material & equipment suppliers	Actors: Publishers	

REGULATORY FRAMEWORK
Activities: Intellectual property, content, communications and professional regulation
Actors: Governments, regulators, copyright agencies, industry & professional associations

Source: Derived from Houghton, 2002: 3.

In spite of this seemingly organic relationship between research and publishing, there is some confusion in academia, it seems, as to the role of scholarly publishers and as to how and why publishers do what they do. The main role of publishers is to add value. Scholarly publishers add value to research findings by managing the peer review process (thus validating the research findings), by editing the work, by publishing this in a durable format, and by making the resulting publication available to an audience of peers, if not a wider audience, as well as marketing the work. The publisher also provides a guarantee of quality through the branding of its name (see ICSU, 1999: 14). Thompson (2005: 24) provides a useful breakdown of the value added by publishers, as shown in Figure 3. Continuing the argument to its logical conclusion, Robinson (2003: 1) notes, "Without publication and diffusion, research is of little value", while Drijfhout (2002: 2) argues, "Research is incomplete until it is validated through review processes and shared with others."

These two processes – dissemination and peer review – are the essential functions of the scholarly publisher (see Figure 2).

Figure 3: Functions of the Publisher

Where do publishers add value?

content acquisition and list-building	financial investment and risk-taking	content development
quality control	management and coordination	sales and marketing
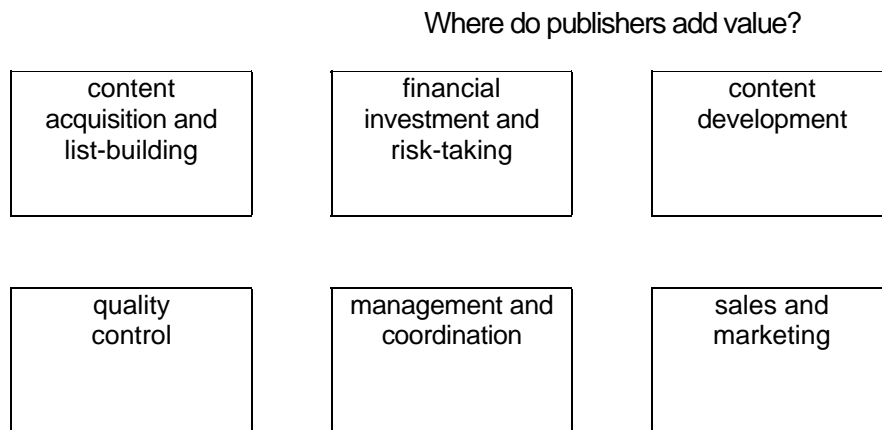
Source: Thompson, 2005: 24.

In the developing world, the processes of research, publication and dissemination are complicated by unequal power relations, which means that researchers in the developing world (the South) do not always have access to the work done by their peers in the North, while in turn their own work is not always made available to those in the North. This trend has been exacerbated by the growing importance of information and knowledge in the modern world. Indeed, "(l)eft unchecked, the 'globalisation of information' (the creation, access, and utilisation of information on a global scale) will widen the information gap between 'developed' and 'developing' countries, further distance elites from the general population, and limit traditional social and economic development efforts" (Zaidi, 1999: 2). This is no small matter; the International Council for Science (ICSU, 2003a: 2) argues that: "Inequalities in access to information and in the availability of relevant technologies lead to differences in productivity, creativity, innovation, and income. If the United Nation's Millennium Development Goals – including the reduction of poverty – are to be realized, equitable access to scientific knowledge must be made a priority."

Dipesh Chakrabarty (quoted in Striphas, 2000) attributes the imbalance between access to information in the North and South to "the hegemony of 'global English': a predicament whereby the so-called 'global flow' of information (read: books) facilitates the exportation of the problems, politics, histories, theories, and accounts of social and cultural life in the English speaking world, *as though they were generalizable regardless of context*" (emphasis added). Yet, as social scientists are aware, the importance of local knowledge and local context should not be downplayed.

As part of the above-mentioned imbalance, the distribution of books and the wider dissemination of research findings are certainly skewed towards the North, "with African countries playing the role of consumers of content rather than disseminators" (Gray, van Schalkwyk and Bruns, 2004: 3). Wafawarowa (2000) estimates that, while African countries consume around 12% of books produced world-wide, they produce only 2% of world-wide output. At the same time, foreign publishers largely see 'Africa' - as an undifferentiated whole - as a "lucrative but frequently troublesome supplementary market" (Smith, 2005: 1). In this regard, South Africa's Minister of Science and Technology, Mosibudi Mangena, feels strongly about the need to shift from consuming books to producing them:

> The development of the continent will however need to be knowledge-driven. This is the dictate of the new global economic order. We have made this point to drive home the critical role of scientific knowledge and technological innovation in developing our economies. However, the judicious application of these technological changes, and the achievement of broad social transformation shall be predicated on sound social research and critical analysis. This demands that Africans redouble their efforts towards understanding themselves. It is ironic that most research about Africa is done by non-Africans, and sits on library shelves across the great seas and oceans. It is about time we Africans reclaim in earnest our right to tell our own story (Mangena, 2005).

Aina (quoted in Zeleza, 1996: 298) takes the point somewhat further, to argue for the importance of indigenous publishing initiatives, and against a

> process of intellectual reproduction about Africa that is characterized by sterility, outdated facts and information, casual and ad hoc observation, name-calling and sometimes wild speculation. It is our argument here that for an up to date, realistic, correct and appropriate … understanding of Africa, the most appropriate and relevant source is that scholarship and production emanating from or still directly linked to the continent in terms of research experience and reflection.

Yet, indigenous publishing in Africa has been faced with some very specific constraints. Some of the factors preventing African scholarship from flowing freely to the rest of the world include resource constraints (especially with regard to the costs of production and distribution), linguistic issues, and issues relating to imperialism. For instance, "In Africa, concerns loom large about how local books are to be published in an environment in which the economic and political interests of multinational firms dominate. Multinationals enter a market to earn profits. They are basically unconcerned with ensuring that particular kinds of books are published, and they care little about local booksellers or authors" (Altbach and

Teferra, 1998). Some have also argued that Africans lack a culture of reading, but this seems to be an inaccurate assumption, which has largely been disproved by several more recent studies (see for example Zeleza, 1996). Instead, as Nigerian writer Kole Omotoso (quoted in Habomugisha *et al*, 1999) suggests: "It is not that people do not read. They do read. It is what they read, what is available for them to read, that is the problem." This, again, reveals the significant problem of access to information and power relations in this regard.

What is the African response? There is a growing call for publishers in marginalised areas of the world, such as the African countries, to respond to the new 'imperialism' of research and publication, by publishing their own studies, grounded in their own local experiences and regions. One of the ways in which research from the developing world, and Africa in particular, could be made more available would be through the creation of a local scholarly publisher with that very aim as its mandate: to publish (Africa-focused) research from Africa, for Africa, in Africa. Indeed, this press fits the very definition of an "indigenous publisher", as defined by Zell (1993): "publishing in Africa by Africans on African and other matters". The mission of the press would be to promote access to Africa's research by keeping costs low (probably linked to a non-profit objective), by working together with other publishers and distributors world-wide (i.e. through collaborative dissemination), and by keeping African intellectual property in Africa.

As Zeleza (1996: 299) argues,

> The real challenge, then, is … to produce the knowledge in the first place; for Africa to study, read, and know itself, to define itself to itself and to the rest of the world, and to see that world through its own eyes and not the warped lenses of others. There is no substitute for a vigorous intellectual system, of which publishing is an integral part.

1.2 The Aims of the Research

Based on informal discussions with a range of scholars across the African continent, it was felt that there was a need for a scholarly publisher located in Africa, focusing on African content, and targeting an African audience. It had also been expressed by a number of researchers, and was of wider potential interest – given the author's institutional situation and context at the time, as well as management imperatives – that the Africa Institute of South Africa (AISA) could use its existing capacity and strengths in the area of African studies,

specifically from a social science and development perspective, and its networks on the African continent, to form a possible institutional base for such a press, through the expansion of its publishing division. But there was no certainty as to whether this was in fact a viable business idea.

Thus, this study aims to carry out a feasibility study – to investigate and evaluate whether a scholarly press focusing on African material would be viable in the current South African, continental and international context. The study will examine that context, and assess whether the Africa Institute is in a position to transform its publishing division into a fully fledged scholarly press. The study, which will take the form of a feasibility study based on a literature survey and questionnaire-based empirical survey, will examine the implications of such a transformation. The possibilities of a South African press serving the African need for quality scholarly publishing will also be investigated, especially in light of the relative strength of publishing in South Africa as compared to the rest of the continent. The results of the study are intended to improve the publishing practice of AISA, and of the scholarly publishing community more generally in South Africa and the wider continent.

The Africa Institute of South Africa, a science council with a public mandate to perform research in the field of African studies, is interested in the possibility of extending its publishing activities to the extent that the current publishing division becomes, in effect, an independent scholarly publishing house. At present, AISA fulfils its role of processing and disseminating information through an in-house, centralised (and very small) publishing division. Two key questions that can be asked in this regard are whether there is indeed a real need for a scholarly publisher in a specific niche relating to African studies, and secondly whether publishing scholarly research is indeed AISA's core business.

The first issue – that of market demand – will be assessed in this study in terms of a questionnaire-based survey and interviews with key informants and role-players in this field and in publishing. Attention will also be given to the changing role of publishers, and in particular university presses, in the current international context, as this informs the potential models for and sustainability of any new publishing venture. The university press model will be explored in particular detail, as it is believed that this may be the most appropriate model for such a publisher (i.e. because of its non-profit nature, and because it focuses on the academic merit of a manuscript rather than purely commercial concerns), given that this

model has been an effective means of disseminating research publications for a fairly long period of time in both the developed and now the developing world. It is hoped, from this investigation, to develop a model for a publishing house for AISA, and in this way to provide a framework to benchmark the current publishing efforts in various African countries, although the actual benchmarking is beyond the scope of this study. In this way, it will be shown how to measure the viability and success of such a publisher.

The second issue – the rationale for locating a scholarly publishing house within AISA – can be looked at from several points of view:

- AISA priorities, in terms of its mission, mandate and strategic objectives;
- Department of Science and Technology (DST) priorities (as this government department is AISA's main funding body), as well as wider national South African government priorities (and thus wider social issues in the country);
- Priorities on the African continent in terms of research funding and dissemination, as well as new priorities aligned to the African Union's New Partnership for Africa's Development (NEPAD) and concerns about closing the information divide (the so-called digital gap between developed and developing countries).

These issues will all be dealt with in more detail, in turn, within the study. In each case, the viability of an AISA scholarly press will be considered, but from a range of different perspectives: these include looking at viability from a strategic point of view or from an implementation point of view (AISA priorities); from a political point of view or from a resource (funding) point of view (DST and government priorities); from a social need point of view; from an economic point of view, and so on. It will also be taken into account and argued that the branding of an 'AISA Press' (a name used throughout the study for simplicity and ease of reference, rather than because that is the actual brand identity proposed) could confer various benefits on the Institute itself, especially in terms of prestige, better awareness and visibility, attracting top-flight scholars and researchers, putting a stamp of quality on AISA's published work, and positioning the Institute as a serious research institution. From this basis, a research problem can be developed.

1.3 The Research Problem

Problems among African researchers include isolation, lack of access to published materials and to publishers, and possible duplication of research (Scott, 2003: 1). This is in addition to the problems of neo-imperialism raised earlier in the Introduction. Science and Technology (which includes research, and indirectly research output or publishing) is one of the priority areas of the African Union's programme, the New Partnership for Africa's Development (NEPAD), which aims to return Africa to its rightful place on the world stage (NEPAD, 2001).

To relate NEPAD's aims specifically to publishing, Wafawarowa (2003: 2–3) points out that "NEPAD can use the African publishing industry as a tool", and proposes several areas in which NEPAD and African publishers could cooperate. These include the communication of NEPAD and its priorities to the wider African population and the rest of the world; promoting awareness of Africa and of each other among the different African peoples; and promoting literacy and economic development. AISA already works in several of these areas, and in particular in promoting awareness and communicating NEPAD's priorities. Publishing in these areas would thus be a natural extension of such research work, and this should be reflected in the proposed niche and editorial mission for a possible AISA scholarly press. Zeleza (1996: 300) proposes just such a mission:

> The mission, always, must be to promote the highest standards of research and scholarly exchange, to repossess the study of Africa, to define African realities, to understand and appreciate the African world with all the intensity, intelligence, and integrity it deserves.

The key research question, then, is: *Given the limitations of and challenges currently facing the South African (and wider African) scholarly publishing industry, could a scholarly publisher working according to the above vision be viably set up, and how could this be achieved?*

One of AISA's 'sister' organisations, the Human Sciences Research Council, has undergone a similar process in recent years, moving from a service editing unit, to a professional publishing unit, and then to a scholarly press (see Bruns, 2004; Gray, van Schalkwyk and Bruns, 2004). On the basis of such an example, this study will investigate whether it would

be feasible for AISA to follow suit, and redevelop its existing publishing division into a fully fledged scholarly publishing house. The inherent benefit for the Institute of developing a scholarly publishing house is largely linked to credibility and prestige, as a press has the connotations of a certain standard of quality and scholarly evaluation being reached.

In summary, it is hypothesised that the options that are available and that will be elaborated in this study include the following:

- Develop AISA's publishing division, over a number of years, into a scholarly press operating along the lines of a university press model;
- Adopt another model or structure for a scholarly publishing house, which includes elements of some of the different options;
- Eliminate or downscale existing publishing activities, in favour of an electronic model of information delivery;
- Enter into more joint ventures, whether for traditional collaborative book projects (i.e. in print) or in terms of electronic ventures;
- Maintain the status quo: i.e. continue to publish as a division within the Institute (as is the case with many other research institutes world-wide).

Very little systematic work has to date been undertaken to provide a sense of the size and shape of scholarly publishing in South Africa, but it is hoped that it will be possible to establish whether there is a place for another small, not-for-profit scholarly publisher, against the background of the consolidation (through mergers and take-overs) and commercialisation that have taken place in South African publishing in recent years. Some of the factors that will be examined in an effort to evaluate viability include a survey of potential and existing competitors, whether there is indeed market demand, the suitability of AISA as an institutional host, the preferred model for an 'AISA Press', and the ability to develop a sustainable business plan (with an appropriate publishing philosophy, including mission, vision and niche, identified). This business plan would be tailored to the scholarly publishing sector, which differs from commercial, or trade, publishing in several significant ways, and to the South African and wider African context.

1.4 Definitions: What is Scholarly Publishing?

Because of the sometimes confused (and confusing) use of terminology, some clarity will be required as to the key terms used in the study. The terms 'academic publishing' and 'scholarly publishing' are often used interchangeably in the literature, but in fact refer to (sometimes overlapping) segments of a wider 'educational' field of publishing.[2] Indeed, within the African context, it has been suggested that "as the bulk of publishing in Africa is textbooks for primary and secondary schools, other books of a higher level of academic content tend to be labelled 'scholarly'" (Bgoya, 2007: 1). Of course, as Bgoya goes on to point out, this is not a satisfactory definition, lacking both rigour and specificity.

In some cases, the overlap in terms reflects a narrower, rather than a wider, definition: both the terms 'academic publishing' and 'scholarly publishing' are often used to refer, quite narrowly, to the publishing of peer-reviewed academic journals.[3] Indeed, this proved very common when surveying the literature, to the extent that many studies that may at first glance have been considered of importance, were later found to be limited in their scope and application because of their overwhelming focus on scholarly journals as practically the only outlet for scholarly communication and publishing. This literature was thus included only as secondary reference material for the literature survey contained in this study, which focuses on scholarly book publishing.

In this study, and deriving from a broad survey of the literature, the following working definitions will be used. 'Academic publishing' will be said to encompass tertiary-level textbook publishing ("tertiary educational publishing"), academic journals, and other publications aimed at an academic (i.e. tertiary education or university) or student readership. The concept of 'scholarly publishing' is somewhat more nuanced, emphasising the significance of peer review and of research, and entailing a slightly different audience. Scholarly texts are written by scholars themselves (academics and experts, on the whole), and

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[2] A related term, scientific publishing (or STM – scientific, technical and medical), will not be used in this study as it is most often used to refer to the natural sciences, and this study will focus on the social sciences primarily.

[3] For instance, a report by the Wellcome Trust (2004: iii) refers to "scientific research publishing", but is in fact limited to "publishing scientific, technical and medical research in peer-reviewed journals". See also, for example, Keller, Michael A. 1998. 'Returning responsibility for scholarly communication to the academy'. IuK Workshop, 'Wege in die Zukunft – Elektronische Zeitschriften II – International Symposium on Electronic Journals', Berlin, 16–17 February; Ellison, Glenn. 2000. 'Evolving Standards for Academic Publishing: A *q-r* Theory', Occasional Paper, Department of Economics, Massachusetts Institute of Technology. It should be noted, however, that these are only a few examples among very many.

are aimed at a small, niche market, consisting largely of academics, researchers and educated people interested in a recognisable and specific area of study – but not necessarily students of this field. Andrew (2004: 80) makes a useful distinction in these terms: "One must distinguish here between student texts (prescribed books), recommended reading material for students, and specialised works bought by the academics themselves (scholarly works)". It is this latter category that may be defined as scholarly publications, although the definitions do sometimes overlap or blur: "University textbooks may or may not be classified as scholarly works depending on the level, as well as in presentation of content" (Bgoya, 2007: 1–2).

The distinction between academic and scholarly publishing is important because it will be argued that, while South Africa has a fairly dynamic academic publishing industry (both non-profit and commercial), which focuses mostly on textbooks, there are very few scholarly publishers in the country, or indeed on the wider African continent. Those that are present tend to be local branches of major international university presses, as well as a few non-profit institutional (or association) publishers. And where they are present, they appear to be beset by constraints in the majority of cases. The major constraint is the extremely small market size within South Africa and more broadly within Africa, meaning that financial sustainability is still more difficult in this environment than in the relatively prosperous North American or European one.

These definitions help us to understand what a scholarly text is, but what, then, does a scholarly publisher do? Two more general, but widely accepted, definitions of scholarly publishing include the following: "the process through which newly discovered knowledge is refined, certified, distributed to and preserved for researchers, professors, students, and the public" (Griffin, 2001: 2), and "the production, quality control, dissemination and consumption of knowledge" (Kinne, 1999: 312). In other words, scholarly publishing is concerned with the review and distribution of *knowledge*, in the sense of research and scholarly communication. Perhaps because such knowledge generation is often carried out at universities, scholarly publishing is often closely linked with university presses, which have been called the "backbone" of scholarly publishing, especially in the social sciences (Sievers, 2003: 1).

(A short digression may be useful here: a definition of the 'university press', the main mode of production and delivery for scholarly publications. A university press is a specialised form

of publisher, affiliated (as the name suggests) to a university. The parent organisation generally provides a subsidy or subvention to support the press, which enables it to emphasise academic or scholarly merit rather than commercial viability in its publishing decisions. The environment is changing to some extent, as university presses are being expected to become more financially sustainable. This changing environment, and the structure and functions of the university press, will be discussed in more detail in Chapter 2.)

In terms of the definition of scholarly publishing, Rowland (2002: 247) notes that "the four main functions of the scholarly literature are dissemination of current knowledge, archiving of the canonical knowledge base, quality control of published information, and assignment of priority and credit for their work to authors". These activities are closely related to Kling and McKim's (1999: 897) three dimensions for assessing the strength of (especially electronic) scholarly publishing: publicity, trustworthiness and accessibility. Rowland's functions, and these three dimensions for assessment, will be applied to the AISA case in more detail later in the study.

As should be clear from the discussion above, scholarly texts are also not the same as non-fiction trade books for a general readership – although, again, there may be an overlap in both purpose and audience. This overlap may be seen in the following definition: "Scholarly books provide an outlet for the publication of work on topics that are critical to advancing knowledge but that may not necessarily have mass-market appeal (although occasionally such books have become national bestsellers)" (AAP/PSP, 2005: 3).

Essentially, the difference between the two forms of publishing comes down to one of focus or emphasis: while Unesco (1993: 7) sees the objectives of the book publisher as being "to make profits for the shareholders and to publish valuable books", this definition is far more applicable to trade publishers than to scholarly publishers. General, or trade, non-fiction, values profit above (academic) merit, and the text is seldom based on the same level of research as scholarly texts. It is also pitched at a more popular level. In other words, where a popular work of non-fiction may well take into account its intended non-expert audience, and tailor its language, terminology and level of detail accordingly, a scholarly work may not make such concessions. A "best-selling" or even moderately successful scholarly book at a popular level is usually one that touches a chord in terms of topicality and relevance to current affairs, rather than due to its inherent scholarly merit. That being said, there is a

school of thought that scholarly texts share many traits with popular non-fiction and should be marketed in the same way as trade non-fiction books. This argument will be examined in more depth in the study in the section assessing target audience needs and market demand.

Clearly, then a scholarly publisher could be said with accuracy to be a "critical, rather than market-driven, publisher" (cf. Evans and Seeber, 2000: 50) as well as a "mission-driven" publisher (Alleyne, 2005: 1). Thus, when developing a business plan for a proposed 'AISA Press', particular attention will need to be paid to its mission.

1.5 Defining the Case Study: An Introduction to AISA

The feasibility of establishing a scholarly press at AISA must be related to the core business of the institute and its capacity to support such a venture. How does AISA see itself and its role? Is AISA a suitable host institution? Publishing both derives from, and responds to, the institutional mandate. The priorities of the Africa Institute can be found in its mission statement, mandate (as set out in the Africa Institute Act, no. 68 of 2001), and strategic objectives, as well as in supporting documentation such as the 2004 Institutional Review. AISA's vision reads as follows:

> AISA's vision is to become an independent authoritative centre of excellence for the production of knowledge on Africa and to promote awareness as well as the importance of unity, peace, prosperity and democracy on the African continent.[4]

The Institute's mission is:

> "We are an independent Pan-African institution that works towards:
> - The promotion of research excellence;
> - The dissemination of information;
> - Empowerment;
> - Policy support; and
> - Partnerships."

The theme of producing and disseminating knowledge is thus already being introduced. Moreover, according to the AISA Act (no. 68 of 2001), the Institute's objectives are to:

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[4] A new vision statement was adopted in February 2006, which shortens this statement considerably, but without changing the essential focus. The new vision is "Generating knowledge for a better Africa".

- "promote knowledge and understanding of African affairs through leading social scientists acting in concert and across all disciplines and through training and education on African affairs;
- collect, process and disseminate information on African affairs, give effective advice and facilitate appropriate action in relation to the collective needs, opportunities and challenges of all South Africans;
- to promote awareness and consciousness of Africa at grassroots level."

Importantly, as can be seen, the publishing and dissemination of information is a significant function in terms of the AISA Act. At present, this function is carried out within a publishing division. The key roles of the AISA publishing division are to publish research results and findings, disseminate information as widely as possible, and promote quality through rigorous peer review. These roles are carried out with a view to:

- Promoting awareness of Africa;

- Communicating and educating;

- Having an impact by publishing relevant and influential work;

- Promoting discussion and debate;

- Creating awareness and promoting the visibility of AISA;

- Reaching diverse markets.

Publishing may thus be interpreted as a core function of the Africa Institute. This point may not be immediately obvious to all stakeholders of AISA, and so it needs to be emphasised that publishing adds value to all aspects of a research organisation's work, as Alleyne (2005: 3) argues:

> The view may be taken that because publishing is not the principal business of the organization or profit is not the main function of the publishing enterprise, there need not be the same rigor in terms of the functions of identifying, verifying, molding and dissemination that I mention above. I would posit the reverse. I would suggest that the professional publisher committed to the mission of the non-profit organization has a great responsibility to demonstrate to the other parts of the organization that this function is a critical one that must be in place for the organization to achieve the results needed to satisfy its publics. This is important not only to satisfy the professional pride of the publisher, but also because that work does truly bring value to the organization's other lines of action.

Indeed, it could be argued that the extent to which publishing is seen as a core function depends on one's definition of the research process, and whether publishing of research

results is seen as an integral part of research or not. As indicated earlier, the two processes of dissemination and peer review are the essential functions of the scholarly publisher. Moreover, what comes out of any survey of 'best practices' at other research institutions, is that publishing is seen as an essential role for any authoritative research centre. What differs is how the publishing function is structured and how much emphasis is placed on publishing, as well as whether institutions make a strategic decision to publish only their own, in-house research findings, and/or other important research as well.

The reason we need to be clear on AISA's mandate as a research institute is that it guides and informs the eventual mandate of any publishing house that may be set up in AISA's name, as well as its publishing philosophy and policies. According to the literature, presses that are set up with a vague mandate may well be setting themselves up for failure. The mandate required relates to the types of publications produced, as well as the general philosophy relating to non-profit or profit-making status. One issue of particular importance, and which will be raised in some detail when discussing the university press model in the next chapter, is that of sustainability, while remaining a "critical, rather than market-driven, publisher" (cf. Evans and Seeber, 2000: 50).

1.6 The Study: Methodology and Division of Chapters

1.6.1 Methodology

In an exploratory study of this kind, the appropriate methodologies to follow include a literature survey (both of print sources and on the Internet), a questionnaire-based survey of a focus group of users, and the analysis of AISA as a specific case study. A business planning process will also be followed.

Because of the nature of the scholarly publishing industry – it is both a commercial business sector and a field linked closely to universities and research work – the literature study will of necessity need to cover both some commercial and some academic sector-related sources. Much of the information on electronic publishing is available online, while other sources include scholarly books, articles in peer-reviewed journals, publishers' catalogues, reference works, newspaper reports, discussion groups, and results of surveys and other empirical research that has already been undertaken. The available literature specific to or focusing on

South Africa and Africa more broadly is limited, so some comparative analysis of the literature will need to be – and indeed, should be – undertaken.

To add to the limited literature, a questionnaire-based survey was carried out with a group of researchers, academics and key informants in the scholarly publishing industry. The exploratory survey focused on obtaining both quantitative and, more importantly, qualitative information about and perceptions of the industry. As the study is intended to explore trends and identify patterns, rather than produce hard statistics on who reads what in South Africa, the sample is not representative of scholars in South Africa, or more broadly, as a whole. Rather, it represents a segment of scholars who were, on the whole, familiar with the Africa Institute of South Africa's work and who themselves are involved in the business of research and publishing on matters relating to Africa. The survey was carried out electronically, by means of e-mail, using a structured questionnaire. Respondents were also free to add comments as they wished. These results have largely been incorporated into Chapter 3, which assesses market demand and the potential niches available for a scholarly publisher in Africa.

The data gathered from the literature study and survey inform the feasibility study and business plan. It should be noted, in terms of the literature available on scholarly publishing, that much of this focuses on peer-reviewed journals and journal articles, and relatively little on books or monographs. This is in spite of the general perception that, in the humanities and social sciences at least (the disciplines upon which we will be focusing in this study), scholars tend to communicate the results of their research primarily through books and monographs, and only secondarily through journal articles (see, for instance, Derricourt, 1996). Watkinson (2001: 2) notes in this regard that "it is also significant that the standard book on research communication is overwhelmingly concerned with serials and the publication of articles (papers) as the way in which research is characteristically communicated". This study is thus a contribution to scholarly publishing literature focusing on books and on models for scholarly publishers.

1.6.2 Objectives
As mentioned above, the key research question for the study is: *Given the limitations of and challenges currently facing the South African (and wider African) scholarly publishing industry, could a scholarly publisher of African material be viably set up, and how could this be achieved?*

To unpack this research question and address all of its aspects, the objectives of the study are to:

- outline the challenges facing scholarly publishing in South Africa;
- assess market demand for a new scholarly publisher in South Africa;
- develop a model for and describe the possible structure of an 'AISA Press';
- describe a potential editorial policy, in terms of publishing philosophy, publishing list (including product mix), and house style;
- draw up a business plan for implementation, and identify strategically important issues that may impact upon the planning and implementation of the business plan;
- give guidelines for policy and planning;
- collect all relevant information for the basis of a decision by AISA's strategic management.

The success of this study should not be evaluated in terms of whether or not AISA is able to set up a viable publishing house, but by whether it demonstrates that there is (or is not) a real need for a scholarly publisher in South Africa focusing on Africa-related material, and whether it provides clear guidelines as to whether AISA can and indeed should fulfil this role. If it is determined that it would be viable to set up a niche scholarly publisher at AISA, then the study will serve as a preliminary business plan for such an undertaking. It is important to consider, in this regard, how AISA would benefit from implementing any of these changes – how its priorities, for instance, would be both extended and better fulfilled through a more expansive publishing programme.

As well as being of strategic importance to AISA, the study will provide a baseline for evaluating other scholarly publishing ventures in a similar context, and can be extrapolated to other fields of publishing and other areas within the developing world.

1.6.3 The Importance of a Business Plan

Any new publishing venture, like any other business venture, is more likely to succeed if it is based on a sound business plan – hence the importance of this feasibility study. According to June Campbell (2003), a scholar in the field of knowledge management, "A feasibility study

is research that gives you preliminary information regarding your business idea's potential to succeed in the marketplace." In other words, it focuses on the viability of an idea. Importantly, a business plan can be an effective planning tool for any kind of organisation, even if it does not aim to make a profit (Bovée *et al*, 2004: 3). Figure 3 provides a schematic representation of the benefits of developing a business plan.

Figure 4: The Benefits of Business Planning

An effective planning process will …	By . . .
Generate enthusiasm, build consensus	• Focusing the efforts of the core planning and development team. • Allowing key players to sign on and share ownership early in the process.
Size the effort	• Serving as a mechanism to determine the scope and magnitude of the project. • Identifying and quantifying the core competencies and resources required for the project.
Assess the situation	• Recognising key opportunities and challenges, possible risks and barriers to overcome, and potential rewards. • Encouraging objective analysis.
Set expectations, define success, garner support	• Establishing realistic expectations. • Identifying success criteria and how measured. • Serving as a *prospectus* to seek and establish or confirm support and participation.

Source: Crow and Goldstein, 2003: 4.

Crow and Goldstein (2003: 6) recommend that any business plan should start with a model. This study will thus look at various models relating to the university press model. Some other important factors to be taken into account when considering viability include:

- Market demand (which will be assessed by means of a survey of potential authors and consumers);
- Barriers to entry;
- Capacity;
- Marketing and awareness;
- Articulating a mission;
- Organisational will and support;
- Financial planning (Crow, 2004).

The Stationery Office (TSO, 2004) adds other important points to be taken into account when developing or adapting an editorial policy – encompassing the publisher's publishing philosophy, publishing list, and house style (Unesco, 1993: 25–27) – which are of direct relevance to this study. Their points include:

- Identifying an organisation's information dissemination objectives;
- Understanding end users and their information needs (a user profile);
- Devising an information package (product mix and formats);
- Looking at editorial and production procedures;
- Testing and evaluating the information package;
- Ensuring accessibility and discoverability (i.e. how will users find your information or publications);
- Choosing dissemination channels and marketing campaigns;
- Ensuring efficient customer services and fulfilment;
- Evaluating and managing the ongoing publishing cycle.

A business plan for a scholarly publishing venture should ideally include aspects of both of these models, as well as looking at a publishing strategy in terms of a clearly defined editorial mission, an action plan for short-term implementation – for instance in terms of human resources – as well as a marketing strategy, and some indication of the financial resources required for implementation. Moreover, Gray, van Schalkwyk and Bruns (2004: 3) refer to the "classic strategic business management triangle" in formulating a publishing strategy for a research organisation. This can be represented as follows (Figure 5):

Figure 5: The Business Management Triangle
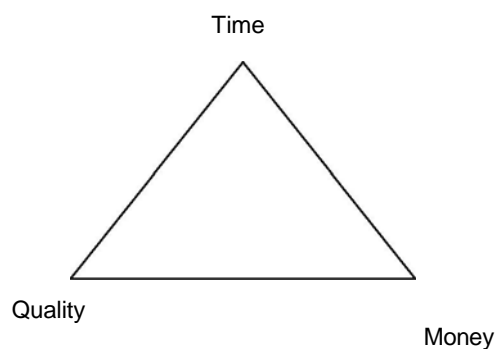
Source: Gray, van Schalkwyk and Bruns, 2004: 3

These issues will especially be taken into consideration when considering the resources available (and required) and focus for the implementation of a publishing strategy for AISA.

1.6.4 The Division of Chapters

The study begins (in Chapter 2, after this Introduction) with a literature survey on the nature of scholarly publishing in South Africa and beyond. This chapter provides an overview of scholarly publishing in South Africa, and attempts to provide a snapshot of the potential competitors for the proposed 'AISA Press'.

Based on this local contextualisation, attention then shifts to the various models of scholarly publishing available world-wide, with a view to identifying the best practices used and then assessing their appropriateness for a scholarly publisher within the AISA framework. The models selected for discussion are all non-profit and focused on increasing the accessibility and availability of scientific, academic research. Most of the institutional bases (whether a university, research organisation or other, similar body) provide a subsidy for the publishing concern, and this subsidy is very often publicly funded. What is significant about this comparative survey is that, according to the literature, experiences from other countries *can be applied* in the South African situation as well. Derricourt (1996: 6) notes that: "it is astonishing how much similarity there is across the range of scholarly publishers in the English-speaking world". He goes on:

> Because much of this publishing is international, and the authors are working in international fields, a common culture of academic publishing has emerged. The similarities are greater than the differences between academic publishing in the United States and Britain, Australia and Canada, Ireland and New Zealand. Writers from other areas where English is the medium of academic communication share much of the same culture.[5]

For this reason, attention will be paid to the university press model in countries such as the USA, UK, and Australia, as well as to the experience of scholarly publishers in other African countries.[6] Apart from university presses, attention will also be given to the publishing

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[5] Note that, in this quotation, the term 'academic publishing' is used in the same sense as 'scholarly publishing' is used throughout this study.

[6] The United States is of particular importance in this survey, given the size and significance of its university press and research organisation publishing sector. To omit reference to the USA and other countries would be to distort the picture of scholarly publishing, as the South African experience to date cannot be seen as typical, and other models exist.

models employed by other research institutes world-wide, including the highly prestigious and well-known Brookings Institution and the Hoover Institution. What is significant in these cases is the different models they have followed to structure their response in terms of publishing research. These will be looked at in more detail in the section on publishing models.

What emerges from this survey of such 'best practices' at other research institutions, is that publishing is seen as an essential role for any authoritative research centre. What differs is how the publishing function is structured and how much emphasis is placed on publishing, as well as whether institutions make a strategic decision to publish only their own, in-house research findings, or other important research as well.

One assumption that is made in this study is that the question of whether to outsource or maintain an in-house publishing division is not a key issue.[7] The management at AISA believes that there is a need to maintain a closeness between the Institute's main research priorities and the priorities of publishing division, as well as its non-profit aims and status. The Institute's public funding also dictates that the publishing and dissemination of its research findings is an essential function. This will be reflected in the kinds of models discussed. The basis for such a discussion is the principle that, "The role of publishers must be to make available and deliver what they publish in whatever way best enables the intended audience to access or receive it" (ICSU, 1999: 18).

The chapter then goes on to discuss how the role of publishers has changed in the past few years, especially in relation to the changing higher education context in South Africa, and the growing drive towards commercialisation of publishing activities. Another factor that has had a huge impact on how publishers are seen and see themselves is the now extensive use of new technologies to change how information products are packaged and 'published' – i.e. the move towards electronic publishing and the opportunities and threats posed by the open access movement in scholarly publishing.

Chapter 3, based largely on the results of a survey and interviews, analyses the intended audience, and assesses their needs. This chapter constitutes the core of the feasibility study,

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[7] Similar assumptions guiding the research are pointed out as they arise, in context. They thus help to shape the discussion throughout the study.

as it evaluates (in an exploratory way) whether a market exists for the proposed publisher and its products. The chapter is largely based on an exploratory questionnaire survey, which was carried out in the first half of 2005. Structured questionnaires were e-mailed to a sample comprising AISA members and peer reviewers used from time to time by the Institute. This sample is largely university-based, which is appropriate given that AISA's main market – and indeed the main market of most scholarly publishers – is the universities and their libraries and research centres. Through the questionnaire, it was not intended to survey the entire potential market, but rather to explore potential gaps and needs, in an attempt to identify a niche for the proposed AISA Press.

Based on the literature review and exploratory market survey, Chapter 4 provides detailed recommendations and a proposed strategic or business plan for the transformation of AISA's publishing division into a scholarly publishing house. In this chapter, attention is paid to the classic elements of a business-cum-strategic plan – such as mission, market demand, financial management, and so on – as well as those elements peculiar to the scholarly publishing industry, and especially the proposed editorial policy and publishing philosophy (this is believed to have particular importance for a "mission-driven publisher"). Recommendations are also made for the implementation of the findings of this study in a practical sense, and it is considered how a potential 'AISA Press' could be evaluated.

The Conclusion, Chapter 5, wraps up the study and evaluates the outcomes. The question of evaluation, in general, is considered in some more depth in this chapter. The conclusion also considers the most significant findings emerging from the study, and makes various recommendations as well as suggestions for further study.

Chapter 2
Literature Review: Scholarly Publishing in South Africa and Beyond

In making a strategic decision as to whether there is indeed a place for a scholarly publisher of African content based in South Africa – and whether AISA can play the role of providing such a publishing outlet – it is necessary to consider the broader picture of the research scene in South Africa, and Africa more generally, as well as the scholarly publishing industry, again both in this country and further afield. This should be seen against the background of the publisher's changing role in society, and of publishing in a developing country context.[8]

2.1 Scholarly Publishing in South Africa

2.1.1 An Overview of the Sector

South Africa produces very few books in terms of the total global output of books, but in the context of the African continent, it is extremely important. As Gray (1999) points out, "South Africa possesses the largest publishing industry in Africa, an industry that is capable of producing books of international quality at much lower prices than the price of imported books." Moreover, "The importance of the publishing industry extends beyond its size. The growth of the local publishing industry is a key factor in education, literacy and cultural initiatives, and hence in economic growth" (Gray, 2000b: 1).

