

The African Books Collective

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and Social Development**

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Sida Evaluation 00/6

**Department for Democracy
and Social Development**

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COWI

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List of Acronyms and Abbreviations

ABC	African Books Collective Ltd.
ADEA	Association for the Development of Education in Africa
APNET	African Publishers' Network
BAI	Book Aid International
BPN	Bellagio Publishing Network
DANIDA	Danish International Development Agency
DESO	Department for Democracy and Social Development
DHF	Dag Hammarskjöld Foundation
FINNIDA	Finnish International Development Agency
GIBF	Ghana International Book Fair
HIVOS	The Humanist Institute for International Development Co-operation
IABSS	Intra-African Book Support Scheme
LIBF	London International Book Fair
MIS	Management Information Systems
NGO	Non-Governmental Organisation
NORAD	Norwegian Agency for International Development
SEK	Swedish Kronor
SWOT	Strengths, Weaknesses, Opportunities and Threats
UK	United Kingdom
ZIBF	Zimbabwe International Book Fair

Executive Summary

Key Findings

1. The African Books Collective (ABC) was founded in late 1989 after a core group of African publishers met in 1985 to reflect upon how they could more effectively promote and distribute African books outside Africa. The 18 original founder members agreed to contribute £1000 each to help establish the Collective, which started trading in 1990 as a non-profit UK company limited by guarantee. Among the problems they were facing were that there were only a handful of commercial book distributors willing to handle African books and they were reluctant to take on the complete list of a particular publisher. Second, European distributors tended to buy publishers' titles in Africa at African prices, paying in local currency and taking large discounts, thereby leaving negligible returns for African publishers. Third, these distributors hardly undertook any marketing or promotional activities and stocked only a limited number of titles and in small quantities. As a consequence libraries and individual book buyers in the north faced chronic problems in acquiring books published in Africa.
2. Originally, ABC described its mission as "to improve the free flow of communications through published material from Africa to the North". ABC also maintained that it would be "open to all African publishers and research institutions with publishing programmes" and that it would "continue to seek to promote its benefits to all such publishers". Today ABC describes its core mission as "to create markets, and promote and distribute the titles of the owner/member publishers into markets outside Africa". Strategies include i) the Intra-African Book Support Scheme (IABSS) and ii) to "disseminate research and information about African books and publishing in particular and African culture and scholarship generally".
3. ABC has the unusual task of performing the role of a publisher as well as that of a distributor – a publisher normally markets its titles, while a distributor usually plays a minimal role in promotional efforts. Additionally, a distributor gets to choose the titles it wishes to distribute. This is not the case with ABC whose remit includes taking on all books on the list of each member publisher and promoting all of them. This includes participating in exhibitions and "repping". ABC's activities have many benefits that cannot be evaluated in sales terms only. It actively promotes African writing and cultural identity and contributes to a better understanding of Africa in the north. It also plays an important role in strengthening the economic base of its members, which in turn has the potential of leading to increased publishing activity. By distributing a very diverse range of books, ABC offers a new and important channel for African scholars and writers to disseminate their work.
4. Initially it was hoped that ABC would attain self-sufficiency within a period of 5 years. That is why ABC asked for "seed money" to get the Collective started. However, within the first few years, it became clear that closing the gap between income and expenditure would be a difficult feat. After nearly ten years of trading, ABC does not see self-sufficiency as a realistic goal in the foreseeable future. This is because the bulk of African publishing comprises educational texts followed by children's books, which have minimal markets in the north. The quality of production of African books, especially children's titles, has also caused problems in sales terms. Further, African book output is relatively small and irregular, the mortality rate of African publishers is high and the economic and political context in which some African publishers operate can have considerable negative effects on the output. Meanwhile, the prices of African books, even when marked up into pounds/dollars, are comparatively low. At the same time, ABC and its members are not active enough with regard to exploring solutions to improve its financial base and hence get-ting closer to sustainability.

5. The amount that ABC has remitted to its member publishers since its inception is almost exactly equivalent to the donor funding over this ten-year period. About 43% of the remittances are to five publishers – 2 founder members, 1 full member and 2 associate members.
6. ABC's offices are in Oxford. This has enormous operational advantages in performing their main function of promoting and distributing African books in northern markets. Oxford has developed into a major centre of publishing and book-selling in Europe, which gives ABC access to a pool of trained manpower. More importantly, one of the biggest UK book wholesalers, an important ABC client, is located a block away. Locating ABC in Africa as some have suggested would make it extremely difficult for ABC to carry out its main functions. It would lead to many operational and logistical hurdles besides divorcing ABC from its main markets.
7. The Collective is governed by a Council of Management representing East, West and Central/Southern Africa. Only founder members can serve on the Council unless there are problems to ensure appropriate regional/gender representation, in which case a non-founder member can be co-opted. The Council of Management has met only 5 times between 1988 and 1999. Originally, the Council of Management was to change every three years. Because meetings have not been held annually, it was later decided that changes in the composition of the Council would be made every three meetings. Furthermore, for reasons of continuity and practicality, it was decided that Walter Bgoya, Henry Chakava and Victor Nwankwo would remain on the Council indefinitely. There is no provision at the moment for electing a chairman of the Council for a fixed term. Between meetings, the Oxford office is in regular touch with individual members of the Council through fax and e-mail, though there is no institutionalised communication as there is no single effective constitution-like document which outlines the relationship, roles and responsibilities of the bodies within the Collective. When meetings of the Council take place, thorough preparatory work is undertaken and the agenda is fairly exhaustive. A summary of the main business conducted is however only disseminated to founder members.
8. Over the years ABC has grown to include a total of 43 members from 11 countries. Many of them are university presses, research institutions and other non-profit-making organisations. There are four types of membership. "Founder members", which is a closed category, are the only members entitled to vote and serve on the Council of Management. They contributed £1000 in hard currency in 1989 and receive 65% of the sales proceeds of their books. From the original 18, there are now only 11 founder members. Category 2, or "full members", pay a membership fee of £500. In return they receive 60% of the sales proceeds of their books. There are currently 12 full members. While they can attend meetings of the Council of Management, they have no voting rights. The third category is "associate members", who pay no membership fees, receive 55%, have no voting rights and cannot participate in Council of Management meetings. There are 17 associate members. In addition there is one single title member plus publishers who are not formally members but who enjoy ABC's distribution services. These include ZIBF, APNET, ADEA and ABC's own output. Those publishers enjoy the same high returns as Associate members. Over the years, at least 104 African publishers have applied for membership. Some of them (about a dozen) are still under active consideration. ABC has not been forceful enough in identifying and convincing suitable members to join the Collective and maintains that its existing membership covers virtually all suitable African publishers.

9. ABC has developed efficient, effective and lean management systems. It has a small, dedicated and hard-working team that is committed to ABC's mission. It has highly professional order fulfilment, marketing and management systems in place, which has earned it considerable respect and confidence from both members and customers. The relatively recent computerisation of most of its operations has gone a long way to assist this process. However, some of the systems have been set up in a linear fashion, which are not conducive to easy analysis. In one instance, the software has calculated remittances including postage, which in effect has resulted in slightly higher levels of remittances to member publishers which means that the ABC office has retained less.
10. As part of its marketing efforts, ABC produces a range of high quality promotional material every year. In 1998 it brought out two main catalogues; six subject catalogues; two supplementary catalogues; and various individual book flyers. These materials were mailed out to more than 26,000 addresses in the north. In addition, they issue New Title Information Cards that are sent to booksellers and, funds permitting, periodically send a sales representative to call on the major booksellers in the UK. ABC exhibits its books at various exhibitions including the African Studies Association's annual meeting in the US, where it has for many years been the only exhibitor of African published books. Further, ABC publishes its own source books related to publishing in Africa.
11. The aims and purpose of ABC are not sufficiently well known and are surrounded by a great deal of misunderstanding. Even some of its members hold misconceptions about ABC. This lack of awareness about ABC's mission extends to donors as well. On the other hand, communications within the ABC office are well-developed, participatory and transparent. Member publishers are generally very satisfied with their communications with ABC. However, ABC requires more marketing suggestions from the publishers and its authors while some of its members desire more feedback from the northern market. At the moment, aside from the Council of Management, ABC's members do not receive an annual report that for instance outlines salient developments during the year, the difficulties faced by ABC, future directions and which provides an annual financial statement.
12. A factor not playing to ABC's advantage is that library budgets in the north have been pinched in the 1990s. Nonetheless, ABC's sales have developed well on the whole. In 1990, ABC's total sales turnover was £29,649. Sales exhibited a steady growth until 1995 (turnover in that year was £205,823). However there was a sharp drop in 1996 when the turnover was only £166,198. ABC has recovered reasonably well and the sales in 1998 were £292,440. The financial difficulty experienced in 1996 has had a profound effect on the organisation, including inducing a feeling of anxiety among its staff members.
13. Since 1991, ABC has been involved with Book Aid International (BAI) in administering the Intra-African Book Support Scheme (IABSS). The aim of this scheme is to "overcome shortages of culturally relevant African books in African libraries; to promote intra-African trade in books, raise awareness of African-published materials and to support autonomous African publishers through sales via ABC". It consists of two components: 1) the supply of fiction/children's books to school and community libraries; and 2) provision of scholarly books to university libraries in Africa. The IABSS sales have generated substantial extra revenue for ABC – well over 40% of its total sales turnover comes from the IABSS scheme. Additionally, ABC retains a higher share from such transactions compared to non-IABSS sales. This scheme is widely appreciated by African libraries and schools who i) have a chronic lack of resources and ii) experience great difficulty in acquiring books from other parts of Africa.