Of this industry, the broad category of academic publishing (into which scholarly publishing usually falls) is the smallest segment of the industry, accounting, according to the PASA Industry Survey 2005 (2006:16), for around 10.47% of turnover.[9] Estimates vary as to the proportion produced by local publishers, but there is consensus that it is higher for academic (and thus scholarly) books than for trade books (see Andrew, 2004: 9; Gray, 2000a: 169; Gray, 2000b: 12; CIGS, 1998: 39). However, it seems that scholarly books may face more

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[8] Throughout this study, an attempt will be made to examine the broader African context for scholarly publishing, although it is acknowledged that the South African situation is considerably less gloomy than that in many other African countries. Indeed, South Africa is even excluded from some analyses of African publishing, but I would argue that it faces many of the same challenges and problems, even if to a different degree in some cases.

[9] This can be compared to estimates in the USA, which has a very strong scholarly publishing industry, especially in terms of university presses: Robinson (2003: 3) estimates that between 16% and 20% of all titles published in the US are from "academic" presses. Australia, a much smaller market and industry, produces around 10 000 scholarly or research books a year (Houghton, 2000).

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competition from international publishers than other categories of academic books. Andrew (2004: 75) points out in this regard that: "It is, however, to some extent true that South African publishers supply the tertiary market with textbooks for first and second year students, while British and American publishers provide for specialised fields in third year and in postgraduate study." These "specialised fields" refer to a large degree to scholarly books, even though these may not have been produced specifically for (high-level) students. Table 1 provides more information about the size and growth of the South African academic publishing industry. The table shows a positive trend for the use of local products.

Table 1: Value of the South African Academic Publishing Sector, 2003-2005

	2003	2004	2005
Net Turnover Local Product	R 138,283,864	R 131,927,693	R 149,484,599
% Growth / Decline		*-4.60%*	*13.31%*
Net Turnover Imported Product	R 44,628,238	R 56,235,750	R 62,234,461
% Growth / Decline		*26.01 %*	*10.67%*

Source: PASA Broad Trends Survey, 2006: 13.

The field is dominated by commercial academic publishers, especially in the provision of textbooks. For instance, Juta and Company claims that "Juta Academic continues to be the market leader in academic publishing" – this largely in terms of tertiary textbooks, but also some social science scholarly works through the University of Cape Town Press (see Juta Annual Report, 2003: 16). According to the Publishers' Association of South Africa (PASA), only a small group of its members could be considered scholarly publishers, rather than textbook publishers for the higher education market (cf. PASA Industry Survey 2005, 2006). These are South Africa's four university presses – Cape Town University Press (run by a commercial publisher, Juta and Company), the University of KwaZulu-Natal Press, Unisa Press, and Witwatersrand University Press – as well as Juta, Oxford University Press SA and Cambridge University Press: Africa Branch. There is also the recently launched initiative of the Pretoria University Law Press (PULP), and an emerging initiative from the University of Johannesburg. As will be seen below, in a more detailed survey of competitors in South Africa, some of these presses operate in very small niche areas – such as international law, and specifically human rights, in the case of PULP – while others are working hard to produce general interest books which might find a wider readership. This reflects the general trend in publishing of a growing commercial focus, even for non-profit publishers.

Apart from the academic publisher focus, the PASA Directory (and most studies of scholarly or academic publishing) does not cover all of the non-profit, institutional publishers in South Africa, as only a few of these consider publishing to be their core business, and they thus do not tend to join PASA (with a few exceptions, such as IDASA and the HSRC Press). This is a significant field in the area of scholarly publishing, and a brief survey will be undertaken (see below, in the section on competitors) to measure the field and assess the fields it currently covers in its publishing endeavours. This is, however, an area that merits further study in its own right.

A key organisation in this regard, and one that will be looked at in some depth in this study, is the Human Sciences Research Council (HSRC) and the HSRC Press. The HSRC has undergone a transformation in recent years, aimed at making its research more relevant, cutting-edge and cost-effective, and its publishing role was transformed as part of that process as well. The HSRC Press has thus developed from a service unit (providing language and technical editing services), into a professional in-house publishing division, and eventually into a press. Its model, based on quality control through peer review, cost-recovery, and a dual media strategy (electronic and print), is similar to that of the university press, but does differ in some respects (Bruns, 2004). This model may serve as an important benchmark for the 'AISA Press'.

2.1.2 South African Competitors

A significant part of a feasibility study or business plan is a survey and description of the competitive landscape. It is important, in other words, to begin by identifying and assessing the relative strengths and weaknesses of the business's competitors, and identifying their market position, especially in regard to the business idea being investigated. Thus, a brief survey of the editorial policies (as defined, earlier, in terms of publishing philosophy, list and house style) of AISA's potential competitors was undertaken. The survey, as reported in the discussion below and in Tables 2 and 3, analysed the publishing philosophy, publishing list (especially in terms of production categories, subject fields and areas covered) and availability of a house style or author guidelines of a number of scholarly publishers in South Africa.

South Africa's university presses publish in a range of fields, especially in the social sciences, but with a focus on specific areas. Some of these could be considered an overlap with the

fields in which AISA conducts research and publishes. According to their publishing philosophies, they also publish for both the general reader and the academic or scholarly market. However, what does seem clear from a survey of the publishing lists of South African university presses (see Tables 2 and 3 for more detailed information) is that they tend to focus more on South Africa than on the rest of the continent – this in spite of the history of, for instance, Witwatersrand University Press, which was first established as an "African studies" publisher. As can be seen in Table 3, Wits University Press has managed to maintain a small list in African studies, largely in the fields of literature, theatre, art, "life experiences" (biography and memoirs), politics and development issues. However, WUP is now under some pressure to refocus its list on general or trade titles to make it more financially viable.

The University of KwaZulu-Natal Press also includes some works on African history and politics in its small publishing programme, but its focus is more closely on South Africa. Its list, and the international scope thereof, is however growing, thanks largely to a number of co-publishing arrangements with international publishers. The University of Cape Town Press (now a division of Juta Academic) also focuses on South Africa and Southern Africa, but it appears from the Juta catalogue that this imprint is in decline (only one or two titles appear a year, and the catalogue does not even distinguish which titles appear under the UCT Press imprint). This may be because Juta's focus is less on scholarly than on academic books, in the sense that it focuses on textbooks and study materials.

Pretoria University's new initiative, the Pretoria University Law Press (PULP), is of interest as a niche publisher although it is not really a competitor of AISA because of its very specific focus. This press "endeavours to publish, and increase access to innovative, high quality and peer-reviewed texts with a focus on human rights and other aspects of public international law especially in Africa" (PULP 2006). PULP has not been included in the survey of editorial policies and recent books (Tables 2 and 3), because its focus is so narrow: human rights and international law. Nonetheless, it is encouraging that this university considered it viable to set up a new scholarly press in a specific niche area at this time – precisely what AISA is considering doing with the expansion of its publishing division, and hence the need for this feasibility study.

Of the university presses in South Africa, it is Unisa Press that is increasingly focusing on the rest of the African continent in its publishing; the Press recognises this by stating that "we are

from Africa, and as such, our list of African themes has shown the greatest growth" (Unisa Press, 2005). This press is probably AISA's greatest competitor in terms of producing scholarly books on African themes (in the social sciences) or carrying African case studies, and it has significant capacity in terms of institutional backing, staffing, and infrastructure (such as design and printing resources in-house). It is also aiming to produce more books that are appropriate for use in the rest of the African continent. In this regard, the collaboration with Codesria (the Council for the Development of Social Science Research, based in Senegal) is particularly interesting, as it focuses on social science books relating to the African continent at large. However, as can be seen in Table 3, at present the Unisa Press list of "African studies" titles focuses largely on cultural studies, biography, and literature and language, and its titles tend to look at South Africa rather than the continent at large. This leaves some room for AISA – if it acts soon, and takes the initiative away from Unisa Press – in terms of continent-wide studies, and especially the fields of politics, governance, development and so on.

An interesting trend that the survey reflected in Tables 2 and 3 reveals is the overlap between the niches or specialised fields of the university presses. As it appears from the outside, these presses have not really taken the opportunity to analyse their own lists, nor to consider their own niches. Rather, they appear to compete on a wide range of topics, and for a limited author pool. Indeed, there is such a lack of specialisation and so much overlapping that it appears that the university presses are driven more by unsolicited manuscripts and by fashionable themes than by a rational analysis of their own strengths. This situation cannot be allowed to continue if the university presses are to remain viable and competitive as publishers.

Apart from the university presses, AISA faces competition from the wider academic or research sector, and in particular from research institutes and NGOs. The HSRC Press, for instance, is increasingly focusing both its research and its publications on issues of interest to the wider African continent. The HSRC's publications fall within the areas broadly defined by its research structure: arts, culture and heritage; democracy and governance; development; education and training; health; history; regional studies; science and technology; and youth and family development (HSRC, 2006). Of these areas, those most likely to overlap with the niche areas of AISA are democracy and governance; development; history; and regional studies. The HSRC Press should be seen as an important competitor, but perhaps more

importantly as a potential collaborator, especially given that its parent organisation is the same as AISA's (the Department of Science and Technology). It also has developed significant experience in terms of online and open access publishing. Indeed, the HSRC Press publishing philosophy is well summed up in its slogan: "South Africa's open access publisher of quality social science" (HSRC, 2006).

Smaller, more dedicated research institutes – such as the Institute for Democracy in South Africa (IDASA), the Institute for Global Dialogue (IGD), the Institute for Security Studies (ISS) and the South African Institute of International Affairs (SAIIA) – also produce publications which often overlap with the interests of AISA. For instance, IDASA produces influential publications arising from research programmes that monitor government performance in a number of areas (such as elections, budgets, and democratisation, for instance), usually relating to South Africa but occasionally also other Southern African countries. The ISS, as its name suggests, is focused on issues relating to conflict resolution, within a wide definition of human security in Africa. The IGD and SAIIA overlap in their focus on current affairs, politics and economics, in Southern Africa and beyond. The publications produced by such research institutes appear to be more likely to be edited collections than single-author works (see Tables 2 and 3, below); more popular reports are also regularly produced, reflecting the different audiences served by the research institutes and their policy advice role.

However, these organisations have several weaknesses in their publishing programmes: for one thing, they tend to produce publications (often 'reports' rather than scholarly books) as the result of donor-driven research, and not as the outcome of basic research. This can, but does not in all cases, result in somewhat superficial research that is of little direct relevance to the academic and wider community. Moreover, these organisations do not all have clear publishing plans or editorial policies, which is reflected in their lack, for instance, of consistent style guides or guides for authors. As a result (or perhaps as a contributing factor), they do not encourage unsolicited manuscripts. Finally, they are also often weak in terms of distribution and marketing (some institutions, for instance, give away their publications for free rather than marketing them as products or assets). This means that they are not self-sustaining in their business model. Thus, while such research institutes may produce publications of some importance, they cannot really be considered publishers. This is not to

suggest that AISA should not take their output seriously when considering the potential competition!

Moreover, several of AISA's competitors in terms of research have not been included in this survey because their publishing programmes are entirely ad hoc or considered subordinate to their wider research and policy advice goals. The Centre for Policy Studies, for instance, produces very good policy advice and briefs, but does not publish scholarly books. Other institutions produce journals but not books. Examples would include the African Centre for the Constructive Resolution of Disputes (ACCORD), which produces two journals and a monograph series, and the Centre for Conflict Resolution at the University of Cape Town. The Centre for International Political Studies (CIPS) at the University of Pretoria produces online briefing papers, but again not scholarly books of the nature which this study is investigating. The growing trend for producing electronic briefing papers should be highlighted here, as it is certainly a mode of delivery that AISA should consider. However, at the same time, it should be seen as a product *in addition to* books and other publications; it should expand the product range rather than reducing all publications to 'online only'.

What this survey of the competition in South Africa reveals is that, if AISA carefully selects certain areas for publication, and produces high-quality books on these topics, then it should be successful in carving its own niche in the market. Some of the areas that are well covered are conflict studies, election analysis, history, the arts and culture, and certain aspects of politics. Areas that are not as well covered at present – especially in terms of well-researched, in-depth studies – include issues of democratisation and governance, as well as the social aspects of economic policies.

Tables 2 and 3 follow, providing more details of the editorial policies of selected scholarly publishers in South Africa, and an analysis of recent titles produced by those publishing houses in the past three to five years (specifically those focusing on topics relating to Africa and 'African studies').

Table 2: Editorial Policies of Selected Scholarly Publishers in South Africa

Publisher	Production categories[10]	Subject fields	Area focus	Number of titles p.a.	House style
UCT Press (an imprint of Juta Academic)	Single-author books Co-authored books Textbooks and study materials	Business Economics Education Engineering Health History Marketing Politics and Public Administration Social Sciences Tourism	SA (Southern Africa)	1-2 (unclear from sources used)	Author Guidelines available on website; includes house style guide
UKZN Press	Single-author books Co-authored books Children's books	Anthropology Art (especially photography) Biography Cultural studies Economics Health History (especially SA history) Gender Natural sciences Literature Philosophy Politics	SA	± 10	UKZN Press has a house style
Unisa Press	Single-author books[11] Co-authored books Edited books Textbooks Art books Festschriften Journals	Art and architecture Business Culture Education History Law Literature Politics Social theory and general social sciences Theology Urban geography	SA Africa International	± 20-30	Author Guidelines available on website; includes house style guide
Wits University Press	Single-author books Co-authored books Edited books Textbooks Field guides	African studies Anthropology Archaeology Art Biography and memoirs Business / economics	SA Southern Africa Africa International	± 10	WUP has a house style

[10] Note that, because of differing definitions of the term "monographs", this category is not featured. Instead, publications that may have qualified as monographs by some definitions have been classified as either books or research papers.

[11] Unisa Press uses categories of 'original research', 'series', 'textbooks' and 'festschriften' when classifying its own output.

		Health History Literary studies Media studies Medicine Politics and law Science (especially "popular science") Theatre studies Women's writing			
HSRC Press	Single-author books Co-authored books Edited books Conference proceedings Research reports Reports	Arts, culture and heritage Democracy and governance (politics) Development Education and training Health History Regional studies Science and technology Youth and family development	SA Southern Africa Africa	± 70	Author Guidelines available on website; includes house style guide
IDASA	Edited books Research reports Briefing papers Conference proceedings Newsletters	Elections Government monitoring (e.g. budgets) Health Social issues Migration Politics	SA Southern Africa Africa	± 10	Not available
ISS	Edited books Journal Reports Newsletters	Security, including: Conflict Crime Politics Violence	SA Southern Africa Africa	± 10	Not available
IGD	Research papers Edited books Briefing papers Newsletters	Politics Regional integration	SA Southern Africa Africa	1-2 books 5 research papers	Not available
SAIIA	Edited books Research papers Reports Briefing papers (electronic) Journals	Current affairs / International relations Politics Economics (History)	SA Southern Africa Africa	± 5 books	Not available

Sources: UKZN Press catalogue, 2006; Unisa Press catalogue, 2005; Wits University Press catalogue, 2006; Juta Academic price list and website, 2006; HSRC Press catalogue, 2006; IDASA website, 2006; ISS website, 2006; IGD website, 2006; SAIIA website, 2006.

Table 3: Selected Recent Titles of Scholarly Publishers in South Africa ("African studies" titles)

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
UCT Press (Juta Academic)						
	Political economy of regionalism in Southern Africa	M Lee	Single-author book	Politics	Southern Africa	2003
	Security and politics in South Africa: The regional dimension	P Vale	Single-author book	Politics	SA	2003
	Governance in the new South Africa: The challenges of globalisation	G Mhone & O Edigheji	Co-authored book	Politics	SA	2003
	Fighting poverty: Labour markets and inequality in South Africa	H Bhorat et al	Co-authored book	Social issues	SA	2002
	Tigers in Africa: Stalking the past at the Cape of Good Hope	C Schrire	Single-author book	History	SA	2002
	Power, wealth and global equity: An international relations textbook for Africa	PK McGowan & P Nel	Co-authored book	Politics	Africa	2001
	South Africa: Limits to Change – The political economy of transition	H Marais	Single-author book	Politics	SA	2001
	Against global apartheid: South Africa meets the World Bank, IMF and global finance	P Bond	Single-author book	Economics	SA	2001
	Looking back, reaching forward: Reflections on the Truth and Reconciliation Commission of South Africa	C Villa-Vicencio & W Verwoerd	Co-authored book	History / Politics	SA	2000
UKZN Press						
	Looting Africa: The economics of exploitation	P Bond	Single-author book	Politics / Economics	Africa	2006
	The World Bank: Development, poverty, hegemony	D Moore (ed)	Edited book	Politics / Development	International	2006
(co-pub with Zed Books)	Crude interventions: The United States, oil and the new world (dis)order	G Leech	Single-author book	Politics / Economics	International	2006
(co-pub with Zed Books)	Beyond US hegemony? Assessing the prospects for a multipolar world	S Amin	Single-author book	Politics / Economic	International	2006
(co-pub with Pluto Press)	Hamas: A beginner's guide	K Hroub	Single-author book	Politics	International	2006

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	Class, race and inequality in South Africa	J Seekings & N Nattrass	Co-authored book	Politics / Social theory	SA	2006
	Why race matters in South Africa	M MacDonald	Single-author book	Politics / Social theory	SA	2006
	Voices of protest: Social movements in post-apartheid South Africa	R Ballard, A Habib & I Valodia (eds)	Edited book	Politics / Social theory	SA	2006
	Art talk, politics talk: A consideration of categories	M Chapman	Single-author book	Politics / Art	SA	2006
	Chiefs in South Africa: Law, power and culture in the post-apartheid era	B Oomen	Single-author book	Politics	SA	2005
	Season of hope: Economic reform under Mandela and Mbeki	A Hirsch	Single-author book	Economics / Politics	SA	2005
	Beyond the apartheid workplace: Studies in transition	E Webster & K von Holdt (eds)	Edited book	Social theory	SA	2005
(co-pub with Palgrave)	African masculinities: Men in Africa from the late nineteenth century to the present	L Ouzgane & R Morrell (eds)	Edited book	Social theory	Africa	2005
	The Maphumolo uprising: War, law and ritual in the Zulu rebellion	J Guy	Single-author book	History	SA	2005
	Myth of iron: Shaka in history	D Wylie	Single-author book	History	SA	2005
	Lost city of the Kalahari	A Paton	Single-author book	History / Biography	SA	2005
	Rewriting modernity: Studies in black South African literary history	D Attwell	Single-author book	Literature	SA	2005
	JM Coetzee and the ethics of reading: Literature in the event	D Attridge	Single-author book	Literature	SA	2005
	Dead leaves: Two years in the Rhodesian war	D Wylie	Single-author book	History / Biography	SA	2005
	Poetry and protest: A Dennis Brutus reader	L Sustar & A Karim (eds)	Edited book / Fiction	Literature / Fiction	SA	2005
Unisa Press						
(co-pub with Codesria)	African intellectuals: Rethinking politics, language, gender and development	T Mkandawire (ed)	Edited book	Social theory	Africa	2005
(co-pub with Codesria)	Negotiating modernity: Africa's ambivalent experience	ES Macamo (ed)	Edited book	Social theory	Africa	2005

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
(co-pub with Codesria)	Urban Africa: Changing contours of survival in the city	A Simone & A Abouhani (eds)	Edited book	Urban geography	Africa	2005
	Marketing research in practice	Tustin	Textbook	Business	SA	2005
	The property finance business in South Africa	Wight & Ghyoot	Co-authored book	Business	SA	2005
	Open to the world: rethinking the character and task of Christian theology for the third millennium	Loubser	Single-author book	Theology	SA	2005
	The making of an African Communist: Edwin Mofutsanyana and the Communist Party	Edwin	Single-author book	History	SA	2005
	Enhancing adult basic learning: training education and unlocking the potential	Singh & McKay (eds)	Edited book	Education	SA	2005
	On jurisdiction and the recognition and enforcement of foreign money judgements	Schulze	Single-author book	Law	SA	2005
	Democracy X: Marking the present, re-presenting the past	A Oliphant, P Delius & L Meltzer (eds)	Art book	Culture / History	SA	2004
	Cape Flats details: Life and culture in the townships of Cape Town	C Ledochowski	Art book	Culture / Art	SA	2004
	Hear our voices: Race, gender and the status of black South African women in the academy	R Makobela & Z Magubane (eds)	Edited book	Higher education	SA	2004
	Johannesburg: The making and shaping of the city	K Beavon	Single-author book	Urban geography	SA	2004
	Making the changes: Jazz in South African literature and reportage	M Titlestad	Single-author book	Music / Literature / Media	SA	2004
	On becoming a democracy: Transition and transformation in South African society	C Manganyi (ed)	Edited book	Politics	SA	2004
	The law of commoners and kings: Narratives of a rural Transkei magistrate	D Ndima	Single-author book	Law / History	SA	2004
	Voices that reason: Theoretical parables	A Sitas	Single-author book	Social theory	SA	2004
	African oral story-telling tradition and the Zimbabwean novel in English	MT Vambe	Single-author book	Literature	Southern Africa	2004
(co-pub with Codesria)	African universities in the twenty-first century (vol. 1 and 2)	PT Zeleza and A Olukoshi	Co-authored book	Higher education	Africa	2004
(co-pub with Codesria)	Between democracy and terror: The Sierra Leone civil war	I Abdullah (ed)	Edited book	Politics / conflict	West Africa	2004

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
(co-pub with Codesria)	Africa's media, democracy and the politics of belonging	F Nyamnjoh	Single-author book	Media / politics	Africa	2004
(co-pub with Codesria)	Good Muslim, bad Muslim: America, the Cold War, and the roots of terror	M Mamdani	Single-author book	Politics / Social theory	USA / World	2004
	Of myths and migration: Illegal migration into South Africa	H Solomon	Single-author book	Geography	Southern Africa	2003
	The Lemba: A lost tribe of Israel in Southern Africa?	M le Roux	Single-author book	Geography / Culture	SA	2003
(co-pub with UNDP)	Africa 2025: What possible futures for sub-Saharan Africa?	A Sall (ed)	Edited book	Politics	Africa	2003
	Communities at the margin: Studies in rural society and migration in Southern Africa, 1890-1980	JA Jeeves & JM Kalinga (eds)	Edited book	Geography	Southern Africa	2002
	Amulets and dreams: War, youth and change in Africa	O Badsha (ed)	Art book	Art / Conflict	Africa	2002
	Discordant comrades: Identities and loyalties on the South African left	A Drew	Single-author book	Politics / History	SA	2002
	Bound by tradition: The world of Thabo Mbeki	L Mathebe	Single-author book	Politics / Biography	SA	2002
	From boys to gentlemen: Settler masculinity in colonial Natal, 1880-1920	R Morrell	Single-author book	History	SA	2002
	Our dream deferred: The poor in South Africa	A Zegeye & J Maxted	Co-authored book	Politics / Social theory	SA	2002
Wits University Press						
	After colonialism: African postmodernism and magical realism	G Gaylard	Single-author book	Literature	Africa	2006
	Still beating the Drum: Critical perspectives on Lewis Nkosi	L Stiebel & L Gunner (eds)	Edited book	Literature	SA	2006
	Portraits of African Writers	G Hallett	Art book	Art / Literature	Africa	2006
	Youth2Youth: 30 years after Soweto '76	G Hallett (ed)	Art book	Art	SA	2006
	Big African states	C Clapham, J Herbst & G Mills	Co-authored book	Politics	Africa	2006
	Africa on the move: African migration and urbanisation in comparative perspective	M Tienda et al (eds)	Edited book	Urban geography	Africa	2006

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	Law and sacrifice: Towards a post-apartheid theory of law	J van der Walt	Single-author book	Law	SA	2006
	From tools to symbols: From early hominids to modern humans	F d'Errico & L Backwell (eds)	Edited book	History / heritage	Africa	2005
	The state of the state: Institutional transformation, capacity and political change in South Africa	L Picard	Single-author book	Politics	SA	2005
	Untold stories: Economics and business journalism in African media	P Kareithi & N Kariithi	Textbook	Media	Africa	2005
	Into the past: A memoir	P Tobias	Single-author book	Biography / Archaeology	SA	2005
	Papwa Sewgolum: From pariah to legend	C Nicholson	Single-author book	Biography	SA	2005
	Seeking Mandela: Peacemaking between Israelis and Palestinians	H Adam & K Moodley	Co-authored book	Politics	International	2005
	Imaginative trespasser: Letters between Bessie Head, Patrick and Wendy Cullinan	P Cullinan	Biography	Literature	SA	2005
	Women writing Africa: West Africa and the Sahel	A Diaw & E Sutherland-Addy (eds)	Edited book / Fiction	Literature / Fiction	Africa	2005
	Celebrating Bosman: A centenary selection of Herman Charles Bosman's stories	P Mynhardt (ed)	Edited book / Fiction	Literature / Fiction	SA	2005
	After colonialism: African magical realism	G Gaylard	Single-author book	Literature	Africa	2005
	History after apartheid: Visual culture and public memory in democratic South Africa	AE Coombs	Single-author book	Culture / History	SA	2004
	Security intersection: The paradox of power in an age of terror	G Mills	Single-author book	Politics	International	2004
	Worlds of power: Religious thought and political practice in Africa	S Ellis & G ter Haar	Co-authored book	Politics / Theology	Africa	2004
HSRC Press						
	Creating knowledge networks	G Kruss et al	Research paper	Higher education	SA	2006
	Debating high skills and joined up policy	A Kraak et al	Research paper	Politics	SA	2006
	Democracy compromised: Chiefs and the politics of land in South Africa	L Ntsebeza	Single-author book	Politics	SA	2006

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	The development decade? Economic and social change in South Africa, 1994-2004	V Padayachee (ed)	Edited book	Development / Social issues	SA	2006
	Disability and social change	B Watermeyer et al (eds)	Edited book	Social issues	SA	2006
	Doctors in a divided society	M Breier & A Wildschut	Research paper	Health	SA	2006
	South Africa's role in conflict resolution and peacemaking in Africa	Roger Southall (ed)	Conference proceedings	Politics / Conflict	Africa	2005
	Elusive equity: Education reform in post-apartheid South Africa	EB Fiske & HF Ladd	Co-authored book	Education	SA	2005
	State of the Nation: South Africa 2005-2006	S Buhlungu, J Daniel, R Southall & J Lutchman (eds)	Edited book	Politics	SA	2005
	Migration in south and southern Africa	P Kok et al (eds)	Edited book	Geography	Southern Africa	2005
	Crossing over: The basics of evolution	E Dempster	Textbook	Science	SA	2005
	Baba: Men and fatherhood in South Africa	L Richter & R Morrell (eds)	Edited book	Social issues	SA	2005
	An African peace process: Mandela, South Africa and Burundi	KA Bentley & R Southall	Co-authored book	Politics / conflict	Africa	2005
	A census of orphans and vulnerable children in two South African communities	S Jooste, A Managa & LC Simbayi	Report	Health	SA	2005
	The business of higher education	Mahlubi Mabizela	Research paper	Higher education	SA	2005
	Changing the fourth estate: Essays on South African journalism	A Hadland (ed)	Edited book	Media	SA	2005
	Confronting the region: A profile of southern Africa	S Naidu & B Roberts	Research paper	Reference	Southern Africa	2004
	State of the Nation: South Africa 2004-2005	J Daniel, R Southall & J Lutchman (eds)	Edited book	Politics	SA	2004
	Education in exile	S Morrow, B Maaba & L Pulumani	Co-authored book	Education / history	Southern Africa	2004
	Chasing credentials and mobility: Private higher education in South Africa	G Kruss	Single-author book	Higher education	SA	2004

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	Changing class: Education and social change in post-apartheid South Africa	L Chisholm (ed)	Edited book	Education	SA	2004
	Overcoming apartheid: Can truth reconcile and divided nation?	JL Gibson	Single-author book	Politics	SA	2004
	Every step of the way: The journey to freedom in South Africa	M Morris	Report	History	SA	2004
	Assessing the costs of a rural PMTCT pilot site in the Eastern Cape	C Desmond & G Boyce	Report	Health	SA	2004
	An audit of HIV/AIDS policies	N Zungu-Dirwayi et al (eds)	Research paper	Health	Southern Africa	2004
	Democracy in Africa: Moving beyond a difficult legacy	R Southall	Research paper	Politics	Africa	2003
	Fragments of democracy: Nationalism, development and the state in Africa	G Williams	Research paper	Politics	Africa	2003
	State of the Nation: South Africa 2003-2004	J Daniel, A Habib & R Southall (eds)	Edited book	Politics	SA	2003
	Limits to liberation in Southern Africa	H Melber (ed)	Edited book	Politics	Southern Africa	2003
	Food security and sustainable development in Southern Africa	S Drimie & S Mini	Research paper	Development	Southern Africa	2003
	Curriculum responsiveness in FET colleges	J Gamble	Single-author book	Higher education	SA	2003
	Development, health and the environment	JH Romani & B Anderson	Research paper	Health	SA	2002
	Environmental education, ethics and action in Southern Africa	J Hattingh et al (eds)	Edited book	Environment	Southern Africa	2002
	Energy sustainability for South Africa's poor	A Clark & S Drimie	Research paper	Social issues	SA	2002
	Cost recovery and the crisis of service delivery in South Africa	DA MacDonald & J Pape (eds)	Edited book	Social issues	SA	2002
IDASA						
	AIDS & electoral democracy: Insights into impacts on Africa's democratic institutions	K Chirambo	Single-author book	Politics / Health	Africa	2005
	Democracy in the time of Mbeki: Idasa's Democracy Index	P Graham & R Calland	Co-authored book	Politics	SA	2005

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	Trick or Treat? The effects of the pre-election climate on the poll in the 2005 Zimbabwe parliamentary elections	T Reeler & K Chitsike	Co-authored book	Politics	Southern Africa	2005
	Budget transparency and participation 2: Nine African case studies	M Claasens & A van Zyl (eds)	Edited book	Economics	Africa	2005
	Citizens at the centre: AIDS councils as catalysts for unlocking citizen power	ML Strom	Single-authored book	Politics / Social issues	SA	2005
	Creating spaces for dialogue: lessons from Africa	IDASA	Co-authored book	Politics	Africa	2004
	HIV/AIDS and democratic governance in South Africa: Illustrating the impact on electoral processes	P Strand et al	Co-authored book	Politics / Health	SA	2004
	Understanding the institutional dynamics of South Africa's response to HIV/AIDS	A Strode & K Barret Grant	Co-authored book	Health	SA	2004
	Children and the budget in Zambia	E Coetzee et al	Co-authored book	Economics	Southern Africa	2004
	Transparency & participation in the budget process: Burkina Faso: A case study	M Classens & A van Zyl (eds)	Edited book	Economics	Africa	2004
	Monitoring children's socio-economic rights: achievements & challenges	E Coetzee & J Streak	Co-authored book	Social issues	SA	2004
	Funding the fight: Budgeting for HIV/AIDS in developing countries	T Guthrie & A Hickey	Co-authored book	Health	International	2004
	How do children with disabilities experience poverty, disability and service delivery?	IDASA	Co-authored book	Social issues	SA	2004
Institute for Security Studies						
	Intimate partner violence	E Pelser et al	Co-authored book	Social issues	Southern Africa	2005
	Understanding offending: Prisoners and rehabilitation in Malawi	P Burton, E Pelser & L Gondwe	Co-authored book	Social issues	Southern Africa	2005
	Suffering at school	P Burton	Single-author book	Social issues / Education	Southern Africa	2005
	The many faces of human security	K Muloongo et al (eds)	Edited book	Politics / Conflict	Southern Africa	2005

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	Evolutions and revolutions: A contemporary history of militaries in Southern Africa	M Rupiya (ed)	Edited book	Politics / History	Southern Africa	2005
	Prospects for a security community in Southern Africa	N Ngoma	Single-author book	Politics	Southern Africa	2005
	Not business as usual: Public sector responses to HIV/AIDS in Southern Africa	R Pharaoh	Single-author book	Health	Southern Africa	2005
	From the ground up: Land rights, conflict and peace in sub-Saharan Africa	C Huggins & J Clover (eds)	Edited book	Politics / Conflict	Africa	2005
	A tortuous road to peace: The dynamics of regional, UN and international humanitarian interventions in Africa	F Aboagbye & A Bah (eds)	Edited book	Politics / Conflict	Africa	2005
	Invisible stakeholders: Children and war in Africa	A Macintyre (ed)	Edited book	Politics / Conflict	Africa	2005
	Achieving security in Southern Africa	G Harris (ed)	Edited book	Politics / Conflict	Africa	2004
Institute for Global Dialogue						
	The politics of regionalism in Southern Africa	C Mulaudzi	Research paper	Politics	Southern Africa	2006
	The making of a region: The revival of the East African Community	IGD	Edited book	Politics	Africa	2005
	Which way SADC? Advancing co-operation and integration in Southern Africa	G le Pere & EN Tjønneland	Research paper	Politics	Southern Africa	2005
	The conflict in Côte d'Ivoire	AR Lamin	Research paper	Politics	Africa	2005
	Beyond 'third term' politics: constitutional amendments and Museveni's quest for life presidency in Uganda	J Okuku	Research paper	Politics	Africa	2005
	The inviolability of Africa's colonial boundaries	FN Ikome	Research paper	Politics	Africa	2004
South African Institute of International Affairs						
	People, States and Regions: Building a collaborative security regime in Southern Africa	A Hammerstad (ed)	Edited book	Politics	Southern Africa	2005
	Enter the Dragon: Towards a free trade agreement between China and SACU	P Draper & G le Pere (eds)	Edited book	Economics	Southern Africa; Asia	2005

Publisher	Title	Author	Production Category	Subject Field	Area Focus	Date
	The History of the South African Department of Foreign Affairs 1927-1993	T Wheeler (ed)	Edited book	Politics / History	SA	2005
	Reconfiguring the Compass: South Africa's African Trade Diplomacy	P Draper (ed)	Edited book	Politics / Economics	SA; Africa	2005
	Doing Business in Latin America	L White (ed)	Edited book	Economics	Latin America	2005
	Arms and Security in Asia	M Edmonds, L Chyungly & G Mills (eds)	Edited book	Politics / Conflict	Asia	2004
	Towards China Inc?: Assessing the Implications for Africa	G Mills & N Skidmore (eds)	Edited book	Economics	Southern Africa; Asia	2004
	Apartheid Past, Renaissance Future	E Sidiropoulos (ed)	Edited book	Politics	SA	2004
	New Tools for Reform and Stability: Sanctions, Conditionalities and Conflict Resolution	G Mills & E Sidiropoulos (eds)	Edited book	Economics	SA	2004
	Mine Action in Southern Africa: Instrument of Development?	N Grobbelaar (ed)	Edited book	Economics	Southern Africa	2003
	Crime as Business, Business as Crime: West African Crime Syndicates in Southern Africa	SAIIA	Edited book	Politics / Economics	Africa	2003
	Asia-Pacific and Africa: Realising Economic Potential	G Mills & G Shelton (eds)	Edited book	Politics	Africa; Asia	2003
	Southern African Scenarios 2015	SAIIA	Edited book	Politics	Southern Africa	2003
	Preventing Insecurity: Lessons from and for East Asia	M Edmonds, C Lee & G Mills (eds)	Edited book	Politics	Eastern Africa	2003
	Angola: Prospects for Peace and Prosperity	N Grobbelaar, G Mills & E Sisiropoulos (eds0	Edited book	Politics	Southern Africa	2003

Sources: UKZN Press catalogue, 2006; Unisa Press catalogue, 2005; Wits University Press catalogue, 2006; Juta Academic price list and website, 2006; HSRC Press catalogue, 2006; IDASA website, 2006; ISS website, 2006; IGD website, 2006; SAIIA website, 2006.

2.1.3 Challenges Facing Scholarly Publishers

Scholarly publishers, in South Africa as in the rest of the world, face a variety of challenges and threats. Some of these are specific to South Africa, while others are trends that can be observed on a global scale.

As Eve Gray (2000a: 176) points out, the university presses in South Africa (the country's key scholarly publishers) have had a "problematic history". During the apartheid years, they appear to have struggled to produce critical, scholarly works, and, especially in the case of Unisa Press, lapsed into publishing only materials for students. As a result, much serious scholarly publishing was taken up by other kinds of publishers, such as the "small, oppositional trade publishers" of David Philips, Ravan Press and Ad Donker. There is some evidence that the university presses are now beginning to fulfil their mission once again, but in a somewhat difficult (and very narrow) market – more evidence of this may be seen in the analysis of their catalogues in Tables 2 and 3. Indeed, Gray states that not only is the market narrow, but there is an *absence* of real markets for scholarly books, for a number of reasons, including the low prestige value of locally produced books (Gray, 2000a: 178).

At the same time, the focus in universities driven by administrators and by the pressure to break even has shifted from the dissemination of research results to the viability (read: profitability) of a university press. As a result, university presses in South Africa are shifting in focus more to the general market than to scholarly books, or at least attempting to strike a balance between the two. Andrew (2004: 76) notes that: "The South African University Presses therefore tend to publish at the upper end of the general book market, as well as publishing tertiary textbooks". This international trend will be discussed in more detail in the section on university presses, below.

The threat of competition from international publishers, who may be more competitive in terms of price and print run (i.e. their economies of scale are more advantageous), is significant. "Foreign booksellers (sic) are also more up to date with global trends and are able to print highly specialist books for niche academic markets" (CIGS 1998: 39). Moreover, as mentioned above, locally produced books may have a lower prestige value, leading to a threat of competing with an established (foreign) brand. Competition is largely on the basis of quality and the perception of better credibility, depth and distribution.

Another threat is that of copyright violations and piracy, which is of particular importance in "the higher education publishing sector", which overlaps with that of scholarly books (Andrew, 2004: 62). Because of the increasing costs of both scholarly books (including those aimed at students) and of tertiary education itself, photocopying rather than book purchasing is on the rise. This leads to a "significant erosion of sales", with some estimates of the loss of potential sales being as high as 30–40%.

However, the CIGS report (1998: 40) goes on to add that, "The threat of international booksellers (sic) should be regarded as a spur for increased innovation and competitiveness in the academic book market place. South African academic book publishers must find ways of successfully marketing South African books in Africa and around the world. … Market research into the potential for South African publishers to print books on behalf of foreign authors should be undertaken, particularly in the fields of high quality, specialist books and in the area of the re-publication of editions". What this implies, in practice, is that African scholarly publishers must move from being "net consumers" to "net producers" of knowledge. Terence Ranger (cited in Gray 1997: 3) responds to this challenge by arguing that a "good model for African research would be: funded by the north, controlled by an African institution, published in Africa and in the north, and favouring the development of young scholars". Yet funding from the North is not necessarily more sustainable than local publishing making its own way.

Eve Gray (2000a: 171) echoes this opportunity for local publishers, arguing that: "With an increasing emphasis on local relevance and an awareness among academic and publishers alike of the necessity of responding to real student needs in a diverse and multicultural environment, the South African market is eager for good local titles that embody cultural, racial and gender awareness." As a result, and even though "the academic establishment looks tentatively northwards for its credibility, local textbooks – with greater relevance to the African environment – are gaining ground". Indeed, there is no reason why this cannot be done, in the context that international university presses, such as Cambridge University Press and Oxford University Press, are running their African offices from South Africa.

Another major issue that is impacting on both academic and scholarly publishers in South Africa at present is the restructuring of the South African higher education sector. The most optimistic view is that this may consolidate the sector, making it a better defined market for

such publishers – and providing opportunities for "creative publishing" (Gray, 2000a: 168). For instance, Gray (2000b: 26) notes that, "For publishers, this would have the advantage of consolidating student numbers and creating a larger and more rational market for individual courses. Emphasis on local relevance and an African context will also help local publishers." Less optimistic views fear that it may disrupt especially academic publishing (and to a lesser extent scholarly publishing) for some time to come. This factor needs to be borne in mind, but it can in no way be controlled and its impact cannot as yet be predicted, so it will not be discussed in detail in this study.

The use of electronic media in scholarly publishing – an issue which is discussed in more detail below – is also having a real impact on how such publishers go about their business. It is a fact that, now, "Print is no longer the sole medium for scholarly publishing" (ICSU, 1999: 18). Increasingly, there are calls for scholarly publishing in South Africa, and indeed in Africa, to favour electronic content over the traditional and more costly printed media. Supporting this latter route, Estelle du Toit (2003) argues that "university presses that publish scholarly books of academic merit but with limited sales potential are an anachronism in the times in which we live, especially on this continent". She supports the option of placing all scholarly books with small markets on the Internet, and foregoing the traditional print process altogether. The HSRC, a non-profit research organisation like AISA, has followed this route to some extent (Daniel and Gray, 2001), but has since modified its approach towards electronic publishing in an attempt to create some balance between commercial motivation and a responsibility towards the advancement of knowledge as a public good.[12] On the other hand, the US-based National Academy Press has put all of its books online, using the "content-rich site as a major marketing and dissemination tool for clothbound books" (quoted in Siler, 2000).

In all of these issues, it should be attempted to keep in mind the principle that "The role of publishers must be to make available and deliver what they publish in whatever way best enables the intended audience to access or receive it" (ICSU, 1999: 18). This principle is of particular importance for bodies, such as AISA, that receive public funding to carry out their research and dissemination mandate. In effect, such a publishing venture would be receiving government support – in a context in which almost all scholarly publishing is subsidised.

The University of Stellenbosch has since set up an electronic-only 'university press'.

2.1.4 Arguments for the Value of Scholarly Publishing

Indeed, there is growing consensus in the literature that publishing is a significant sector that deserves government support. Darko-Ampem (2000: 7) argues strongly that: "Although fairly insignificant in economic terms, publishing is of central importance to the cultural, intellectual and educational life of a nation and the development and dissemination of knowledge products is a matter of the utmost importance for any civilization. It is also a central element in the emerging nexus of knowledge industries that are so important to postindustrial societies." Davies (1996: 6), similarly, reinforces this argument, saying, "Indigenous publishing in Africa requires the support of governments, above all because it is vital to the rehabilitation of education." Moreover, publishing, and scholarly publishing in particular, has a key role to play in terms of national and continental priorities: "Scholarship and scholarly publishing in Africa should be concerned with education for the transformation of African societies" (INASP, 2002: 4).

Houghton (2000:1) continues this argument to its logical conclusion: "The capacity of the national innovation system to create and disseminate scientific information is becoming a fundamental determinant of national prosperity. Indeed, it has been observed that prosperity in a knowledge economy depends as much, if not more, on the knowledge distribution power of the system than on its knowledge production power. So, the scholarly communication system is an increasingly important element of the national innovation system."

But, in a developing country context such as that of South Africa and other African countries, there are many competing demands for government attention and priority. Wresch (1996: 40, cited in North, 1998: 158) puts the case bluntly when he notes that, "Publishing in a developing nation can be a daunting task… Production costs are high, … while costs are high, sales may be smaller. Part of the problem is literacy… part is poverty… and part is distribution."[13] To add to these problems, government priorities are not always (in fact

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[13] This study will not address the related, and highly significant, issue of the language in which scholarly books are published, for several reasons: the scholarly market is a highly educated and literate one, especially in the international language of English; the market for scholarly titles is already so limited that to impose a constraint in terms of language (and especially a language which has no export value to other countries) would make publishing simply not viable; and the fact that English is widely used in the social sciences. This is especially important in view of the international reach of AISA. It should be noted that AISA published in both English and Afrikaans in its early days, as Appendix B shows, but this was found to be an unsustainable strategy and was phased out over the years. Some publishers continue to publish Afrikaans textbooks, but almost no scholarly books. This is a contentious issue, and one that deserves more attention.

seldom) focused on publishing: "Priorities of government are, by necessity focussed on the provision of basic needs. For instance, of the rural schools that exist many are without electricity and water, not to mention libraries" (CIGS, 1998: 8). In such a context, is there a place for government support for publishing?

One of the important factors to take into account when considering a national government's social priorities in terms of publishing includes the capacity of the publishing industry to contribute towards 'growth' in the country. As the CIGS (1998: 7) report on publishing in South Africa makes clear, 'growth' can be defined in several ways:

- "Consumers – number of people buying and reading texts;
- Revenue – increased turnover for publishers, printers, booksellers etc;
- Industry – number of publishers in the sector and efficiency of value chain;
- Productivity – number and variety of texts written and published;
- Employment – number of people employed by the industry."

In terms of this study, the support of the government in the form of the Department of Science and Technology (DST) is particularly crucial to any strategic decisions that AISA may take regarding its structure and future, given that DST provides the core funding for the Institute. This funding is essential because, as Christa North (1998: 126) points out, subsidisation is generally needed to bring out scholarly texts on a sustainable basis. An additional implication of this is that, because AISA is already state-funded, and because almost all scholarly publishers such as university presses require some form of subsidisation, such subsidisation for a scholarly publishing concern would not introduce any serious distortion or unfair competition into the scholarly publishing market.

There are thus good reasons why the government should be involved in and supporting scholarly publishing. According to the HSRC's institutional review, one reason is that governments must ensure "that the social benefits that arise from the development of knowledge are widely distributed" (2003: 97).

Another reason relates to access: ICSU (2003b: 2) argues that "Data created with the use of public funds should be recognized as a public resource and remain publicly accessible." Litchfield (2002: B9) elaborates on this point: "Scholarly communication is a public good. University administrators frustrated with the amount of money going to university presses need to be reminded that subsidizing scholarly communication cannot, by definition, be free."

Houghton (2000: 1), however, reminds us that "while knowledge is a pure public good, information is not". He goes on: "The social value of ideas and information increases to the degree they can be shared with, and used by others. The more such items are produced, the greater the social return on investment in them. Social returns are maximised through expansion of access and wide dissemination; not by limiting access and exclusion."

Indeed, while for a commercial publishing venture value may be measured in terms of income generation (return on investment) a non-profit, scholarly publisher contributes in different ways. Some of these have been articulated in the AAUP discussion document, 'The Value of University Presses' (AAUP, 2004a). It is reproduced in its entirety below:

> **"University Presses and Society**
> 1. University Presses make available to the broader public the full range and value of research generated by university faculty.
> 2. University Press books and journals present the basic research and analysis that is drawn upon by policymakers, opinion leaders, and authors of works for the general public.
> 3. University Presses contribute to the variety and diversity of cultural expression at a time of global mergers and consolidation in the media industry.
> 4. University Presses make common cause with libraries and other cultural institutions to promote engagement with ideas and sustain a literate culture.
> 5. University Presses help to preserve the distinctiveness of local cultures through publication of works on the states and regions where they are based.
> 6. University Presses give voice to minority cultures and perspectives through pioneering publication programs in ethnic, racial, and sexual studies.
> 7. University Presses bring the work of overseas scholars and writers to English-language audiences by commissioning and publishing works in translation.
> 8. University Presses rediscover and maintain the availability of works important to scholarship and culture through reprint programs.
> 9. University Presses encourage cultural expression by publishing works of fiction, poetry, and creative nonfiction and books on contemporary art and photography.
>
> **University Presses and Scholarship**
> 10. University Presses sponsor work in specialized and emerging areas of scholarship that do not have the broad levels of readership needed to attract commercial publishers.
> 11. University Presses, through the peer review process, test the validity and soundness of scholarship and thus maintain high standards for academic publication.
> 12. University Presses add value to scholarly work through rigorous editorial development; professional copyediting and design; and worldwide dissemination.
> 13. University Presses are based at a wide array of educational institutions and thus promote a diversity of scholarly perspectives.
> 14. University Presses encourage and refine the work of younger scholars through publication of the first books that establish credentials and develop authorial experience.

15. University Presses make the works of English-language scholars available worldwide by licensing translations to publishers in other languages.

16. University Presses commit resources to longterm scholarly editions and multivolume research projects, assuring publication for works with completion dates far in the future.

17. University Presses add to the richness of undergraduate and graduate education by publishing most of the non-textbook and supplementary material used by instructors.

18. University Presses collaborate with learned societies, scholarly associations, and librarians to explore how new technologies can benefit and advance scholarship.

University Presses in the University Community

19. University Presses extend the reach and influence of their parent institutions, making evident their commitment to knowledge and ideas.

20. University Presses demonstrate their parent institutions' support of research in areas such as the humanities and social sciences that rarely receive substantial Federal or corporate funding.

21. University Presses help connect the university to the surrounding community by publishing books of local interest and hosting events for local authors.

22. University Presses generate favorable publicity for their parent institutions through news coverage and book reviews, awards won, and exhibits at scholarly conferences.

23. University Press staff act as local experts for faculty and administrators, providing guidance on intellectual property, scholarly communication, and the publishing process.

24. University Presses provide advice and opportunities for students interested in pursuing careers in publishing."

These arguments provide a useful counterpoint to the increasing calls for commercialisation and focus on profit motives, often at the cost of all others.

2.2 The University Press Model

A key question in the study will be what model is selected for AISA to build upon. Does AISA want to follow in the footsteps of university presses, both in South Africa and internationally, and develop a mission that focuses on quality, peer-review, and the highest academic standards (as opposed to policy-oriented publications, or commercial motivations, for instance)? As Striphas (2000) points out, university presses are "often considered the most prestigious among the institutions of academic [i.e. scholarly] book publishing, given their historically stringent refereeing, revising, and editorial practices".

This model will be explored in greater detail below, in an effort to test how appropriate it may be for AISA.[14] What must be taken into account when developing a university press 'model', however, is that the context in which they operate is changing: "University presses have been challenged to analyse and reconsider the way they do business and how they advance scholarship" (Siler, 2000). Indeed, South Africa's university presses have come under "increasing pressure in recent years to put themselves on a commercial basis and generate profits, and are tending to dilute their scholarly publishing programme" (Davies, 2002). A related problem with the university press model, some would argue, is that "the idea of the British or American university press making money by selling monographs and research work by academics is not appropriate in Africa" (Currey, 2002: 3). This study will first attempt to distil some elements of a university press model, before making such judgements as to whether or not the model would be appropriate.

2.2.1 The Typical University Press

The question does need to be asked, at the outset, whether a static model can be derived from a business model that is itself in a state of flux. Both universities and their presses are changing, both world-wide in response to global forces such as globalisation, the spread of information technology, and the increasing pressures to commercialise all spheres of life, and in particular in South Africa as the result of changed government priorities and changes in the higher education sector. However, it is believed that some aspects of a business model can be distilled from the current practices, editorial missions, and strategic plans of university presses.

What, then, is a university press? According to many definitions, it is an ambiguous structure: "A university press is a curious institution, dedicated to the dissemination of learning yet apart from the academic structure; a publishing firm that is in business, but not to make money; an arm of the university that is frequently misunderstood and occasionally attacked by faculty and administration" (Harvard University Press, 2004). This balancing act is reflected in the words of one university press's mission statement: "Seeking excellence in its chosen subjects, the Press aims to strike a balance between imaginative flair, scholarly rigour, and commercial reality, to produce academic books of the highest quality" (Edinburgh University Press, 2004). Similarly, the Chinese National Administration of News and

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[14] The model of commercial scholarly publishers is not examined in this study, because of the nature of AISA's public funding base and non-profit orientation.

Publishing defines the role of university presses as follows: "The presses should put social benefit first, and combine that social benefit with sound economics" (Wang, 2005: 271).

The Association of American University Presses (AAUP, 2004b) has brought out a document designed to answer this very question, 'What is a University Press?':

> University presses are publishers. At the most basic level that means they perform the same tasks as any other publisher – university presses acquire, develop, design, produce, market and sell books and journals … But while commercial publishers focus on making money by publishing for popular audiences, the university press's mission is to publish work of scholarly, intellectual, or creative merit, often for a small audience of specialists.
> University presses also differ from commercial publishers because of their place in the academic landscape. A university press is an extension of its parent institution, and it's also a key player in a more general network – including learned societies, scholarly associations, and research libraries – that makes scholarly endeavor possible. Like the other nodes in this network, university presses are charged with serving the public good by generating and disseminating knowledge. That's why the [US] government has recognized our common interest in the work of university presses by granting them not-for-profit status.
> Many of the books university presses publish, then, are meant primarily for scholars or other people interested in certain concentrated fields of research. Thousands of these books (generally termed monographs) have been published. (AAUP, 2004b)

Or, more prosaically, "University presses were created to ensure the availability in print of scholarly monographs for scholarly constituencies" (Teute, 2001: 1). At the same time, "If the university presses vanished, scholarly communication in the liberal arts, and particularly in the humanities and social sciences, would shrivel" (Duke University Press, 2004).

To gain a better understanding of how university presses function and of their editorial aims, a survey was made of the publishing philosophies, and in particular the missions and scope, of a number of university presses, primarily in the English-speaking world of the USA, UK, and Australia, as well as South Africa and to some extent the rest of Africa. While they differ in emphasis, these missions reveal a remarkable unity of purpose.

While their missions and many of their future strategic plans may be similar, however, the size and shape of university presses differs widely. According to the AAUP website (AAUP, 2004b) the university presses in the USA publish between five and 200 titles annually per press, while their staff may be anything from four, in a single office, to several thousand,

world-wide – with an average per press of 34 staff members. Cork University Press, for instance, publishes around 20 books a year, and two journals, with just four full-time staff members. At the other end of the scale, Johns Hopkins University Press (which argues that it is the oldest continually operating university press in the USA), has published more than 6 000 books and a host of journals in its 125 years of existence, with a staff of about 130. Oxford University Press is by far the biggest in this category, publishing around 600 scholarly books a year (cf. Watkinson, 2001: 9). University presses also differ in *what* they publish, which may include books (both in print and electronic formats), higher-level university textbooks, academic journals, and even newsletters.

Yet, on the whole, there is more similarity than diversity among the university presses in terms of a few broad issues:

- The close relationship between university presses and their parent organisations;
- A commitment to publishing high-quality, academically rigorous work;
- An attempt to balance the publishing of scholarship and commercial realities, while usually remaining non-profit organisations;
- A coherent publishing list that focuses on a specific and usually well-defined niche.

In terms of the first point, the mission statements refer to the close relations between the parent institution (the university, or, in the case study, a research organisation such as AISA) and the publishing house, and the congruence between their missions and aims. The most obvious area in which this is seen is in the names of the university presses, and in their aims to extend the activities, reach and reputation of their parent institutions. Presses seek to contribute to many of the university's purposes, including "teaching, research, public service, and dissemination of the results of scholarly inquiry" (Texas A&M University Press, 2004). In this way, university presses support the aims of their universities, and "reflect the intellectual strengths and values of (their) parent institutions" (Central European University Press, 2004). One of the ways in which they do this – and this factor is stressed in several university presses' mission statements – is by improving the accessibility, credibility and availability of research results emanating from the parent institution. The corollary to this support offered by the university press to its parent institution is that the support of top management at the host appears to be essential to the sustainability of a press. Texas A&M

University Press (2004), for instance, comments that "Throughout its history, the Press has enjoyed an extraordinary level of support from the entire Texas A&M community, and that support has been essential to the Press's remarkable growth."

Typical mission statements reflecting this symbiosis include the following:

> Since its founding in 1891 as one of the three original divisions of the University of Chicago, the Press has embraced as its mission the obligation to disseminate scholarship of the highest standard and to publish serious works that promote education, foster public understanding, and enrich cultural life. (University of Chicago Press, 2004)

> Founded in 1963, the University of Massachusetts Press is the book publishing arm of the University of Massachusetts. Its mission is to publish first-rate books, edit them carefully, design them well, and market them vigorously. In so doing, it extends the reach and reputation of the university. (University of Massachusetts Press, 2004)

> The aim of the University of the West Indies Press is to be the premier academic book publisher in the Caribbean, to enhance and encourage research and publication of Caribbean scholarship, to promote the global reputation of the University of the West Indies by empowering the scholarly community it serves, and to disseminate Caribbean scholarship to the world within a cost-effective environment. (University of the West Indies Press, 2004)

A related feature, and a striking one (especially in terms of its implications for the case study), is that several modern university presses began as publishing divisions or imprints within a university, and were gradually upgraded over the years into fully fledged publishing houses. One example is the still small Canterbury University Press, which was established as a "publications committee" in 1964, but has since developed into a "full-time publisher" since 1991 (Canterbury University Press, 2004). This move was perceived as having a number of benefits, not least of which was the prestige it lends to a research institution: "the presence of a leading university press ... says that this institution takes seriously its responsibility to foster scholarly communication and the dissemination of knowledge, which is one of the hallmarks of a major research university. The Press thus adds to the reputation and stature of the University" (Texas A&M University Press, 2004). So, too, "The University of the West Indies has not only expanded its global reach and regional relevance by its investment in the Press, but it has enhanced immeasurably its reputation as a centre of excellence" (University of the West Indies Press, 2002–03: 5).

The importance of quality and standards is the other most common feature in the editorial missions of university presses. In fact, it is the factor that most sets them apart from commercial presses, as they strive to publish books whose scholarly value outweighs – and in some cases outlasts – their commercial value. Kling and McKim would link this issue to their criterion of trustworthiness in assessing a scholarly publisher, while Greenbaum (1999: 1–2) argues that, "A long standing difference between university presses and commercial presses is that the commercial presses have generally considered profitability before content of what they have published, whereas, the university presses have considered content before profitability. Economic strains, however, may be changing this picture."

Key words that come up again and again in the mission statements and other key documents of university presses include "highest standard", "excellence", "quality", "distinguished", and "significant", while the more daring presses emphasise their attempts to be "innovative", and even "adventurous" and "provocative". Duke University Press (2004), for instance, combines the drives towards quality and innovation, stating that,

> By insisting on thorough peer review procedures in combination with careful editorial judgment, the Press performs an intellectual gatekeeping function, ensuring that only scholarship of the highest quality receives the imprimatur of the University. At the same time, through its close association with the faculty and its own willingness to take risks, the Press reflects the bold spirit of the University: it does not and must not shy away from scholarship that is innovative or controversial.

The University of California Press (2004), which argues that it primarily "publishes works because they contribute to knowledge", explicitly states the perceived importance of their mission:

> Scholarly books are the conduit of civilization. They capture the spirit, intellect, and creativity of one generation and define it for the next. Written by experts in the field, they shape the important libraries – and minds – of tomorrow. For over one hundred years, publishing the best scholarly books has been the essence of the University of California Press.

Similarly, Harvard University Press established a specific imprint (the Belknap Press) to publish "books of long-lasting importance, superior in scholarship and physical production, chosen whether or not they might be profitable" (Harvard University Press, 2004). And Indiana University Press (2004) adds its own perspective to the same objective:

> Indiana University Press's mission is to inform and inspire scholars, students, and thoughtful general readers by disseminating ideas and knowledge of global significance, regional importance, and lasting value.
>
> At Indiana University Press, we want to publish books that will matter twenty or even a hundred years from now – books that make a difference today and will live on into the future through their reverberations in the minds of teachers and writers.

So too, Princeton University Press (2004) echoes and expands upon the importance of academic quality:

> We select for publication only scholarship of the highest quality on all levels regardless of commercial viability: specialized monographs making an original contribution to knowledge within a subdiscipline; titles appealing to a broader range of scholars and professionals in a single discipline; interdisciplinary academic works intended for readers in more than one subject area; and works by scholars aimed at bringing the findings of a discipline to the larger, well-educated reading public.
>
> ... Through the publication of works of scholarly significance, Princeton University Press fulfills part of the mission of Princeton University by furthering its fundamental commitment to the dissemination of knowledge.

To uphold the quality of their publications, in terms of both content and design, university presses base their publishing decisions largely on the recommendations of Editorial Boards or Publishing Committees, and, of course, on peer review. This is a central function of a scholarly publisher.

In addition to the quality of the contents, editorial standards at university presses are extremely important, and this has implications for the kinds of staff hired at such a press. Squires (1993: 214, cited in North 1998: 148) notes, "in scholarly publishing the guardians of standards are the editors". Davies (1995: 1, cited in North 1998: 156) reinforces this position, arguing that "While it is true that the relative importance of various departments in a publishing house has changed in recent years the role of the editor remains the central one." One of the factors on which university presses appear to pride themselves is this focus on editorial standards, while another is their often close relationships with their authors. Because such presses are (often) smaller and driven by different motivations than trade publishers, authors tend to receive more personal attention. This is a significant strength in attracting authors to publish at a press.

As noted above, another key issue is that university presses are not profit-making – they publish books because of their scholarly value, not because of their commercial value. As

Princeton University Press (2004) puts it, they publish "regardless of commercial viability". Many, if not most, presses are sustainable only because they receive a subsidy from their parent institution. But commercial pressures, and a shift towards a business orientation within the higher education sector, are putting their subsidies under increasing pressure, and many presses are now having to move towards self-funding and even profitability. This pressure can be seen in Duke University Press's (2004) statement about its approach to funding:

> Through business practices that place service to scholarship above commercial interest, without sacrificing the business acumen necessary to make the most of its limited resources, the Press fosters nonprofit attitudes toward scholarly communication, demonstrating that universities can build efficient and businesslike operations that do not sacrifice long-term goals for short-term profits.

Similarly, Louisiana State University Press (2004) notes that, while it does receive a subsidy, "the Press is 90 percent self-supporting with revenue derived from book sales, subsidiary rights, licenses, grants, and contributions from private individuals". Henry Chakava (2007: 74) refers to the delicate balancing act of producing both commercially viable books (usually textbooks) alongside academically sound texts that sell very few copies as being "between the cathedral and the stock exchange".

Some university presses, especially in the United States, have introduced 'Friends of the Press' programmes in an effort to diversify their sources of funding. Others are focusing more on marketing and distribution, to improve income and sales figures, while still others have embarked on fund-raising drives to solicit grants and gifts, and, where possible, endowments. Indiana University Press (2004), for example, runs a donor programme, based on the following rationale:

> ... some people are surprised to learn our book sales revenues do not cover operating expenses. Scholarly books are more expensive to publish because of manuscript peer reviews and the higher cost of producing quality products for small audiences. The Press is a self-financing not-for-profit publisher whose operations are funded by a fragile balance of sales revenue, grants, and gifts.

The perennial problem of funding could, however, also could be considered from the point of view of the advantage of a scholarly publisher over a trade publisher. For instance, non-profit publishing means that publishing decisions are not necessarily bound to bottom-line viability, and can thus be more creative. Such publishers can keep books in print or reprint books that are of huge scholarly importance but not necessarily much commercial value, and are usually

able to pay greater attention to each book produced, because they do not have to only consider how cost-effectively it can be produced and how much money it can make. As mentioned, this is a key factor in attracting authors to non-profit presses, even if it means lower royalties for them. This also has implications for the print runs at university presses, which appear to usually be in the region of between 500 and 1 000 copies (for a first run). Bill Strachan, director of Columbia University Press, says that the aim (or challenge) is not "to change the nature of what we publish but to utilize better what we publish" (quoted in Dunlap-Smith, 1998: 1). In other words, even if the market for a particular title is limited to a few hundred world-wide, this may be a viable print run for a publisher operating according to this university press model, as it should be able to cover production costs at least.

Another strategy for sustainability, and a response to the lack of funding for scholarly books, is that the university presses tend to focus on specific niches, with the strategic aim of becoming the leaders in their fields of expertise. Because of the increasing pressures towards commercialisation, and to make a profit, these are not always scholarly fields of publication, but may include more popular works, especially on regional issues. James Olson (1991), speaking on the fiftieth anniversary of the University of Nebraska Press, argues that "The central mission remains the publication of scholarly books – or books that won't make any money. To support that enterprise – and there never seems to be enough money to fund pure scholarship – university presses for years have sought to broaden their lists by publishing books that would make money, or in the jargon of the profession, 'trade books'." This is sometimes known as "scholarship plus" (Harvard University Press, 2004). As mentioned earlier, in South Africa, "This [scholarly publishing] is an embattled sector because of pressure on university budgets and a lack of available subsidy for scholarly publishing. The South African University Presses therefore tend to publish at the upper end of the general book market, as well as publishing tertiary textbooks" (Gray, 2000b: 4). Several presses also publish literary fiction. In other words, nowadays there is little money available to publish scholarly works – the core function of the university press – and so presses are looking for innovative ways to balance "the cathedral and the stock exchange".

Some presses also publish a diverse list for other reasons, linked to their mission. The editorial mission of New York University Press (2004), for instance, speaks of the importance of policy-relevant research:

We do not believe that the sole purpose of a university press is to publish works of objective social science, though to be sure this remains an important role of our mandate. Rather, NYU Press also eagerly embraces the role of a gadfly. We oftentimes publish books on the same issue from different poles of the political spectrum in the same catalog, to generate dialogue, engender debate, and resist pat categorization of our publishing program. Rather than praise diversity as an abstract goal, we embrace ideological diversity as a necessity; a crucial, defining ingredient for a healthy program.

Similarly, McGill-Queen's University Press (2004) gives as its mission "Publishing books that defend, refute, and create fresh interpretations of the world", and notes that the press "is in the business of debate". This blending of scholarship and policy relevance will be seen more clearly in the next section, which looks at publishing models in research organisations other than universities.

With the shifts in what is published, the audiences for university presses have also changed in recent years. Their strategic plans do take this trend into account (with projects aimed at attracting "new audiences"), but there is also an important focus on strengthening ties with their existing and traditional markets. Another trend is the increasing move towards joint, consortial or co-publishing, both in an effort to cut costs and to reach more diverse markets (the issue of collaboration will be considered in more detail below).

The University Press of Florida (2004) combines several of these issues in a mission statement which differs from those quoted already only in terms of its practicality:

1. The University Press of Florida, the scholarly publishing arm of the State University System, representing all ten universities, is charged by the Board of Regents with publishing books of intellectual distinction and significance, books that will contribute to improving the quality of higher education in the state, and books of general and regional interest and usefulness to the people of Florida, reflecting its rich historical, cultural, and intellectual heritage and resources.

2. The Press may publish original works by State University System faculty members, meritorious works originating elsewhere, important out-of-print books, and other projects related to its backlist that will contribute to a coherent and effective publishing program – one that will supplement and extend programs of instruction and research offered by the universities.

3. The Press shall engage in a publishing program that, on balance, has the potential for recovering full publishing costs in a reasonable amount of time.

What emerges from this survey of publishing philosophies is that it could be said that there is a 'typical' university press, in broad strokes, even within a context of change and transformation. North (1998: 153) has developed a figurative diagram to depict such a model (see Figure 6) – although she sees the traditional model as requiring some adaptation for the South African context.

Figure 6: North's Model of the 'Typical' University Press
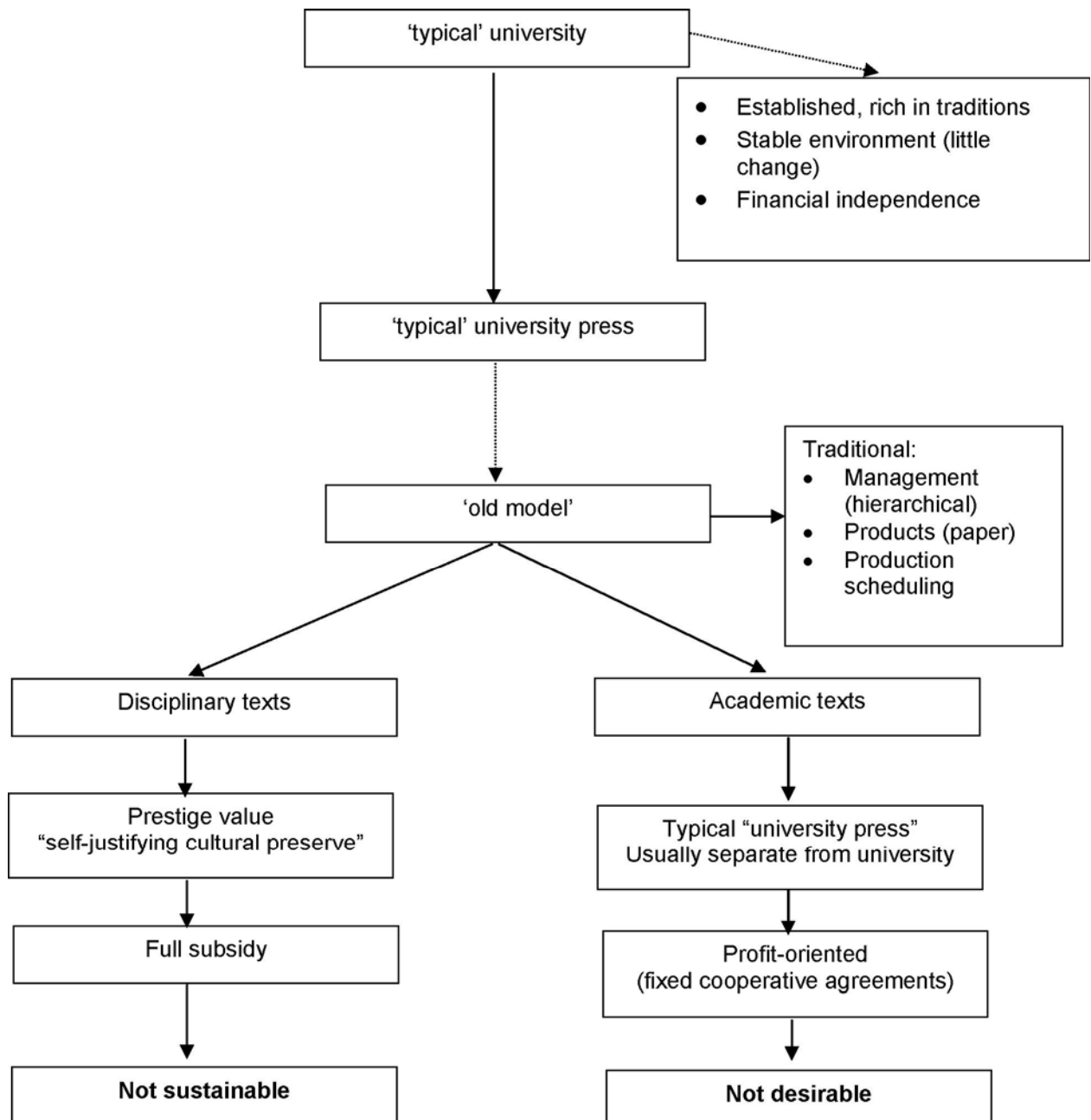
Indeed, North (1998: 153) sees some aspects of the 'typical' university and its press as "unsustainable" and even "undesirable". Importantly, this model is changing, as the university press model is in a state of flux. In particular, the context in which university presses operate has changed, in terms of the higher education sector, subsidies for publishing, and the general publishing context. This can have a very negative impact on the ability of university presses to fulfil their missions:

> ultimately trade marketing standards have an adverse impact on the publication of scholarly monographs. Resources are diverted to promoting trade books; specialized studies are either rejected or relegated to low priority, and they are prohibitively expensive because of small print runs. Authors whose topics are suited for a public readership are pressed to distort their scholarship by shortening texts, popularizing arguments, and minimizing scholarly apparatus. (Teute, 2001)

The example of Temple University Press is particularly instructive in this regard. Rather than closing down or being radically restructured or commercialised, the press has managed to turn itself around as a niche scholarly publisher. The focus of this turnaround was based primarily on developing a sound business plan, hiring a business manager and marketing staff, and publishing both in the traditional scholarly market as well as the upper end of the regional and trade market (Pastine and Patton, 2001).

What emerged from the strategic thinking at Temple University Press were the following recommendations:

1. The necessity for developing niche publishing where there would be few competitors in the marketplace.
2. The necessity to expand into the popular regional and trade book publishing business in order to stay afloat and to command new markets.
3. The necessity to have cutting edge technology and technological staff expertise, to move into the e-book or digital imaging publication business.
4. There was encouragement for university presses to enrich and expand their marketing and sales efforts to become more revenue producing and less reliant on subsidies.
5. There was a need to improve marketing and selling with links to the AAUP website; with consortial university press websites; and to develop the press's website for marketing and sales.

6. Recommendations included consideration for consortial inventory/warehousing; invoicing and selling; and collection of unpaid debts.

7. There was a need for greater reliance on back lists of successful titles to tide one over in revenue production, and a greater focus on marketing the front list more akin to the commercial publishing giant (Pastone and Patton, 2001: 4–5).

Based on this example, one could ask how it is that success is measured at a scholarly press. Success factors for university presses include the publication of key series in their field, often representing the most original or innovative work in that discipline; the publication of distinguished authors; or recognition in the form of awards. Often, too, success is measured in terms of expansion, for instance of "the list, the number of employees, and the net income" (Harvard University Press, 2004).

Other factors are included in this statement from Indiana University Press (2004):

> (The press) has both embodied and protected the academic freedom that is essential in higher education, fulfilling the goal of its prescient founder. Certain features have characterized IU Press from its earliest days:
> • High acquisition and editorial standards
> • Thoughtful development of specialty lists
> • Strong support of key disciplines
> • Willingness to publish without precedent
> • Determination to innovate and expand
> • Cultivation of respect from peers and reviewers
> • Exceptional attention to visual impact.

In summary, then, in spite of the pressure of a changing environment, there has been tremendous growth and development in the past 25 years or so in scholarly publishing internationally, and university presses appear optimistic about the sustainability and continuing significance of their role. One of the reasons for this optimism – although it could also be considered a threat or constraint – is the trend of moving into new formats, using new media and new technologies. Hong Kong University Press (2005) looks at the future in this regard positively: "As a small academic [scholarly] publisher we are constantly exploring the potential of the web to reach a wider audience and to provide new opportunities for information and interaction."

In keeping with such trends, North (1998: 155) has developed a revised diagrammatic model for a more sustainable press at a 'modern' university and in a changing context (see Figure 7). The outcome of such a university press is the production of "*economically feasible information products*" (emphasis added), and it is characterised by continuous change and development. This model reflects the pressures on and changing circumstances of university presses, as well as the changing reality that "The admirable liberal model of the university press, a humanist's construction, is no longer fashionable" (Walker, quoted in North, 1998: 149).