14. The growth of ABC's sales is seriously hampered by the lack of a North American distribution point. Most North American customers require an American address – buying from abroad is considered “risky” and is not commonplace. Furthermore, North American libraries do not want to pay carriage and book traders ask for as much as a 60% discount. The Internet bookshop “Amazon” does not list books which are not available in America and which cannot be delivered within a certain number of days. At present it takes ABC a considerable amount of time to send books to North American customers.
15. In recent years ABC has played a pro-active role in investigating how digital printing can benefit African publishing and contribute to ABC's products. This technology allows for the speedy printing of relatively small quantities and at low cost. Publishers could simply e-mail the text of a book to ABC who would lease or buy the necessary equipment. Digital printing could be used by ABC members for preparing preview copies of textbooks to be used in tendering processes in Africa. It could also be used by ABC for short print runs, and for printing books that are out of print or where the order is time-bound.
16. Seven out of nine staff members in the ABC office are women, which includes the senior management. There is one woman on the Council of Management. In recent years, ABC has taken on a couple of woman publishers as members and has given prominence to gender studies in their promotional and marketing efforts.
17. Most of ABC's relationships with other organisations working with the African book sector are constructive and mutually enhancing. The boards of APNET and ABC recognise the importance of a close relationship, given the commonality of some of their fundamental aims. However, the full range of possibilities in this context have yet to be explored.
18. ABC has generally enjoyed a good relationship with Sida as well as with its other donors. Most of the donors and ABC have regularly met during meetings of the Bellagio Publishing Network but the BPN secretariat has not been involved in funding issues related to ABC. This is partly because ABC was up and running before the BPN was formed and had quickly established strategies and management structures. Since it has been running on fairly smooth lines and shown a steady growth, donors have been less disposed to be directly involved in both policy and operational issues. Further, donor agencies have a limited understanding of the intricacies of the book trade.
19. ABC is by and large obliged to apply for funding every year. Over the ten-year period, the Rockefeller Foundation, Hivos and Sida have been the largest contributors. Sida and Hivos have played particularly important role in providing crucial core funding. Each donor requires separate funding proposals and reporting, which is time consuming. A significant part of senior management resources is used for this purpose. There is no coordination structure in place between the donors although many donors have expressed the desire to work more closely together.

Conclusions

1. ABC plays a unique and vital role in being the most important commercial provider of African books in the north and thereby disseminating African culture and heritage in Europe and North America. If it ceases to exist, it will leave a major hole in terms of the availability of African books in the north. It serves as a one-stop service for customers, i.e. bookshops, libraries and readers in the north, as well as a one-stop service for African publishers. Its strategy is unique in that it remits the lion's share of its sales income to African publishers. No other distributor in the world does this. Further, "normal" distributors do not even come close to marketing books to the extent that ABC does. ABC is neither "fish nor fowl" – it is both commercial and non-profit, acts like an NGO and a business at the same time.
2. ABC is an unusually efficient mechanism for supporting African publishing. With total remittances to African publishers virtually equalling total donor contributions, the "over-head" of the support is zero. In comparison with transferring funds directly to publishers in Africa, ABC as a channel also offers i) important exposure for African books in the north and ii) addresses the demand for African published books in the north. In this way it promotes reciprocal understanding and counteracts isolation out of both the southern and northern perspective. While some publishers benefit more than others, this is mainly a function of the sort of books that are more easy to sell in the north as well as the differing output and types of books published by the member publishers.
3. ABC's work supports many of Sida's policies. It contributes to socio-economic growth and cultural plurality in the south and north, as well as paying attention to gender aspects. ABC's de facto structure of governance, however, is not wholly consistent with Sida's aims to promote democracy.
4. To a considerable extent ABC's strategies have been affected and even altered by ten years of trading and the realities of the market place. On the whole, its strategies and activities appear well-structured. While ABC operates in a way that suggests an implicit mission, having a clear and precise mission would allow for a better focus within the organisation.
5. ABC's founder members initially played an important pioneering role and have continued to be a solid pillar of support. It is appropriate that the Council of Management has taken into consideration gender and geographic representation in its composition, but the pool of members (i.e. founder members) from which the Council is selected is very limited. As a result, the governance is neither broad-based nor sufficiently democratic. Further, governance on a regular basis is difficult, as the Council meets very infrequently due to lack of funds. This makes it difficult for the Council to play a more active role in providing guidance to the Oxford office. As a Collective, ABC would benefit from having a single constitution-like document that defines the relationship, roles and responsibilities of the bodies within the Collective.
6. ABC's initial goals of self-sufficiency in a short period were unrealistic. However, at that time, there was very little information available to enable the necessary analysis, as distribution of African books in the north had been minimal. The fact that the budgets of libraries and academic institutions have been increasingly pinched during the 1990s, has affected ABC's sales. Nevertheless, closing the gap between self-generated income and expenditure should be possible over the long-term. This would require greater determination on the part of ABC's members with the active support of the donors.

7. Since 1997, ABC has been cautious about adding more members. However, a more forceful search for suitable members would benefit the Collective, not least as ABC's analysis in 1996 revealed that the lack of new product seriously affected sustainability.
8. Financial uncertainty has hampered ABC's ability to undertake long-term planning and to launch new initiatives in order to attain the ultimate goal of self-sufficiency.
9. There is room for ABC to improve some of its marketing strategies and materials in order to make them more effective.
10. At present IABSS is crucial to ABC's survival. The fact that IABSS consists of sending books back to Africa at marked up prices appears strange. However, there are several operational advantages for BAI, who claim they would otherwise not be able to implement the scheme. The aim of "promoting an intra-African trade in books" appears not to be addressed by the scheme. This is viewed as a contentious issue by parts of the African book industry.
11. ABC has adequate capacity to administer and account for donor support. However, ABC's existing staff is under pressure to attend to day to day operations which leaves very little time for analysis and perspective business planning or even to devise and/or implement new initiatives. It would save duplication of staff time and release man-hours for other work, if ABC were fully computerised.
12. Communication and guidance from the member publishers can be improved. This relates to management as well as marketing inputs. Similarly, knowledge about the African publishing context can be enhanced among the Oxford staff.
13. ABC's distribution is constrained by not having a distribution point in North America. There is considerable unrealised potential in the North American market for ABC's books, which can only be fulfilled if it sets up its own distribution arrangement in that region.
14. Digital printing could have several potential benefits for ABC's members. A consequence of performing such a function is that ABC would have to assume the role of a publisher while the books selected for printing in this manner would be mainly those where the demand is in the north.

Recommendations

1. Sida should continue its support to ABC with a longer-term perspective since it fulfils an important role in both the south and the north: ABC does not simply remit sales to African publishers, it also serves to meet the need for African published material in the north. Furthermore, ABC has proven itself to be a well functioning and efficient African self-help initiative. However, as outlined below, Sida should encourage ABC to initiate some changes in its structures and strategies.
2. ABC would benefit from clearly re-articulating its fundamental mission in order to guide its operations, strategies and planning. Such a process should be broad-based and participatory. A basic document, such as a constitution, should be drawn up which clearly defines the roles, responsibilities and relationship between all parties within the Collective.
3. ABC needs to consider the principle that all publishers that have paid a membership fee should have the right to vote and to stand for the Council of Management – i.e. become a *shareholder* in effect. To ensure that not even the smallest publisher is excluded, ABC could advance the requisite membership fee (as it has done on occasion), which could then be deducted in instalments from subsequent remittances.

4. All shareholders should elect the Council of Management for a fixed term. Not more than three positions on the Council should be reserved for founder members. A chairman should also be elected for a fixed term and should be empowered with the overall responsibility for all policy issues, in consultation with other members of the Council as far as practical. Funds should be made available for annual meetings of the Council.
5. ABC should be more proactive in developing its membership, as also co-opt its members to recommend suitable new members. It should publicise the conditions and the criteria, enunciated in May 1997, based on which ABC will accept a publisher as a new member. These criteria should be formulated and widely circulated throughout Africa through, for example, the *African Book Publishing Review*, the *African Publishing Record* and newsletters of the national publishing associations. ABC should, largely through its members, actively scout the key African book fairs for potential members.
6. In order to get closer to the goal of greater self-sufficiency, ABC should through its members, rethink the basis on which remittances are being sent to African publishers. Despite the genuine constraints it faces, ABC should chalk out a long-term strategy to progressively reduce the gap between self-generated income and expenditure. Some suggestions include a) recalculate the percentage of sales that ABC remits to its members; b) give less favourable terms to non-African members such as ADEA and Bellagio Publishing Network; c) actively canvas new members which would increase the number of books available for sale; and d) penetrate existing markets more deeply and explore new markets – e.g. North America. In addition, efforts should be made to analyse again the possibility of taking on suitable Francophone and Lusophone publishers.
7. ABC and its donors should actively pursue setting up a North American distribution point as soon as possible. This can be done even on a small scale and with fairly low investment to begin with. As the operations develop and provided that it yields sufficient additional revenue as is expected, the office can be expanded.
8. ABC should explore the market among the expatriate African community and Afro-Americans. More in-depth list research in order to strengthen its mailing database should be undertaken. ABC should be more active in promoting promising African creative writers, especially through the northern media. One of its UK directors can be co-opted for this purpose. ABC should continue to give relatively less focus to northern bookfairs, which are expensive and often of little direct benefit.
9. To improve communications between the Oxford office and the members, enhance the office's understanding of the African publishing scene and build capacity among its members, regular exchanges should be organised. Firstly, a rotation system should be established whereby a marketing middle-management staff member from an African publishing house is attached to ABC every year for a period of at least 3 months. The African "trainee" should contribute to ABC's operations. Second, ABC's fulltime staff members should be funded to spend time in Africa with member publishers.
10. ABC should be more active in creating awareness in Africa about ABC as an organisation. It could, for instance, regularly publish information about what its aims are, how it operates and what it has achieved.
11. Presuming that the scheme continues, ABC, BAI and their donors need to seriously consider how IABSS can be used to strengthen the book trade within Africa in the long term.