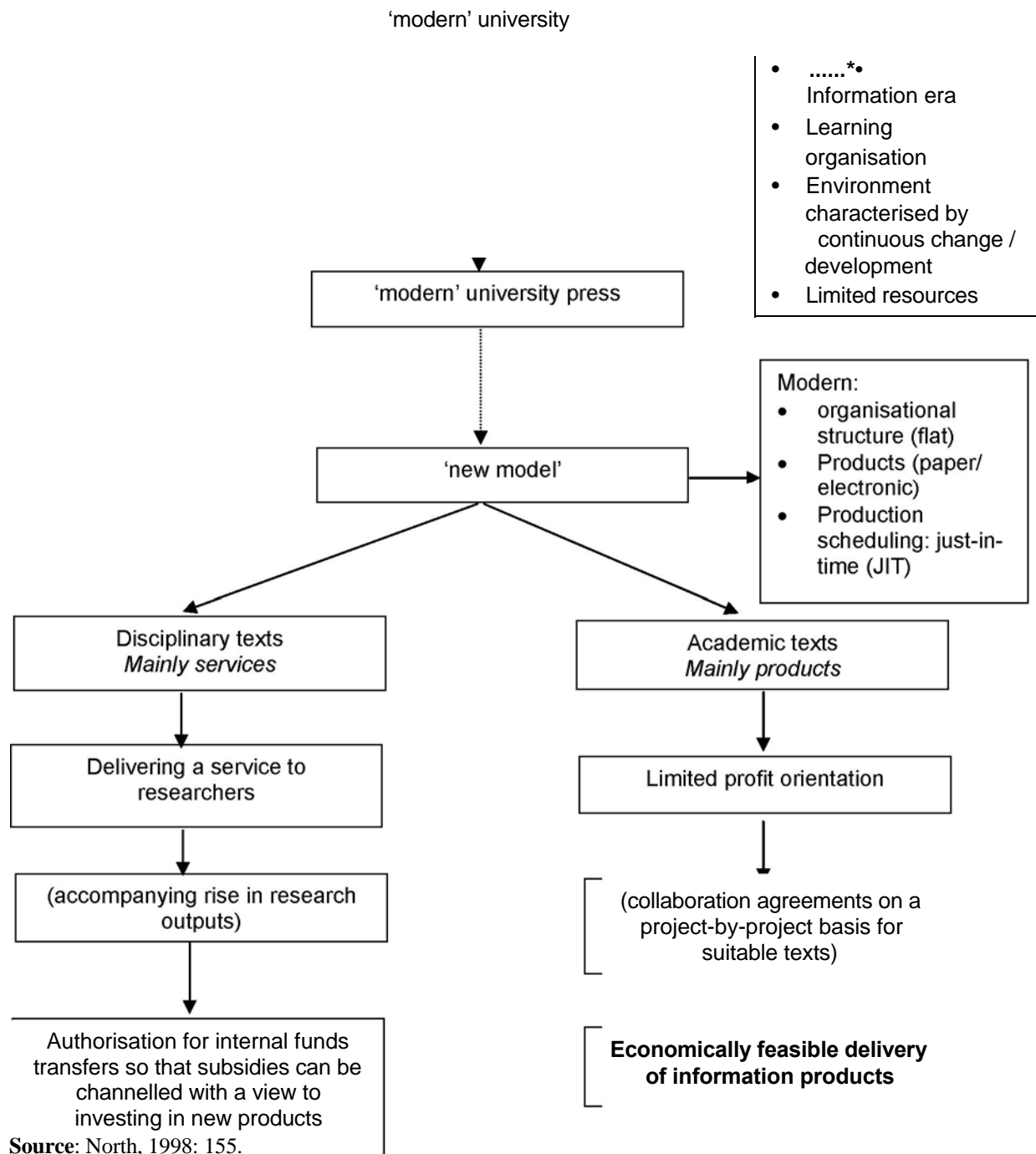### 2.2.2 African University Presses

So far, then, this study has examined the 'typical' university press to develop a model of what this might look like. But the examples used are largely from the developed countries of the North. Do university presses in the developing world, and particularly in African countries, follow the same trend? The answer is both yes and no: in some respects, university presses in Africa are like presses everywhere else, but they face additional, and significant, challenges and constraints in their operations. As a result of these, many university presses in African countries are either not running at full capacity or have even closed down.[15]

Because of wider economic problems (especially in the wake of the failure of structural adjustment programmes), political instability, unemployment, low literacy rates, popular demands for social interventions – various other more pressing problems, in fact – many universities are simply unable to support a publishing programme, yet the need for relevant and affordable materials remains. The World Bank suggests the following approach to the challenges facing African universities:

> … traditional university policies and practices are losing their relevance in the context of rapid social and economic changes in the 21st century, and … tertiary institutions in Africa, much like their counterparts around the world, are actively in pursuit of the innovation and modernization necessary for them to meet the evolving expectations of their societies and their governments. To this end, African universities are challenging long-established procedures and successfully devising "things that work" as they find new ways to meet their historic mission of teaching, research and community service. (World Bank, 2003: 26)

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[15] One particular constraint that hampers the collection of information on such presses for a study such as the present one is the general lack of websites and electronic capabilities in African university presses. Even if only this step were taken, it would immediately position local scholarly publishers as serious, credible institutions on the international stage and would enlarge their marketing and dissemination scope.

Figure 7: North's Model of a Sustainable University Press

'modern' university

- ......*•
  Information era
- Learning organisation
- Environment characterised by continuous change / development
- Limited resources

'modern' university press

'new model'

Modern:
- organisational structure (flat)
- Products (paper/ electronic)
- Production scheduling: just-in-time (JIT)

Disciplinary texts
Mainly services

Academic texts
Mainly products

Delivering a service to researchers

Limited profit orientation

(accompanying rise in research outputs)

(collaboration agreements on a project-by-project basis for suitable texts)

Authorisation for internal funds transfers so that subsidies can be channelled with a view to investing in new products

Economically feasible delivery of information products

Source: North, 1998: 155.

Ironically, one of the factors constraining the higher education sector in Africa is the consequence of the application of World Bank policies. In spite of such difficulties, however, there is still a real recognition in African countries of the importance of knowledge generation and of a suitable means of publishing and disseminating the knowledge produced at higher education institutions throughout the continent. This can be seen in a single example: the African Books Collective (ABC) functions as a consortium and marketing partner for 102 African scholarly publishers, representing 18 countries. It is non-profit-making, and supported by government agencies and development organisations. Sadly, ABC is now struggling due to a decline in donor funding (one of the real dangers of over-reliance on external funding), but is managing to stay afloat thanks to an innovative switch to print-on-demand technology.

The mere presence of 102 scholarly publishers in this consortium, publishing approximately 150 titles a year (see African Books Collective, 2005), says something about the scholarly authorship and readership in African countries: there is both passion and commitment despite the hardships, but productivity levels and output remain low. What are the publishing philosophies of some of these scholarly publishers?

For instance, while in Tanzania the University of Dar es Salaam (like several other universities in African countries) has undergone major reforms of late, a policy decision was taken to retain a publishing capacity:

> It is worth noting that UDSM decided not to contract out several highly professional services, including printing, publishing, the campus bookshop, and computer services. Instead, they have been turned into limited liability companies wholly owned by the university. This is because these services are both critical to the university and not well developed in Tanzania's private sector. According to Mr Mkude, "The purpose of hiving-off these units from the corporate structure of the university is to give them greater autonomy to operate efficiently and compete effectively without being hampered by institutional policies that are not business-minded." (World Bank, 2003: 9)

In Kenya, the University of Nairobi Press is still operational, but not at a very high level of productivity. The mission statement of the press is very similar to those of the 'typical' university presses world-wide, as discussed in the previous section:

> The University of Nairobi Press mission is to be a premier academic book publisher in Kenya and the East Africa region, to enhance and encourage research and publication of Kenyan scholarship, to promote a global reputation of the University of Nairobi by empowering the scholarly community it serves and to disseminate African scholarship to the world using modern publishing technology. (University of Nairobi Press, 2006)

The mission statement mentions the benefits to the host institution, quality and reputation (as a "centre of excellence") as well as the "diversification of income". Indeed, the focus is quite clear in this regard: "Although the mission of the UONP is essentially academic and scholarly in nature, it must be achieved within a cost-effective environment that promotes long-term survival, growth and sound knowledge principles."

Scholarly publishing in Kenya is supplemented by the venerable East African Educational Publishers, and by a small commercial publisher, Acton Publishers. The latter, according to its website (Acton, 2005), "was established in 1992 to meet the needs of specialized authors and readers that were not being served adequately by large commercial publishing firms in Africa". This statement in itself reveals the lack of publishing outlets for scholarly authors. Some authors suggest that university presses in Africa (and perhaps other developing regions) have a special role to play, even "an obligation to help disseminate the results of the research and the ideas of native scholars, as African scholarship may be rejected by international publishers for being too local in orientation" (Aguolu and Aguolu, 1998: 1). But it does not appear that, at present, many of Africa's university presses have the capacity to fulfil this demanding role.

Nigeria, for instance, has a large number of universities, but only a small number of university presses – and even these are threatened, especially by a rampant culture of photocopying and piracy of books. As a result, such scholarly publishers have tended to move away from the 'traditional' focus on scholarly books, functioning more as a service provider to the university. This can clearly be seen in the stated objectives of Ibadan University Press (2006):

> The main objectives of the Press are:
> 1. To serve the University in all its routine printing of stationery, cards etc.;
> 2. To print official University reports, circulars, journals, etc.;
> 3. To print and publish such educational, cultural and research materials as further the general aims of the University, and in particular the works which are referred to it by the Publications Committee of Senate.

In turn, Ethiopia's higher education sector appears to be still struggling to emerge from years of autocratic rule: "After years of repression and turmoil in Ethiopia, observers speak of a deep resignation and apathy among Ethiopian tertiary institutions" (World Bank, 2003: 17). Addis Ababa University Press has a respectable history and continues to publish today, focusing on textbooks and a few scholarly monographs. As is emerging from the literature survey, this focus on textbooks and teaching materials appears to be more common among African university presses than those in the developed world. However, AAUP is facing severe resource constraints in terms of both funding and skilled staff, especially editorial staff – as Atnafu (n.d.) points out: "There are serious shortages of skilled professional editors and designers. There is no training institution for publishing knowledge and skills in the country. Professional publishers abroad and those who acquired short-term editing, design and illustration training locally are few in number. Besides, most of them do not stay in the profession but leave for better paid jobs."

The press's strategy to keep itself afloat has been to enter into joint ventures wherever possible, especially with US-based university presses such as Ohio University Press and with James Currey Publishers from the UK. This has been a particular strategy of James Currey, and a laudable one, aiming to develop local publishing efforts and to ensure that books on Africa are available in the countries which they study and discuss – which has not always been the case.

What this brief survey shows is that the broad university press model also applies to African-based university presses, even in terms of new trends of commercialisation, electronic publishing and joint ventures. But it needs to be borne in mind that African scholarly presses appear to face particular challenges and constraints. Training, in particular, is critically needed, in several areas, while marketing and distribution present greater obstacles than in the more developed North. There also appears to have been less attention paid to developing economically sustainable business plans, for instance in terms of setting a niche and assessing the competition. Perhaps as a result, African university presses function partly as service-providers within their host institutions – could this be interpreted as an effort to justify their continued existence and subsidy? Partnerships would appear to be a key strategy in making these presses more sustainable and more visible on a global research stage.

2.2.3 Hybrid Models: Policy Research

While the university press model clearly holds much promise for a scholarly publisher, it is also clear that there are problems associated with the traditional or 'typical' university press model. Gray (2005), in particular, refers to the need to "crack open" the university press model, basing her argument on the need for research organisations to publish findings of immediate and often topical relevance. It should be noted that university presses have never held the monopoly on scholarly publishing, and that research organisations also make an immense contribution to disseminating research and scholarship (Mlambo, 2007: 16). In this section, attention will be given to the modified or 'hybrid' university press model used at several prestigious research institutions world-wide, including the Brookings Institution and Hoover Institution. North also provides an adapted university press model (see Figure 7), which is closer in philosophy to the 'hybrid' model discussed here. These models tend to produce policy-relevant or advisory pamphlets and research reports in addition to the scholarly publications of traditional university presses, and, as will be seen, publishing is either modelled after an adapted university press model or is seen as a 'service' and is thus a division of the administration.

Thus, a typical mission statement for such a research organisation is "to unite the world of ideas to the world of policy by supporting pre-eminent scholarship and linking that scholarship to issues of concern to officials" (Woodrow Wilson International Center for Scholars, 2004), while the "Hoover Institution publishes books on a wide range of national and international policy issues" (Hoover Institution Press, 2004). This aspect receives even more emphasis at the American Enterprise Institute for Public Policy Research, where "No aspect of AEI's contribution to public policy is more important than its book publishing" (AEI, 2004). In other words, books are not produced because of their inherent merit or scholarly contribution, but rather for the contribution they can make to informing government policy. This is a significant shift in perspective from that of a traditional or 'typical' university press.

In fact, it could be said that the most important aspect of the difference the hybrid model used by many research institutions and the traditional university press model is this very attempt to find a balance between the quality of academic scholarship and public policy or impact. This can be represented diagrammatically as follows (see Figure 8):

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Figure 8: Implications of Publication Focus: Scholarly vs. Policy Publications

	Academic or Scholarly Publications		Policy-Relevant Publications
Focus	Credible Scholarly Authoritative		Relevant Topical Shaping policy
Products	Edited books Research reports Journals		Policy briefs Opinion pieces & interviews Learner support materials
Media	Print Electronic (full-text or TOCs on website)		Electronic (full-text downloads & email) POD

The Brookings Institution's publishing philosophy, as expressed by Robert L. Faherty, vice president and director of the Brookings Institution Press (quoted in Brookings Annual Report, 2003: 30), is that:

> Books add a solid, scholarly underpinning to the academic research and analysis of our Brookings scholars … While the scholars regularly disseminate their conclusions via op-ed articles, television and radio interviews, short papers, and direct presentations to policymakers, books give credibility to their work … Decisionmakers can rely on the recommendations in Brookings books because they have gone through the rigid academic review process.

Faherty goes on to say that, "many Brookings books are designed to be used as required reading in college courses. While the total number of sales for these titles may be small, their long-term impact can be large. 'Because our books are being used in the classroom, we're informing not just today's policymakers but also tomorrow's policymakers.'" (pp 30–31). The Brookings Institution now publishes around 50 books a year, most by Brookings scholars, but also some by outside experts. Their product mix thus depends on both tertiary-level textbooks and accessible but authoritative books on topical issues.

A similar focus, which recalls that of the university presses but is not entirely the same in emphasis, can be seen at the Russell Sage Foundation. Like the Brookings Institution, the Russell Sage Foundation links the publication and dissemination of social research directly to

its mission and research areas: Publishing is seen as "an essential part of its contribution to 'the improvement of social and living conditions in America'" (Russell Sage Foundation, 2004). Moreover, "As the principal American Foundation devoted exclusively to the social sciences and as one of the few foundations with a regular publishing program, Russell Sage continues to make a substantial contribution to the social science literature."

Both of these research bodies have developed their publishing sections into fully fledged presses to enhance the credibility and reputation of their work, and to ensure its wide accessibility. This latter point tends to be emphasised above most others, to the point where publishing is quite often seen as part of the institutes' outreach programmes. Thus, the United States Institute for Peace Press, according to its website, has as part of its mandate "Increasing public understanding about the nature of international conflicts, as well as approaches to their prevention, management, and resolution – using radio, publications, the Internet, and other electronic forms of outreach" (USIP, 2004). At the Carnegie Corporation, dissemination is also seen as key: "In 1911, Andrew Carnegie created Carnegie Corporation of New York 'to promote the advancement and diffusion of knowledge'. By giving equal weight to both goals, Carnegie acknowledged that no idea – no matter how powerful – could bring about change unless it had an audience" (Carnegie Corporation, 2004).

The similarities between the missions of the university presses and the research bodies which have adapted the university press model can be seen in the extent of their co-publishing and collaborative ventures. The Woodrow Wilson Center Press (2004), for instance, claims to reach a "world-wide English-language readership through co-publishing and distribution arrangements", with publishers such as Cambridge University Press, Johns Hopkins University Press, and Stanford University Press.

In several cases, the significant focus on policy relevance and the notion of publicly funded research as a public good has led research organisations around the world to go beyond the university press model in terms of their dissemination of research output electronically, and especially online. For example, the RAND Corporation makes its research available at no cost as a public service. They do ask, though, "If you find a publication useful, please consider purchasing a copy to help support RAND's research efforts" (RAND Corporation, 2004). In South Africa, the Human Sciences Research Council has adopted this 'hybrid' model in redeveloping its publishing activities from an in-house publishing division to a

scholarly publishing house. Daniel and Gray (2001) argue that the HSRC, because it is a publicly funded research council like AISA, has a responsibility to disseminate the knowledge produced through its research in an accessible and affordable way. Acknowledging that the HSRC serves only a limited niche market, although arguably a highly 'wired' one, they strategised transforming the HSRC's publishing division into a publishing house – now known as HSRC Press – with the slogan of "publishing social science that makes a difference" (echoing and reinforcing the institutional slogan of "social science that makes a difference").

At first, the HSRC's new strategy for its publishing division was to make publications available online at no cost, or with print-on-demand copies available for order on a cost-recovery basis. Quality control was perceived to be unaffected, as all publications appearing under the HSRC imprint undergo peer review. The aim was to develop into the "largest non-profit online research publisher in Africa" (Daniel and Gray, 2001: 4). The strategy, however, has undergone some modifications since it was first introduced. For one thing, it now relies much more on a dual publishing strategy – involving both print and electronic media – than was first envisaged. And it appears that the availability of full-text documents online is driving sales of the print publications too.

As a result of this new strategy, according to the Institutional Review of the HSRC, the council now has a "marked strength in research dissemination" (HSRC Review, 2003: 66).

But not all such research organisations have seen the need to develop a fully fledged scholarly publishing house under their imprimatur. In several cases – and especially in cases where research bodies publish only their own research findings – publishing may fall under the administration division, or be seen as a 'support service'. At the RAND Corporation, for instance, there is a distinct focus on quality and peer review in their publishing programme, but operationally publishing falls under services, along with divisions such as the library, information technology, facilities, and security. In this case, the brand of the parent institution is seen as a sufficient indicator of quality: "The RAND publications series has been designed to support corporate standards for high-quality analysis and clearly convey to all audiences the extent of the RAND quality assurance review process to which each work has been subjected" (RAND Corporation, 2004).

Similarly, the African Economic Research Consortium (AERC), a "public not-for-profit organization" focusing on economic policy research and training, and based in Kenya, sees publishing as an important part of its mandate, but as supporting its research rather than an end in itself. It emphasises quality as well as credibility:

> Publication and dissemination of AERC research results receive considerable attention. Over the decade-plus of its existence AERC has built a critical mass of highly credible research that has enhanced the professional stature of the network both locally and internationally – and that has, moreover, focused attention on issues critical to African development. Apart from the highly regarded series of refereed AERC Research papers and other publications, many collections of project papers have been published in joint ventures with esteemed academic presses. (AERC, 2005)

Another Kenya-based organisation, the Institute of Policy Analysis and Research (IPAR), operates similarly. And the Nigerian Institute of International Affairs points out that, "One of the most significant features of the Institute is its publishing programme which is a direct result of research activities" (NIIA, 2005). Also in a similar vein, the Heritage Foundation places "publishing services" and "editorial services" under communications and marketing. The Foundation tends to publish only research by its own large body of scholars, and its research is thus identified with its own brand as an organisation. Some scholars, however, caution against this approach, as the net result tends to be that publishing is seen as an administrative department rather than an academic department. This may have implications for the autonomy of the publishing section, and especially its ability to take strategic decisions as to whether or not to publish any given manuscript (Gray, 2005).

A related caution concerns the business approach of some research organisations that maintain only a publishing programme, rather than setting up a semi-autonomous publishing house. Wafawarowa (2007: 54) argues that such research organisations "have published high quality research but have been very wasteful because they lacked the economics of publishing". This is an important concern, which will resurface when developing a business plan, in Chapter 4. It could be brought down to the fundamental question of whether a research organisation sees publishing as its core business, or not.

In summary, some of the key strategies and publishing philosophies of the 'hybrid' model of research organisations in terms of their scholarly publishing function are as follows:

- Disseminate research results and information, ensuring the widest possible access – often through media such as the Internet or other electronic means;
- Provide advice and remain highly relevant and topical, to inform and impact on policy-making;
- Balance policy-oriented publications and more scholarly work;
- Promote quality through rigorous peer review and ensure that all publications are based on sound research;
- Promote discussion and debate;
- Create awareness and promote visibility of the parent organisation;
- Collaborate, where necessary, to extend accessibility and ensure cost-effectiveness;
- Target diverse audiences: government departments, academics, the youth and grass-roots, business, NGOs and research institutes.

As can be seen, these are similar to the editorial policies and publishing philosophies of many university presses, as discussed above, but with some differences in emphasis and strategy. It may be considered that this 'hybrid' model is more relevant to a body such as AISA, for the following reasons:

- AISA is a publicly funded research organisation;
- AISA's core business is research, rather than the dual mandate of research and teaching which is common at most universities;
- Its target audiences include government, academics and universities, embassies, NGOs, and the youth;
- In its research, AISA attempts to produce both policy-relevant and academically rigorous outputs.

The 'Brookings' or 'HSRC' model may thus be more relevant to AISA's structures and purposes than a pure university press model. But it should be borne in mind that all such models are being posited within a changing context.

2.3 Publishers' Changing Role

Drivers of change in the publishing industry in general, at present, and which will affect any publishing decisions made, include the following:

- rapid advances in technology;
- a convergence in consumer tastes;
- a shift towards global markets;
- the world-wide search for raw materials and skills to service global business networks and achieve economies;
- changes in leisure pursuits as other media displace time for reading (Scottish Arts Council, 2004: 9).

Current international studies of university presses and of scholarly publishing also bring up several common issues that are facing this kind of publishing at the moment. These include the above factors, but add more sector-specific issues of a shrinking specialised market, especially due to budgetary cuts at many university libraries, growing pressures to cut costs and to commercialise (often at the expense of publishing value-add and of quality), and the challenges linked to new technologies, the Internet and electronic publishing. With globalisation, these issues are as relevant for a developing nation context, such as South Africa, as for anywhere else, with the added concern that developing nations are faced with narrow markets due to small higher education and research sectors, poor literacy levels, low income levels, language issues as a hang-over from colonialism, and issues of relevance and authoritativeness.

As we have seen, the university press itself is busy changing, with a shift in emphasis to the importance of commercial success and sales (with lowered subventions from national governments and parent institutions in the face of changing priorities); cost-cutting measures (including less use of experienced editors, at the cost of quality and possibly credibility), and the challenges (even threats?) of electronic publishing. Walker (cited in North, 1998) lists some of the problems facing university presses as constant financial pressure, small publishing programmes, low productivity levels, and, always, the threat of closure. Greenbaum (1999: 1) argues that "University presses' core business has been publishing the scholarly monograph. Concern has been expressed about the monograph's future, because of

reduced monograph sales to academic libraries, increased production costs, and changes in the scholarly cannon (sic) in some subject areas."[16] This has led to a trend of declining print runs.

Some specific issues that will be discussed in more detail in relation to the changing context for university and scholarly presses are the higher education context in South Africa and the rest of the continent, the ever-present problem of financing, and the challenges and threats posed by the new electronic environment.

2.3.1 The Higher Education Context

Scholarly publishing, it need hardly be said, is closely related to the university or tertiary education sector, both in terms of authors and readers (as well as peer reviewers). "Scholarly publishing needs vibrant universities in order to flourish", according to the International network for the Availability of Scientific Publications (INASP) seminar on 'Strengthening Scholarly Publishing in Africa' (INASP 2002, 1). In the broader African context, this is a key challenge, as universities remain weak in terms of research and resources. In the South African context, this sector cannot be discussed without reference to the recent restructuring of the higher education landscape, and its implications for future scholarly publishing ventures. In particular, mergers and consolidation of the sector, the drop in student numbers over the past few years and the financial constraints many institutions are facing mean that the local higher education scene is barely able to support a viable scholarly publishing sector on its own – the market may simply be too narrow (see Gray, van Schalkwyk and Bruns, 2004: 7). This is compounded by the international trend that scholars want "to publish *more*, but read *less*" (Elsevier, 2002, quoted by Smart, 2004).

South Africa has also been affected by the general trend towards a business management approach to its higher education institutions. This has translated into an increasing concern with revenue streams and profitability, a pressure that has been passed on to university presses around the world. The next section will focus on this aspect in particular.

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[16] It should be noted that the US requirement of the publication of a monograph for an academic to be considered for tenure is not applicable in the South African context. The problem here is often too few quality submissions for publication, rather than too many. But there is also a lack of good publishing outlets for such scholars as do want to produce book-length works and have them published locally.

In Africa more broadly, there are huge capacity problems in higher education. Research output remains very low as a percentage of world output – UNESCO estimates that just 2.5% of the world's total number of researchers are in Africa and around 1% of world research output is produced on the continent (UNESCO Institute for Statistics, 2001: 10, 24). However, while efforts are underway to boost research spending and output, that 1% of output still requires outlets to be published, and still deserves visibility on a world stage. At the same time, the limited number of researchers still requires up-to-date sources and publications, on which to base their future research outputs. In sum, we should not be overly pessimistic about the numbers: the low numbers and small markets do not negate the fact that a significant number of people are involved in research in Africa, and require both publishing outlets and sources for their research. A narrow market is still a market; it may just require more focused efforts to reach it.

Another factor affecting scholarly publication in terms of the higher education sector is that copyright infringement at universities remains rife. Gray (2000b: 28) notes that:

> Photocopying is a particular problem in the higher education publishing sector, leading to significant erosion of sales. There has been a tendency for high levels of illegal photocopying in the institutions, of course packs made up of extracts taken from a variety of books. In the last few years, this form of photocopying has been gradually brought under control by the creation of copyright clearing offices (in the Western Cape, the Adamastor Trust, part of the Western Cape consortium of tertiary institutions) and by the efforts of DALRO, the South African copyright licensing agency. Further illegal copying is undertaken by students who copy instead of buying textbooks. There is a general perception that books (particularly imported books) are too expensive and many students are resistant to the idea of buying books. Because of problems in the Copyright Act, prosecutions of illegal photocopying are difficult.

It is estimated that between 30% and 40% of potential sales are lost to illegal photocopying in South Africa. This is a severe drain on the publishing industry (cf. Andrew, 2004).

If scholarly publishing needs vibrant universities to flourish, then there are real constraints in the African context. But, with scholarly publishing becoming an increasingly global exercise (especially with the use of a global language such as English), a market need not be limited to the local or the regional. Moreover, as pointed out above, even a narrow research market requires a publishing base to sustain it.

2.3.2 Commercialisation

In the changing higher education context, "Universities and research organisations are under increasing funding pressures, and there is greater focus on the efficient allocation of resources and on achieving demonstrable return on investment in those resources" (Houghton, 2002: 1). This in turn puts pressure on subsidiaries of the universities and research organisations, such as scholarly publishers. Yet, it would seem that very few publishers make money out of scholarly publishing, and indeed this is usually only achieved through cross-subsidisation or through ventures into less scholarly publishing (see North 1998: 126).[17] "Except in unusual cases, the university press cannot recover their costs through the sales of books and periodicals" (Robinson, 2003: 7). Indeed, Kate Torrey (cited in Robinson, 2003: 1), the director of UNC Press, states baldly that, "scholarly publishing is deficit publishing". The MLA report on the future of scholarly publishing in literature and languages in the USA cites a university press director as saying, "even with our valiant efforts, we can barely keep our heads above water. The revenue we take in through sales is simply too low to cover our costs" (Ryan et al, 2002: 4–5).

One of the reasons for this dire situation is that there is increasing pressure on scholarly publishers, even those that operate on a non-profit basis, to become self-sustaining and even to bring in income. This growing commercialisation of scholarly (and academic) presses is putting pressure, in turn, on the mission of such publishers – they have to begin to consider how to balance accessibility, and making scientific research available to the public (especially if public funding is involved), with revenue generation. Mary Case (1997) calls this "one of the most troubling issues facing higher education today", and describes it by saying that "the values of the market are clashing with the values of the academy".

Watkinson (2001: 6) asks, "Is the publishing of research monographs so different from other types of scholarly communication that it has to be subsidised come what may?", and then goes on to describe some of the results of the apparent crisis in funding for university and other non-profit publishers:

> Most of the smaller university presses do not make money. Especially in the USA there are recurrent crises within this sector, which are mostly not discussed openly.

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[17] Indeed, "statistics from the Association of American University Presses suggest that scholarly communication remains unattractive from a commercial standpoint" (Litchfield, 2002: B9).

The University of New England Press comprehends a number of presses that used to be independent but now have only an editorial role. The University of Iowa Press has recently taken a different step and become part of a commercial publisher while retaining editorial independence. Some presses in the UK (such as University College London and Imperial College London presses) are part-owned by commercial companies.

Some scholarly presses have seen a potential way out by developing a wider product mix, and appealing to new audiences – especially the 'general educated reader'. Ryan et al (2002: 5), for instance, note in this regard that: "Academic presses increasingly favor textbooks and other books for undergraduates, as well as books that extend beyond the university altogether; many regional scholarly presses have been publishing more and more books on local history. Some presses have been able to counteract dropping sales in many areas by sales of an important reference work." In other words, there is cross-subsidisation of profitable works (such as textbooks or non-fiction trade books) to produce less profitable, but important, scholarly works with small audiences.

Other ways in which scholarly publishers have sought to make a profit (or at least break even) with books that do not necessarily have a wide audience include:

- tightening up on efficiency, and outsourcing where possible (and where this is more cost effective);
- an increased marketing drive, pushing books to new audiences, and ensuring sales fulfilment is spot on and immediate.

The Committee for Institutional Cooperation (2001: 15) adds the following avenues for improving dissemination and increasing revenue:

- support library consortia;
- direct researcher participation in editorial activities of the Press;
- sufficient baseline funding;
- diversification into different media;
- sponsorships for unusually long or complex works;
- training of new staff;

- creation of fellowships to give researchers with academic backgrounds experience in scholarly publishing.

These strategies are specifically targeted at non-profit scholarly publishers, partly because there is some resistance to the over-commercialisation of scholarly publishing. Some have reacted strongly against what they call the "Routledge model", which "consists of sacrificing the quality of editing and production in the name of efficiency; pressuring authors to produce 'fashionable, saleable topics'; and over-saturating the market with vast numbers of strikingly similar titles that, together, can undercut the possibility of any one title becoming too intellectually viable" (Striphas, 2000, quoting Meghan Morris). Thus, especially in setting up a small scholarly publisher, one should take care to retain both its non-profit character and its commitment to publishing the best quality scholarship available.

Closely related to the issue of the pressures for commercialisation is the drift towards lower print runs. The MLA Report (Ryan et al, 2002: 4) reflects that, "One press director, writing in 1993, had this to say about his own field of Latin American studies: 'back in the early 1970s … one could still count on selling between 1,000 and 1,500 copies of most new monographs in the field. By the end of [the 1980s] it was closer to 500'. Writing in The Nation in 1997, Phil Pochoda estimated that library orders for scholarly books were 'now averaging 300 copies per title and falling fast'. The director of Rutgers University Press stated in the same year that she could rely on 'about 200 libraries' to purchase a given scholarly monograph." Indeed, several specialist (commercial) scholarly publishers apparently now rely on print runs of as little as 200 (Watkinson, 2001: 9). This may mean that prices, in turn, remain high, as the runs are too low to take advantage of economies of scale.

Gray (1999) notes that, while a minimum print run of 1 000 copies of a book on a specialised topic may be too few for a trade publisher to find this commercially viable, this figure could well be the normal run for a smaller press. The difference lies largely in the motivation of the press – its mission – and whether it aims at cost-recovery or is able to access a subsidy, as is the case with university presses. Internationally, for example in the USA, there is concern that the consolidation of the publishing sector through mergers has led to a 'crisis' of scholarly (and, more broadly, academic) publishing, especially in terms of spiralling costs.

One of the solutions that has been proposed is the development of affordable alternative publishing outlets, such as university presses and non-profit institutional presses (see for example ARL, 1997).

This motivation is also linked to the issue of the protection of intellectual property. It is common nowadays for the vast majority of publishers to retain the copyright to the work they publish, in exchange for the value they add in terms of editing, production, distribution and marketing.[18] This role is sometimes misunderstood by authors. It may also be misunderstood by auditors, who see little value in "intangible" intellectual property!

2.3.3 Electronic Publishing and Open Access

This issue refers largely to the means of distribution employed by the scholarly publisher. It focuses on how "the IT revolution is fundamentally changing the ways in which scholarly content can be, and is being created, communicated, packaged, accessed and disseminated" (Houghton, 2002: 1).

There is great excitement among scholars about the possibility of the African publishing industry being revitalised by new technologies. The reasoning is that "The creation of virtual communities with an interest in African studies could very well provide a route to more effective dissemination of African-based scholarship, with at least some potential for reversing the dominance of African studies by publications emanating from the USA and Europe" (Gray, van Schalkwyk and Bruns, 2004: 4). Especially in a context where distribution costs are very high and the means available for purchasing books are low, this is, as Gray points out, a highly seductive alternative.

Many scholars and even publishers are currently advocating the replacement of traditional publishing methods (such as paper-bound books) by electronic archives. For example, one proposed solution (which has not come to fruition), is the following:

> Naspers, which owns Gauteng-based Van Schaik Publishers, is restructuring its business and has switched some of its academic business from traditional books to customised publishing, working from digitally stored text and using print-on-demand technology. This new business, Content Solutions Online, is situated in Stellenbosch,

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[18] Although, with Creative Commons licensing and the open access movement growing, a number of presses are suggesting a shift towards exclusive licences to publish as the best practice when contracting with authors.

working closely with the university in providing customised products, particularly for the University of Stellenbosch's growing distance education activities. This business is likely to be expanded, along with Naspers's interests in electronic publishing. Naspers is also looking at the development of electronic higher education delivery, in conjunction with Naspers-owned companies, Eduflex/Virtual Book and M-Web (Gray, 2000b: 19).

Although the above example is now defunct, and has been overtaken by other solutions, it does provide a window into how publishers are thinking about options for the move to electronic publishing.

Even on a small scale, many research institutes are now publishing electronically, by making their working paper series and technical reports available on their websites, rather than (or in addition to) in print. Kling and Spector (2002: 3) argue that this could be making these 'e-scripts' "more widely available than their paper precursors".

The electronic publishing of books, monographs or journals is most often linked in the literature to accessibility and to costs. Indeed, electronic publishing models are generally based on the argument that "Publicly funded research data should be priced no higher than the marginal cost of dissemination and be freely available on the Internet to the greatest extent possible" (ICSU, 2003c: 2). Moreover, "The social returns on investment in information are maximised through expansion of access and wide dissemination, not by limiting access and exclusion" (Houghton, 2002: 6). Somewhat more cautiously, Houghton (2000) also points to the cost efficiency of effectively employing new electronic technologies in publishing:

> Significant cost savings could be made by streamlining or obliterating article processing activities, and because distribution costs are a relatively small part of total costs electronic distribution is unlikely to lead to major cost savings. That is not to say that it might not add significant value in use. By implication:
> • unless the whole processes is geared to purely electronic publication, cost savings may be relatively modest,
> • dual mode publication increases costs, and
> • new opportunities for value adding features in electronic form makes cost comparisons difficult, because the print and electronic products are very different, and exhibit different value in use.

The cost-effectiveness of electronic publishing is as yet largely untested, and doubts do remain. The expected cost savings also relate almost entirely to printing and distribution

costs, as set-up and editorial costs remain the same, and even layout and typesetting may be unaffected. And, while these fixed costs remain unchanged, any cost savings must be balanced by the lower income associated with an online publication. In particular, for publishers who fear a loss of revenue from the sale of their printed publications, "The revenue-generating potential of scholarly e-books remains unknown" (CIC, 2002: 11). At the same time, the start-up and skills costs involved in electronic publishing are currently high. Even in an apparently successful case, "The National Academy Press reports that providing free online e-versions of their publications has not diminished the print sales of those publications. However, the Committee emphasizes that developing and maintaining high-quality print and electronic publishing operations create major stresses on the finances of university presses" (CIC, 2002: 11). Indeed, the National Academy Press may be having some success with its electronic publishing strategy – in support of print sales – partly because it makes it cumbersome for the reader to download an entire book or even a chapter, as only a single page can be accessed at a time. The HSRC is currently placing all of its publications online as part of its dual publishing strategy, and this experience should be watched carefully to glean the lessons learned.[19]

The question of accessibility is frequently linked, in the literature, to the issue of open-access publishing, which in effect means placing (usually) journal articles and (more occasionally) books on the Internet, where they can be accessed free of charge. It is argued that the "virtual elimination of the costs of distributing scientific research results – now that this can be done electronically – opens the way to a new model of scientific publishing, known as 'open access'" (Dickson, 2004: 2).

Open access goes beyond the mere electronic dissemination of research results, as the model most frequently proposed suggests that research results and scholarly literature should be freely available to all other researchers and students. This proposal is becoming popular among donors (who fund research), governments (who both fund research and develop policy guidelines), and the academic community (libraries and scholars). Several recent studies have focused on the potential impact of the open access model (the UK House of Commons, the Wellcome Trust, the US Congressional hearings, etc.), although usually from the point of view of the advocates of such a model. The argument goes that: "Where public money has

[19] Initial indications are that, like the National Academy Press, online versions drive up the sales of print publications.

funded the creation of data and other research, … the results should remain in the public domain, freely accessible to all for the maximum public benefit" (Waelde and McGinley, 2005: 97).

This model has definite implications for a government-funded institution such as AISA, although South Africa has yet to formulate a policy on this matter: "The open access model is therefore one that we would argue needs to be considered by any publicly funded research organisation, particularly in Africa, where development goals are of primary importance. It is an increasingly accepted view that where public monies are the source of research funding, the imperative to ease public access is even greater" (Gray, Van Schalkwyk and Bruns, 2004: 5).[20]

However, in terms of the case study being investigated here, and in general terms for local scholarly publishing, open access should be approached with some caution. In reality, the business model proposed for open access involves a *shift* in costs – rather than a real *reduction* in costs – from the user (the reader or subscriber) to the author, researcher, or the institution funding the research. Some of the apparent 'cost savings' are also dependent on the authors being willing to add value to their publications (for example, through doing or paying for their own editing and layout) – an assumption that, in the AISA experience, would not be sustainable or even necessarily desirable, due to a lack of skills. There is also a debate as to the perpetual access to and archiving of materials published only online or in an electronic format (and the concomitant impact on legal deposit of non-print publications), and there are concerns about the possibility of widespread copyright violations. Watkinson (2001: 59) notes that the most widespread barriers to putting material online relate to production, (especially relating to the quality and reliability of electronic files) and rights or licensing. As Epstein (2001), a proponent of digital books, points out: "Sumerian clay tablets can still be read but the long-term survival of digital texts cannot be taken for granted".

It should be noted, moreover, that, promising as the benefits of open access appear to be, they are not applicable in all fields. The social sciences have proved especially resistant to open access models involving the payment of author fees (the 'author pays' model) rather than the traditional subscription model. At the same time, the subscription rates for journals and the

The ASSAf (2006) report on journal publishing in South Africa is an initial step towards policy-making.

costs of books in developing countries are still on the whole affordable, even for 'cash-strapped' libraries and scholars in the North.

More worryingly, the role of publishers is even being eroded by some open-access proponents, who would like to see the scholarly publisher's role reduced to that of a "peer review facilitator". Steven Harnad (2003), a keen proponent of open-access publishing through "self-archiving", in particular for journal articles, argues that publishers should "downsize to providers of peer-review service + optional add-ons products" because "The only essential, indispensable service [they provide] is peer review". This reveals, in my opinion, a gross misunderstanding of the role of publishers, and in particular of non-profit bodies such as university presses and association publishers. Fortunately, this does not appear to be a widely held view.

There is also a problem with electronic publishing models that is fairly specific to Africa, or at least to developing country conditions. As Wafawarowa (2003: 2) points out, print is appropriate for African conditions, as it is currently the most accessible medium, second only to radio. This observation is borne out by informal discussions with scholars from other parts of Africa (as well as the results of the survey reported on in Chapter 3). Indeed, as Bruns (2004) notes, there is some resistance to purchasing online books (as opposed to journal articles, for which the open access model was first developed), especially directly from institutions. Often, government departments and other institutions are not set up to purchase books online as this does not fit their bureaucratic requirements. As a result, "The Internet and electronic publishing have transformed the way we communicate, but the reality is that there is still a high demand for ink on paper – either as stand alone printed products, or as part of multi-media information packages" (TSO, 2004: 2).

An electronic technology that may be more appropriate to this context, and which stops short of placing publications online, is print-on-demand. Olson (1991) asks, "With costs constantly accelerating, should university presses continue to publish 500 to 750 copies of books for which the real demand may be even smaller, or should university presses and university libraries work together to provide a copy of the book only when it is called for. The technology is available; our culture may not be ready for it."

The implications are that an entirely open access publishing policy is probably not (yet) suitable for AISA's publishing ventures, although some forms of electronic publishing may be. These could include the use of print-on-demand, coupled with the online publishing of especially policy-oriented research reports. For scholarly books, however, traditional print may be the answer, coupled with an online marketing and sales campaign. A dual strategy, of print plus online, is an expensive option, but remains the gold standard at the present time, perhaps as a transitional form.

2.3.4 Collaboration

The literature points to the importance of collaborative links and partnerships among publishers, in terms of aspects such as funding, co-publishing, distribution rights, and marketing. Indeed, James Currey (2002: 1) notes, somewhat ruefully, that "The survival of [his] own scholarly publishing company since 1985 has depended upon co-publishing." Robert Molteno (cited in Gray, 1997: 2) agrees, arguing that co-publication could be the only means of sustaining scholarly publishing in Africa. More specifically, "The indigenous knowledge industry, to the extent that it is made tangible through scholarly publishing, must survive through its links with global academic activities; this is the only way to overcome regional isolation, indifferent scholarship and the constraints of a small and regional market for academic publications" (Evans and Seeber, 2000: 7). So, for example, Witwatersrand University Press notes that

> Scholarly monographs feature prominently on WUP's backlist. Even under mounting pressure for increased commercial viability, the tradition of scholarly monographs will be continued where co-publishing opportunities with overseas university presses can be created. (Witwatersrand University Press, 2005)

Gray (1997: 2) argues strongly, in fact, that the "South African publishing industry could provide some solutions to the problems of African academic [scholarly] publishing, in the form of strong South African partners with commercial and professional strength to provide the basis for a revitalisation of the African information industry." She goes on to say that such "joint ventures" need not "rely on financial equity, but could be structured around the contribution of one partner's local expertise and knowledge of the market". Unisa Press is an example of a South African scholarly publisher that is following this route, by offering services and partnerships to publishers from other parts of Africa (cf. Zegeye, 2003).

One area where collaboration is gaining in ground, apart from joint publishing ventures, is in the area of marketing and distribution. The African Books Collective (ABC), a non-profit distributor based in the UK, is a leader in this regard, as is the International Network for the Availability of Scientific Publications (INASP), through, for instance, its African Journals Online project (now based in South Africa, under the auspices of NISC). According to ABC, "an organisation of 102 independent and autonomous African publishers from 18 countries", their objective is to "market and distribute African published books globally outside Africa, and publish resource material for African book and publishing communities" (see ABC, 2005). Their motivation is not commercial, but rather to assist African publishers:

> This self-help initiative arose from the constraints publishers were experiencing in financing, marketing and distributing their books, and the dearth of African published materials in the North. Collectively, it would be possible to strengthen the economic base of independent African publishers and meet the needs of Northern libraries and other book buyers.

INASP's African Journals Online (AJOL) project has recently found an African institutional base, in Grahamstown, South Africa. This project, unlike ABC, is not aimed so much at distribution as at promoting the visibility of African journals. The project's aim is "to increase the visibility of African journals amongst the global research and librarian community by providing an online catalogue and current awareness service for members" (AJOL, 2005). This is particularly useful for publishers of a single journal, who cannot afford to set up their own online service for their journal, yet do not want to enter into a partnership with one of the commercial multinational journal publishers, often for ideological reasons (and for reasons of cost: they do not want their journals priced too high for their primary African market).

Moreover, in terms of collaborative marketing and distribution deals, if the local market for scholarly publications is limited, the obvious solution is to turn to related and regional markets. A particularly significant market for South African publishers could be the intra-African trade. Gray (2000b: 23) argues that

> Publishing is not a strong export industry. The major potential growth market for exports, according to many industry informants, is Africa. In order to reach these markets, a conscious strategy is needed to address logistical problems and tariff barriers between African countries. Both book and magazine publishers have identified expansion into African markets, particularly for magazines and for travel publications, as a major potential growth area.

However, in this regard, Makotsi (cited in Lawal-Solarin, 2003: 5) notes that: "[African] Publishers are still very reluctant to venture into intra-African trade, seeing it as risky business". Some of the reasons she cites include:

- poor communication infrastructure;

- shipping problems;

- unreliable postal services;

- high customs and tariff barriers;

- restrictive foreign exchange control regulations;

- cumbersome government bureaucracy;

- non-applicable trade incentives and bilateral trade agreements, as these only favour large-scale trade.

Makotsi notes that intra-African trade could reduce the current dependency – up to 80% in some cases – of African countries on imported books. Gray (2000a: 173) cites similar and further concerns while considering whether South Africa's publishers could expand into the African market. She notes that:

> ... suspicion of South Africa's imperialist intentions lingers in Africa. South African publishers also face the problem of pricing in markets that have even weaker currencies and an even lower price threshold than South Africa. There are also tariff barriers, distribution problems and high distribution costs inhibiting the free circulation of books in Africa.

She suggests as a partial solution that co-publication and joint academic textbook development across Africa should be explored.

Another potential area for collaboration is in experimental projects – such as placing publications online. A project that is currently operational in South Africa, and indeed in which AISA is already involved, is Sabinet Online's ePublications project (at www.journals.co.za), which involves placing South African journals online (plus some shorter research monographs). Using a similar business model, INASP's AJOL project (referred to above) places the journals of African publishers online. Another example is that of OneWorld Books, which provides a portal and an online bookshop for research

publications (more particularly scholarly monographs and books) in the social sciences and humanities. It thus carries out the function of a distributor, and indeed works closely with the Blue Weaver distribution company in terms of order fulfilment. OneWorld is deliberately targeting the scholarly publishing market:

> Given the lack of conventional outlets for academic and research materials, effective marketing and distribution are important to ensure a demand for these publications. Oneworldbooks is a unique resource of academic and research publications in the field of the social sciences relating to the Southern African region. The website aims to become a one-stop shop for specialist information on Southern African research or academic topics. (OneWorld, 2005)

Scholarly publishers also have the benefit, internationally, of several consortia or associations that aim to promote their interests. In the USA, for instance, the most prominent of these bodies is the Association of American University Presses (AAUP), while several smaller groups of university presses are moving towards collaboration – or even consortia – rather than competition (for example, the Committee On Institutional Cooperation, or CIC). In the UK, there are similar bodies, such as the Association of Learned and Professional Society Publishers (ALPSP). The Australian university presses also appear to be working towards such a model of collaboration, citing the benefits of joint marketing (such as joint exhibitions), reducing costs, and gaining a larger presence in the market (see University of Western Australia Press, 2001: 4, 6). Some of the apparent benefits of collaboration include the following:

- cost-savings and economies of scale in warehousing, customer services and order fulfilment;
- shared sales representatives and distribution services;
- discussion of mutual problems;
- joint e-publishing ventures;
- sharing of comparative statistics for benchmarking;
- attending workshops and training;
- joint exhibitions at conferences and book fairs;
- possibility of mentoring (CIC, 2001).

It should be noted, however, that there is little collaboration among scholarly (or academic) presses in South Africa, and no overarching professional body for such organisations or their

staff, along the lines of the American Association of University Presses – although the Consortium of Academic and Independent Presses of South Africa (CAIPSA) is a step in the right direction. But such publishers do face common problems – such as the small market size and copyright piracy – and could benefit from increased collaboration. This is a significant recommendation of this study.

At the same time, although collaboration and co-publishing ventures are often touted as one of the routes for scholarly publishers to follow if they are to remain sustainable, a problem of balance can arise in such cases. Scholarly publishers value their academic freedom and editorial autonomy very highly, and this can be compromised by collaborative agreements with other publishers or institutions that may have a profit motive. And, indeed, there are other possible dangers inherent in too much collaboration:

- losing the Press's particular identity or branding;
- shifting priorities away from the Press's own mission;
- instability of consortia;
- loss of control over quality control;
- loss of control over scheduling;
- heavy investment required in internal communications with collaborators;
- clashes due to differing policies;
- loss of in-house skills (CIC, 2001).

Indeed, the CIC (2001: 14) argues that, "We believe that a university press can grow, prosper, and serve its university well only if its keeps control of (1) its acquisitions; (2) its finances; (3) its copyediting; (4) design; (5) production schedule and specifications; (6) and its marketing." On the other hand, "The areas with highest potential for non-local collaboration are: (1) distribution and warehousing; (2) sales representation; (3) promotion as it relates to digital initiatives and online communities; (4) purchasing; and (5) conversion of book and journal publications into e-books and databases". In other words, while certain strategic areas should remain in-house, others are more suited to collaboration and outsourcing.

2.5 Conclusion

This chapter has attempted to provide some context to the notion of transforming AISA's publishing division into a scholarly publishing house. The chapter began by providing an overview of scholarly publishing in South Africa, and then a snapshot of the potential competitors for the proposed 'AISA Press' was given. From this competitive analysis, it emerged that there are niches available for scholarly publishing in South Africa.

Based on this local contextualisation, attention then shifted to the various models of scholarly publishing available world-wide, with a view to identifying the best practices used and then assessing their appropriateness for a scholarly publisher within the AISA framework. As was argued in the Introduction, such a comparative survey is valuable because, according to the literature, experiences from other countries can be applied in the South African situation.

For this reason, attention was paid to the university press model in countries such as the USA, UK, and Australia, as well as to the experience of scholarly publishers in other African countries. The models selected for discussion were all non-profit and focused on increasing the accessibility and availability of scientific, academic research. Most of the institutional bases (whether a university, research organisation or other, similar body) provide a subsidy for the publishing concern, and this subsidy is very often publicly funded. Apart from university presses, attention was also given to the publishing models employed by other research institutes world-wide, including the highly prestigious and well known Brookings Institution and the Hoover Institution. What is significant in these cases is the different models they have followed to structure their response in terms of publishing research. What comes out of any survey of such 'best practices' at other research institutions, however, is that publishing is seen as an essential role for any authoritative research centre. What differs is how the publishing function is structured and how much emphasis is placed on publishing, as well as whether institutions make a strategic decision to publish only their own, in-house research findings, or other important research as well.

An analysis of these various models of non-profit scholarly publishing throws up several implications, as identified by this study, for the process of setting up such a publisher. These include the following:

1. Defining an editorial mission statement and strategic objectives;
2. Identifying a niche, or several key niche areas, based on end-users' needs;
3. Assessing the product mix, especially in terms of creating a balance between academic or scholarly works, and policy-oriented pieces;
4. Drawing up a marketing strategy to make the most of the new branding;
5. Improving dissemination and distribution networks;
6. Identifying potential strategic partnerships and collaborators;
7. Assessing what can be done with the resources available (both staffing and funding resources), and what growth needs to be built into future budgeting exercises;
8. Setting indicators (both quantitative and qualitative) for evaluating the performance of the new Press.

All of these issues will then need to be decided upon, and will thus be discussed in the proposed Business Plan in Chapter 4. This planning process can be inserted into the information life cycle identified by The Stationery Office (TSO), as depicted in Figure 9. It could be summarised that the current study, in terms of the feasibility study that it attempts to conduct, is an *assessment* of the information life cycle at AISA. The proposed Strategic Plan forms part of the *planning* process. When this plan is implemented, the activities of *publishing*, *disseminating* and *evaluating* will come into play. Thus, this study can be seen as an integral part of the information life cycle at AISA.

Figure 9: The Information Life Cycle

Source: Hook, 2002: 4.

Chapter 3
Finding a Niche: Assessing Market Demand

3.1 Introduction

There is clearly a moral and pragmatic imperative for more scholarly publishers in Africa, relating to the provision of indigenous platforms for African scholars and "redress[ing] the marginalisation of African knowledges" (Mlambo, 2007: 11). But this study is also concerned to look more closely at the actual needs and desires expressed by African scholars in relation to a scholarly publisher, and the question of whether the narrow scholarly market can sustain another press in this region.

This chapter focuses on what is commonly known as market research – investigating the habits of the target audience, and making forecasts based on the data. In particular, the focus is on assessing the demand for scholarly books among AISA's target audiences. The chapter will assess the market demand for a scholarly publisher, based in South Africa, and focusing on the publication of material relating to Africa in the social sciences. AISA's primary audience, as derived from its Act (no. 68 of 2001), is policy-makers (both government and civil society or 'think tanks') and academics, largely in the social sciences (in a broad, interdisciplinary sense), and in South Africa first of all. Other audiences are important, but are seen as secondary.

The chapter reports on the results of a questionnaire-based survey among a sample drawn from this target market. In so doing, it attempts, with a view to Figure 10, to define and demarcate some of the uncontrollable factors that influence marketing research and management, and to define the target market more clearly than has hitherto been done for AISA. In this way, the correct marketing mix of promotion, product, place and price may be established and applied.

But why the need for market research? All research organisations and their scholarly publishing arms operate in a competitive knowledge market. For this reason, it is important to have a well-defined niche in which each organisation operates, so as not to duplicate work and so as to be sustainable in terms of market share.

Erdmann (1999: 2) argues that successful publishers understand their readership and publish

Figure 10: Factors Affecting Market Research
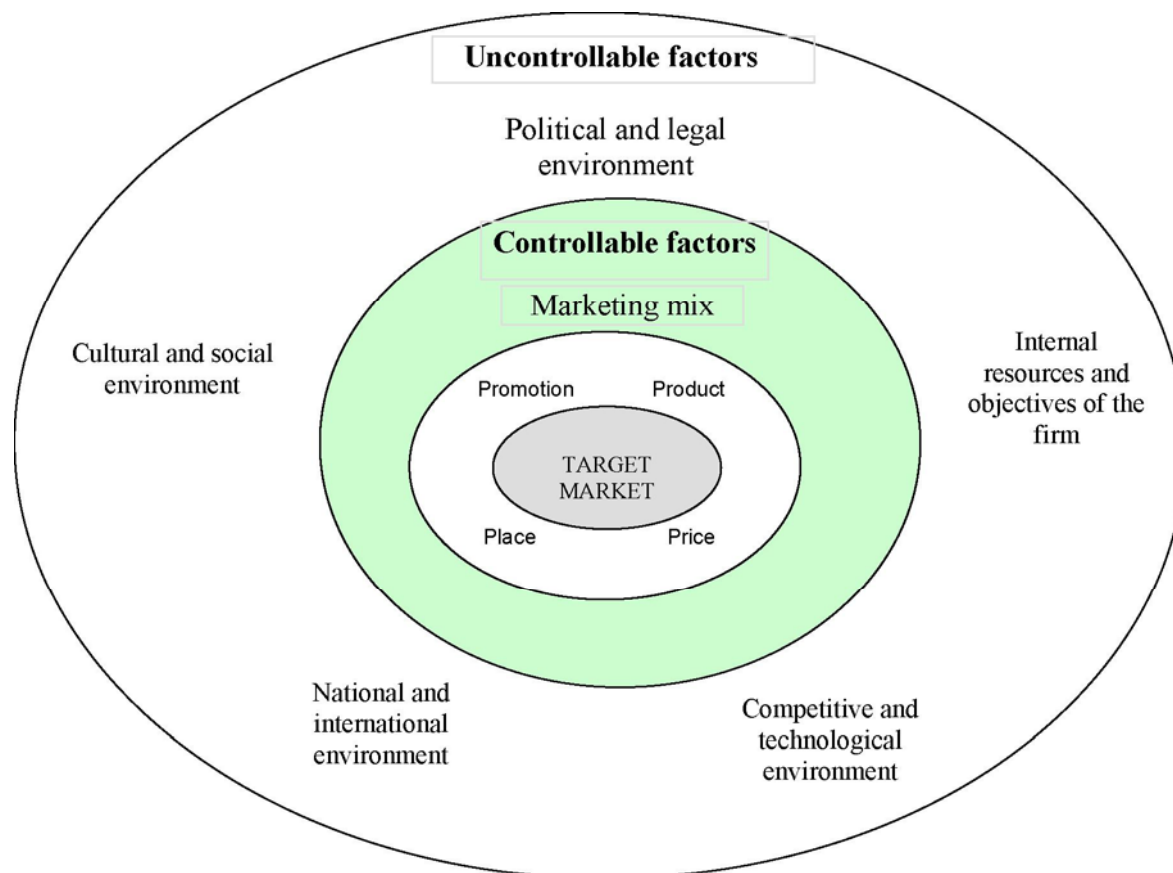
"to fill a real, not perceived, need". Scholarly publishers need to specialise in a particular area and develop skills in that area, so as to develop a reputation and thus attract the best manuscripts for publication. Woll (2002: 21) argues that the "first key to establishing and running a successful publishing company is to define your editorial niche". A niche suggests that there is a well-defined market for publications on a specific topic – in other words, there is a strong economic component to this concept, as well as the idea of defining a focus (Matthews, 1996: 6). Moreover, "Having a reputation for publishing good work in a particular area also strengthens marketing and sales initiatives" (Robinson, 2003: 2).

An example of a scholarly publisher working in a very small, focused niche, but operating successfully, is the Canadian Institute of Ukrainian Studies (CIUS) Press. This press has published more than 130 books on this small area of scholarship, as well as producing a peer-reviewed journal (CIUS, 2004). The new Pretoria University Law Press (PULP) is also an

example of a new venture focusing on a specialised niche area. Other presses have more widely defined niches, but the importance of a specific focus must be emphasised, from both a business and a strategic point of view.

How does one go about identifying such a niche? One means is to ask potential authors and consumers of the products of a publisher: "No-one involved in scholarly communication in an intermediary function can afford to forget that it is what the authors and readers want that counts" (Watkinson, 2001: 35). Thus, an attempt is made in this chapter to assess user needs – as both authors and readers – through market research, and, in this way, to identify potential niche areas for publishing. Significantly, as Houghton (2000) points out, defining a target audience is a different process in the field of publishing, and specifically scholarly publishing, from that which obtains for many other kinds of products. He argues that

> … the decision to buy is not made on the basis of the content, directly, but on the basis of other 'values' and cues.
> A new scholar to a field might make extensive use of abstracting and key word searching to identify articles to read. More experienced scholars might use other signals, such as:
> - the institutional affiliation of the authors,
> - who the authors are,
> - the title of the journal,
> - knowing the work of the editor and editorial board members, or
> - of the brand – the publisher and publishing stable.
>
> Because the decision to consume is made in these ways, these things become important sources of value. Content may be King: but authorship, quality control and branding are major elements of value.

What this long quotation highlights is that "A readership is not a market. Publishers' main interest, if they want to survive, should not be who reads a book, but who buys it" (Derricourt, 2002). The market survey will thus include actual purchasers of AISA products in the past, and asks questions about book-buying habits, in an attempt to identify an economically feasible niche. This niche should, ideally, emerge from combining AISA's traditional research strengths with the expressed needs of the market. To date, AISA has developed research expertise in material on African countries, from a social science perspective, and it would thus make sense for its publishing programme, or a scholarly publisher growing out of that publishing programme, to focus on these traditional strengths (see Appendix B for a full backlist of AISA titles). The focus is on post-independence, and

even more specifically contemporary Africa, and the general topics have included development, politics, social issues (especially in terms of urban geography), and economics.

But is there indeed a market in AISA's traditional research areas? Some would argue out of hand that there is no such market, especially in the North. Robert Molteno of Zed Books, for instance, expresses considerable pessimism regarding the viability or marketability of African scholarly publishing, pointing to the "decline in interest in area studies in countries in the north" as well as trends in the tertiary academic sector such as "declining library budgets, increasing student impoverishment and low academic salaries" (cited in Gray, 1997: 2). More recent studies – or perhaps more optimistic scholars – would argue that local publishers should be encouraged, even if only as a political gesture to the North. Terence Ranger (cited in Gray, 1997) has argued, for instance, that African research needs to be controlled by African scholars, and that includes the publication and dissemination of that work. Such scholars, to be sure, tend to focus on the importance of the activity of publishing rather than (or as well as) the viability of the market.

It should be noted, in this regard, that what a commercial (or Northern) publisher might consider a viable market differs from that of a scholarly, non-profit publisher:

> Books of extraordinary significance are being produced every year which whilst not justifying the criterion of normal commercial viability, do most certainly justify themselves in terms of the target readerships they seek to achieve in specific circles, whether nationally or internationally. And it has been made evident that the achievement of these target readerships bears little relationship to accepted marketing demands. (Farrell, 2004: 1)

On that somewhat ambiguous note concerning the appropriateness of marketing research for scholarly publishing, we turn now to the target audience survey. By asking the question, "what do the authors and readers want?", we hope to establish whether there is indeed a viable and economically feasible niche market for a scholarly publisher in South Africa.

3.2 Survey of Target Audience Needs and Market Trends

This section seeks to answer the question of whether there is indeed an expressed need for a(nother) publishing house focusing on scholarly works in the (broad) field of African studies. The analysis is based on a literature survey and a questionnaire survey carried out

with a sample of representatives of AISA's target audiences, as well as an analysis of potential competitors in this market (see Chapter 2). The market survey was carried out by means of a questionnaire (which was drawn up with the assistance of Statomet at the University of Pretoria, and which can be found at Appendix A), which was e-mailed to a large sample of AISA's members, as well as the full list of associate researchers affiliated with and peer reviewers used by the Institute. This specific means was chosen because of the low costs involved in an e-mail survey (AISA currently has no budget for market research), combined with the circumstance that AISA's target audience is a highly 'wired' one – more than 90% of members and peer reviewers use e-mail regularly and have personal e-mail addresses. However, it was borne in mind that e-mail surveys tend to provide low response rates, and the results are therefore more exploratory than indicative.

As the survey is intended to be exploratory and to identify trends and patterns in terms of needs, rather than to provide detailed quantitative information about the sample population, it was not felt necessary to draw a representative or random sample of the entire population of scholarly book consumers (see Tustin et al., 2005; Oppenheim, 1970). The data generated should thus not be seen as representative of the entire South African academic sector, for instance. It should also be noted that the possibility of bias is high, as the respondents were already familiar with AISA's publishing programme and products.

Given this sample population and exploratory approach, the initial sample size was 745, but this was reduced to 612 after a number of e-mail addresses turned out to be faulty or had changed, or the messages bounced back unread. (The survey was undertaken at the same time, unfortunately, as mergers were taking place at South African universities, which resulted in many changes to e-mail addresses and problems with computer servers during the period in question.) Of the total, 70 responses were received, indicating an 11.4% response rate. This was considered representative of the sample, in that e-mail questionnaires are generally accepted to have lower response rates than other forms of survey, but it was also disappointing – indicative of a general apathy among South African academics when it comes to publishing, perhaps? Or perhaps merely indicating how very busy such academics are, with publishing only one priority among many competing demands of teaching, research and adaptation within a changing higher education context.

The questionnaire was sent out in March 2005, and a reminder was sent out a month later. The results were coded and analysed with the assistance of Statomet at the University of Pretoria.

3.2.1 Key Characteristics of the Respondents

The sample population, by its very nature, was largely academic or university-based, with significant sub-sectors drawn from government (including parastatals) and business. This reflects AISA's traditional markets: the universities and their libraries, government departments, parastatals, non-government (civil society) research organisations, and a few companies (usually their business libraries, which actually buy the books, as opposed to those who may read or use them). However, the responses did not equally reflect all these sectors: the large majority (77.1%) were from university-based academics and another 10% from other research organisations. The remaining 12.9% of respondents were from government departments, or were based in businesses, schools or publishing houses. A few (n=3) listed their job title as "consultant".

To drill down one more level: the respondents were largely senior academics, with 44.2% being at associate professor level or higher. And some 71.4% of respondents have doctoral degrees. This is significant, as it is academics at this level who are believed to purchase the most books for their own use, as well as supporting the wider academic book sector by prescribing publications for course adoption, recommending books for their libraries to purchase, and recommending books for post-graduate students. This, then, is the core of the university press market, and the sector which should be targeted most closely by a scholarly publisher.

In terms of countries of origin or work (as the two are not always the same, especially for migratory African academics who may work in the USA or UK), the respondents were largely, but not overwhelmingly, based in South Africa – 51.4% (n=36) of the sample work in South Africa. Nine other African countries were also represented (Nigeria, Ghana, Botswana, Morocco, Kenya, Uganda, Swaziland, Ethiopia and Tanzania), most of which are Anglophone – which is a good result for a study of this nature. In the North, not surprisingly, the USA was best represented (with 14.2% of respondents), followed by the UK, Canada, France and Germany. There were also responses from Australia, Cyprus and Oman. Unfortunately, and despite growing interest in African studies in the region, no responses

were received from Asian countries such as China, Japan or India. However, the bias towards South African respondents reflects AISA's priority focus on South Africans as its primary audience, followed by others on the African continent.

It is clear that AISA cannot set up a viable publishing house without marketing its publications successfully to the university sector. The academic, or more precisely, university market is a mature market rather than an emerging one, and means of reaching this market have been identified and indeed 'tried and tested' over the years (cf. Weir-Williams, 1999). The market is fairly clearly defined, and is not inherently difficult to reach, although this may involve non-traditional marketing methods and direct marketing (including targeted e-mail campaigns, inspection and desk copies for course adoption, exhibitions at major conferences, and so on). The means of reaching this market will be elaborated upon below. And, as will become clear in the discussion of the results of the survey, there are gaps in the market that AISA could viably fill.

Identification of a niche based solely on the results of the survey would inevitably be biased in favour of the academic disciplines best represented by the respondents – and nearly a quarter of these (22.8%) were from Political Science or associated disciplines. A significant group were also from History (18.5%), with representation also from Geography (10%), Education (8.5%), Business Science (5.7%) and Sociology (4.2%), as well as a few responses from 15 other disciplines – a very good spread of responses indeed. These disciplines, with the exception of Business Science and to some extent Education, are in any case the key focus areas of the Africa Institute, although it aims to cover the social sciences more broadly. Thus, any bias that emerges may be in part due to the past and current publishing and research profile of the Institute, which in turn will influence its future directions in terms of a niche and mission statement.

3.2.2 Publishing Needs

The literature suggests that one of the key problems facing indigenous publishers is the lack of interest shown by writers, especially established or well-known authors, in publishing with African publishing houses. These reasons are linked to: (a) seemingly unbreakable contracts with Western publishers; (b) higher royalties, often in foreign currency; (c) the desire for an international readership; and (d) an attitude of distrust towards indigenous publishers (see, for example, Asafo, 1999: 29). The survey thus attempted to support or refute this apparent lack

of interest and, in the process, to ascertain the publishing needs of the sample group. It began with the simple question, "Have you ever published a book?". Nearly half of the sample (47.1%) indicated that they had previously published a book – a large proportion, which reflects both the seniority of the sample (an academic's publishing history is taken into account for promotions purposes in most countries) and their probable reason for answering the survey, based on their demonstrated interest in scholarly publishing.

Even more interesting was the finding that more respondents had experienced difficulties than not in finding a publisher for their scholarly output (30% had experienced difficulties, while 25.7% had not, and 44.2% gave no response – presumably because they had not yet tried to publish a book). The reasons given for these difficulties accord with those identified by Njinya-Mujinya, Asafo and Habomugisha (1999: 95–97), in the context of African scholars choosing to publish their works with foreign presses rather than with local (Africa-based) presses. According to these authors, foreign presses are selected for their credibility and prestige, their world-wide distribution and marketing, the quality of their production, and their high standards (i.e. they are perceived to select only the best quality books). In contrast, the problems identified with African presses include the following:

- Many books are aimed at small markets and do not benefit from international marketing;
- The presses are not well-known (in terms of reputation and branding);
- There is little economic support for publishing in African countries;
- The publishers exhibit a lack of professionalism;
- Delays in production are common;
- Publishers set prices that are unaffordable for locals;
- And there is a simple lack of sufficient publishers.

As a result of these factors, Njinya-Mujinya, Asafo and Habomugisha (1999: 97) argue, local publication of an African scholar's work is often perceived as the last resort, and may only be considered by some academics if a foreign press has already turned down a manuscript. While this survey has found real support for local publishing (with around 40% of respondents indicating that it was important to them to keep African intellectual property within Africa), the problems identified remain real ones. Moreover, the respondents indicated that there were also many problems encountered in attempting to publish with foreign

presses: "Publishers do not want to publish academic titles by Africans from my own experience". Some of the difficulties listed by the respondents in this survey included the following:

- *Suitability*: Finding a publisher suitable for the work, or one interested in publishing materials on Africa. It seems that insufficient publishers focus specifically on Africa, or even on Africa as a core area among others. One respondent noted, "Many publishers do not like a regional orientation, preferring a systematic approach in keeping with a commonly held view that regional specialisation is outdated." Moreover, it seems that some fields and disciplines are well represented among publishers, while others are almost absent.

- *Location of the author vis-à-vis the publisher*: It was noted that finding a publisher from a distance, if based away from the main (foreign) publishing bases, can be difficult, because of communication difficulties (this in spite of the use of e-mail). A local publisher is thus preferred by many respondents.

- *Commercial focus*: Various respondents indicated that their works had been rejected because these were not considered "commercially viable". This was particularly the case with scholarly works that were not intended as textbooks and work based on doctoral research (such as dissertations) – a world-wide phenomenon rather than one restricted to the (South) African context. The market for such books was also considered too small to be viable for certain more commercially oriented publishers. As indicated earlier, scholarly publishers may still consider a manuscript viable where a commercial publisher would turn it down. However, it should be noted that not all manuscripts are viable, and this is a valid reason for rejecting a manuscript – in other words, authors' expectations may not always be realistic.

- *Limited readership*: Linked to the previous point, several respondents had been informed that the market was not large enough for their intended book, or that it could not be published because it did not appeal to "an international readership".

- *Marketing*: Publishers were taken to task for limited marketing of books after publication. This complaint is widespread.

- *Peer review and bias*: The basis of the publishing decision for many scholarly publishers, rather than a purely commercial motive, is often the peer review process. This process is open to criticism, but the respondents also charged that the process is biased. They argued

that peer review is sometimes unreasonable, leading to unjustified rejection. As a result, some scholarly presses accept "only a tiny percentage of the submissions" – perhaps indicating that the demand is greater than the current number of presses can fulfil. Moreover, one respondent suggested that it was at times by-passed altogether in favour of a network of influence or (at worst) cronyism: "If you are not known by publishers or editors you are not likely to have anything published."

- *Professionalism among publishers*: It seems that the criticism of publishers regarding production delays is a valid one, as several respondents had experienced long delays – "especially in the social science field". This could result in material being outdated by the time it appears in press. Another criticism, in terms of a lack of professionalism, was that some presses do not even acknowledge receipt of manuscripts or book proposals – and this critique was directed particularly at the foreign presses. A third problem related to the quality of editing and production.

- *Affordability*: One respondent called for greater social responsibility among publishers, citing the key difficulty as "finding a publisher who can make books available at affordable prices and thus contribute to growing a reading public".

If one looks at the results more carefully, a regional pattern also emerges, beyond the bald statistic of 30% of respondents experiencing difficulties in finding a suitable publisher for their work. Those who did not experience problems in finding a publisher were *all* either from the developed countries (mostly the USA) or from South Africa – implying either that the latter country is providing outlets for much of the work produced by its academics, or that South African academics are being accepted into the "networks of influence" that control much of foreign scholarly publishing.

What all this implies is that there are problems that go beyond the simple fact of insufficient numbers of publishers. Moreover, any publisher that wishes to be successful would have to take these points into account and ensure that they fulfil these expectations on the part of the potential authors and purchasers of its books.

Why do academics seek to publish their work? Studies differ as to the reasons why scholars publish. Pedersen (1998), for instance, argues that traditional motivations are no longer the only factors, in the UK context:

> Even in the UK's ivory towers, publication is no longer merely a means of communication. It has come to be a way of evaluating academics, and can be a major factor in professional advancement. It can also help the academic – or his or her department – attract more research funding from outside bodies. So there are practical reasons of promotion and tenure for publication.
>
> Of course, this is not to discount the more esoteric reasons for publication – the desire for immortality in print and the resolution of 'priority of discovery' disputes. Ignoring funding and CVs for a moment, one of the most important reasons for scholarly publication is still to inform peers of research findings, and to be informed by them in turn.

The questionnaire in this study supported some of these findings, although it found that scholarly communication is still one of the most significant factors. The most important factor, according to the respondents, was to advance their discipline (with 92.8% rating this factor as either very important or important) – which suggests that academics are highly motivated to work in specific fields and are committed to their work. This explains why the second highest rating was reserved for recognition by their peers (88.5%) – or "communicating with my peers", as one respondent put it – closely followed by 'personal satisfaction' (78.5), 'developing my CV' (78.4%), and 'enhancing my chances of promotion or tenure' (77.0%). Of course, this point may be taken too far, and some commentators argue that one of the roles of the publisher is to guard against scholarship becoming "less beneficial to its readers and more of a service to the careers and personal enrichment of authors" (Jaygbay, 1998: 1).

One respondent took the concept of responsibility or commitment even further, arguing that a major factor when deciding to publish was "serving my continent by participating in research and disseminating knowledge for true human development". Similarly, one respondent suggested several related factors: "dispelling ingrained myths and stereotypes and simply outdated images of Africa and improving the circulation of higher quality information and knowledge of Africa … (and) making the fruits of my research in Africa available to Africans in Africa for their own purposes if there is use to be had". Another suggested a more pragmatic motive: "providing lecture material for the courses I teach" – which also reveals a significant deficiency in the books currently available, a point to which we will return later.[21]

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[21] Although scholarly publishing is not strictly concerned with the production of textbooks, it seems there is a considerable need for regionally appropriate learning materials and supplementary or recommended reading at the tertiary level.

Becoming eligible for book awards was of some importance (35.6%), but monetary rewards were considerably less important. This supports the finding by Waelde and McGinley (2005: 97) that "large numbers of academics who work in scientific research are not 'in it for the money' in the sense that they either look to, or depend upon a commercial return from their innovative work". Pedersen (1998) argues similarly: "In the vast majority of cases, UK scholars do not publish for money. The average academic is too pleased to find a publisher for his or her monograph or journal article to start making many financial demands about royalties or rights income."

However, there is another side to this story – and, once again, it reveals a regional split. The subsidies that academics working at South African universities earn from that country's Department of Education clearly play a role in influencing these academics to publish more. This is reflected in the finding that, of those who found subsidies to be 'very important' when deciding to publish, 13 out of 16 (81.2%) were South African, and in the case of 'important', 16 out of 25 (64.0%) were South African.[22] Royalties were also found to be more important to South Africans than to any other group (81.8% of those who found this factor 'very important' or 'important').

Once the decision to publish has been made (and a manuscript has been produced!), the next step is finding a publisher – no easy task, as we have seen. Respondents were asked which factors they took into consideration when selecting a publisher. The results buttress their stated reasons for publishing in the first place: academics want to disseminate their research results as widely and as quickly as possible (see Table 4 for more details of the responses given). Thus, top of the list of factors when selecting a publisher was distribution – which is the physical channel for "communicating with the author's peers". Above all, authors seek a publisher that will be able to sell their books world-wide and make their work visible to as wide a range of their peers as possible. This is a significant finding, given that an important UK publisher has argued that "The central problem of academic [scholarly] publishing is distribution" (James Currey, 2002: 1).

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[22] It should also be noted, in this regard, that the current subsidy or funding formula of the Department of Education is heavily biased towards the production of journal articles rather than books. This may be having a depressing effect on the production of manuscripts for South Africa's scholarly publishers, but this hypothesis remains anecdotal rather than established; more research is required in this regard.

The distribution of books (especially by African publishers) within Africa is hampered by a lack of infrastructure, and outside of the continent by a lack of resources (see Lawal-Solarin, 2003: 4). The difficulties of distribution are exacerbated by the small size of the local market: "The South African market for published products is relatively small and spread over an extended geographical area. This means that logistics are difficult and distribution costs high" (Gray, 2000b: 1). The key solution that is usually proposed, especially for a small publisher with limited means, is to go the co-publication or licensing route. Other, more innovative, solutions are also required.

Table 4: Factors Considered when Selecting a Publisher

Factor	Not Important	Important	Very Important	% Very Important
distribution	1	24	40	57.1%
reputation of the publisher	2	24	39	55.7%
quality selection or peer review	3	30	34	48.5%
speed of publication	2	31	33	47.1%
service rendered to authors	8	27	31	44.2%
marketing efforts	12	27	28	40.0%
design, layout and packaging	10	27	26	37.1%
pricing of books	7	37	21	30.0%
mission of the publisher	30	21	11	15.7%
potential royalties	39	22	5	7.1%

Note: Figures do not add up to n=70 or 100% because not every respondent answered every field.