12. Donors should assist ABC to fully computerise its operations particularly by linking the warehouse to the office and to upgrade its software and hardware. In this process, ABC should refine its management information systems and in particular should cease to calculate remittances inclusive of postage costs.
13. Donors should also look into the possibilities offered by digital printing. One method would be to obtain a grant or a loan to set up a revolving fund to use for the production of the books. Meanwhile, ABC should continue to monitor technological developments that may be applicable in the African publishing context.
14. The Board of APNET and ABC's Council of Management should actively explore all avenues to strengthen and mutually reinforce the relationship between the two organisations.
15. ABC should aim at securing longer-term commitments from donors by producing a five-year strategic plan that serves as a joint funding proposal. Besides some of the activities outlined above that can be funded on a project basis, ABC's donors should consider core funding, particularly as a large part of its costs are related to personnel. Sida can play an instrumental role in this process. Further, ABC's donors should increase the co-ordination amongst themselves and should accept a common reporting framework including a joint audited financial account in which all donor contributions are specified.

1 Introduction

Founded in 1989, the African Books Collective Ltd. (ABC) is a self-help initiative by a group of African publishers to promote and distribute their books outside Africa. It addresses both the needs of African publishers to disseminate their output in the north, as well as the needs of the north, which faces chronic problems in acquiring African published material.

Since 1990, Sida/DESO has provided core support to ABC, amounting to a total of SEK 2,370,000. In 1997 Sida felt that an evaluation was necessary before it could consider continued long-term support to ABC. For various reasons the evaluation could not be carried out when planned and was therefore postponed. Interim funding was approved by Sida to enable ABC's activities to continue without interruption.

At the end of September 1999, COWI was chosen by Sida to conduct the evaluation of ABC. The evaluation team consisted of Cecilia Ljungman as team leader and Tejeshwar Singh, who is a publisher himself.

As laid out by the terms of reference (see Annex 1) the purpose of the evaluation is "to evaluate the Swedish support to ABC and to make recommendations on future co-operation".

The terms of reference specify that the following issues should be addressed:

1. ABC's development since its establishment/indications for future development;
2. The time aspect – is ABC a permanent or an interim set-up?
3. Sustainability and possibilities to direct the support to Africa;
4. Future possibilities and constraints facing ABC/assessment of technological and economic developments affecting the book industry;
5. The business aspect and commercialisation of ABC's activities;
6. Possibilities to projectorient the support instead of giving core support; and
7. The role and relations of various organisations working towards the same objectives i.e. to promote publishing and book development in Africa.

1.1 Approach and Methodology

To the extent possible, the team used a participatory approach for data collection and analysis. The evaluation consisted of the following components:

1. Initial deskstudy of documents from Sida and ABC. (See annex 3 for documents reviewed.)
2. Start-up meeting with Sida in Stockholm on September 30 to discuss the scope and expectations of the evaluation as well as the tentative work plan.
3. SWOT workshop and in-depth discussions with the Oxford office. (See annex 4 for the SWOT Workshop Report.)
4. A questionnaire (See annex 5) was developed and sent to all ABC's member publishers. In total, 20 questionnaires were returned and processed.
5. Interviews with partners, donors and end-users in the north. (See annex 2 for list of persons met.)
6. Fact-finding mission to Kenya and Ghana that included interviews with ABC members, national publishing associations and non-members.
7. Preliminary finding workshop in Copenhagen with Sida, representatives from the Oxford office as well as ABC's Council of Management.

ABC can be regarded as both an NGO and a business at the same time. However, as the objectives of the evaluation have been closely tied to the financial sustainability of ABC, the evaluators' point of departure has been to largely regard ABC as a commercial enterprise. Nevertheless, the NGO aspects of ABC have not been overlooked. In this report, less attention has been given to those parts of ABC's operations that function well.

1.2 Structure of the Report

This report consists of an executive summary, seven chapters and four annexes. The ensuing chapter looks briefly at African publishing, the problems it faces and how ABC was established. Chapter 3 discusses ABC's mission, strategies and structure. Chapter 4 covers ABC's management. In chapter 5 ABC's operations and achievements are presented. The next chapter examines ABC's finances and relations with donors. Finally, chapter 7 provides an analysis of future prospects – including sustainability, opportunities and the donors' roles.

The evaluation team would like to extend its sincerest thanks to ABC's staff, the Council of Management, ABC's members – particularly those in Ghana and Kenya – Sida and all other ABC partners who provided the team with information, important input and, not least, warm and generous hospitality.

2 The African Publishing Context

There are great variations with regard to the status of the publishing industry between various countries in Africa. This is in terms of historical development, readership and market size, printing and publishing technology, and communication infrastructure. These differences, to a large extent, reflect the state of development and the contemporary economic and political situation of the individual countries. Certain problem areas, however, cut across these differences: inadequate access to capital, the high price of many raw materials, generally poor printing facilities, and the shortage of qualified staff, in particular at middle-level. In addition, underdeveloped marketing and distribution systems, the dominance of northern publishers¹, inadequate attention on the part of most African governments to book development policies, and difficulties in export (both outside and within Africa), are challenges facing the African publishing industry.

The social problems of many African countries – such as high illiteracy, an emphasis on functional reading only, the wide diversity of languages and the general lacking of libraries – further affect the African publishing industry negatively.

The vast majority of African publishers are involved in textbook production. It is estimated that around 60% to 70% of all books produced in Africa are textbooks. The World Bank and bilateral donors finance most of the textbook production. Although significant changes are being made in a few countries – not least as a result of the lobbying carried out by APNET and its members – textbook publishing is often dominated by foreign multinationals or by governments who have had a monopoly over the textbook market.

Among the problems faced by all indigenous African publishers before ABC was established was that only a handful of commercial book distributors were willing to handle African books and they were reluctant to take on the complete list of a particular publisher. Second, European distributors tended to buy publishers' titles in Africa at African prices, paying in local currency and taking large discounts, thereby leaving negligible returns for African publishers. Third, these distributors hardly undertook any marketing or promotional activities and stocked only a limited number of titles and in small quantities. As a consequence, libraries and individual book buyers in the north faced chronic problems in acquiring books published in Africa.

2.1 Establishing ABC

The “Bookweek Africa” exhibitions at the Africa Centre in London in 1982 and the 1984 Dag Hammarskjöld Seminar “Developing Autonomous Capacity in Publishing in Africa” played an important role in bringing indigenous African publishers together. In 1985 African publishers were brought together again, this time in London, to reflect upon how they could more effectively promote and distribute African books outside Africa. Here it was decided that a collective to market and distribute African books abroad would be set up. In 1988, five African publishers² met in Oxford together with Hans Zell, who as a consultant to ABC formed its secretariat. In 1989 ABC was registered in the UK as a company limited by guarantee. The 11 existing founder members each contributed £1000. In those days when most African nations had stringent exchange control laws, it was no mean feat for these pioneers to have arranged this remittance – which also amounted to a considerable sum of money in terms of local currencies.

¹ This is particularly true in most parts of Francophone Africa where the majority of publishing houses have a majority French ownership. In many of these countries publisher must turn to Paris for ISBN numbers.

² Walter Bgoya (Tanzania), Henry Chakava (Kenya), Peter Eke (Nigeria), Mthobi Mutloatse (South Africa), and Victor Nwankwo (Nigeria).

After four years preparatory work, ABC finally began trading in 1990, with an initial stock of 400 titles, in quantities that ranged between 30 and 300 per title.

The benefits of establishing ABC were seen as several:

1. The dissemination and visibility of African books would be enhanced.
2. African publications would be more easily available to libraries, scholars and other book buyers in the north.
3. African publishers would strengthen their economic base which would encourage increased publishing activity.
4. It would help African publishers to persuade top-ranking African writers and scholars to publish with them as opposed to with overseas firms.
5. The cultural, social and economic identities of African countries would be more widely communicated through an African organisation, rather than through primarily profit-oriented organisations of developed countries.
6. It would promote the independence of African publishers and their authors and put them on a basis of equality with their colleagues overseas.

It was decided that ABC would seek to be profit making on behalf of its members, although non-profit-making on its own behalf. In this way, the publishers' earnings' from foreign sales would be substantially higher than obtained through conventional commercial distributors. Furthermore, approximately two-thirds of the net income from the sales achieved by ABC would be remitted to the members, regardless of the net profit made by the Collective. The non-profit-making status of ABC and the preferential terms for its members led ABC to seek donor funds for what was believed to be an interim period.

3 ABC's Mission and Structure

3.1 Mission

Originally, ABC described its mission as “to improve the free flow of communications through published material from Africa to the North”. ABC also maintained that it would be “open to all African publishers and research institutions with publishing programmes” and that it would “continue to seek to promote its benefits to all such publishers”.

Today ABC describes its “principle aims” on its website as follows:

Within the context of support for the indigenous African publishing industry, the principle aims and activities are three fold:

1. The main core aim is to more effectively promote and disseminate African-published material in the major English-language book markets outside Africa; and in this way to increase export sales earnings of member publishers. Two needs are addressed: the need of African publishers to get their wealth of output on the shelves of libraries and bookshops in the North, and the need of libraries and others who face chronic problems in the acquisition of African publications.
2. To disseminate information and materials about the African publishing industry. ABC also publishes some resource guides primarily for the African book communities.
3. To promote intra-African book trade, through the Intra-African Book Support Scheme, run in partnership with Book Aid International. Recipient-request led, and donor funded, the scheme supplies African published books to African libraries (university, rural, public, schools) and institutions, and other community organisations.