Secondly, and reflecting those respondents who make publishing decisions based on the development of their CV or to enhance their chances of promotion or tenure, academics choose publishers based on their reputation and their quality control (peer review) procedures. This is because the relationship between publisher and author is mutually reinforcing – if one of the two has a high reputation, then it enhances that of the other. And if academics are satisfied that their work has been fairly and rigorously judged – by experts in their field – then they are more willing to accept the decisions of the publisher, in terms of whether or not to publish a work, and whether it requires adaptation before publication. Thompson (2005: 46) refers to these related factors as the "indices of scholarly esteem", and argues that they are probably the most important factors that academics take into account when publishing.

Speed of publication, as mentioned earlier, is also important to the respondents. Research becomes quickly dated, and the window of opportunity for contributing to an academic

debate is thus limited. Moreover, from a publisher's point of view, if a book is dated then it is unlikely to sell well. However, this factor should be considered with some caution, too, as authors are often impatient to have their work appear in print and they may have unrealistic expectations of how quickly a scholarly book can be published.

Other factors considered of importance, but not primary motivations for the respondents to this survey in selecting a publisher, include the service rendered to authors, the marketing efforts made on a book's behalf, the design, layout and packaging, and the pricing of books. Factors that are seldom taken into account in advance when choosing a publisher are the mission of the publisher – i.e. whether it is non-profit or commercial in orientation (although one respondent did comment, "I much prefer university publishers. They are better and more trustworthy.") – and the potential royalties which may be earned. This suggests, once again, that academics' primary motivation for publishing is not commercial gain, but rather related to advancing scholarly debate in a particular field.

These results are significant, in that they show that there is a place for a publisher of quality, affordable scholarly books in Africa. The apparent lack of interest in publishing with locally based publishers has also not been supported by the research findings of this survey. While there may be some distrust towards local publishers, there is also a willingness to give them a chance, if they can attain high standards and supply the international readership that academics (and probably all writers) crave. Any local publisher will thus have to focus a large proportion of their resources and energies on distribution, both within the continent and further afield. They would also need to be focused in terms of editorial policy, especially with regard to quality control (peer review) and service. On a cautionary note, such a publisher needs to retain their ability to produce a book relatively quickly, which means avoiding cumbersome bureaucratic processes, and perhaps remaining small and focusing on a small (manageable) number of books published each year.

Moreover, in contrast to assertions in some of the literature on the topic (e.g. Asafo, 1999: 29), royalties have not been found to be of much importance in the publishing decision, Similarly, the mission of the publisher – whether non-profit or commercial in outlook – could be said to be of little importance to scholarly authors, who will rather look at the publisher's track record and reputation before making a final decision to publish there. The mission is

perhaps of greater importance to the publisher itself and its parent institution (e.g. a university), as the case may be.

Yet, before we can dismiss this matter, linked to the mission of the scholarly publisher is the question of intellectual property. While 54.2% (n=38) of the respondents did not feel that it was particularly important that African intellectual property should remain in Africa, a significant 40% (n=28) felt that this was important. The divide appears to centre around distribution and accessibility, versus quality – although this may be a false opposition, as the one does not necessarily preclude the other. The issues were concisely summed up by one respondent:

> It is important to me that African scholarly output circulates in Africa and contributes to building strong, sustainable humane life conditions for Africans. It is also important that strong publishers develop in Africa, along with strong libraries and strong schools and universities, as requisites for self-sustaining and sustainable development. It is important to me that African authors and creators retain control of their work to prevent it becoming unavailable due to failure of a foreign publisher/ producer/distributor to keep a work available under profitability criteria created by foreign markets.

Given the many factors at play when selecting a publisher, then, it is hardly surprising that few of the respondents claimed to have a preferred publisher. Of those who did (just 21.4%), most named university presses, including the South Africa-based Unisa Press, University of KwaZulu-Natal Press and Witwatersrand University Press; the Nigeria-based Obafemi Awolowo University Press; the US-based university presses of Ohio, Virginia, Indiana, and Wisconsin; and the UK-based scholarly publisher James Currey. It seems, given the diversity of these publishers, that the personal preference is based on previous good experiences, and not simply on reputation.

Without hard and fast preferences for specific publishers, the majority of respondents (82.8%) were open to the notion of AISA setting up a press, to fill the role of a scholarly publisher of African content, while 60% would consider publishing a manuscript with an AISA Press in the future (with a further 34.2% saying "maybe").[23] This is a positive outcome for the study, and perhaps an initial indicator of the depth of interest in publishing with AISA.

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[23] One respondent noted, "This questionnaire in itself would make me more inclined to look into the possibility." Indeed, there have already been several requests for more information and enquiries into the possibility of AISA publishing book manuscripts, since the questionnaire was circulated. In itself, this reveals the desperate need for additional publishing outlets for scholarly works.

The questionnaire went on to enquire into the respondents' perception of the possible benefits of publishing with AISA. The issues listed can be linked to the factors employed when selecting a publisher:

- Distribution: AISA's network of contacts within Africa was considered important by many, as well as the further existing links to the European and North American markets. The role of AISA's distribution partner in the UK, USA and Commonwealth countries, the African Books Collective, was highlighted and commended in this regard.

- Reputation of the publisher: AISA's reputation as a research institution is already fairly well-established, and would lay the basis for its reputation as a noteworthy scholarly publisher. The Institute's long-standing organisational existence bodes well for the stability and experience of any potential press. Its current publishing programme also has a good reputation, for high quality, relevant and interesting works on African issues.

- Quality: The quality of AISA's current publications was noted, in terms of both editorial work and production. And the publishing division's rigorous scholarly standards in terms of peer review were praised.

- Speed of publication: Comments were made on AISA's capacity and record to date for prompt service and speedy publication – although one respondent also criticised the Institute for its slow service in terms of publication. Again, this reveals to what extent respondents based their answers on personal experience.

- Service rendered to authors: It was noted especially that AISA's publishing division is accessible and approachable, as well as being professional and positive in approach.

- Marketing efforts: While it was suggested that more could be done in this sphere, some respondents appreciated the marketing efforts currently being made.

- Pricing of books: It was noted that AISA's pricing policy makes its publications accessible to an African audience.

In addition, the Africa Institute of South Africa was recognised for contributing to knowledge production in the African region. AISA's emphasis on African issues was seen as a benefit, because this area is so neglected by other publishers, especially in the developed world. Moreover, AISA is perceived as being committed to the promotion of Africa and to an 'Afro-

optimist' perspective: "AISA allows the publication of an Africanist vision of African issues rather than a blind critique of the continent as often encouraged by, especially, many Western publishers," noted one respondent. AISA's strategic position within Africa, as well as its network within influential political circles, were also considered assets.

As Wafawarowa (2003: 2) notes, African publishers have for years "struggled to present a new perspective of the continent through their publications in an environment that has been dominated by Western literature and perspectives, which have been until recently very pejorative and in most cases irrelevant to the needs of African education and cultural development". He goes on to argue that publishers in Africa can produce material that is highly relevant to the needs of the people on the continent, including the NEPAD priority areas and topics that indirectly support these initiatives, such as globalisation, democracy, governance, and conflict resolution.

One of the respondents provided a fairly lengthy answer to the question of the potential benefits of publishing with AISA, which supported the above arguments. He noted that AISA:

- "helps the works of Africans and African writers to be published in Africa and owned by African institutions;
- [provides] easy access for Africans to publish and also find a market within the continent;
- saves the time and energy that one wastes in trying to find publishers in Europe or America;
- helps to develop the capacity of African publishing institutions;
- promotes African institutions to be able to produce quality materials independently;
- enhances the African image as not only a consumer (importer) but also a producer of knowledge (exporter);
- encourages Africans to research and debate about their own situations (i.e. Africans studying Africa and solving their own problems) by providing easy avenue for distribution of discoveries in the continent for its academic institutions and others."

But the responses were not entirely positive, and some potential constraints to a publishing house at AISA were also mentioned. These include issues of resources and capacity. Some doubts were also expressed as to AISA's actual capabilities in terms of distribution, especially for books aimed beyond the southern African region and in the wider international sphere. The Institute's focus on socio-political issues was also questioned, as this may narrow

the focus or niche of the proposed publisher – which would, as discussed earlier, be an entirely suitable strategy for a small publisher. The improvement of the situation in terms of resources requires a high-level commitment to the notion of scholarly publishing at AISA, and underlines the importance (as noted in the literature survey) of managerial support for the viability of a small, institutionally located publisher.

In addition to such AISA-specific responses, some respondents merely highlighted the need for more publishers, wherever they may be based:

> There are relatively few publishers of academic books on Africa.
> Anything which increases the size of the field has to be a good thing.
> There is a need to develop viable publishers on the African continent.

The survey did not ask what kinds of publications scholars were most interested in, an issue which should perhaps be taken into account in any follow-up study. International studies suggest that journals are becoming ever more important, with other forms of publication being left behind:

> The publication of textbooks, monographs, and, in particular, articles in peer-reviewed learned journals has always been regarded as an important achievement and mark of success in an academic career. However, in terms of universities' research and teacher quality assessment exercises, textbook writing is not valued as highly and is largely ignored … Articles in a refereed scholarly journal were seen as more prestigious than published monographs, which, in turn, were more valued than textbooks. (Pedersen, 1998)

3.2.3 The Consumption of Scholarly Books

The next set of questions investigated the teaching and research needs of the respondents, or the actual use to which they put scholarly books and their consumption of such books. An initial question asked simply whether there were, in fact, sufficient scholarly books in the respondents' fields, with the important caveat that these books should *include African content* (for instance providing case studies on African countries, issues or contexts, or integrating research undertaken in African countries). The next question asked whether these books were affordable and accessible in the countries in which the respondents were based, as even the best books are of little use if they cannot be purchased and used by their intended audiences. These questions led to many academic respondents venting their frustration at not being able to find suitable publications for the university courses that they teach. The majority of respondents (67.1%) argued that there were not sufficient scholarly books in their field,

which included material on Africa. This was true of all regions, whether developed or developing, and points to a real lack of quality material in the marketplace – only one-third of respondents' needs for material for teaching and research were being filled.

Some of the fields identified by the respondents as being particularly lacking in suitable materials include the following: science and technology research, urban development and social geography, international relations (as opposed to African politics, in which there is a fair amount of material), education, legal systems, public administration (especially local government), and history. In addition, respondents bemoaned the lack of in-depth country case studies; books written specifically to be used as textbooks, especially regional or topical overviews aimed at the undergraduate without a specialist knowledge of specific African regions; and up-to-date works that link academic research with policy recommendations or interventions. At present, respondents claimed, much of the material available is often superficial and not based on solid research. At the same time, too many of the texts available are written by foreigners, especially Americans, and not by Africans, and do not contain appropriate regional case studies or in-depth local experience and knowledge. Currently, as a result, many lecturers have to supplement 'foreign' material with more relevant local publications, such as journal articles.

The criticisms in this regard were varied, but came down to a basic problem of a lack of locally produced materials:

> Although there are publications, they remain limited in terms of their analysis. This is mainly due to the fact that many of them are published by non-Africans who often underscore other issues (e.g. social structures), thus providing a one-sided, biased analysis.

> Most of the books simply ignore African examples in appropriate places or make only a passing reference.

Moreover, in addition to the lack of suitable local material, it was felt that the material that is available is largely not accessible or affordable – with the exception of many of those based in the developed countries, especially the USA, and a few South Africans. Nearly half (48.5%) of all respondents had trouble in accessing material or in paying for it, while 41.4% had fewer problems. Complaints centred especially around the affordability of books from the USA or UK.

The study attempted to elicit some indicators as to the use of books in teaching and research, as opposed to photocopies or 'course packs', but the results were inconclusive as few respondents answered the question in full. Similarly, questions aiming to reveal some indication of the scope of use of AISA publications were inconclusive – the results show that some of the respondents do use AISA publications, but answers to the question could not provide more detail. Perhaps some of this vagueness can be attributed to the question design – pointing to the importance of keeping questions simple in an unmediated questionnaire (cf. Tustin et al, 2005). However, the section does describe some general trends regarding the use of scholarly books by the respondents, and especially shows the perceived gaps in the availability of material.

The next section of the questionnaire investigated the respondents' consumption of scholarly books, from the point of view of their book-buying habits and certain reading habits. While hard numbers and quantitative data could not be extracted in such an exploratory study, it emerged that academics (at least those among the respondents) purchase books both from their personal funds and using their departmental or library budgets (or through recommendations to their university libraries). Around one-third of respondents (31.4%) purchase three or fewer titles a year, while at the other end of the scale another third (37.1%) purchase ten or more titles a year, with the rest falling somewhere in between. Some, moreover, wield considerable power and influence over what is purchased for their departments or university libraries, and scholarly presses would do well to identify such individuals and target them with relevant marketing material. A few, especially in the African countries, do not earn enough to be able to purchase any scholarly books using their own money. This problem of resources at African universities has been highlighted in various studies, but bears repeating.[24]

The library market, and especially the libraries at universities and other higher education institutions, is clearly an important one for scholarly publishers. Indeed, Andrews (2004: 50) points out that: "The [higher education] libraries hold the bulk of South Africa's scientific and scholarly information resources". A marketing plan to specifically target these libraries

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[24] See, for example, World Bank, 2003 for a more detailed discussion of resource constraints at African universities, including case studies.

should therefore be an important component of the business plan of the proposed scholarly press.

The study then attempted to gauge where academics purchase their scholarly books. All types of outlets listed are used to a greater or lesser extent, but the most popular were specialist academic bookshops (61.4%), general or trade bookshops (60.0%), and over the Internet, for instance from an online bookseller such as Amazon.com or Kalahari.net (55.7%). The importance of this latter outlet is growing, and scholarly presses would do well to consider this when planning their marketing and distribution of both new and backlist titles (especially given growing research findings that so-called 'long tail' marketing of backlist books is particularly effective, and inexpensive, over the Internet[25]). A smaller proportion of respondents (42.8%) is pro-active in obtaining scholarly books, requesting publishers' catalogues to obtain desk or inspection copies or to recommend books for library purchase. Other outlets mentioned include publishers' exhibitions at conferences (where discounted rates are a definite draw-card), second-hand bookshops, direct purchasing from research institutes that lack other outlets or means of distribution, and occasionally copies are requested directly from authors (but usually only if other means of obtaining a copy have failed first).

The importance of selling scholarly books through trade bookshops must be considered from a fairly nuanced perspective. While scholars may enjoy the convenience of purchasing serious non-fiction from trade bookshops such as Exclusive Books in South Africa, the majority of scholarly works are not available through such outlets. One of the reasons is caution from the booksellers themselves: "Trade bookshops such as Exclusive Books are wary of taking academic [scholarly] titles, even when they have some popular appeal" (Andrew, 2004: 80). The discounts required by trade bookshops may also be prohibitive for the average scholarly publisher, especially if they work in a non-profit environment. However, publishers should not dismiss this option out of hand, and it should be explored more widely. This is where the bargaining power of a publishers' consortium can add value.

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[25] See, for instance, O'Reilly, 2006. The concept of long tail marketing was first developed by Chris Anderson in his book *The Long Tail* (Random House, 2006). The "long tail" theory suggests that, using traditional marketing means, 20% of a publisher's titles and customers account for 80% of its sales. However, when publications are available for sale online, there is growing evidence to suggest that new audiences can be reached and that the deep backlist (the "long tail") can become more profitable.

Factors considered when buying a scholarly book were also identified (see Table 5 for more detailed results). Here, some interesting trends emerged, as the results are not similar to those emerging from the respondents' own publishing decisions. In other words, academics take different factors into account depending on whether they are writing (publishing) or reading (buying) a book. This can be clearly seen in the example of the factor of the publisher's reputation: while this is considered a very important factor when selecting a publisher, it is of much less importance when selecting a book (just 14.2% of respondents considered it 'very important'). Indeed, the reputation of the author is of more importance in the latter case (30.0%). Why is this the case? Books are *bought* because of their content and academic rigour, not because of who produces them, necessarily. Moreover, it seems that when an academic decides to publish, commercial and marketing motives – such as how many copies a book might sell – hardly come into play, although these are of increasing importance for publishers, even non-profit scholarly publishers. And, significantly, publishers must take into account issues of both prestige and marketing when making the decision of whether or not to publish a book.

Table 5: Factors Influencing the Purchasing Decision

Factor	Not Important	Important	Very Important	% Very Important
language of the book	1	23	33	47.1%
suitability for target audience	7	24	28	40.0%
suitability as a prescribed textbook	13	18	28	40.0%
price of the book	3	31	26	37.1%
reputation of the author or editor	12	28	21	30.0%
style of writing and appropriate language level	9	25	20	28.5%
inclusion of a good, user-friendly index	9	31	17	24.2%
publication date	12	29	15	21.4%
design, layout and packaging of the book	16	33	10	14.2%
reputation of the publisher	25	22	10	14.2%
geographical location of the publisher	40	13	3	4.2%

Note: Figures do not add up to n=70 or 100% because not every respondent answered every field.

The key factors for the respondents, when deciding to purchase a book, relate largely to suitability: is the book in an accessible language (47.1% saying 'very important'), does it meet the needs of its target audience (40.0%), and is it suitable for use as a textbook or

prescribed work (40.0%)? Moreover, it should be easy to read (28.5%), up-to-date (21.4%), and, not surprisingly, it should be affordable (37.1%). Other factors that make a book easier to use, such as a user-friendly index (24.2%), also enhance its chances of being bought, but are not of primary consideration when making a decision to purchase or not. And it seems that the truism that a book should not be judged by its cover is true of academics, as design plays a significant role in only 14.2% of cases among the respondents to this survey. Again, good design may enhance a book's chances of being bought, but it is not central to the publishing decision if the correct content is not there.

Interestingly, a few respondents noted that none of the factors listed is of particular importance, apart from the subject matter of the book: if it is on a topic that interests them, then they will buy it.

Because of the growing importance of the Internet and the open access movement, respondents were asked whether they preferred to read a book online or in print.[26] Academics revealed a certain conservatism when they expressed a preference for reading 'real' books, as one put it: 67.1% prefer printed books for their personal or research use, while 65.7% still prefer printed books for teaching purposes. Around half are willing to try online sources *in addition* to the traditional print materials, for either teaching or research use, but not one respondent claimed to use online sources instead of print resources. However, one respondent suggested, "Introducing a CD version of a book would make it even more appealing, especially in parts of Africa where Internet access is either inefficient or too expensive or not available at all." This is a useful suggestion.

However, certain factors would persuade the respondents to be more willing to read a scholarly book online. These include accessibility (80.0% answering that this would make them 'always' or 'sometimes' more willing to use an online version), convenience (80.0%), and cost (67.1%). Internet connection speeds and costs are significant in this regard, for at least 68.5% of respondents, and especially in the developing world. The format of online books appears to have little impact, although PDF is slightly more popular than HTML. Thus, if a publisher places its books online, it may attract some additional readers, and thus

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[26] These terms were defined in the questionnaire as follows: "Online means a book is available electronically on the Internet. It could be read onscreen or downloaded and printed out. In print means a published hard cover or soft cover edition of a book."

additional sales of its printed books, by making its material more accessible and visible. The experience of the HSRC Press in this regard would appear to support this contention.

What is significant about the Internet, as a number of respondents commented, is that people use it to find out what is available – as students are wont to say, "if it's not on Google, it doesn't exist". Thus, as Smith (2005: 2) argues, "If African publishing is to get on the world map, it might do well to focus more energy on the creative and energetic use of information and communications technology, to make sure that the messages about Africa originate in Africa." This is an extremely important part of the modern marketing mix, and should be considered against the background – as was found in the literature survey – of an absence, rather than a presence, of African scholarly publishers on the Internet.

In this regard, the initiative launched by Google itself, to enable Internet users to search for keywords within books as well as across website, is considered to be very significant. It is recommended that a small institution such as AISA link up with such major partners to collaborate in making its texts more widely known and available.

3.4 Conclusion

The chapter reports on the results of a questionnaire-based survey among a sample drawn from AISA's target audience. In so doing, it attempts to define the target market and its needs, and, in this way, to identify potential niche areas for publishing. It seems clear that there are gaps in the market that AISA could viably fill, especially in terms of both scholarly books and (post-graduate) textbooks that focus on South Africa and the Southern African region in particular, as well as the African sub-region more broadly.

The survey respondents were mostly senior academics, and it emerged as a strong recommendation that AISA cannot set up a viable publishing house without marketing its publications successfully to the university sector.

The survey, although based on a limited sample and thus exploratory rather than indicative in nature, did refute some hypotheses found in the literature. One of these is that writers have little interest in publishing with local publishing houses. This was certainly not found to be the case, with most authors apparently desperate to find publishers and keen to avoid some of

the problems they associate with international publishers – problems such as bias. Indeed, nearly half of the sample had published a book, and many had experienced difficulty in finding a publisher.

Why publish? The reason given by the overwhelming majority of respondents was to further scholarly communication, not for personal gain such as to gain royalties or tenure – although these may lend a competitive edge. This is borne out by the international experience, which shows that "In the vast majority of cases, UK scholars do not publish for money. The average academic is too pleased to find a publisher for his or her monograph or journal article to start making many financial demands about royalties or rights income" (Pedersen, 1998).

Respondents were asked which factors they took into consideration when selecting a publisher. The results buttress their stated reasons for publishing in the first place: academics want to disseminate their research results as widely and as quickly as possible. Above all, authors seek a publisher that will be able to sell their books world-wide. This is a significant finding, given that "The central problem of academic [scholarly] publishing is distribution" (James Currey, 2002: 1). And many of the respondents complained of a basic lack of suitable scholarly works in their fields of interest.

These results are important, in that they show that there is a place for a publisher of quality, affordable scholarly books in and on Africa. The apparent lack of interest in publishing with locally based publishers has also not been supported by the research findings of this survey. While there may be some distrust towards local publishers, there is also a willingness to give them a chance, if they can attain high standards and supply the international readership that academics seek. Any local publisher will thus have to focus a large proportion of their resources and energies on distribution, both within the continent and internationally. They would also need to be focused in terms of editorial policy, especially with regard to quality control (peer review) and service. And there is support for a product mix ("scholarship plus") of both scholarly books and higher-level tertiary textbooks, especially given the apparent lack of suitable, locally relevant material.

On a cautionary note, such a publisher needs to retain their ability to produce a book relatively quickly, which means considering their own capacity, and thus focusing on a manageable number of books to be published each year. AISA's capacity problems to date

did arise in the study, although more respondents were positive about the Institute's publishing programme than were negative.

Indeed, in this regard, it is very encouraging that as many as 60% of the respondents would consider publishing a manuscript with an AISA Press in the future (with a further 34.2% saying "maybe"). This is a positive outcome for the study, and perhaps an initial indicator of the depth of interest in publishing with AISA. But resources and capacity remain a significant concern, and marketing especially would be of great importance in establishing an 'AISA Press'.

With regard to marketing, the important factors appear to be world-wide reach, accessibility (and the linked factor of affordability), and adequate penetration of the appropriate sectors, such as university libraries. These can be achieved through collaborative distribution and co-publishing agreements, innovative direct marketing techniques, and use of the publisher's website both to publicise books and, eventually, to make them available online. The growing importance of technology and the online environment, in spite of many researchers' ongoing aversion to the elimination of 'real' books, was an expected outcome for the survey, which reinforces much of what is argued in the literature in this respect.

Finally, it is a positive outcome that so many books are apparently being bought each year! While resource constraints limit many academics in other African countries, it appears that a significant proportion of academics in South Africa and the developed countries continue to purchase books for their own use, as well as recommending them to their students and university libraries.

Chapter 4
Towards a Strategic Plan for 'AISA Press'

4.1 Introduction

Against a background of unequal power relations and unequal production of knowledge between the developed and developing world, there is a growing call for more scholarly publishers based in Africa to serve the needs of the African scholarly community. Specifically, there appears to be a need for a scholarly publisher located in Africa, focusing on African content, and targeting an African audience. The management of the Africa Institute of South Africa (AISA) felt that the Institute could use its existing capacity and strengths in the area of African studies, specifically from a social science and development perspective, and its networks on the African continent, as an institutional base for such a press, through the expansion of its publishing division.

A feasibility study, conducted by means of a literature survey and a questionnaire-based survey of a sample target audience, has shown that a need for such a publisher exists, and that there is indeed a demand for additional scholarly publishers on the African continent. Moreover, the respondents to the questionnaire survey expressed their support for the notion of such a press being based at AISA. This chapter thus sets out to develop a proposed strategic plan for such an 'AISA Press'.

Although the barriers to entry in setting up a scholarly publisher are declining – especially as technological advances have made publishing less costly – the costs are still significant, and so a well-thought-out strategic plan is required to set up a publisher for success. To guide us in our thinking, North (1998: 163) provides a list of possible challenges that could be encountered when setting up a scholarly publisher. These include:

- What are the expectations of the publisher from management?
- Does the press directly support the parent organisation's mission?
- Does it need to be financially self-supporting?
- What infrastructure and staff does it require?
- How will it be evaluated – in terms of value or income?

Crow's (2004) list of factors to be taken into account in a publishing business plan is equally useful in this regard, and overlaps to some extent with those of North:

- Market demand;
- Barriers to entry;
- Capacity;
- Marketing and awareness;
- Articulating a mission;
- Organisational will and support;
- Financial planning.

These issues, which will structure this chapter to a certain extent,[27] will be considered in parallel with the implications and recommendations emerging from the literature study and questionnaire-based survey.

The options that were identified at the outset of this study as being available for the development or transformation of AISA's publishing division include the following:

1. Develop the division, over a number of years, into a scholarly press operating along the lines of a university press;
2. Adopt a hybrid model for a scholarly publishing house, which includes elements of some of the different options;
3. Eliminate or downscale existing publishing activities, in favour of an electronic model of information delivery;
4. Enter into more joint ventures, whether for traditional collaborative book projects (i.e. in print) or in terms of electronic ventures;
5. Maintain the status quo: i.e. continue to publish as a division within the Institute (as is the case with many other research institutes world-wide).

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[27] The structure of this chapter is set out according to international standards for strategic and business planning, and draws in particular on the work of Bovée *et al* (2004: 99), as well as Crow (2004) and North (1998). The contribution of Jean-Pierre Labuschagne, an expert in the field, is also acknowledged.

From the literature survey and questionnaire-based survey carried out so far in this study, it can be summed up that it would be feasible for AISA to expand its current publishing unit into a scholarly press with a larger vision, mission, and scope – given certain conditions and assumptions. It seems most suitable, for instance, for the Institute to adopt a hybrid model for the structure and publishing philosophy of its press, rather than adopting a pure or 'typical' university press model, in particular because of the policy advice component of its work. Option 4, of expanded collaboration and co-publishing opportunities, is also important, and should certainly be carried out as an integral part of the development of an expanded 'AISA Press'. It is not recommended that Option 3, of eliminating or downscaling existing publishing activities, be considered – although electronic publishing must certainly be seen as an important strategy and challenge for the future – but Option 5, of maintaining the status quo, *is* a distinct possibility, especially if resources and institutional support are not forthcoming.

How should the decision be made, based on these options? One implication that arises from a survey of best practices in publishing at other research organisations world-wide is that the decision of whether to develop a publishing house or maintain an in-house publishing division relates very closely to the editorial mission and expected role of the publisher, and specifically to the policy of publishing either in-house research alone or both in-house and external research in one's field. If AISA is to transform its publishing division into a publishing house, then certain strategic decisions need to be taken, in terms of the expectations of the Institute's dissemination role and the importance thereof. Without this institutional support, at the highest levels, then it is recommended that the publishing division remain an integral part of AISA, and that it focus on publishing in-house research findings.

But, even if the division were to continue its activities virtually unchanged in form, it would still need to develop over the coming years to respond to new challenges and demands. For instance, the staff complement would need to grow to keep up with an ever-increasing pool of researchers and their research outputs. This would particularly be the case in terms of editorial and sales staff, but would also include administrative and marketing staff.

However, if the institutional support and resources are in place, then the study has provided evidence that it would be viable to transform the publishing division into a scholarly publisher. This chapter provides a basic business plan for such a venture. In summary, the

issues of planning and of implementation that will need to be taken into account in drawing up a strategic plan for a proposed 'AISA Press' can be diagrammatically represented as in Figure 11.

4.2 Mission and Objectives

According to the literature, presses that are set up with a vague mandate, or based on unsound publishing principles, may well be setting themselves up for failure (see for example North, 1998). The mandate required relates to the types and numbers of publications produced, as well as the general philosophy or ethos of the press, for instance its non-profit or commercial status, its sustainability, and its mission (Crow, 2004). The mandate also refers to the editorial policy, which generally comprises the publisher's publishing philosophy, the publishing list, and house style (Unesco, 1993: 25–27).[28]

The mission statement of the press needs to be carefully considered, as it forms the base of the publishing house and all of its decisions. A mission statement tends to be based on and reflected in the editorial goals; the publisher's niche; the market; and the publisher's goals and objectives.[29] In addition, as noted by North (1998: 163), the goals and mission of the parent organisation must align with those of the publisher.

Keeping these points in mind, a proposed mission for an 'AISA Press' would be along the lines of the following statement:

scholarly publishing *on* Africa, *by* African authors, *for* African audiences.

This translates into a publishing philosophy that prioritises manuscripts about African issues (relating to the niche area), that are written by African authors (mainly based on the continent, but also African authors based abroad), and targeted at audiences on the African continent (while the wealthy and large North American and European markets should be considered secondary markets). The mission also supports the broader NEPAD priorities of promoting awareness of Africa (NEPAD, 2001).

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[28] As AISA already has a house style, this aspect of the editorial policy will not be discussed in detail here. The house style was generated in 2002, is regularly updated, and is available to all authors.

[29] The aspects identified as important in developing a mission statement were sourced from Woll (2002: 26).

Figure 11: Planning and Decision-Making in a Publishing House

Source: Unesco, 1997, Chapter 3.

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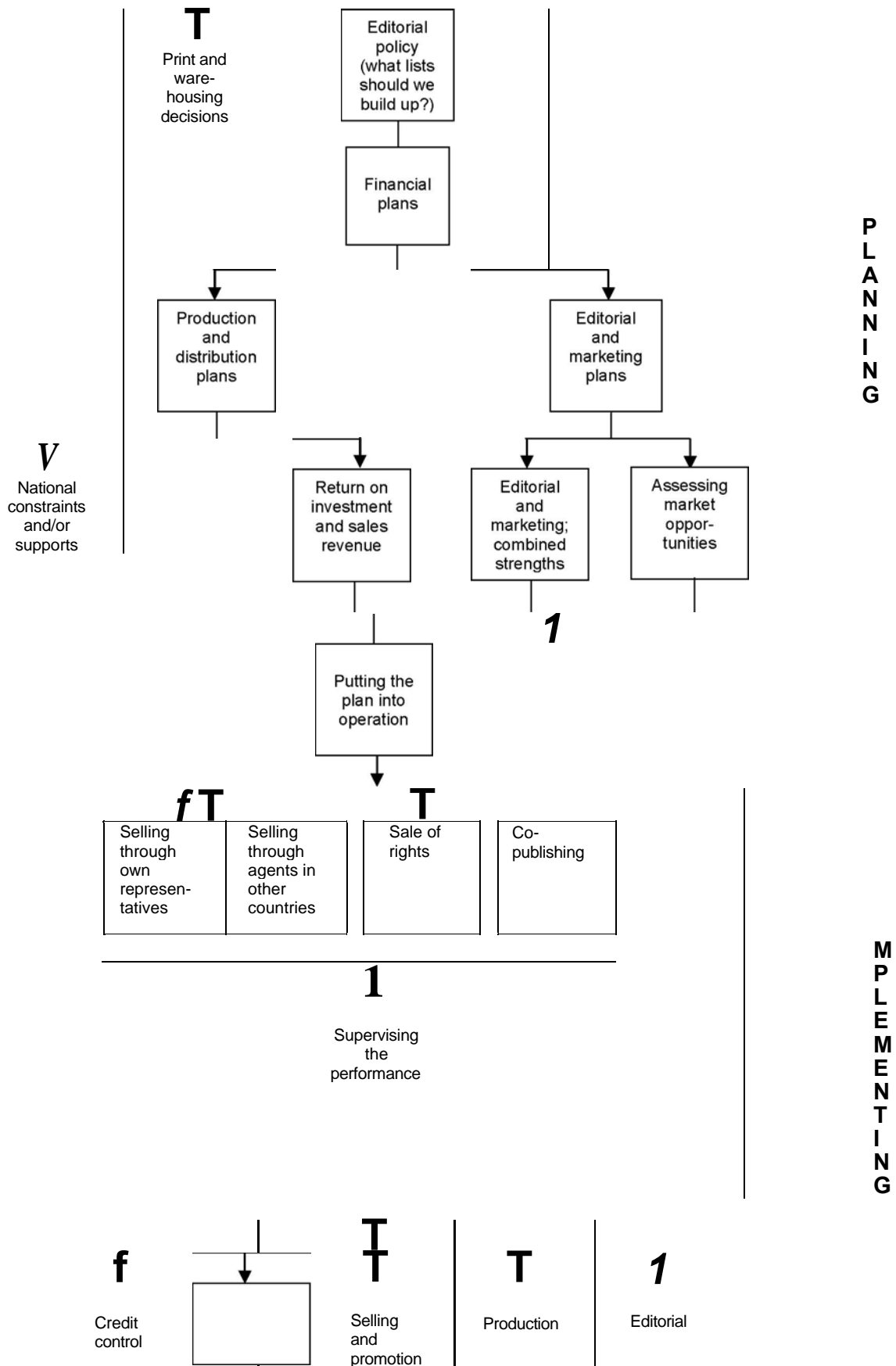
This mission statement focuses on what is published (in terms of both authors and themes), as well as the key readership or audience for the 'AISA Press'. Because this is not a commercial goal, the value of the Press immediately is interpreted in terms of a non-profit character (or at least reveals a commitment to accessible pricing), and a commitment to publishing the best quality scholarship available. While the principle of not for profit will be discussed under the section on financial planning, below, the importance of quality as a binding principle of all that is published must be emphasised here. This is an integral part of the mission statement. If the 'AISA Press' is to be a credible scholarly publisher, and confer prestige and credibility in turn on its parent organisation, AISA, then peer review and a functional publications panel or committee to evaluate submissions and make decisions about the publishing list are non-negotiable.

These elements should be seen as essential goals in support of the more general publishing philosophy. They could be listed as follows:

The 'AISA Press' is committed to:
- publishing the highest quality scholarship on Africa;
- providing policy advice and impact;
- guarding African intellectual property;
- providing a platform for African authors;
- making its publications widely accessible to African audiences and worldwide, through both print and electronic means;
- a non-profit ethos, aligned to subsidisation and cost recovery, in its pricing and financial management;
- professionalism in its publishing practice.

The publishing philosophy described above is both specific enough to guide decision-making and broad enough to provide flexibility and adapt to changing circumstances. This philosophy will also guide the development of the publishing list. The list will be looked at in more detail in the next section, Products and Services.

4.3 Products and Services

When describing a publishing enterprise, the products and services relate to the product mix of publications – i.e. what to publish? The decision of what to publish at the 'AISA Press', and in what formats, should be based on the strengths and reputation of AISA's own research, in order to develop a coherent publishing list. AISA's publishing division currently produces publications in a variety of formats, including books (both single-authored and edited volumes), research reports, a peer-reviewed, accredited journal, a newsletter, and a few online papers. The output (as can be seen in Appendix B) in five recent years (2000–2005) has been around six books a year.

Thus, AISA has an established publishing list. In terms of an 'AISA Press', the decision may be taken to continue with the current publishing programme, and 'transform' simply by means of a change in branding or identity. However, it is recommended that some list building take place, to develop a coherent publishing list with a strong identity. List building may involve assessing the existing list and then adapting or expanding publishing in certain areas; developing a new series, especially in terms of opportunities identified in the market survey; and/or managing the backlist of titles that continue to sell after the first year of publication (see Davies, 1995: 123–130). To begin with, the current list needs to be analysed to see how it supports the proposed publishing philosophy outlined above. In other words, is AISA already publishing the right kinds of material to meet the new, expanded goals of the 'AISA Press'?

Over the five years of 2000–2005, the publishing list expanded (up to about six new titles a year), but has nonetheless concentrated on certain specific areas: politics (16 titles), peace and conflict (nine titles), economics (seven titles) geography (six titles), reference works (five titles), development (four titles) and education (two titles). The strongest area, of politics, includes topics such as democratisation, elections and continental initiatives like NEPAD, and also overlaps with the second area of peace and conflict. These titles all focus strongly on Africa as a continent or on specific regions of Africa, and the authors were largely of African origin. Perhaps, in terms of the proposed publishing philosophy, more authors from other African countries outside of South Africa could be sought, but there has already been a distinct trend in this direction.

In other words, then, the current list already supports the proposed publishing philosophy. What could be recommended in terms of list building is maintaining existing strengths in African politics, economics and development, while new ventures could include developing a more substantial reference list to complement the few existing titles. However, a topic such as education dilutes the focus of the publishing list, and should not be continued. At the same time, care should be taken to retain a focus on contemporary political issues, and not shift or drift into historical issues.

In terms of new ventures, a potentially important area to branch into could be to fulfil the need (expressed in the survey carried out for this study and elsewhere) for significant and relevant study material and scholarly books for the continent's academics and broader higher education sector. However, this would depend on a management decision to move into this area or retain a more scholarly (rather than academic) focus. The notion of "scholarship plus", of offering policy-relevant work in addition to scholarly titles, is also a significant one for AISA, and it should produce such works within the same niche areas identified above.

To maintain the focus proposed above, it is suggested that, in addition to continuing to receive and review unsolicited submissions from academics across the continent, the role of Commissioning Editor would become central to positioning the 'AISA Press' as a key role-player in publishing on the continent. A more thorough audit needs to be carried out of the actual research material needs of academics in South Africa, in Southern Africa, and in the rest of the continent and beyond, and key works could be commissioned based on this audit. AISA's existing networks of scholars across the continent and world-wide would be very helpful in this regard, as they would constitute a significant resource. As the 'AISA Press' gains a reputation for publishing in specific areas, the unsolicited manuscripts received should also begin to feed more clearly into its key publishing areas. In the early stages, though, a severe weeding process would need to be followed to reject any manuscripts that do not fit the identified niche areas, while a formal peer review process should be followed for any unsolicited manuscripts that do fit the desired profile.