The above suggests that strengthening African publishing is the overall aim of ABC – an aim that corresponds to that of the African Publishers' Network (APNET). However, in several of its recent donor reports ABC writes that its *core mission* is “to create markets, and promote and distribute the titles of the owner/member publishers into markets outside Africa.” This statement can be viewed as a practical expression of how ABC attempts to carry out its mission and is therefore a *strategy*, as opposed to a *mission*. Meanwhile, the profile of ABC included in its catalogues does not mention it aims or mission at all.

While there is a lack of clarity in the formulation and distinction between its overall mission, aims and strategies, ABC operates in a way that suggests that there is a clear implicit mission and strategies related thereto. On the whole, its strategies and activities appear well-structured. However, having a clear and precise mission would allow for a better focus within the organisation. It would also provide a basis for formulating new strategies or reformulating existing ones as also to determine what activities are to be undertaken. While it could be argued that defining a mission is an exercise more relevant for NGOs and institutions rather than for a commercial enterprise, it is not uncommon that businesses today undertake the exercise with the aim of improving overall productivity.

3.2 Structure

Originally, ABC wanted to register as a charity. ABC was however denied this status under UK law as it was going to trade books commercially. Thus, ABC is a UK-registered company limited by guarantee, but has a “not-for-profit” tax status. It has two UK resident directors who are legally responsible for the company and receive a nominal fee for their services. The Collective is non-profit-making on its own behalf but seeks to be profit-making for its member publishers. On balance, ABC is essentially an NGO but it can fulfil its aims and objectives only by being commercial in its activities and orientation.

Day to day operations are carried out by the Oxford office. Its composition and management are discussed in chapter 4.

3.2.1 Governance

A Council of Management representing East, West and Central/Southern Africa governs the Collective. The Council is responsible for policy matters, including financing and staffing. Only founder members can serve on the Council unless there are problems to ensure appropriate regional/gender representation, in which case a non-founder member can be co-opted³. The Council of Management has met only 5 times between 1988 and 1999. Originally, the Council of Management was to change every three years. Because meetings have not been held annually, it was later decided that changes in the composition of the Council would be made every three meetings. Furthermore, for reasons of continuity and practicality, it was decided that Walter Bgoya, Henry Chakava and Victor Nwankwo would remain on the Council indefinitely. These founder members initially played an important pioneering role and have continued to be a solid pillar of support.

When the Council's meetings take place, thorough preparatory work is undertaken and the agenda is fairly exhaustive. The resulting documentation is comprehensive. Although the Oxford office is in regular touch with individual members of the Council through fax and e-mail between meetings, there is no institutionalised form of communication. There is also no provision at the moment for electing a chairman of the Council for a fixed term.

There is no single basic document, such as a constitution, which describes the roles and responsibilities of the Council of Management, the Oxford office and the members. The governing documents include: i) a document outlining membership terms; ii) minutes from the Council meeting in 1988 and 1994 that specify the terms and period of appointment for the Council of Management; iii) a memorandum of agreement signed between ABC and member publishers delineating the terms and conditions related to sole distributing and marketing rights; iv) a certificate of incorporation of a private limited company; and v) a memorandum of association. The latter two documents primarily exist to satisfy British company law. To avoid misunderstanding and to enhance internal and external awareness of the roles, responsibility and relationships between ABC's structures, ABC should consider drafting a single document that covers these issues.

When the Collective was formed, ABC's decisions were taken in a participatory manner that included all members. Foundations were laid for an inclusive governance structure that was democratic and representative. However, its point of departure was the founder members – the Collective's new members have not enjoyed participation in governance, as voting and serving on the Council of Management is restricted to founder members only. At the moment, the summary of the main business conducted is disseminated to the founding members only. Some members felt that not enough is communicated to the membership body about policy decisions, future direction, the financial situation and other strategic issues. While some members do not seem preoccupied by this fact, others see this as a problem:

There is a need for operational accounts (income and expenditure) of ABC to enable members to see how ABC is faring.

I have no idea how the Council operates. In any other enterprise there is interaction between the board and the company. It feels lonely.

Why is the Council perpetual? ABC should encourage new voices.

³ In 1994, to ensure gender and regional representativity, ABC co-opted Jane Katjavivi from Namibia to the Council of Management.

3.2.2 Membership

Originally eighteen African publishers came together in 1989 to form the African Books Collective. Eventually, only 11 publishers actually remitted the required £1000 and they are known as the “founder members”. These publishers enjoy the following benefits:

- They receive 65% of the sales proceeds of their books from ABC
- Only they can be elected to serve on the Council of Management
- And only they enjoy voting rights for the Council of Management.

The founder members also own the assets of the collective valued at a nominal £1 each. The founder members have legal responsibility for the policy of the company under the British Company Act. The 11 founder members are located in Ghana (2), Kenya (1), Nigeria (4), Senegal (1) and Tanzania (3). This category of membership is closed.

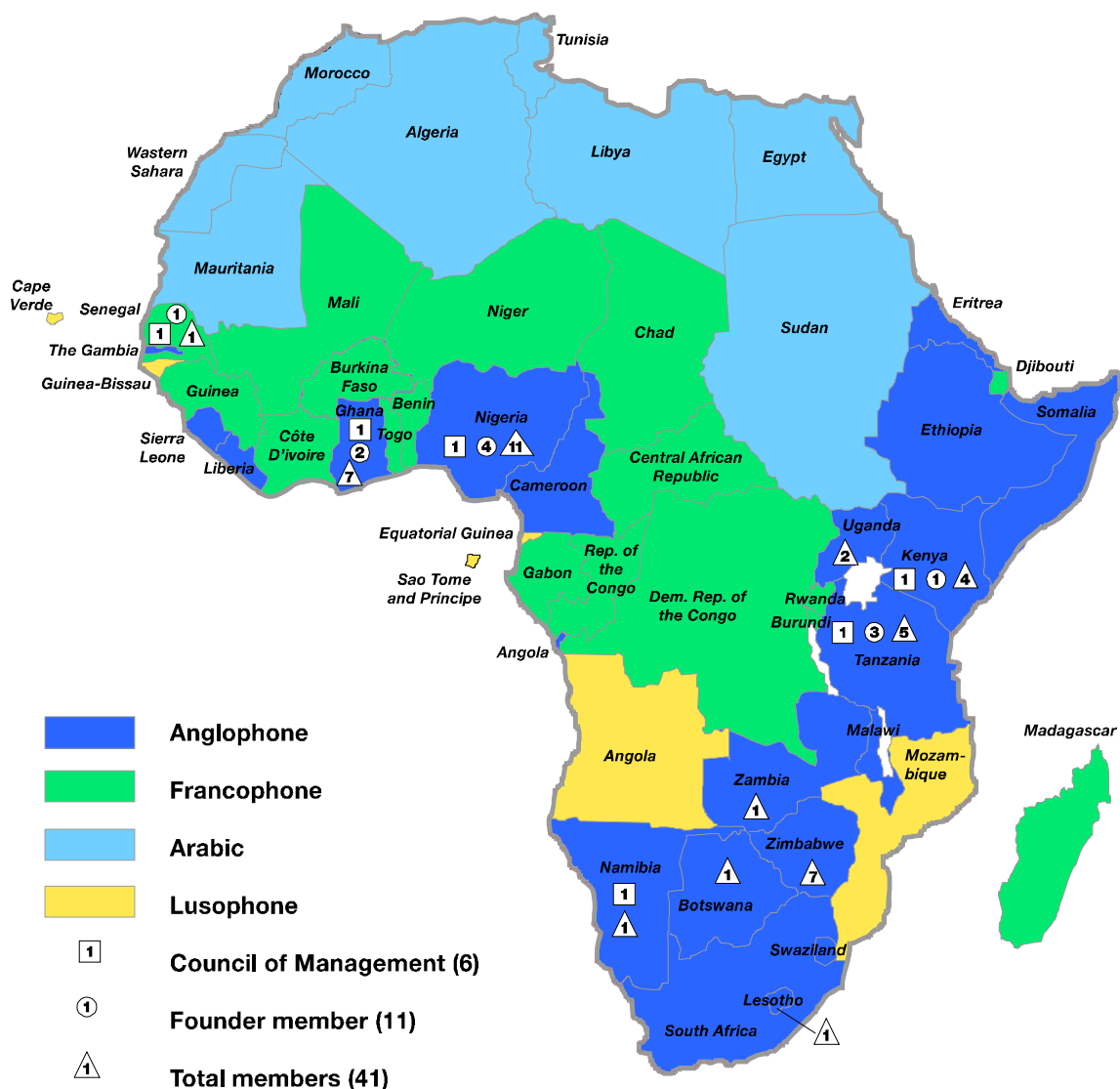
The next category of membership is known as “full members” who paid £500 each to become members of ABC. They receive 60% of the sales proceeds of their books from ABC. Full members can attend meetings (at their own expense) of the Council of Management but cannot stand for elections to the Council nor are they entitled to vote. As with all the subsequent categories of membership, these member publishers do not own assets in the company. Their relationship with ABC, which is characterised by ABC providing a service to these members, is governed by a Memorandum of Agreement signed by both parties.

There are currently 12 full members located in the following countries: Ghana (3), Kenya (1), Lesotho (1), Nigeria (4), Tanzania (1), Uganda (1) and Zimbabwe (1).

The third category of membership is known as “Associate Members”. They pay no membership fee and receive 55% of the sales proceeds of their books from ABC. Like full members they can neither vote at nor stand for elections to the Council of Management. Additionally, they are not entitled to attend meetings of the Council. In October 1998, there were a total of 17 Associate Members drawn from the following countries: Botswana (1), Ghana (2), Kenya (2), Namibia (1), Nigeria (3), Uganda (1), Zambia (1) and Zimbabwe (6).