In addition to the themes to be covered in AISA's publishing list, the kinds of manuscripts to be published should be taken into account. It is significant to note here that it appears that the publication of monographs (substantial, original research by a single author) appears to convey more prestige than a multi-authored or edited work (which is often considered

'secondary' research or a 're-presentation' of existing research) – and such monographs are certainly more likely to win publishing awards (see, for example, Striphas, 2000). However, the proportion of monographs published at AISA (and more generally world-wide) appears to be declining, at least in relation to other kinds of books. This is perhaps the result of management decisions regarding what is of interest at AISA, as well as a consideration of the policy audience in addition to the typical academic or scholarly audience, but is also related to the more general trend of declining sales for monographs. AISA currently publishes mostly edited, multi-author collections or shorter research reports by one or two authors. If high quality is maintained, then the Press could become known for producing excellent edited works. Editorial standards will be very important if this direction is to be followed.

In addition to such edited books, AISA currently produces an interdisciplinary academic journal, *Africa Insight*. This provides an important outlet for shorter scholarly work, and, because it reaches a wider audience than any other AISA publications at present, it could serve to attract both authors and readers for the 'AISA Press'. For this to be done effectively, however, editorial quality is again of paramount importance, as quality attracts both readers and authors.

The product mix also needs to take into account a balance between print and electronic publications. The trend in scholarly publishing at present is to create parallel versions of publications that would traditionally have been produced only in print; in some cases, this has been taken to the extreme of producing electronic-only instead of print versions of publications. As AISA currently has little expertise in this field, and as the survey revealed continuing support for print publications, it is recommended that the balance at present lean more heavily in the direction of print, with a small, experimental electronic component. For instance, the Institute's scholarly books could continue to be produced in print form, while policy briefs and publications could be placed online or disseminated by e-mail. This would also help to both differentiate and balance the scholarly and policy 'arms' of the Institute.

4.4 Market and Competition

Once the mission and areas of specialisation of the Press have been determined, the next step is to assess market demand and analyse the competition. According to the literature, a company can gain competitive advantage through three main strategies: differentiation, cost

leadership, and focus (Bovée *et al*, 2004: 142). These can be spelt out, in the field of scholarly publishing, as having a viable niche area, making prices accessible, and focusing on a specific market, such as academics at universities, or policy-makers in government departments, as well as focusing on specific areas or themes when selecting titles to publish. This last aspect has been dealt with in the section on the publishing list (areas of specialisation), above, but will also be considered in terms of developing a niche area.

As the brief survey of the competition, in terms of other scholarly publishers in South Africa, reveals, there are gaps and niches in the existing market (see Chapters 2 and 3). The competitive survey revealed that South Africa's scholarly publishers publish in a range of fields, especially in the social sciences. Some of these could be considered an overlap with the fields in which AISA conducts research and publishes. Some of the areas that are well covered are conflict studies, election analysis, history, the arts and culture, and certain aspects of politics. Areas that are not as well covered at present – especially in terms of well-researched, in-depth studies – include issues of democratisation and governance, as well as the social aspects of economic policies.

However, what does seem clear from the survey of the publishing lists of selected South African scholarly publishers (in Chapter 2, Tables 2 and 3) is that they tend to focus more on South Africa than on the rest of the continent. AISA's greatest local competitors in terms of producing scholarly books on African themes are probably Unisa Press and the HSRC Press. In this regard, Unisa Press's collaboration with Codesria (the Council for the Development of Social Science Research) is particularly interesting, as it focuses on social science books relating to the African continent at large. The HSRC Press should also be seen as an important competitor, but perhaps more importantly as a potential collaborator, especially given that its parent organisation is the same as AISA's (the Department of Science and Technology).

The survey in Chapter 2 also revealed several weaknesses in the publishing programmes of research institutions: for one thing, they tend to produce publications (often 'reports' rather than scholarly books) as the result of donor-driven research, and not as the outcome of basic research. This can, but does not in all cases, result in somewhat superficial research that is of little direct relevance to the academic and wider community. Yet, at the same time, researchers and academics are struggling to find publishers, as the survey reported in Chapter

3 showed. This means that there is material available, and authors are seeking outlets, and a publisher needs to step into the breach.

In particular, if AISA carefully selects certain areas for publication – including its strengths of contemporary African international relations and politics (on topics such as democratisation, but not so much elections, which is already well covered), social and sustainable development, and reference works – and produces high-quality books, then it should be successful in carving its own niche in the market. Country studies or studies focusing on regions of the continent, in particular, would fill a gap in the market. This implies both differentiation from other scholarly publishers, and a focus on existing strengths.

Differentiation could also be successfully integrated with the proposed publishing philosophy, if the key target audiences are seen as African academics, universities and policy-makers, and the key pool of authors is also African. This element could become a very important strategic focus for marketing the 'AISA Press'.

The notion of cost leadership is also significant, although it must be considered within the context of a subsidised, not-for-profit environment. The section below on financial planning will also raise issues relating to this point. The 'AISA Press' will most likely not be run as a commercial (or even self-sustaining, in the short term) entity, and so the 'race to the bottom' in terms of prices cannot be entertained as a strategy. Having said that, AISA's financial backing for the 'AISA Press' and a commitment to accessibility rather than profit should keep the prices of AISA's publications relatively low. This pricing policy is also reflected in the suggested publishing philosophy outlined above, and reveals how the publishing philosophy permeates and influences decisions at all levels of the institution.

4.5 Marketing Strategy

Even if a very clear niche is identified, and excellent publications produced, the importance of marketing needs to be emphasised as one of the key roles of the publisher. It is one of Kling and McKim's (1999: 897) criteria for evaluating scholarly publishing, in that they describe the significance of publicity and of making the relevant audiences aware of a publication. Like any other company selling a product or service, AISA needs to create

awareness of its products and find a way of bringing potential customers and products together (through distribution).

As can be seen from the market survey, AISA has a key audience in the academic sector, especially in universities. It also markets its publications to government departments, embassies, NGOs, businesses, specialist libraries, schools, and individuals. This target market is too diverse for an undifferentiated marketing strategy (Bovée *et al*, 2004) to have much impact. Thus, the marketing strategy must be tailored for the different audiences.

Based on the findings of the survey reported in Chapter 3, as well as the associated costs of advertising and other forms of promotion, the following strategies are proposed for contacting potential customers and creating awareness among the target audience. The first, and perhaps most important for a small scholarly publisher, is direct marketing, especially through e-mails to a targeted and specialised database of potential customers. E-mail marketing is widely accepted in the scholarly market, and it is relatively easy to develop good, targeted databases from conferences and other academic networks, without the expense of purchasing databases or lists from commercial companies. List-sharing is also common among non-profit and scholarly organisations, which contributes to keeping costs low and expanding networks.

And the added benefit of direct marketing in this way is that international customers can be reached as easily as local ones. In today's 'globalised' environment, a scholarly publisher can no longer focus only on the local market – it must compete internationally if it is to survive and justify its continued existence. For smaller publishers and those with limited means (and in particular those with the perceived disadvantage of being based in a 'developing' country) – who cannot afford to set up offices around the world, or to employ huge sales forces – this means that partnerships are becoming more important than ever and that moving into the electronic environment is inevitable and indeed essential.

A second key strategy implies a further move into the electronic environment, via Internet advertising, both on AISA's website and on that of its partners. These include distributors such as the African Books Collective, Sabinet or OneWorld, as well as perhaps Google Books or Google Scholar. In the longer term, AISA needs to consider e-commerce, i.e. making its publications available for sale over the Internet. The questionnaire survey has

shown that there is growing market demand for online services (e-commerce) and to a limited extent for online publications (usually in parallel with print publications).

E-commerce, or as it is becoming increasingly known as "long tail" marketing (see above), is particularly useful for backlist marketing and sales. While developing a new frontlist of titles will be important in positioning the new 'AISA Press', sales of the backlist are also of great importance in keeping scholarly publishers afloat. Backlist scholarly titles tend to show good sales in the first year after publishing, but then, unlike many trade titles, they continue to show slow but steady sales for a number of years. For this reason, scholarly publishers tend to keep their books in print for longer than commercial publishers – and an online platform such as Google Books may be especially useful in creating new awareness of such titles, again helping to drive ongoing sales. A close relationship between a site creating awareness and publicity, and driving visibility, such as Google Books, and an e-commerce site for sales of books could be a very useful way of extending the "long tail" performance.

More traditional marketing methods are also of importance, but the emphasis placed on electronic marketing methods is deliberate. Complementary marketing, such as targeted exhibitions of books at significant conferences and seminars, should focus on reaching audiences for whom Internet access is problematic and on consolidating relationships with audiences who have already been reached through the Internet (e-mail or online). Exhibitions at AISA conferences, for instance, draw a focused group that has already demonstrated interest in AISA's research areas, which will be reflected in the publications the Institute produces. Costly publicity events, such as book launches, can be effective if coupled with other events at which there is a 'captive' audience, but it is recommended that the 'AISA Press' make use of existing publicity opportunities rather than creating separate ones of its own. This will help to reduce marketing costs, but should have little negative impact on actual sales figures. Similarly, any corporate advertising should be seen as an opportunity to promote the 'AISA Press' at little or no additional expense.

Print advertisements, if carefully placed, can be of occasional use, but the costs are usually unaffordable and responses are few – but cooperative advertising, for instance through the swapping of advertising space in journals, may be of more use.

It should be clear from the discussion above that strategic relationships with partners in terms of marketing are essential. For instance, AISA has seen the need to venture into a partnership with distributors to improve its reach, impact and accessibility. This has already led to a differentiated pricing structure, with a rand price for Southern African sales, a dollar price for African sales, and a pound or dollar price for the rest of the world. This is significant because the local market, and particularly the wide African market, is extremely price sensitive. The issue of pricing and costing will be discussed in more detail below, in the section on financial planning.

4.6 Operations and Capacity

An important question to answer is what infrastructure and staff a publishing house will require (North, 1998: 163). Significantly, scholarly publishers vary in size, from the very small to huge multinational corporations. The two main indicators for measuring size (and thus growth) in this regard are number of titles published annually and numbers of staff employed. According to Robinson (2003: 4), "the smallest presses issue five or fewer titles per year", while a well-established press such as Oxford or Cambridge could issue as many as 1 500 or 2 000 titles a year. The literature survey (cf. Chapter 2) puts AISA on a par with, for instance, Cork University Press, which publishes around 20 books a year and two journals, with just four full-time staff members. The 'AISA Press' should be able to manage a similar output if given sufficient resources and organisational support, although its current output of about six book titles and one quarterly journal title is sustainable. What seems clear is that there is no single model or structure that can be applied in terms of the resources required.

In terms of human resources, all publishers need staff in the following categories (see Figure 12 on the structure of a well-organised publishing house):

- **Management**: A Director is required to set the editorial direction and goals of the publisher, and to supervise the staff. The Director in a small press will play a very 'hands-on' operational role, and will thus need experience in a range of publishing aspects, from editorial to production. Within a context of limited resources, the Director will also play the role of Commissioning or Acquisitions Editor, recruiting authors and manuscripts to build up the publishing list.

Figure 12: Structure and Flow in a Well-Organised Publishing House
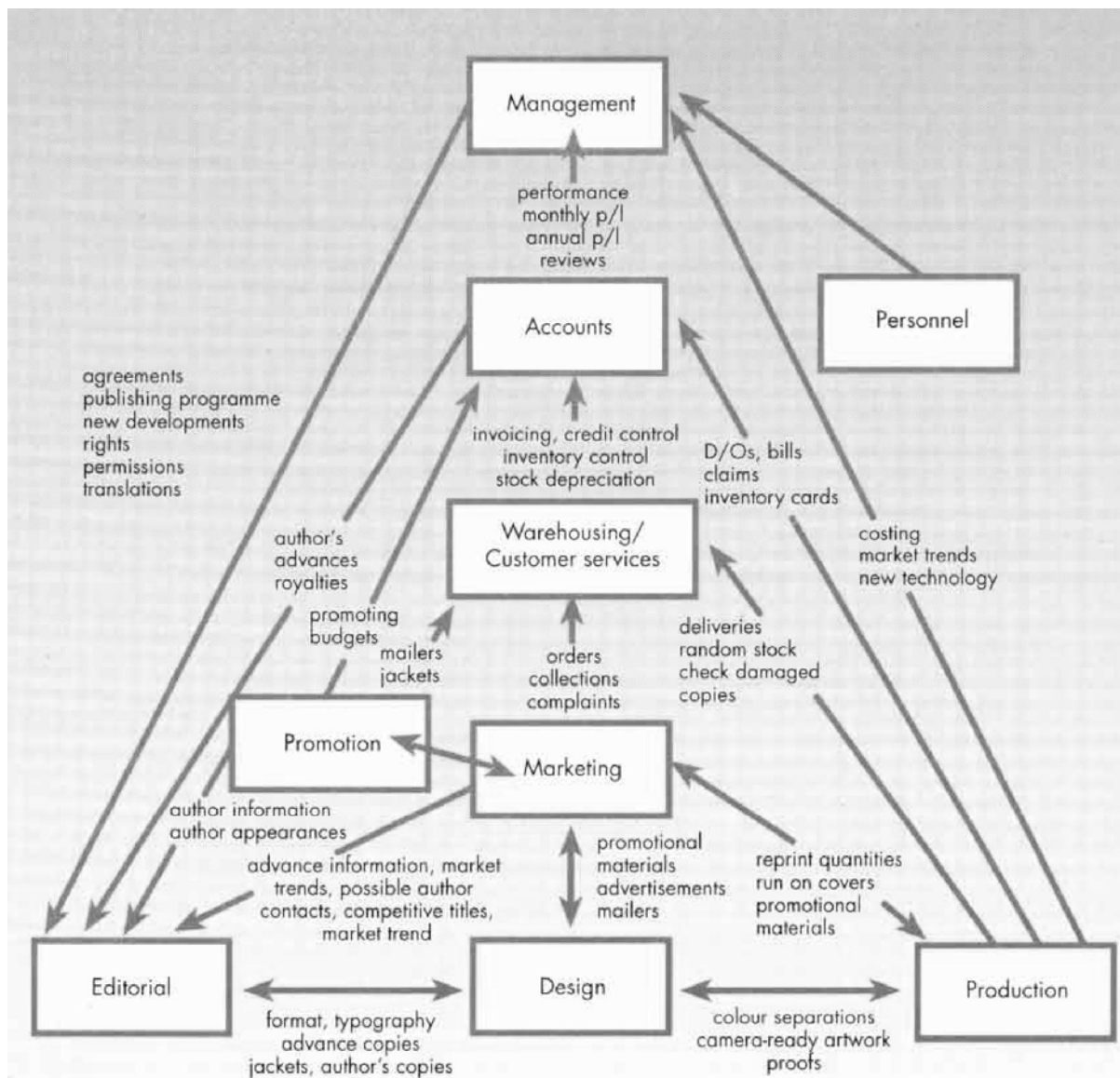
Source: Unesco, 1997, Chapter 3.

- **Editorial**: The core staff of the press, editors develop and prepare manuscripts for typesetting. In many modern publishing houses, this function is outsourced, and in-house Editors become 'project managers'. Scholarly publishers sometimes buck this trend because the nature of the manuscripts they publish requires highly specialised editing for which there is little training available. If a good team of freelance editors could be developed, then the outsourcing option would be feasible, but it is rather

suggested that a small number of very good manuscripts be edited and produced each year than a larger number that contain sloppy work.

- **Production**: Production includes design, typesetting, proofreading, and printing. Several of these tasks may be outsourced, in particular those requiring large investments in equipment and training, such as typesetting and printing. Design may also be outsourced, but the final decision should remain an in-house one. Other tasks, like proofreading, could be performed by the Editor(s).

- **Marketing**: Marketers promote publications, with a view to generating income from sales and subscriptions. They also create visibility and awareness for the products and the organisation, and track the impact of their marketing efforts. In larger publishers, the Sales function is separate from the Marketing division, but it would be argued here that this cannot be justified in a small press. Rather, some of the sales and distribution functions may be outsourced.

- **Distribution**: Importantly, publications must be distributed to the customers, and order fulfilment is a significant part of the role of the Distributor. This function is often outsourced to specialists, although a small publisher may also elect to sell directly to its customers if it is in regular contact with them (e.g. through seminars and conferences). I would argue that a small publishing operation cannot really do justice to the distribution needs of its titles, especially with diverse markets being targeted. Outsourcing or a partnership with a similar publisher with similar needs is thus recommended.

- **Administration**: This support function is always necessary, especially given the volume of correspondence generated by a publisher and other routine tasks. An Administrative Assistant may also be asked to support other staff, for instance through providing back-up in terms of customer service and distribution.

- **Finances**: In a well-organised publisher, the finance division would provide sufficient and accurate information as required to make decisions and report on financial management. This is a significant role, and while the finance division of AISA may

be able to handle the role, it is recommended that a dedicated financial officer be allocated to serve the 'AISA Press'.

AISA at present has four staff members: a Director, an Editorial Assistant, a Marketing Assistant, and an Administrative Assistant.[30] With a target in mind of producing twenty books per year (in accordance with international standards), it is recommended that these be supplemented with an additional Editorial Assistant, as well as interns. In addition, a Commissioning Editor needs to be appointed to drive the development of the publishing list – or the Director needs to take on this role for the short term – while a specialised Editor is also required in the medium term to focus on the development of policy-relevant electronic resources. In the long term, an in-house Designer could be considered, depending on how the list is growing and the volume of work. The Finance function at AISA falls within a separate division (Corporate Services); it is recommended that a specific liaison be designated to handle the financial services for the 'AISA Press', and to run the Press as a cost centre.

There is a need, in terms of the human resources, to carefully select the staff that are hired for the 'AISA Press', as these must understand and promote the scholarly, non-profit ethos or editorial policy of the press. Moreover, the staff required need to have specialised skills and have received specialised training. Unfortunately, there is no specialised training available in scholarly publishing in South Africa at present.[31] As a result, an important task of experienced and senior publishers in this sector is skills transfer. It is also recommended that more use be made of interns, particularly publishing students, to provide them with some background and capacity building in the scholarly publishing field.

4.7 Financial Planning

As shown in the literature, scholarly publishing is not a very profitable business from a financial, 'bottom-line' point of view. Thompson (2005: 26), for instance, points out that "most publishers tend to generate relatively low levels of profitability". He goes on to show that

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[30] As of mid-2006, when the case study was being finalised. There have been staff changes since then, and especially a change in management at AISA.

[31] Publishing has only recently become a specialised area of study at South African universities, with Pretoria University and the University of the Witwatersrand offering degrees in publishing. But this is still not focused on the special demands of scholarly publishing.

Among commercial academic publishers, it is not uncommon for overall profit margins to be in the region of 5–10 per cent. Many of the American university presses operate on a break-even basis and, in some cases, depend on grants and subsidies of various kinds from their host institutions in order to balance their accounts.

André Schiffrin (2007), head of the non-profit independent The New Press, places the profit margin for many presses even lower, at 2–3%. He defines the concept of a non-profit press in more detail:

> Well, [being a non-profit publisher] means you don't have shareholders. You don't have people who are going to say we want 10% at the end of the year or 5% or whatever or 20% as the conglomerates want. So that, we have the advantage of taking on books that can just break even, and that is, unfortunately, the case with many important books, perhaps most important books.
>
> In fact when I started in publishing, the head of Doubleday, the largest American commercial firm, used to say they weren't expecting to make money out of any of their hardcover books. They made money out of the paperbacks and the book clubs and so on. So publishing is a place where you have to take risks, where you have to know that you're not going to make an enormous amount of money in the short term. And if you have shareholders now who say we want more immediately, then you're in trouble.

An important question to consider, then, when looking at financial planning for a scholarly publisher, is whether the press needs to be financially self-supporting (North, 1998: 163). The Institute receives public funding, via the Department of Science and Technology, and at present runs its publishing programme from this core funding. It is envisaged that this subsidy situation will have to continue, although the 'AISA Press' should be set targets for return on investment and sales revenue. In other words, the Press should remain a subsidised, non-profit entity, but should aim to recover costs within a reasonable period, through a variety of revenue streams.

These revenue targets should be relatively conservative, as Andrew (2004: 53) warns:

> Profits are not excessive: mature businesses in schoolbook and academic publishing normally achieve a return on sales of 12–15% and general publishing only 5–8%. Many new or underperforming businesses achieve well below these returns. The industry as a whole achieves around 10% net profit.

However, conservative targets do not mean that the 'AISA Press' should not be run as a 'business'. Although subsidised, cost recovery should form a fundamental part of the editorial

policy of the Press, and would thus become a significant factor both in deciding which manuscripts to publish (with the option to cross-subsidise valuable but less viable publications) and in the marketing of publications. Targets should take into account the industry norms: In the USA, for instance, "On average, university presses recover 87% of the cost of publishing scholarly books from sales. An important component of this revenue comes from payments received for permission to reproduce works in, for example, anthologies, paperback editions, coursepacks, electronic reserves, and document delivery services" (AAUP, 2005).

Importantly, cost recovery cannot simply be accomplished by raising prices. The pricing strategy needs to be sensitive to the African context, even though it is generally assumed that "The forces of supply and demand determine the market price for products and services" (Bovée *et al*, 2004: 10). Prices cannot simply be worked out by the 'traditional' calculation of 'six times unit cost', as this produces inflated prices (Watkinson, 2001: 26). The pricing strategy thus needs to take into account current market prices, while keeping all publications as accessible as possible. One strategy, which is already being followed, would be to differentiate prices according to markets, with a lower price for African countries, for instance. Table 6 reflects the average prices of books in 2004, and reveals that there is a definite differential in terms of local and imported publications – mostly relating to the costs of importing books, as well as higher production costs in developed countries. This could be used as a selling point when promoting AISA's publications.

Table 6: Average Prices of Books (Rand), 2004

Category	Price (Rand)
Academic/ Professional Books (Imported)	350-400
Academic/ Professional Books (Local)	150-250
Adult Non-Fiction (Imported)	200-250
Adult Non-Fiction (Local)	150-200

Source: Andrews, 2004: 60.

If prices can only be raised so high to improve cost recovery, then the financial strategy of the 'AISA Press' must try to reduce costs wherever possible. This, too, is not an easy task.

Scholarly publishing is generally acknowledged to be an expensive form of publishing, as it places a premium on quality, both in terms of the content of the book (leading to editorial and review costs), and in terms of production values (leading to paper, design and other production costs).

Table 7 reflects some of the key factors that contribute to the cost of publishing books. The table shows that the main factors affecting the price of 'academic' (including scholarly) books include the small market, with low print runs, and production costs. The table refers to print runs as being "marginally viable" at 1 500 and "economically unviable" at 750, but it should be borne in mind that this is not necessarily the case for scholarly publishers, which usually work with such small print runs. Moreover, Adebowale (2002: 4) cites research that found that half of all books with an ISBN sell fewer than 250 copies each year, world-wide – an alarming finding, which could not be corroborated in the confines of this study.

Table 7: Factors that Contribute to the Cost of Books

Categorisation of cost	Factor	Impact on educational books	Impact on academic books	Impact on general books
Costs arising from external factors	Exchange rate	The international price of paper is affected by the exchange rate.	Affects price of paper	Affects primarily imported books but in a significant way
	Small market with low volume print runs	The market is large in terms of student enrolments, but small in terms of expenditure	Major impact	Major impact
	Lack of culture of reading	Affected	Affected	Most affected – affects discretionary purchases
	Extensive photocopying	Beginning to feel the effects of photocopying at school level	Area most affected, which takes print runs from the marginal level of economic viability of 1,500 to the economically unviable 750	Not affected
Costs arising from educational, political, and economic policies	Submission and approval systems	Adds considerable cost to publishers' overheads – estimated 2-3% of retail price	N/A (Although policies such as mergers can have a huge impact)	Affects literature and reference titles, adding to publishers' overheads out of proportion to the likely sales
	VAT	14% on all books in all sectors		

Categorisation of cost	Factor	Impact on educational books	Impact on academic books	Impact on general books
	Number of languages	Fragments market into some economically unviable sectors	Market is too small to be economically viable in languages other than English	Only English and Afrikaans viable
Costs relating to the supply chain	Distribution and supply systems	Choice of supply system by provinces has impact on bad debts, cash flow, corruption – often adds to cost	There is a cost involved in reaching different audiences, and distribution in Africa is especially expensive	N/A
	Management of the supply chain	Lack of communication and knowledge of budgets between depts and supply chain results in inability to predict and plan volume, capacity, & working capital – which increases costs	N/A	N/A
	Cost of importing and marketing imported books	Imported books carry an increased marketing, sales, and distribution cost. The original publisher markets, sells, and distributes to a South African agent, who in turn pays for freight, and marketing, selling, and distribution costs in South Africa.		
Costs relating to the production of books	Extent	Longer books are more expensive		
	Format & binding	Uneconomical formats and expensive bindings add to cost		
	Colour	The use of colour is more expensive than black and white		
	Hardback / soft cover	Hardcover is more expensive than paperback		
	Production costs	High production costs (negotiation of prices, quality delivered, errors) can drive up costs		
	Paper quality	Good quality paper costs more		
	Royalties	High royalties drive up price directly		
	Publishers' overheads	High overheads drive up price or reduce profitability		
	Print run	Low print runs are more expensive than high print runs in terms of unit cost		
	Discount to booksellers	Usually 30%	Usually 35%	Usually 35% - 55%

Source: McCallum, 2004: 13–15.

What the table does not mention in relation to scholarly books is costs relating to peer review, and certain other additional costs:

- High first copy costs, and low marginal costs;
- High review and production costs – which may account for up to 45% of total production costs;

- High non-article processing costs (including marketing and administration), which may add up to 28% of the total;
- High physical distribution costs, which can potentially be offset by electronic publications (Houghton, 2000).

All of these make scholarly books generally more expensive than trade or general books. In other words, though, cutting any of these costs could make the publication of those books more economically viable. Indeed, according to Watkinson (2001: 29), some of the main avenues by which a scholarly publisher can cut costs is by cutting marketing, asking authors to prepare camera-ready copy, or by cutting royalties.[32] Unfortunately, these are not unproblematic solutions – some costs will simply have to be accepted as non-negotiable up to a certain point. For instance, cutting marketing may cut direct costs, but could also lead to lower sales and thus less revenue. Secondly, authors seldom have the expertise to prepare camera-ready copy, leading to the work potentially having to be done twice over, in many cases – or running the risk of looking unprofessional. Thirdly, cutting royalties may be feasible – AISA, for instance, like many scholarly publishers, pays no royalties under its present policy "until and unless production costs are recovered" – but this may deter some authors. The questionnaire survey, however, indicates that this is not a significant problem, as scholarly authors tend to publish for various reasons other than royalties and do not usually choose a publisher based on the royalties they expect to be paid.

One strategy that AISA can use to cut costs is to keep staff numbers and expenses as low as possible, through outsourcing certain roles. Another strategy is the judicious use of print on demand (POD), where an analysis of the possible market for a title indicates that it would be under 500 copies. One of AISA's distribution partners, the African Books Collective, is already using POD to make more African titles available in Europe and North America, without the prohibitive costs of freight.

In addition to questions of costs and revenue, what is necessary if the 'AISA Press' is to run professionally are vastly improved financial systems, including reports from the Institute's Finance Division. As noted in the section on human resources, it is recommended that a

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[32] "The larger commercial publishers, who specialise in monograph publishing, have to make money but they do not explain how they do it in this infertile field. One can assume that it is a combination of rigorous cost control, low print runs and high prices" (Watkinson, 2001: 29).

specific liaison be designated within the Finance Division, to provide a more comprehensive service to the 'AISA Press' and to ensure that reporting meets the auditing standards of the National Treasury (because AISA receives public funding). This person could also assist with proper costing of publications and with drawing up realistic budgets.

At the same time, the publishing division and potentially the Press sorely needs to develop its business skills, given their prime importance in running a successful publishing house (cf. Woll, 2002). While there is a need to maintain a balance between the research focus of the list published and the management skills acquired, attention would need to be paid to issues such as capitalisation (for instance, whether funding, through a subsidy, is expected to continue and the rate of increase of funding); small and even declining markets (and the search for new markets); staff retention; and the ongoing development of a clear vision and strategy for the future, including a plan for improved distribution and marketing. There is also a lack of skills in negotiating contracts and managing the intellectual property built up by AISA's publishing programme over the years. It needs to be recognised that intellectual property is the key asset of any publisher.

4.8 Critical Risks and Constraints

The issue just mentioned, of developing business skills at AISA, is a key constraint on the publishing division's ability to transform into a scholarly publisher. At present, there is little focus on business aspects when making the decision of which manuscripts to publish, and marketing and distribution are so small-scale as to render some of the texts inaccessible rather than widely available, as the intention should be. This is related to the important task of selecting a Director for the Press who has both vision and authority. The Director should have experience in publishing management, as well as hands-on publishing skills.

There are also, as for most scholarly and indeed other publishers in South Africa, constraints with regard to funding. The expansion of the publishing division would require additional funding in addition to what is currently allocated to publishing costs and overheads – and it is not clear that such funding is actually available. As AISA receives the bulk of its funding from the Department of Science and Technology, a special motivation would need to be prepared to request additional funding or seed money to start up the 'AISA Press'. Alternatively, special funding could be sought from another donor or agency. This constitutes

a key risk. The 'AISA Press' is likely never to become financially self-supporting or sustainable, even if it becomes highly successful in terms of cost recovery. For this reason, the success – or even the continued functioning – of the Press relies on a government department continuing to fund its parent body, the Africa Institute. Should the DST's priorities change, then the future of the Press could be placed in jeopardy. This is a risk linked to any business dependent on external funding.

Related to funding is the risk of losing money rather than recovering costs. The market survey has shown a real demand and support for a new scholarly publisher, but this may not translate into the submission of quality manuscripts which can be turned into saleable products, nor into tangible results in the form of sales. For this reason, both the commissioning and marketing roles in the proposed 'AISA Press' are absolutely crucial – and AISA currently lacks capacity in both these roles. Focused marketing, in particular, must be seen as an essential component of the Press.

As discussed in the section on marketing, above, the 'AISA Press' must have an online presence and make good use of the Internet and electronic marketing opportunities. A strategic response to open access will also have to be developed, possibly through the use, to begin with, of print-on-demand technology. At present, this is a real constraint, as AISA lacks expertise and skills in this area. The added risk is that, if the Press is not able to provide authors with world-wide distribution, this would lead to a decline in manuscript submissions, as it is a key area that authors look for in a publisher.

Another capacity constraint relates to the current staff complement, both in terms of numbers and skills. Training is required to focus the staff on the challenges of working in a scholarly publishing environment, and it is important that any additional staff hired bring significant skills and experience with them. A well-functioning Publications Committee or Advisory Board is a concomitant prerequisite for the good functioning of the Press. Otherwise, the Press runs the not inconsiderable risk of a loss of quality in the publications it produces, and a concomitant loss of reputation for the Institute – in stark contrast to the potential gains in reputation envisioned by the creation of the 'AISA Press' in the first place.

Another constraint or risk factor lies in the Institute itself and its culture. There are difficulties in changing corporate culture, wherever transformation is mooted – for instance, there may

be resistance from AISA researchers who see their own reputations as being threatened by the growth or possible autonomy of the 'AISA Press'. Although the reasons for this resistance are not entirely clear, some tensions did surface during the preliminary research for this study, in the form of aggressive questioning of the need for an 'AISA Press'. One of the factors may be a fear that funds channelled into a Press would be funds lost to the research section. Again, a change in priorities, this time at managerial level within AISA, would place the future of the 'AISA Press' at risk, if earmarked funds were to be diverted to research or to any other future priority rather than to the Press.

The most significant risk, then, is that AISA would embark on a transformation of its publishing component without the requisite institutional support. The literature identifies this as perhaps the most important aspect in determining the success or failure of a scholarly publisher (cf. Gray 2005). Indeed, an important recommendation of this study is that AISA should only continue with plans to expand or transform its publishing division if there is buy-in from all levels at the Institute – including the DST, the AISA Council, the CEO and management team, the Director of the publishing division, and the general staff who will be called upon to support the new initiative. Without such support, the Press cannot succeed and the status quo should rather be maintained.

In summary, Gray (2005) argues that there are four essential elements that must be in place for a scholarly publisher to be successful (in South Africa, and in the current context). These are:

- Institutional support;
- The presence of a skilled and discerning publishing director, with real authority to make publishing decisions;
- A strong and focused marketing drive;
- A dissemination strategy based on online open access and intelligent use of print-on-demand (POD).

If these elements, as discussed individually above, are not in place, then each in turn may pose a significant risk to the potential success of the 'AISA Press'.

4.9 Evaluation

How do we measure the success of a scholarly publisher? Much of the literature on success in publishing focuses on success in business terms – maintaining a competitive edge, developing a sound business plan, and so on (see for example Cox 2005; Erdmann 1999). Good marketing and distribution is also a recurring theme. A brief review of publishers' press releases and annual reports shows that the usual means of measuring performance and growth, for a commercial publisher, is to look at the numbers: profitability, sales targets, numbers of titles published, growth in circulation, subscriptions or sales, ratings, and so on.

These measures can also be applied to scholarly publishers, but with the caution that this is often a non-profit environment, dependent on subsidies and grants. As a result, other means of measuring success will also need to be developed, and these will need to take into account the changing context and new technologies in publishing. These criteria could be linked to the issue of 'trust' – also a recurring element in the commercial publishers' assessments, mentioned above – which refers to the credibility, market positioning and accessibility of a brand or organisation. Specifically, in this regard, the three criteria identified by Kling and McKim (1999: 897) for assessing the strength of scholarly publishing – publicity, trustworthiness and accessibility – are useful in this regard. While their criteria were originally developed to assess how effectively a book or article has been published in the scholarly community, they could also be used to assess the health or success of the scholarly publisher as a whole.

It immediately becomes clear, when looking at how publishers (including both commercial and scholarly publishers for the moment) measure their own performance and benchmark themselves against others, that we are looking at two major sets of criteria: those that can be quantitatively measured (the 'numbers') and those that are more subjective, less tangible criteria, such as credibility, reputation, and visibility. In some ways, this comes down to a distinction between quantity and quality (although this is obviously a simplification). However, this is not necessarily an oppositional relationship, a set of binary opposites: rather, we should be looking at both quality and quantity when we assess our performance as publishers (see Le Roux, 2006).

Elsevier, a world-leading commercial publisher in the scientific, technical and medical fields, provides a good example of the use of quantifiable criteria to measure success, especially in the context of electronic publishing. The publisher lists the following criteria for evaluating its "productivity-related results" (Elsevier, 2004: 1):

- wider and more direct access;
- number of users;
- functionality, or improved benefits for readers;
- decline in per article costs for customers.

These are mostly related to the 'accessibility' factor of Kling and McKim, and to the online environment.

All of these factors could be used to measure the success of the 'AISA Press', and indeed a set of success factors will need to be tailor-made for the Press. Some of the options may include:

- Profit, or more suitably, the ratio of income to subsidy;
- Number of titles produced per annum;
- Visibility, presence or reputation (perhaps measured through the attraction of the best authors and manuscripts, or through book reviews and other external measures);
- The quality of books and publishing standards;
- Range or diversity of subjects and authors (for instance, numbers of authors from Africa);
- Number of collaborative projects or agreements;
- Repeat sales and customer satisfaction;
- The establishment of an imprint as a successful brand;
- Market penetration or share, and visibility among new markets;
- Extent to which the publisher fulfils its mission (e.g. mission of the parent institution in the case of a university press).

As can be seen by the growing list, the temptation is there to develop a proliferation of measures and indicators, but, as Peter Givler (2006) of the Association of American University Presses (AAUP) notes, "There are really only two basic metrics for showing the

value of a scholarly publishing operation to its parent institution: the quality of the books it publishes, and its financial performance." Thus, to begin with, a simple decision must be made as to the basis on which the Press is to be evaluated – in terms of value or income (North, 1998: 163). As argued throughout this study, I believe that a scholarly publisher should be evaluated in terms of value rather than just income.

4.10 Conclusion

This chapter sets out the essential factors that must be taken into account if AISA is to expand its publishing function or establish a scholarly press. The key recommendation of the chapter is that, if the requisite political support and funding are available, then the project could optimally be implemented over three to five years. Without resources or support, however, the project of transforming AISA's publications division into an 'AISA Press' cannot reasonably be implemented.

As has been seen, if an 'AISA Press' is set up, it must be evaluated regularly to gauge its progress and success. Peter Givler (2006) sums the matter up with brevity and wit:

> So it's really pretty simple: just publish the best books you can, make sure everyone knows about your successes, do your best to keep the press on track financially, and when there's bad news, make sure your boss hears it from you first. Nothing to it, right?

What this quotation implies is that the success of a scholarly press is very closely related to the Director and direction of the press, as well as to institutional support. Henry Chakava (1997: 45) would agree, arguing that the African publisher has not "approached his (sic) job with the energy, determination and innovativeness that would guarantee success". This will be a key challenge if a successful 'AISA Press' is to be established.

Chapter 5

Conclusion

5.1 The Objectives of the Study

There is a growing call for the developing areas of the world, such as the African countries, to respond to their marginalisation in the domains of research and publication by setting up their own, indigenous publishing houses, to publish and disseminate their own studies, grounded in local experience. One of the key ways in which research from Africa could be made more visible and accessible would be through the creation of a local scholarly publisher with that very aim as its mandate: to publish (Africa-focused) research from Africa, for Africa, and in Africa. Indeed, this press fits the very definition of an "indigenous publisher", as defined by Zell (1993): "publishing in Africa by Africans on African and other matters".