A fourth category of membership, termed “Single Title Publishers” is open to “publishers who require distribution of one or two titles only”. Their rights are identical to Associate members but with the difference that such members receive only 50% of the sales proceeds of their books. Single title publishers were taken on in the beginning with the expectation that these publishers’ lists would develop. In most cases, this did not occur, and most were dropped when the sales of the single titles had become negligible. At present ABC has only one single title publisher who is located in Tanzania.

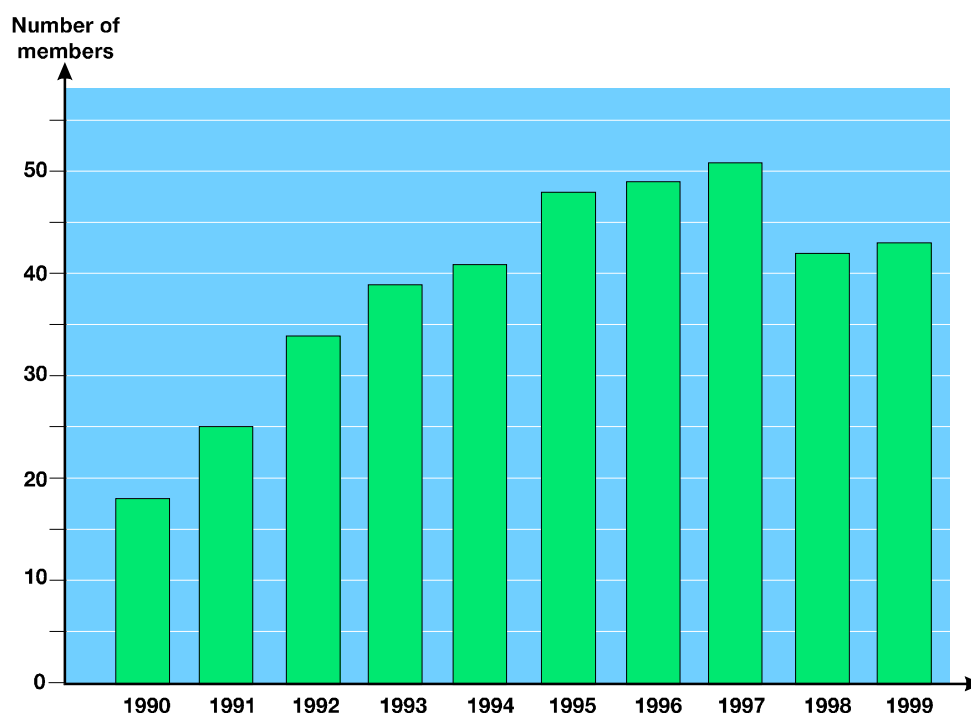
Figure 1: ABC's Membership – October 1, 1999



ABC also distributes a number of books published by its partner organisations such as ADEA, the Bellagio Publishing Network and APNET. This is discussed in greater detail in section 5.5.

At the time the Collective was established, the stated aim was to represent “all African publishers and research institutions with publishing programmes”. However, at the outset, ABC decided to admit only members with English language publishing programmes (and hence to exclude those publishing in French, Portuguese and most of the various African languages). In the early years ABC was fairly quick to admit new members as a result of which the numbers grew to 51 by the end of 1996. However, ABC found that some of these members were producing virtually no books; others had become defunct; while in some cases the books being published were virtually impossible to sell in northern markets. Keeping these considerations in mind, ABC evaluated its membership and dropped about 13 of them in 1997. The point of this exercise was to free up time to spend on productive work, as opposed to servicing books and members that produced little income for ABC. At that stage, ABC also more clearly defined the types of publishers whom it would consider for membership. Since then, they have added 3 new members so that the number of members stood at 43 in October 1999.

Figure 2: Development of ABC's Membership – 1990 to 1999



There are a large number of African publishers who have applied to become members of ABC. This trend has been encouraged by the success of the IABSS scheme. According to information supplied by ABC, it had as many as 104 membership applications outstanding as on 1 October 1999. Of these, 8 were designated as being under “active” consideration (of whom at least 1 has since been admitted); 26 as being “outstanding”; and 70 as “dormant”. According to ABC, those in the “dormant” group are either not suitable or have not responded any further after the initial enquiry.

Some non-members have said that the process of rejecting/considering membership has not been clear. However, ABC's documentation on membership applications would seem to suggest otherwise. The main reasons for rejection have been i) unacceptable production standards; ii) unsaleable subject matter; iii) insufficient quantity of suitable books on the list; and/or iv) majority owned by foreign publishing houses.

After the experience of having to de-stock books and terminate memberships in 1997, ABC is anxious to ensure that there is a market for the lists of prospective members. This has resulted in a tendency within ABC to list arguments why it cannot take on members rather than launch a forceful campaign to find and convince suitable publishers to join the Collective. Furthermore, ABC has stated that it has felt constrained in taking on new members in view of its limited resources in terms of finances, personnel and warehouse space. The last point would appear to be a somewhat limited argument given the fact that ABC was able to handle 51 publishers (no matter how good or bad) in 1996 with a smaller staff and less resources than it has at present. Nevertheless, in the last couple of years, ABC has made some attempt to increase its membership base. It has, for example, taken the initiative regarding the membership of Femrite, the Kenya Publishers Association and the African Association of Political Science. However, ABC could be considerably more active in its search for new members. As one member mentioned:

I don't see ABC looking for new books. It displays at book fairs (in Africa) but does not seem to be scouting.

Enlarging the membership to include as many suitable African publishers (i.e. those who have active publishing programmes comprising the sort of books in demand in the north) should assist ABC to increase its sales with a minimal increase in costs. This would be in consonance with one of its stated aims of strengthening indigenous publishing in Africa⁴.

With a whole new generation of African publishers having come into existence in the past ten years or so, and wanting to get international exposure but unable to get into ABC, there is growing frustration. – *From an interview with an ABC partner organisation.*

By admitting more publishers as members, ABC will assist the growth of those publishers while simultaneously increasing the number and variety of new titles available for sale and thereby enhance its own self-sufficiency. An additional aspect is to increase the pan-African nature of ABC by admitting publishers from at least all “Anglophone” countries. This would further meet the demand among northern scholars who feel that although ABC is extremely useful for their work, the organisation is not completely a “one-stop” shop as they must search elsewhere for books from non-member countries. In addition, ABC should enlarge the membership from countries such as Kenya and Ghana, both of which have increasingly vibrant publishing industries. More than half of those publishers that commented on the current size of ABC in the questionnaire (see annex 5) suggested that the Collective should seek more members:

ABC could work more at attracting others into the fold. Some publishers I’ve talked to think it is a “club”.

I would like to see it (ABC) increased in size.

(ABC) should enlarge its membership and consider increasing its membership fees.

At the same time, many of the members thought that ABC should not let up on its criteria. Some members thought ABC should be tough in resisting poorly produced books and kick out non-active members.

3.3 Conclusions

ABC would benefit from clearly re-articulating its fundamental mission in order to guide its operations, strategies and planning. This would also assist it in its efforts to explain who they are. Such a process should be broad-based and participatory, without being drawn-out and unwieldy, so as not to hamper the organisation’s main goal of marketing and distributing African published books in the north.

While it is appropriate that the Council of Management has taken into consideration gender and geographic representation in its composition, the pool of members (i.e. founder members) from which the Council is selected is very limited. As a result, the governance is neither broad-based nor sufficiently democratic. Furthermore, governance on a regular basis is difficult, as the Council meets very infrequently due to lack of funds. This makes it difficult for the Council to play a more active role in providing guidance to the Oxford office. ABC’s governance structure has been shaped in part by the fact that ABC is a company under UK law: the 17 founding members who came together to launch ABC, are in essence *shareholders* and thereby own ABC’s assets and are legally liable for the Collective. From ABC’s perspective, the growth of non-founder membership and the dormancy of a number of founder members has created a gap in the participation of members in ABC’s governance.

⁴ In any case, its existing membership comprises a significant number of publishers who have published only one or two books (e.g. Sankofa and the Tanzania Commission for Science and Technology) or who produce not more than five or six titles annually, the bulk of which often are textbooks and children’s books.

However, ABC is a collective, which implies a *co-operative enterprise*. It therefore needs to strongly consider the principle that all publishers who have paid a membership fee should have the right to vote and to stand for election to the Council of Management – i.e. to become a shareholder in effect. If implemented, this is likely to have important implications for the current legal status of ABC. To ensure that not even the smallest publisher is excluded, ABC could advance the requisite membership fee (as it has done on an earlier occasion), which could then be deducted in instalments from subsequent remittances. It may be the case that some of ABC’s members prefer to use ABC as a service only and not become involved in its management. The current category of “associate membership” could be an option for such publishers, which because they pay no (less) membership fees, gives them no voting rights. Nevertheless, the evaluators suggest that even associate membership should involve a nominal fee to reflect the co-operative nature of ABC.

All shareholders should elect the Council of Management for a fixed term. Not more than three positions on the Council should be reserved for founder members. A chairman should also be elected for a fixed term and should be empowered with the overall responsibility for all policy issues, in consultation with other members of the Council as far as practical. Funds should be made available for annual meetings of the Council.

In addition to expanding voting rights and thereby participation to include a larger part of the membership body, ABC needs to develop ways of communicating strategic information (e.g. a summary of the main business conducted at Council of Management meetings, decisions taken, current challenges, and a financial report with a statement of accounts) to all members. One member suggested the following:

Member publishers of ABC should convene, say during the Zimbabwe International Book Fair, at least once every three years to deliberate on the challenges and achievements of their instrument.

Overall, ABC needs to be more proactive in enlarging its membership, without easing the membership criteria⁵. Members should be co-opted for this purpose. This requires active scouting, networking, visibility in trade publications and at important events. It should publicise widely the conditions and criteria (enunciated in May 1997) based on which ABC will accept a publisher as a new member and encourage applications. These criteria could be circulated throughout Africa through such channels as the *African Publishing Review*, the *African Book Publishing Record* and the newsletters of national publishing associations. ABC can also, primarily through its existing members, actively scout the key African book fairs for potential members.

Additionally, ABC should carefully review its existing policy of admitting only English language publishers and consider extending membership to Francophone publishers in the first instance and thereafter to Lusophone publishers. This suggestion has been endorsed by at least three existing members. Discussions reveal that Africa scholars in the north require books from all African countries. What these scholars cannot get through ABC, they try to attain through other means. While the majority of publishing houses in Francophone Africa are largely French-owned, and thereby neither “indigenous” nor suitable for ABC membership, there is a small number of Francophone publishers that may have suitable books for ABC. Such an endeavour does not necessarily imply setting up a marketing affiliate in, for example, Paris. Starting small on a pilot basis (for example, taking on a few titles), using the website and communicating with important African studies institutions in the north could be a way to begin.

⁵ This recommendation is also echoed by the evaluation of BAI’s Publishing Support Programmes, including the ABC-BAI administered IABS Scheme. In response to the draft of this report, ABC has stated an intention to analyse the 2000 edition of *African Books in Print* to be published this May with the aim of identifying new members.

4 Management

The ABC office has a total of eight staff members:

1. A Consultant who is responsible for oversight of ABC's operations/policy; finance and funding responsibility; overall management responsibility with the General Manager; responsibility for development, research and dissemination work. (Part-time)
2. A General Manager who is responsible for ABC's core marketing and distribution activities; budget control; consultation and reporting to member publishers; IABSS; and day-to-day operations. (Full time)
3. Customer Services Manager (Part-time)
4. Customer Services Assistant (Part-time)
5. Bookkeeper/Credit Controller (Part-time)
6. Office Manager/Administrator (Fulltime)
7. Administrative Assistant (Fulltime)
8. Warehouse Manager (Part-time).

ABC's team is small, dedicated and hard working. The staff shows a high level of commitment to ABC and its principal aims. There is a congenial working atmosphere and well-functioning communication systems within the office. On four occasions⁶ the team has retreated to conduct a two-day "think tank".

ABC's administration and documentation systems are highly developed and adequately responsive. The procedures and their detailed documentation make it clear exactly what is expected of each team member. This furthermore enables staff members to perform each other's tasks in each other's absence. ABC's operations are also conducted in a timely fashion.

ABC seems to have developed effective accounting systems, satisfactory relations with its bank and has good control over expenditure – a large portion of which is staff costs. In fact, ABC's operations could be described as lean. Bookkeeping is carried out through a chartered accountant. The accounts are audited annually. Donors have generally been very satisfied with ABC's reporting.

ABC's offices are located in Oxford in the UK. This has enormous operational advantages in performing their main function of promoting and distributing African books in northern markets. Besides being home to a major university, Oxford has developed into an important centre of publishing and book selling in Europe, which gives ABC access to a pool of trained manpower. More importantly, one of the biggest book wholesalers, an important ABC client, is located a block away. Locating ABC in Africa as some have suggested would make it extremely difficult for ABC to carry out its main functions. It would lead to many operational and logistical hurdles besides divorcing ABC from its main markets.

Its (ABC's) presence in the north makes it most effective in penetrating the northern market, which still remains the overwhelming giant in the book market.

ABC's offices are far from luxurious. They are rather cramped resulting in the printers and the photocopier being placed in the administrative room where two staff members also work, a set-up that is not in line with safety regulations. The equipment is also old and breakdowns (for example,

⁶ 1993, 1994, 1996 and 1998

of the photocopier) are becoming frequent. While the hardware used by the staff is far from modern, most staff members are fairly satisfied with its performance. The warehouse, however, has no heating.

ABC computerised its systems in 1994. Order processing, various types of mailing, billing and accounting are all computerised. After initial glitches that have now been ironed out, computerisation has played an important role in making operations efficient. The system allows for detailed processing of information and can for instance provide information on sales, remittances by publisher and title, mailing lists, clients and title databases. However, some of the components have been set up in a linear fashion, which are not conducive to easy analysis. In one instance, the software has calculated remittances including postage, which in effect has resulted in slightly higher levels of remittances to member publishers, which also means that the ABC office has retained less.

Another problem with the current system is that the computer at the warehouse, which is located a 40 minute drive from the office, is not linked to the office database and, as a result, there is a certain amount of duplication of work. The distance can also cause a delay in processing orders and inefficiencies in customer servicing. If the warehouse was connected to the database, inventory management would be much easier, stocks could be monitored continuously, and there would be a saving in staff time.

ABC can improve its management by developing Management Information Systems (MIS) to allow for rigorous analysis of financial data and perspective business planning. At the moment, ABC's staff is under pressure to attend to day to day operations, which leaves very little time for analysis, strategic planning or even to devise and/or implement new initiatives. Furthermore, financial uncertainty has hampered ABC's ability to undertake long-term planning and to launch new initiatives – not least those related to the aim of attaining greater self-sufficiency. To adopt effective MIS, it may be worth considering enhancing the office capacity in this area through training or by engaging a MIS specialist to consult ABC. In this light, upgrading the computerised systems may be required.

5 ABC's Operations

ABC operates in the context of the northern commercial book trade⁷. The book trade, and in particular publishing, is often considered one of high risk and low and slow returns. Book distributors, or wholesalers, usually select and buy titles from publishers at a discount, which they subsequently sell to libraries and bookshops. The publisher carries out marketing of titles. On a general level, ABC competes with and is like any other distributor in the north. ABC's competitive advantage is that it has a unique selection of books⁸. However, as is explained in this section, while ABC is run as a commercial enterprise, it is a collective and some aspects of its operations, in particular the underlying mission, can be likened to that of an NGO. ABC is one of several organisations involved in strengthening the book sector in Africa. Some of the other main organisations are the African Publishers Network, Book Aid International, the Zimbabwe International Book Fair, the Bellagio Publishing Network and the Pan-African Book Sellers Organisation.

ABC broadly describes its operations as consisting of three parts: 1) distribution and marketing; 2) research, dissemination and member services; and 3) the Intra-African Book Support Scheme (IABSS). However, in the sections below, ABC's operations are divided into the following parts: Marketing, Sales and Customer Relations; Member Services; Research and Dissemination; Relations with Partners; and IABSS.

5.1 Marketing

Marketing constitutes the most important part of ABC's operations. The books marketed by ABC are divided into 53 subject categories ranging as widely as from zoology, urban planning, biotechnology, and anthropology to history, women's studies, law, children's books and drama. The largest categories (over 100 titles each) are children's books, fiction, politics and international affairs, economics and development. Presently, ABC stock consists of 1700 titles, with about 150 new titles added each year⁹. A copy of each title is available in ABC's showroom in Oxford.

As ABC carries the entire lists of its member publishers, a difficulty it faces in its marketing efforts, is that it has little control over the type and range of "products" it has available for sale. The total number of titles fluctuates significantly from year to year. For instance, in 1997, ABC marketed 147 new titles. In 1998 this figure dropped to 10. In 1999, the number of new titles was back up to 155. In this three-year period, seven of ABC's member publishers did not produce any new titles.

Another obstacle in ABC's marketing effort is that the production quality of some of its books is sometimes poor. While many clients seem to generally accept this fact regarding most of the subject categories ABC carries, this is less true with regard to children's books.

ABC's marketing function is unique. Unlike a purely commercial distributor, ABC promotes its titles, which of course entails significant costs. ABC's marketing effort is generally highly appreciated by its members. The components of the marketing effort are discussed below.

⁷ For an introduction to the players of the book industry, please see annex 6.

⁸ ABC has the exclusive rights for Europe and North America for the books of its member publishers.

⁹ The publishers send their books at their own cost. The books continue to belong to the publishers until they are sold.

5.1.1 Catalogues and Printed Materials

ABC produces a range of high quality promotional material every year. In 1998 it brought out two main catalogues, six subject catalogues, two supplementary catalogues and individual book flyers. The catalogues remain ABC's most important marketing tools.

As it is not regarded as cost-effective, no paid advertisements are taken. However, in the quarterly *African Book Publishing Record*, two free pages of advertising are granted to ABC.

5.1.2 Mailings

ABC's marketing materials are mailed out to more than 7,000 addresses in the north. In addition, information on new titles is mailed in batches about six times a year, to key customers, standing order customers and some African studies journals. While ABC has developed sizeable customer mailing lists, this crucial activity will always require attention.

5.1.3 Website

Since November 1998, all titles are listed on ABC's website. There is evidence that the website is well frequented. On-line orders have been growing steadily. Furthermore, the website contributes to an increased number of requests for catalogues and thereby a greater dissemination of its materials.

5.1.4 Book Events

After many years of experience, ABC has given less and less attention to northern book fairs, which are expensive and often of little direct benefit. Resources are better spent on more marketing and "repping". Nevertheless, ABC attends about six book fairs a year and sends materials for collective exhibits at about 10 events. The most important exhibit is the annual meeting of the African Studies Association in the USA, where ABC has for many years been the only exhibitor of African published books.

In addition, on a couple of occasions, ABC has organised story-telling performances of its writers. Further, for its own publications, such as *The African Writers Handbook*¹⁰, ABC has organised book launches.