With this need in mind, this study aimed to carry out a feasibility study: to assess whether a new scholarly press focusing on African material and authors would be viable in the current South African, continental and international context. The study examined the wider scholarly publishing context, paying particular attention to how university presses are set up and what models of publishing they follow. The possibilities of a South African press serving the African need for quality scholarly publishing were also investigated, especially in light of the relative strength of publishing (and the economy, in general) in South Africa as compared to the rest of the continent.

The key research question, based on this international and national publishing context, was more focused: the study sought to consider whether, given the limitations of and challenges currently facing the South African (and wider African) academic publishing industry, could a new scholarly publisher be viably set up, and how could this be achieved? Using the case study of the Africa Institute of South Africa, it was considered whether AISA is in a position to transform its publishing division into a fully fledged scholarly press. One of AISA's 'sister' organisations, the Human Sciences Research Council, has undergone a similar process in recent years, moving from a service editing unit, to a professional publishing unit, and then to a scholarly press (see Bruns, 2004; Gray, van Schalkwyk and Bruns, 2004).

Based on this example, this study investigated whether it would be feasible for AISA to follow suit, and redevelop its existing publishing division into a fully fledged scholarly publishing house.

The objectives of the study were to:

- outline the challenges facing scholarly publishing in South Africa;
- assess market demand for a new scholarly publisher in South Africa;
- develop a model for and describe the possible structure of an 'AISA Press';
- describe a potential editorial policy, in terms of publishing philosophy, publishing list (including product mix), and house style;
- draw up a business plan for implementation, and identify strategically important issues that may impact upon the planning and implementation of the business plan;
- give guidelines for policy and planning;
- collect all relevant information for the basis of a decision by AISA's strategic management.

The methodology employed to carry out this study included a literature survey, a questionnaire-based exploratory survey, and a feasibility-based business planning process. The results of the study were intended to improve the publishing practice of AISA, and of the scholarly publishing community more generally in South Africa and the wider continent. As well as being of strategic importance to AISA, the study has provided a baseline for evaluating other academic publishing ventures in a similar context, and can be extrapolated to other fields of publishing and other areas within the developing world. It is recommended, in this regard, that further studies be conducted, especially in other African countries, to assess the feasibility of scholarly publishing in those environments, and perhaps to suggest solutions to the existing difficulties faced by scholarly publishers across the continent.

The study also considered how to evaluate the success of the proposed 'AISA Press'. The most useful set of factors was found to be that of Kling and McKim (1999: 897); these also have the advantage of brevity. Their three dimensions for assessing the strength of (especially electronic) scholarly publishing are publicity, trustworthiness and accessibility. If the suggested business plan were to be implemented, for instance, then the press could be measured and assessed for its marketing efforts (how visible are its products?), its growing

reputation (largely linked to the strength of its peer review processes and production standards), and its dissemination (how easy is it to access its products?).

Another factor in evaluation would be how to measure the success of the study? If it is accepted that a key aim has been to contribute to better decision-making at AISA, and better planning for the future, then the production of a business plan would indicate a degree of success for the study. As stated in the introduction to this study, the success of this study should not be evaluated in terms of whether or not AISA is able to set up a viable publishing house, but by whether it demonstrates that there is (or is not) a real need for a scholarly publisher in South Africa in the niche area of African studies, and whether it provides clear guidelines as to whether AISA can and indeed should fulfil this role. The study has determined that it would be viable to set up a niche scholarly publisher (for instance at AISA), and Chapter 4 of the study could serve as a preliminary business plan for such an undertaking.

It is interesting to note how the current study fits into the information life cycle identified by The Stationery Office (TSO), as depicted in Figure 8 (Chapter 2). It could be summarised that the current study is an *assessment* of the information life cycle at AISA. The proposed Business Plan (Chapter 4) forms part of the *planning* process. When this plan is implemented, the activities of *publishing*, *disseminating* and *evaluating* will come into play. Thus, this study can be seen as an integral part of the information life cycle at AISA.

5.2 Findings and Recommendations

The study has found broad support for the notion of setting up a new scholarly publisher focusing on Africa; at the same time, it is considered that it would be economically feasible (within certain constraints or under certain conditions) for this publishing house to be institutionally affiliated with the Africa Institute. For instance, the majority of respondents (82.8%) to the survey (reported in Chapter 3) were open to the notion of AISA setting up a press, to fill the role of a scholarly publisher of African content, while up to 94% would consider publishing a manuscript with an 'AISA Press' in the future. This is a positive outcome for the study, and perhaps an initial indicator of the depth of interest in publishing with AISA. Moreover, the hypothesis sometimes encountered in the literature, that writers have little interest in publishing with local publishing houses, was certainly not found to be

the case in this study. In contrast, most authors are apparently desperate to find publishers and keen to avoid some of the problems they associate with international publishers.

Some of the constraints in setting up such a press, and some specific recommendations emerging from the study, will be discussed in this section.

One of the central recommendations of the study is that, while it may be feasible to set up a publishing house at AISA, and while such a publishing house would contribute directly to the mission of AISA, its success is highly dependent on institutional support, at the highest levels. If the requisite political support and funding are available, then the project could be implemented over three to five years. Without resources or support, however, the project of transforming AISA's publications division into an 'AISA Press' cannot reasonably be implemented. A linked finding is that the success of a scholarly press is very closely related to the Director and direction of the press. It is important to consider, in this regard, how AISA would benefit from implementing any of these changes – how its priorities, for instance, would be both extended and better fulfilled through a more expansive publishing programme.

For this reason, it is recommended that if AISA is to implement the business plan contained in the study, it begin with a meeting of all stakeholders, to discuss the implications and expectations of this group. In particular, any misconceptions relating to the role and functions of the 'AISA Press' would need to be cleared up before implementation gets underway. One potential misconception is that such a press would become a source of income for its parent institution – an additional revenue stream. This is unlikely to be the case for a number of years, if ever – indeed, the study found that scholarly publishing is largely subsidised and will probably need to remain that way, especially in the developing world. A scholarly publisher could become self-sustaining in South Africa, on the basis of a cost-recovery model, but probably not through scholarly publishing alone (i.e. it would need to add textbooks, for instance, to its product mix, or publish high-end trade non-fiction or policy-oriented briefing papers to remain competitive).

Another potential misconception is that the 'AISA Press' would be a vanity publisher for the work of AISA researchers. This would greatly damage the main advantage of developing such a press, which is to add to the prestige of the Africa Institute. It is only through sticking to rigorous peer review and showing a commitment to excellence that a solid reputation can

be developed for the press, and then, by association, for AISA. The Press would also need to publish a mix of external and in-house research to avoid the 'vanity press' label. At the same time, however, it is not necessary for the 'AISA Press' to 'go it alone' – collaboration and partnerships will form an important part of its mandate. In particular, distribution and co-publishing partnerships are recommended.

Indeed, a significant finding of the study was that scholarly publishing, especially in a developing country context, is dependent on both subsidies and partnerships. It should be noted, however, that there is little collaboration among scholarly (or academic) presses in South Africa, beyond the initial and currently limited scope of the Consortium of Academic and Independent Presses of South Africa. But such publishers do face common problems – such as the small market size, difficulty in negotiating with booksellers and distributors, and copyright violations or piracy – and could benefit from increased collaboration. This is a significant recommendation of this study. It also reminds us of the two central tasks of the scholarly publisher, as identified in the Introduction: peer review (as linked to reputation and rigour, above) and dissemination (as linked to partnerships, in this paragraph).

Another issue of some importance that emerged from the literature review was the importance of finding a niche and differentiating a press from its competitors. The university presses and other scholarly publishers in South Africa, by and large, do not have well-defined and stable niches on which they focus; rather, their focus tends to be diluted by the publication of a wide range of topics and manuscripts, however deserving these may be. To avoid this potential pitfall, a rather detailed mission statement and publishing philosophy was developed, to guide the development of the proposed 'AISA Press':

The mission would be: scholarly publishing *on* Africa, *by* African authors, *for* African audiences.

The 'AISA Press' would be committed to the following goals:
- publishing the highest quality scholarship on Africa;
- providing policy advice and impact;
- guarding African intellectual property;
- providing a platform for African authors;

- making its publications widely accessible to African audiences and worldwide, through both print and electronic means;
- a non-profit ethos, aligned to subsidisation and cost recovery, in its pricing and financial management;
- professionalism in its publishing practice.

In terms of structure, the traditional model of the university press was not found to be entirely suitable for the new 'AISA Press'. Rather, a hybrid model that includes attention to both academic work and policy-relevant material, would serve as a better foundation. A dual product mix, with both scholarly books and a journal, and policy-relevant electronic briefing papers, for instance, is proposed in the business plan (Chapter 4). The scholarly books should, in addition, be kept within the truly 'scholarly' range, although in future there may be scope for venturing into tertiary-level textbooks: single-country studies, regional comparative studies, reference works, and multi-author but single-theme studies, would be encouraged. The growing trend for producing electronic briefing papers should be highlighted here, as accessibility is a key aspect of the hybrid or research institution model of scholarly publishing. Thus, online publishing is certainly a mode of delivery that AISA should consider. However, at the same time, the responses to the market survey indicate that it should be seen as a product *in addition to* books and other publications; it should expand the product range rather than reducing all publications to 'online only' (at least during the current, possibly transitional phase in publishing).

Moreover, it is not recommended for the moment that AISA plan for full open access to its publications. While the model is still untested, it would be prudent for such a small organisation to consider limited open access options that do not place the burden of risk on its own budget. Keeping in mind the changing environment for publishing, it is also recommended that the structure of the press be kept sufficiently flexible to adapt to changes in needs and demands.

The AISA management would also need to provide sufficient infrastructure and resources for the expansion of the publishing programme into a press. Another important finding relating to staffing and sustainability, with wider implications than for this study alone, was that highly specialised and qualified staff would be required to run the Press – yet there is no specialised

training available for scholarly publishing in South Africa (and only a few training programmes for publishing more generally). There is also a lack of qualified and skilled staff in African scholarly publishing in general, as the literature survey revealed. As a result, an important task of experienced and senior publishers in this sector is skills transfer – yet there is a trend in the opposite direction, towards outsourcing of functions such as editing. This could potentially result in a dearth of skilled personnel in scholarly publishing, a sector which is highly dependent and prides itself on superlative production and editorial values. It is recommended, for one thing, that more use be made of interns, particularly publishing students, to provide them with some background in the scholarly publishing field. It is also recommended that some aspects of the editorial function remain in-house in a scholarly publisher, to build skills, experience and institutional memory.

It is of particular importance to have highly qualified staff, if a scholarly publisher in South Africa is seen as having a developmental role in terms of authors. The market research conducted by means of a questionnaire revealed a need for a nurturing attitude from publisher towards academic author. This is especially significant in an environment where English – the major international language of research and scholarship – is not the first language of the majority of researchers and scholars. Thus, the staff would need to have the skills to work closely with potential authors to develop their manuscripts into a publishable form.

The three key factors that emerged from the market survey as being of most importance to potential authors were world-wide distribution, strict quality control, and adequate capacity to keep up with demand and schedules. If these targets can be met, then there is no reason why the 'AISA Press' should not become a highly successful niche publisher in the (South) African scholarly publishing environment – success, of course, being measured in terms of both quality (value) and quantity.

5.3 Suggestions for Further Study

The literature survey revealed a dearth of really good, in-depth studies of scholarly publishing around the world. Ongoing studies of changes and developments in scholarly publishing (in terms of both books and journals, and in institutional terms) are of lasting importance, as they set a baseline for future studies. The lack of research is particularly pronounced when looking at scholarly publishing in developing countries, and at publishing activities in research

organisations that do not consider publishing to be their core business. This is a significant group of publishers and disseminators in the area of scholarly publishing, and more surveys need to be undertaken to measure the field and assess the fields it covers in its publishing endeavours.

Further studies also need to be done in relation to Africa's university presses – in this regard, the study of Darko-Ampem (2003) is an important step in the right direction. A similar study could be conducted of all the university presses in South Africa, especially as it emerged in this study that these presses require more in-depth analysis of their publishing philosophies, editorial policies, and list-building. Such studies would have real utility in building up the scholarly publishing industry in South Africa and across the continent.

In a South African context, the close links between the Department of Education, the higher education sector and scholarly publishing merit further study and elaboration. For instance, attention should be paid to the current subsidy or funding formula of the Department of Education, and how it impacts on scholarly publishing in the country. At present, much research in this broad area focuses on those producing research and on their research outputs – but not on those responsible for evaluating and disseminating this research. One issue that could be studied is the bias of the subsidy formula in favour of the production of journal articles rather than books, in contrast to the US situation which elevates the value of books in promotion and tenure decisions.

In general, the tension between journal and book publishing is an interesting one for scholarly publishing, but one that receives very little attention or debate. International studies suggest that journals are becoming ever more important, with other forms of publication being left behind – but should this be the case? Moreover, while a number of studies of new technologies and specifically of open access relate to academic journal publishing, few look at the potential for scholarly book publishing in this area. It is hoped that further studies will be conducted in this fruitful and topical area of research and practice.

It is my belief that further study in these areas would contribute towards better publishing practice and greater professionalisation of the scholarly publishing industry in Africa. More research could lead to improved policy-making and assist in setting realistic and feasible standards. If some of the challenges identified through research can be clarified and then

overcome, then new and existing scholarly publishers could be more successful. Their success would not only be felt locally, but throughout the continent, as a wider publishing platform would be available for African scholars. This would contribute, in the long run, to greater visibility for African scholarship and to improved resources for African academics in the pursuit of their research. In this way, Africans would indeed "reclaim in earnest our right to tell our own story" (Mangena, 2005).

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Websites of University Presses and Research Organisation Presses Surveyed[33]

South African University Presses
University of Cape Town Press. (www.juta.co.za) University of
KwaZulu-Natal Press. (www.unpress.co.za) Unisa Press.
(http://www.unisa.ac.za/press) Witwatersrand University Press.
(http://witspress.wits.ac.za) Pretoria University Law Press.
(http://chr.up.ac.za/pulp/index.html)

International University Presses
Acton Publishers
University of Akron Press
University of Alabama Press
University of Alaska Press
American University in Cairo Press
Amsterdam University Press
Auckland University Press
Beacon Press (a non-profit trade publisher)
University of California Press
Cambridge University Press
Canterbury University Press
Central European University Press
University of Chicago Press
Chinese University Press
University Press of Colorado
Copenhagen Business School Press
Cornell University Press
Columbia University Press
Cork University Press
Duke University Press
Edinburgh University Press
Exeter University Press
FDU Press
University Press of Florida (consortium)
Fordham University Press
Georgetown University Press
University of Georgia Press
Harvard Business School Publishing
Harvard University Press
Hong Kong University Press
Howard University Press
University of Illinois Press
Indiana University Press
Iowa State University Press
Johns Hopkins University Press
Kent State University Press

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[33] Note: An important source for locating university press websites was the AcqWeb Directory of University Presses, located at http://acqweb.library.vanderbilt.edu/acqweb/pubr/univ.html.

Liverpool University Press
Louisiana State University Press
Manchester University Press
University of Massachusetts Press
Massachusetts Institute of Technology Press
McGill-Queen's University Press
Melbourne University Publishing
Mercer University Press
Michigan State University Press
University Press of Mississippi
Presses de l'Université de Montréal
University of Nairobi Press
University of Nebraska Press
University Press of New England (consortium)
New York University Press
University of North Carolina Press
Northeastern University Press
Northwestern University Press
Ohio University Press
Oregon State University Press
Penn State University Press
Princeton University Press
Purdue University Press
University of Queensland Press
Rockefeller University Press
Stanford University Press
State University of New York Press
Syracuse University Press
Temple University Press
University of Tennessee Press
University of Texas Press
Texas A&M University Press
Texas Christian University Press
Texas Tech University Press
Utah State University Press
Vanderbilt University Press
University of Virginia Press
University of Wales Press
University of Washington Press
Wayne State University Press
University of the West Indies Press
University of Western Australia Press
University of Wisconsin Press
University of Wollongong Press
Yale University Press

***Research Institute Presses or Publishing Programmes* a.**
South Africa
Human Sciences Research Council. (http://www.hsrc.ac.za)
IDASA. (http://www.idasa.org.za)

Institute for Global Dialogue. (http://www.igd.org.za)
Institute for Security Studies. (http://www.iss.co.za)
South African Institute of International Affairs (http://www.saiia.org.za)

b. International
African Economic and Research Consortium. (http://www.aercafrica.org)
American Enterprise Institute Press. (http://www.aei.org)
Brookings Institution. (http://www.brookings.org)
Canadian Institute of Ukrainian Studies Press. (http://www.ualberta.ca/CIUS/)
Carnegie Corporation. (http://www.carnegie.org)
Getty Research Institute. (http://www.getty.edu)
Heritage Foundation. (http://www.heritage.org)
Hoover Press. (http://www.hoover.org)
Hudson Institute. (http://www.hudson.org)
Joint Center for Political and Economic Studies. (http://www.jointcenter.org)
Nigerian Institute of International Affairs. (http://www.niianet.org/publications1.htm)
RAND Corporation. (http://www.rand.org)
Russell Sage Foundation. (http://www.russellsage.org)
United States Institute of Peace Press. (http://www.usip.org)
Woodrow Wilson Center Press. (http://www.wilsoncenter.org)

African / South African Publishing Partners

African Books Collective. (http://www.africanbookscollective.com)
African Journals Online. (http://www.ajol.info) OneWorld.
(http://www.oneworldbooks.co.za) Sabinet e-Journals Project.
(http://www.journals.co.za)

Appendix A: Questionnaire

Cover letter:

One of the key problems with scholarship in Africa is the lack of publishing outlets on the continent and of good published materials about the continent. The attached questionnaire is designed to find out more about the perceptions and realities of publishing in Africa. The questions relate to the publishing needs, research dissemination needs, and reading/book buying habits of scholars working both in and on Africa. The questionnaire seeks to identify, in particular, whether there is a perceived niche for an additional scholarly publisher, and what factors influence you – as an academic in this broad field of scholarly work on/in Africa – when looking for a book publisher.

I am conducting the survey as part of the requirements of a Master's in Information Science (Publishing) degree at the University of Pretoria. My supervisor at the university is Dr Francis Galloway, and she can be contacted if you have any queries relating to the research (email: francis.galloway@up.ac.za; Tel: +27 (0)12 420 2426). The study consists of a feasibility study into the need for a scholarly publisher located in Africa, focusing on African content, and targeting an African audience. A case study is included to assess whether the Africa Institute of South Africa (AISA) could use its existing capacity and strengths in the field of African studies, and its networks on the African continent, as a possible host for such a press, through the expansion of its publishing division.

It would be very much appreciated if you could complete the questionnaire and return it to me, by email, fax or post, by about 20 May 2005. If you would like to expand upon any of the aspects or discuss them in more detail with me, please feel free to get in touch.

Regards,

Elizabeth le Roux

Publishing in Africa: Questionnaire

A. Your personal details

1. In which country are you based?
………………………………………

2. At what type of institution are you based? (tick one)

University	
Technikon	
Research Institution	
Government Department	
Other (please specify)	

3. What is your job title? (e.g. senior lecturer; specialist researcher)

4. What is your academic discipline? (e.g. political science, anthropology)

5. What is your highest qualification? (tick one)

Doctoral (PhD, DPhil, etc.)	
Master's degree (MA, MSc, etc.)	
Honour's degree or four-year degree	
Bachelor's degree or three-year degree	
Other (please specify)	

B. Your publishing needs

6. Have you ever published a book?
Yes

No

If yes to question 6, please answer question 7. If no, please go straight to question 8.

7a. Have you had difficulty in finding a publisher for your scholarly output in the past?

Yes	
No	

7b. If yes, please specify some of the problems encountered:

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8. How important are the following factors when you are considering publishing your scholarly output?

	Not Important	Important	Very Important
recognition by my peers			
earning subsidies for research output			
enhancing my chances of promotion or tenure			
developing my CV			
earning royalties			
becoming eligible for book awards			
advancing my discipline			
purely for personal satisfaction			
other (please specify)			

9. How important are the following factors when selecting a publisher for your scholarly output?

	Not Important	Important	Very Important
reputation of the publisher			
the mission of the publisher – e.g. non-profit vs. commercial			
potential royalties			
marketing efforts			
how widespread distribution will be			
speed of publication			
quality selection or peer review process			
service rendered to authors			
design, layout and packaging of books			
pricing of books			
other (please specify)			

10. Is it important to you that African intellectual property (e.g. scholarly output) remains in Africa, instead of being published abroad?

Yes	
No	

11. Do you have any preferred publisher(s) for your scholarly output, especially books?

Yes (please specify)	
No	

12. In your opinion, could AISA reasonably fill the role of a scholarly publisher of African content?

Yes	
No	

13. Would you consider publishing a scholarly book with AISA (or an "AISA Press") in the future?

Yes	
No	
Maybe	

14a. If so (or if you have published with AISA in the past five years), please list some of the potential benefits you perceive in publishing with AISA.

14b. If not, do you have any specific reasons why you would not consider AISA?

C. Your teaching and research needs

15a. Are there sufficient scholarly books in your field, which include African content (e.g. providing case studies on African countries/issues/contexts, or integrating research <u>undertaken in African</u> countries)?

Yes	
No	

15b. If you would like to elaborate on your answer, please do so here.

16. Are these books (with scholarly content about Africa) affordable and accessible in your <u>country?</u>

Yes	
No	

17. In general, do you prefer to use books or photocopied course packs in your teaching and research, and under what circumstances? (please rate 1 to 3 in each case, with 1 as the most preferred)

Circumstances	Textbooks	Other scholarly books	Course packs	Other (please specify)
For a comprehensive overview				
For a prescribed work for introductory courses				
For a prescribed work for senior or graduate students				
For specific case studies/applications				

For recommended reading for students				
For own research and teaching preparation				
For reasons of affordability				
Other (please specify)				

18. Do you use AISA publications in your teaching and research at present?

	AISA books	Africa Insight journal	AISA research papers
As a prescribed work			
As recommended reading for my students			
As a source for own research and teaching			
Other (please specify)			
I have not used AISA publications			

19a. Have you had any difficulty in ordering or accessing AISA books?

Yes	
No	
N/A	

19b. If yes, please list some of the difficulties encountered.

D. Your book-buying and reading habits

20. What is your current scholarly book-buying pattern?

	From personal funds	From departmental or library funds or research grant
None		
1-3		
4-6		
7-10		
More than 10		

21. Where do you buy scholarly books? (tick all that appl

at general bookshops (e.g. Exclusive Books)	
at academic bookshops (e.g. Clarke's)	
from publishers' catalogues (e.g. Cambridge University Press or IB Tauris)	
online (e.g. Amazon or Kalahari)	
other (please specify)	

22. How important are the following factors when you decide to buy a scholarly book?

	Not Important	Important	Very Important
suitability as a prescribed textbook			
style of writing and appropriate language level			
suitability for target audience			
reputation of the author or editor			
reputation of the publisher			
geographical location of the publisher			
publication date			
inclusion of a good, user-friendly index			
design, layout and packaging of the book			
price of the book			
language of the book			
other (please specify)			

23. Do you prefer to read a book online or in print?
Note: online means a book is available electronically on the Internet. It could be read onscreen or downloaded and printed out. In print means a published hard cover or soft cover edition of a book.

	Always	Sometimes	Never
online – for personal / research use			
online – for teaching			
in print – for personal / research use			
in print – for teaching			

24. To what extent would the following factors persuade you to read a scholarly book online rather than in print?

	Always	Sometimes	Never
cost (e.g. free or cheaper access to online publication)			
accessibility			
convenience (e.g. immediately available)			
Internet connection speeds			
format of online book (e.g. PDF or HTML)			
other (please specify)			

25. Do you have any comments you would like to add?

By filling in this questionnaire, I give my permission for the results to be used in this study on the viability of establishing a scholarly publishing house at AISA. All individual answers to the questions and personal details will be kept confidential.

Appendix B
Back List of AISA Titles, 1965 – 2005

	Title	Author	Year	Publication Type	Subject field
1	Ekonomiese integrasie van Bantoe-arbeid	GME Leistner	1965	Monograph (no ISBN)	Economics
2	Bystand aan Afrika	GME Leistner	1966	Monograph	Development
3	Aid to Africa	GME Leistner	1966	Monograph	Development
4	Strukturele veranderinge van die Afrika-volkshuishoudings en die betekenis daarvan vir die Republiek van Suid-Afrika	GME Leistner	1966	Monograph (no ISBN)	Anthropology
5	Swart Afrika: Politieke en administratiewe tendense	JJN Cloete	1966	Monograph	Politics
6	Emergent Africa: Political and administrative trends	JJN Cloete	1966	Monograph	Politics
7	Lesotho: Ekonomiese struktuur en groei	GME Leistner	1966	Monograph	Economics
8	Lesotho: Economic structure and growth	GME Leistner	1966	Monograph	Economics
9	South Africa's development aid to African states	GME Leistner	1966	Monograph	Development
10	Die Republiek en hulp aan ander Afrikastate	GME Leistner	1966	Monograph (no ISBN)	Development
11	Lesotho: 'n Geografiese studie	P Smit	1967	Monograph	Geography
12	Lesotho: A geographical study	P Smit	1967	Monograph	Geography
13	Lesotho: 'n Politieke studie	AJ van Wyk	1967	Monograph	Politics
14	Lesotho: A political study	AJ van Wyk	1967	Monograph	Politics
15	Perspectives on Africa's economic development	GME Leistner	1967	Monograph (no ISBN)	Economics
16	Lesotho needs aid – and gifted leadership	GME Leistner	1967	Monograph (no ISBN)	Economics
17	Swaziland: Hulpbronne en ontwikkeling	GME Leistner & P Smit	1968	Monograph	Development
18	Swaziland: Resources and development	GME Leistner & P Smit	1968	Monograph	Development
19	Swaziland: 'n Politieke studie	AJ van Wyk	1968	Monograph	Politics
20	Swaziland: A political study	AJ van Wyk	1968	Monograph	Politics
21	Lesotho: Revenue and expenditure of the government	EJ van der Merwe	1968	Monograph	Economics
22	Lesotho: National accounts	EJ van der Merwe	1968	Monograph	Economics
23	Malawi, South Africa, and the issue of closer economic co-operation	GME Leistner	1968	Monograph (no ISBN)	Economics
24	Rhodesia: Birth of a nation	FR Metrowich	1969	Monograph	Politics
25	Nigeria: The Biafran war	FR Metrowich	1969	Monograph	Politics: conflict
26	Communism and terrorism in Southern Africa	FR Metrowich	1969	Monograph	Politics
27	Suider-Afrika data / Southern Africa data	WPN Lötz	1969	Monograph	Reference
28	US policy towards regional groupings in Africa	GME Leistner	1969	Monograph (no ISBN)	Politics
29	Influx control: economic and social aspects of physical control over rural-urban population movements in South Africa and elsewhere	GME Leistner	1969	Monograph (no ISBN)	Economics
30	Botswana: Resources and development	P Smit	1970	Monograph	Economics
31	Botswana: Konstitusionele ontwikkeling	M Hough	1970	Monograph	Politics
32	Die Bantoemannekrag potensiaal van Suid-Afrika	P van der Merwe	1970	Monograph	Demographics

	Title	Author	Year	Publication Type	Subject field
33	Africa in the Sixties	FR Metrowich	1970	Monograph	Politics
34	Africa: economic and other implications of population growth	GME Leistner	1970	Monograph (no ISBN)	Economics
35	South Africa's development aid to African states	GME Leistner	1970	Monograph (no ISBN)	Economics
36	Die Rolle der farbigen Bevoelkerungsgruppen in der suedafrikanischen Wirtschaft	GME Leistner	1970	Monograph (no ISBN)	Economics
37	Progress and change in Africa	WFJ Steenkamp	1971	Monograph	Development
38	Three manpower problems in Lesotho	JC Williams	1971	Monograph	Demographics
39	Die fisiese antropologie van die inheemse mense van Suidelike Afrika	HW Hitzeroth	1972	Monograph	Anthropology
40	Population and resources in Southern Africa	GME Leistner	1972	Monograph	Economics
41	Economic and social forces affecting the urbanization of the Bantu population GME Leistner		1972	Monograph	Economics
42	Co-operation for development in Southern Africa	GME Leistner	1972	Monograph	Development
43	Lesotho: Land tenure and economic development	JC Williams	1972	Monograph	Development
44	Migratory labour arrangements in South Africa	WJ Breytenbach	1972	Monograph	Demographics
45	The locust threat to Africa	IR May	1973	Monograph	Geography
46	Africa at a Glance	--	1973	Reference book	Reference
47	Afrika met 'n oogopslag	--	1973	Reference book	Reference
48	Source material concerning certain aspects of labour in Black Africa	T Malan	1973	Monograph	Reference
49	Bophuthatswana: A select and annotated bibliography	PS Hattingh	1973	Reference book	Bibliography
50	Francophone countries of West and Central Africa	CF de Villiers & E Moody	1973	Monograph	Reference
51	Afrika in die 70-ger jare / Africa in the Seventies	--	1973	Monograph	Reference
52	Terrorism in Southern Africa	FR Metrowich	1973	Monograph	Politics
53	Lesotho, Botswana and Swaziland	R Bodenmuller	1973	Monograph	Reference
54	Franssprekende Afrika	--	1974	Monograph	Reference
55	Bophuthatswana: Hulpbronne en ontwikkeling I	JH Moolman & GME Leistner	1974	Monograph	Economics
56	Towns and villages in Lesotho: Basic data on the level and range of services	E Moody	1974	Monograph	Geography
57	Bantoetuislande: Verkiesings en politieke partye	WJ Breytenbach	1974	Monograph	Politics
58	Employment opportunities for Africa's 'exploding' population	GME Leistner	1974	Monograph (no ISBN)	Demographics
59	The Black worker of South Africa	GME Leistner & WJ Breytenbach	1975	Monograph	Economics
60	Crocodiles and commoners in Lesotho: continuity and change in the rulemaking system of the Kingdom of Lesotho	WJ Breytenbach	1975	Monograph	Politics
61	Internasionale spoorvervoer in Suider-Afrika: Geskiedkundige ontwikkeling	WPN Lötz	1975	Monograph	History
62	Swart tuislande in Suid-Afrika	T Malan & PS Hattingh	1975	Monograph	Politics
63	Bophuthatswana: Hulpbronne en ontwikkeling II	JH Moolman & GME Leistner	1975	Monograph	Economics

	Title	Author	Year	Publication Type	Subject field
64	Source material and labour earnings in African countries	T Malan	1975	Monograph	Economics
65	Bantoetuislande: Selfregering en politieke partye	WJ Breytenbach	1975	Monograph	Politics
66	Growth centres in Lesotho	E Moody	1975	Monograph	Economics
67	Black homelands in South Africa	T Malan & PS Hattingh	1975	Monograph	Politics
68	Rhodesia: Economic structure and change	GME Leistner (ed)	1976	Edited monograph	Economics
69	Kernvraagstukke in tuislandontwikkeling	JH Moolman et al	1976	Monograph	Development
70	Society, politics and government in Boleswa	WJ Breytenbach	1977	Monograph	Politics
71	Die Shwarze Arbeitskraft Südafrikas	GME Leistner & WJ Breytenbach	1977	Monograph	Economics
72	Le travailleur noir en Afrique du Sud	GME Leistner & WJ Breytenbach	1977	Monograph	Economics
73	A history of education in Lesotho	P Butterfield	1977	Monograph	Education
74	Africa at a Glance	--	1978	Reference book	Reference
75	Afrika met 'n oogopslag	--	1978	Reference book	Reference
76	South Africa's involvement in Africa	WJ Breytenbach	1978	Monograph	Politics
77	Self-determination in African politics	WJ Breytenbach	1978	Monograph	Politics
78	Namibia/SWA Prospectus	-	1979	Monograph	Reference
79	Women and development: A select bibliography	E Moody	1979	Monograph	Bibliography
80	SWA/Namibia: Prospects for coalition formation	D Venter & A du Pisani	1979	Monograph	Politics
81	Towards a new economic order in South Africa	GME Leistner	1979	Seminar papers	Economics
82	Streeksamewerking in Afrika: wat kan ons daaruit leer?	GME Leistner	1979	Monograph (no ISBN)	Politics
83	South Africa and Black Africa: Some problems and prospects for rapprochement	D Venter	1980	Monograph	Politics
84	Plight of the rural population in Lesotho	EM Makhanya	1980	Monograph	Geography
85	First-borns and younger sons: Culture, change and sibling relations	M Brandel-Syrier	1980	Monograph	Anthropology
86	Southern crucible: South Africa, future world in microcosm	GME Leistner	1980	Monograph	Development
87	Strategies of economic development	GME Leistner	1980	Monograph (no ISBN)	Economics
88	Towards balanced spatial development in Southern Africa	TJD Fair	1981	Monograph	Geography
89	Southern Africa: Challenge of the Eighties	GME Leistner, HS Schoeman & T Malan	1981	Monograph	Politics
90	Education in Africa	E Wessels	1981	Monograph	Bibliography
91	Markets in Africa	E Wessels	1981	Monograph	Bibliography
92	Trade unions in Africa	E Wessels	1981	Monograph	Bibliography
93	Migrant labour	E Wessels	1982	Monograph	Bibliography
94	Alternative structures for Southern Africa interaction	--	1982	Monograph	Politics
95	Soviet foreign policy in Southern Africa: Problems and prospects	P Vanneman & M James	1982	Monograph	Politics: foreign policy
96	Africa at a Glance	--	1982	Reference book	Reference
97	Zambia: The search for rural-urban balance, a review	TJD Fair	1983	Monograph	Geography
98	Southern Africa: Facts and figures	T Malan	1983	Monograph	Reference

	Title	Author	Year	Publication Type	Subject field
99	Van Nyasaland tot Malawi: 'n Politiek-konstitusionele studie	D Venter	1983	Monograph	Politics
100	The silent majority: A history of the Lomwe people of Malawi	RB Boeder	1983	Monograph	History
101	Stedelike behuising in Botswana, Lesotho en Swaziland: Wanbalanse, simptome en strategiëe	A Wilsenach	1983	Monograph	Geography
102	Die Sowjet-Unie in Afrika besuide die Sahara: 1919–1981	PD Botha	1983	Monograph	Politics
103	Afrikatradisies en ekonomiese ontwikkeling	GME Leistner	1983	Monograph (no ISBN)	Economics
104	Southern Africa: Maps and Statistics	PW Esterhuysen & A Wilsenach	1984	Monograph	Reference
105	Urbanisation in Africa	E Wessels	1984	Monograph	Bibliography
106	Community development: An African rural approach	WJD Jeppe	1985	Monograph	Development
107	Bophuthatswana and rural development	JF Graaf (ed)	1985	Seminar papers	Development
108	Rural-urban balance: Policy and practice in 10 African countries	TJD Fair	1985	Monograph	Geography
109	Swazi culture	JS Malan	1985	Monograph	Anthropology
110	Urban housing in Botswana, Lesotho and Swaziland: Imbalances, symptoms and strategies	A Wilsenach	1985	Monograph	Geography
111	On the razor's edge: Prospects for political stability in Southern Africa	CA Woodward (ed)	1986	Monograph	Politics
112	Agricultural production and marketing in Southern Africa	E Osborn	1986	Monograph	Geography
113	Ecology and land usage in Southern Africa	DA Kotze et al	1987	Monograph	Geography
114	Housing practices and strategies in the BLS countries	A Wilsenach	1988	Monograph	Geography
115	South Africa in Southern Africa: Economic interaction	GME Leistner & P Esterhuysen	1988	Monograph	Economics
116	Generic aspects of Marxism Leninism in Africa	PD Botha	1988	Monograph	Politics
117	Perceptions on identity and nationhood among the leaders of the national states and territories in South Africa	JS Malan	1989	Monograph	Politics
118	Internasionale groeperinge van lande	WJO Jeppe	1989	Monograph	Politics
119	Economic interdependence in Southern Africa: an agenda for tripartite cooperation	GME Leistner	1989	Monograph (no ISBN)	Economics
120	Rural-urban balance: Policy and practice in 10 African countries (2nd edition)	TJD Fair	1990	Monograph	Geography
121	Analysis of Southern African transport: An analytical model	TL Kennedy	1990	Monograph	Geography
122	Namibia 1990: An Africa Institute survey	GME Leistner, P Esterhuysen & R Cornwell (eds)	1990	Monograph	Reference
123	The ports of sub-Saharan Africa and their hinterlands	TJD Fair & T Jones	1991	Monograph	Geography
124	Africa at a Glance 1992	P Esterhuysen	1992	Reference book	Reference
125	Regionalism and political allegiances of black South Africans	SP Rule	1992	Monograph	Politics
126	AIDS in Africa and its impact on	Y Sadie, M van Aardt &	1992	Monograph	Demographics

	Title	Author	Year	Publication Type	Subject field
	the South African mining industry	A von Below			
127	African rural development: Policy and practice in six countries	TJD Fair	1992	Monograph	Geography
128	Issues of economic integration in Southern Africa	GME Leistner	1992	Monograph (no ISBN)	Economics
129	South Africa, gateway to Sub-Saharan Africa	GME Leistner	1992	Monograph (no ISBN)	Politics
130	Implications for South Africa of membership of the Organization of African Unity under an interim government	D Venter, GME Leistner & P Esterhuysen	1992	Report	Politics
131	South Africa and the African comity of nations: From isolation to integration 1993	D Venter		Monograph	Politics
132	Local government in the Third World	P Mawhood (ed)	1993	Single-author book	Politics
133	Aspects of local government reform in Ghana	SK Asibuo & JRA Ayee	1993	Monograph	Politics
134	Ghana: Some foreign aid issues	K Boafo-Arthur & J Essuman-Johnson	1993	Monograph	Economics
135	Towards an Urban Research Agenda for South Africa	S Coetzee & C de Coning	1994	Monograph	Geography
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149	Democratisation in sub-Saharan Africa: Transitions, elections and prospects for consolidation WJ Breytenbach		1997	Monograph	Politics

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198	science research in South Africa	Abdul Bemath (ed) F Hendricks (ed)	2005 2005	Reference book Edited monograph	Social science
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