Not least as a result of its serious reputation, ABC benefits from the goodwill of agents in the sector. For instance, ABC's books are exhibited annually at the Copenhagen book fair free of charge. Discussions with Blackwells revealed that although the company would not contribute financially to ABC, it would be willing to assist ABC in other ways, such as through promotion.

5.1.5 Market Research

Since its inception, ABC has conducted a fair amount of market research. In the beginning this task was easier but as the Collective "creamed" the obvious potential customers (such as academic institutions and libraries), more in-depth market research is called for. While ABC has by no means ignored this area of marketing, it has not devoted enough effort to it in recent years. Nor has it been innovative in trying to create new markets. One member suggested:

ABC operations could be improved by:

- Knowing who is in need of African books and has money to purchase them.
- More aggressive and original (i.e. non-traditional) marketing of African books internationally.

¹⁰ This book was printed with the help of Sida financing via the Dag Hammarskjöld Foundation.

More in-depth list research to strengthen its mailing database would be a cost-effective way of developing ABC's markets. ABC could, for example, explore the market among the expatriate African community as well as among Afro-Americans, and develop new lists accordingly.

5.1.6 Repping

Funds permitting, ABC periodically sends a sales representative to call on main retail shops, library suppliers, wholesalers and key institutions in order to present both recent new titles and forthcoming ones. ABC's "repping"¹¹ is only carried out in the UK. Repping also includes gathering market intelligence and feedback concerning the price and acceptability of the books as also about the competition. While travelling is expensive, ABC needs to keep in regular touch with key buyers in major customers such as Blackwells, Foyles and the Africa Book Centre. One way of doing this is over the phone, particularly when ABC receives new consignments. Low-cost day trips to London and Cambridge once every six months are also important sales efforts.

5.1.7 Rapid Response Marketing

In the past ABC has conducted what it calls "rapid response marketing" of new key titles. However, ABC itself feels that it should develop this form of marketing further¹². For example, ABC could be more active in promoting promising African creative writers. While those ABC members who have had their books reviewed have praised ABC efforts, some members thought more could be done:

(ABC could) be more aggressive in getting especially scholarly/academic books reviewed in journals/magazines.

One of its UK directors, who is well-connected in the African cultural scene in Britain, could be co-opted for this purpose.

5.2 Sales and Customer Relations

ABC receives its sales orders by mail, telephone or e-mail. The books are stored at the warehouse in Burford. ABC fulfils its orders by dispatching books using the most cost-effective mail and parcel delivery service. Thus shipping and billing is conducted centrally. After nearly ten years of trading, the logistics and systems involved in the distribution operation are generally streamlined and effective, allowing for efficient order turnaround.

ABC's sales have developed well on the whole. In 1990, ABC's total sales turnover was £29,649. Sales exhibited a steady growth until 1995 (turnover in that year was £205,823). However there was a sharp drop in 1996 when the turnover was only £166,198. ABC has recovered well and the sales in 1998 were £292,440. The financial difficulty experienced in 1996 has had a profound effect on the organisation, including inducing a feeling of anxiety among its staff members.

Since 1996, books have been ordered by customer located in 40 countries outside Africa. A major chunk of ABC's sales are to the UK, which in 1998 amounted to £48,585. However, sales to the UK include books ordered by Blackwells and other distributors who in turn sell books to libraries and bookshop throughout the world. For example, Bokus, the largest on-line bookshop in Scandinavia, has offices in the UK that handle their UK buying. Thus, ABC's orders from Bokus will show up as a UK sale even though the end user may be in Scandinavia.

¹¹ Book industry jargon from the phrase "Sales Representative", hence "rep"-ping

¹² ABC notes that rapid response marketing includes obtaining reviews, which has become more difficult as some African journal have reduced their review space.

Academic institutions and libraries make up an important part of ABC's client base. In fact, the bulk of ABC's sales to North America are to academic libraries. This makes ABC vulnerable to cuts in educational expenditure. In 1999, sales to North American libraries showed a slight fall compared to 1998. Similarly, sales to UK libraries show a static picture and ABC's feedback from the UK market is that budget "are too stretched". One feature of the book market is nevertheless its cyclic nature: when library budgets are cut back, individual book buying tends to increase in compensation. The book trade actors are thus obliged to adjust themselves according to the changing market place to survive.

Interviews with a few ABC customers in the UK, Sweden and Denmark revealed that they were very pleased with ABC's services. All of them maintained that ABC has facilitated the buying of African published books immensely. Blackwells stated that "ABC makes a *massive* difference" and that ABC "is a good thing".

Institutes such as the Nordic Africa Institute and Centre for Development Studies in Copenhagen admit that as their scholars travel to Africa, they have the advantage of being able to purchase books in Africa. This way they can also obtain the titles that ABC does not carry. They, therefore see ABC as "an excellent supplement".

All customers felt that ABC's services were as good and as professional as any other supplier of books. There were no complaints about the quality of the books. They felt that ABC's list of titles represented an important part of indigenous African publishing. However, the institutional customers would like ABC to carry books from a greater number of African countries.

Should ABC close down, all customers interviewed claimed that this would create significant problems for them. One commercial retailer maintained that they would go as far as to dissuade their customers from ordering African published books as the task of attaining them would become extremely laborious. Even if it wanted to, it would not be able to offer a fraction of ABC's current list to its customers.

If ABC shuts down, we will sell fewer African books while our costs will go up. We are willing to order African publications largely because ABC exists. – Chris Tyzack, Director, International Sales, Blackwell's Book Services, Oxford, UK

5.3 Research and Dissemination

ABC's research and dissemination activities are as follows:

1. Disseminating information about African culture, heritage and scholarship.
2. Producing and disseminating ABC's own resource material related to African publishing.
3. Disseminating information about ABC.

ABC includes collating market intelligence and member services as part of its research and dissemination activities. However, in this report these activities are treated under marketing and member services respectively.

Over and above its marketing and distributing role that leads to the dissemination of African culture, heritage and scholarship, ABC's dissemination activities have been relatively few and secondary in nature. They have usually consisted of someone contacting ABC for information about a particular subject. As a general policy, ABC has tried to respond. In a sense, ABC has been "reactive" as opposed to an active advocator. However, it should be kept in mind that advocacy is

not intrinsic to ABC's mission. Nevertheless, there may be opportunities where ABC is in a position to assist APNET with its advocacy efforts.

ABC sees its publishing of resource material as stemming from a perceived demand. For instance, *The African Publishers Networking Directory* came about primarily because ABC was receiving a significant number of requests for addresses and details about African publishers. To deal with this demand, the directory was collated and published. It is distributed free of charge to African publishers. Meanwhile, *The African Writers' Handbook*, completed in 1999, sprung out of the 1998 Arusha African Publishers-Writers seminar organised in association with the Dag Hammarskjöld Foundation.

ABC's dissemination activities relating to its own work have consisted of producing pamphlets, creating a website, writing articles in relevant publications, and presenting the organisation and its members at book events and conferences¹³. Despite this there are many misconceptions about ABC. Many do not understand, for instance, why it has its offices in the north and why it is involved in the IABSS scheme. Misconceptions and suspicion are particularly high among non-member publishers in Africa, especially among those who have applied for membership but not yet been admitted. These publishers claim that ABC is not transparent and does not reply to communications. The rigorous administration of correspondence at the Oxford office, which includes complete files on all new membership communication, would seem to refute this fact. Meanwhile, the transparency issue may partly be due to the fact that ABC's letters, particularly those of rejection, are formulated too diplomatically and without explaining why the publishers books are not suitable.

I don't know much about ABC and see it as a failure of their communication. – *African publisher, non-member*

I have heard about ABC but don't know much about it. – *African publisher. Non-member*

A couple of our members have enquired how they can join ABC but since we do not know the membership procedures we are unable to help. It would be helpful if we could get a copy of ABC's guidelines for membership. – *Wairimu Gichohi, Executive Secretary, Kenyan Publishers*

Since ABC's aims and purpose and membership criteria are not sufficiently well known and are surrounded by a great deal of misunderstanding, ABC's efforts in this area have obviously not been effective enough. ABC needs to be more active in creating awareness about ABC as an organisation, particularly in Africa. It could, for instance, regularly publish information about what its aims are, how it operates and what it has achieved. The *African Book Publishing Review* could be used a channel, as well as the newsletters of the national publishing associations.

5.4 Member Relations and Services

For the Collective to function effectively, relations with member publishers are crucial. ABC has developed appropriate systems for requesting books from its members and remitting the sales proceeds back to Africa.

ABC's members are largely very positively inclined towards ABC. Nearly half of the member publishers who responded to the questionnaire stated that they were "very satisfied" with ABC's services while the remaining stated they were "satisfied". Confidence in ABC appears high.

When asked about the advantages of being a member, *sales* were listed as the number one advantage by all but one newly joined member (who put this as second). In connection with sales, revenue and wide dissemination/visibility were mentioned.

¹³ For example, events such as the Ubuntu conference in Florence in 1999 and the annual Bellagio Publishing Network meetings.

Earnings from ABC have come in handy in paying salaries in hard times. We are now more quality conscious than ever.

Not only have we been able to sell our books beyond our own market reach, our name has been heard in places we never hoped to reach.

I was very sceptical to begin with but am now very pleased with what ABC has done for our books in the one year since we became members. They are doing a good job in exposing our books in the West and in Africa (through IABSS).

Networking was regarded as the second most important advantage. *Market feedback* and *ABC's resource publications* came a joint third. *Information* came fourth and *facilitating co-publications* and *improving book-quality* were jointly rated fifth.

ABCs strengths were ranked as follows:

1. Professional administration/management
2. Marketing skills
3. ABC's collective nature
4. Its location.

Communications and the committed staff in Oxford were also mentioned as important strengths.

5.4.1 Other Services

Almost half of the publishers who responded had enjoyed services besides those related to sales and marketing. For the most part these consisted of advice about rights and co-publication; information about the internet or software products; digital printing; advice related to production quality; reviews; ABC's resource publications; and even letters of reference.

I have used ABC as the first step in seeking answers to all questions related to export marketing and northern contact on all issues, and I have received answers usually within the shortest time.

The ABC office saw expanding and developing ABC's existing services to serve as a resource point for publishers as an opportunity. ABC could play a more active role in assisting in the buying and selling of rights, facilitating co-publishing deals and performing an advisory role. Proportional fees could be levied for some of the services. Some members also saw facilitating rights deals as a way of increasing ABC's income.¹⁴

Suggestions for additional services made by member publishers include assistance to develop their marketing operations in Africa, providing a digital printing service and looking into e-commerce possibilities.

5.4.2 Communications

An important part of ABC's operations relies on good communications with its members. Almost half of ABC's members stated that they thought communications with ABC were "excellent", while slightly more than half felt they were "good". No one rated communications as being "average" or "poor".

Communications from ABC have been prompt and rewarding.

¹⁵ Some European observers believe that rights offer little income and as so many Europeans read English, particularly in the Nordic countries, selling of rights may threaten the sales of the English version of the book.

Meanwhile, the Oxford office felt that members were not always forthcoming in providing information and reacting to their communication. For instance, while it has improved considerably in the last year¹⁵, ABC has experienced difficulty in receiving books from several publishers. Rerun stocks are not replenished in time. Reminders are sent out to the publishers but are sometimes not acted upon.

Communications with the ABC office are excellent. The office communicates promptly *though we rarely follow suit.* (editor's italics)

The fact that communications are not forthcoming from the publishers can to a certain extent be attributed to the generally poor communications infrastructure in Africa and to insufficient capacity within African publishing houses – particularly those facing financial difficulties.

Another area in which the Oxford office felt a communication need was marketing information from member publishers: ABC receives very few marketing suggestions and guidance from the publishers and their authors.

At the same time, some members desired more feedback from the northern market and implied that this type of information had been better in previous years.

I want information about the quality, contents and subject areas of my books. I would like information about how to improve the quality of my books. I would like to be asked “are you thinking about this?” I get more market feedback from my African distributors.

Some members felt that they have a poor understanding of how operations are run. (See section 3.2.1) A couple suggested that a brief newsletter or bulletin, which focussed on ABC's operations and direction, would be useful.

I would like a half-yearly newsletter telling us: 1) The trends in academic studies in the USA/Europe; 2) Possibilities of selling rights in some countries; 3) Trends in children's publishing; 4) Suggesting ways in which we could help ABC market our books better.

The team discovered that apart from a mission to Kenya and visits to ZIBF, ABC's staff had spent very little time in Africa with member publishing houses. There was a feeling that a better grasp of the African publishing scene would be beneficial. Furthermore, there was a desire among some members to learn how ABC carried out its operations. Exchanges would be an effective way to enhance communications and understanding as well as a means of building capacity among its members.

A rotation system could be devised whereby a marketing middle-management staff member from an African publishing house is attached to ABC every year for a period of at least 3 months. The African “trainee” should contribute to ABC's operations. Likewise, ABC's fulltime staff members should be funded to spend time in Africa with member publishers.

5.5 Relations with Partners

Most of ABC's relationships with other organisations working with the African book sector are constructive and mutually enhancing. The main ABC partners have been Book Aid International (BAI), with whom ABC jointly administers IABSS, and APNET. The Dag Hammarskjöld Foundation (DHF) in Sweden has also been an important partner, not least in relation to the Arusha seminars on publishing and their follow-up. In 1999, ABC and DHF worked together to publish

¹⁵ Between January 1995 and June 1996,

The African Writers' Handbook. In addition, ABC distributes books for partner organisations such as the Association for the Development of Education in Africa (ADEA) – Working Group on Books and Learning Materials; Zimbabwe International Book Fair; and the Bellagio Publishing Network.

Its respective founding members have called APNET and ABC “sister” organisations. The two organisations recognise that their missions are organically linked but that they have not maximised opportunities for co-operation. They have mainly co-operated regarding exhibitions – for instance, ABC has been given space in APNET’s stand at the Zimbabwe International Book Fair while ABC usually exhibits APNET material at the London International Book Fair. ABC has on a few occasions made use of APNET’s newsletter, the *African Book Publishing Review*, and ABC has agreed to distribute some of APNET’s publications. Further, APNET’s Trade Officer made a study visit to ABC in 1997.

The boards of APNET and ABC recognise the importance of a close relationship, given the commonality of some of their fundamental aims. However, the full range of possibilities in this context has yet to be explored. For instance, ABC’s *African Publisher’s Networking Directory* and its *Women in Publishing and the Book Trade in Africa* could be enhanced by working on these books jointly with APNET since the latter has significant resources to draw upon for these types of publications. Both ABC’s and APNET’s secretariats have pointed out the possibilities of co-operation in the area of training (e.g. marketing and warehousing techniques for books). Conducting joint seminars on co-publishing, rights and overseas marketing has also been mentioned.

A greater collaboration between ABC and APNET will indubitably enhance the activities of both organisations. The Board of APNET and ABC’s Council of Management should actively explore all avenues to strengthen and mutually reinforce the relationship between the two organisations.

5.6 Intra-African Book Support Scheme

The Intra-African Book Support Scheme (IABSS) forms part of the Book Aid International’s Publishing Support Programmes. Its aims are “to help overcome shortages of culturally relevant African-published books in African libraries; to promote an intra-African trade in books to raise awareness of African-published materials; and to support autonomous African publishers through sales via ABC”.

The Scheme has been in operation since 1991 and currently comprises two components:

- The supply of adult fiction and children’s books/teenage fiction to public, school and community libraries in Africa.
- The provision of scholarly/tertiary level African-published titles to university libraries in Africa.

Both schemes have been widely appreciated by the recipients who have a chronic lack of financial resources besides finding it very difficult to acquire books from other parts of Africa, even if they have funds. The Scheme is seen to have greatly benefited the general reading public, all types of libraries, and publishers in Africa.

The books supplied under both schemes are chosen from those available through ABC. The books selected are invoiced to BAI at ABC’s prices without discount and BAI also reimburses the costs incurred by ABC to mail the books to the recipients in Africa. Because of the beneficial terms, ABC retains a higher portion of the sales proceeds from IABSS sales than it does from its non-IABSS sales. The Scheme has become a vital source of income for ABC and has contributed an average of 41% to ABC’s annual sales over the period 1991–98. In 1998, IABSS sales (£175,761) constituted 60% of ABC’s total sales of £292,440.

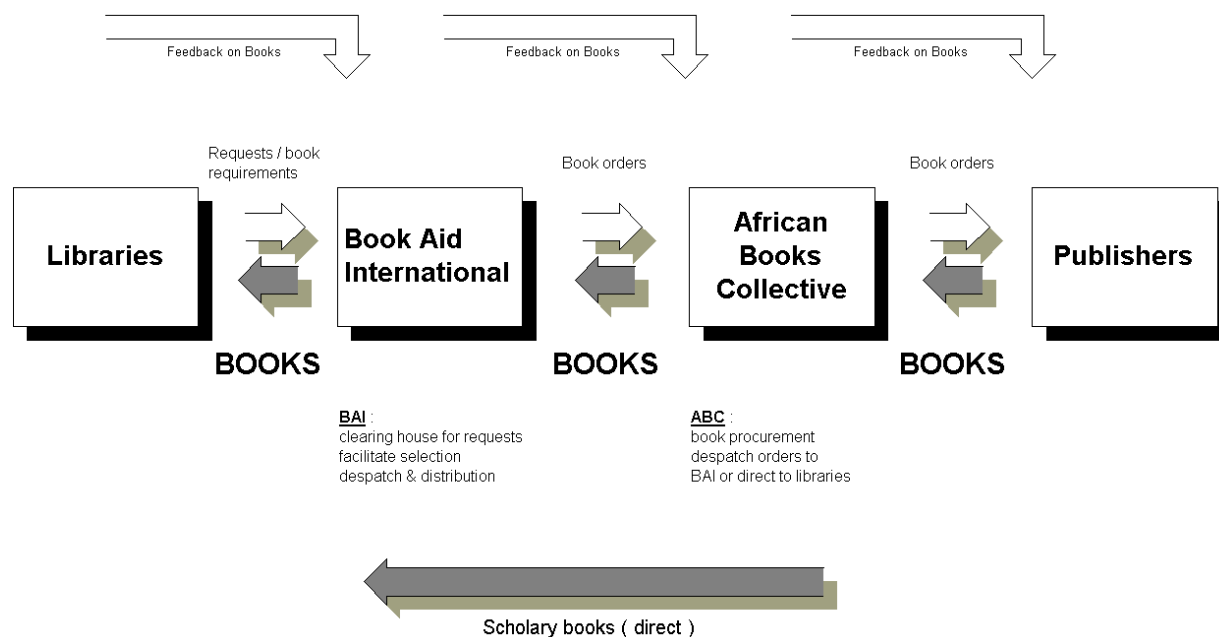
This heavy dependence on the revenue generated by IABSS is a worrying factor for the future of ABC. The Scheme is donor-funded and hence not permanent. If it were to be terminated, the resulting loss of sales turnover will be a huge blow to ABC and may even force it to wind up – but certainly to drastically reduce its staffing, operations and overheads. ABC needs to plan ahead for this eventuality and to develop proper contingency plans.

There are other issues that arise from the way that the Scheme is currently being administered through ABC. Some of them are:

1. The fact that IABSS is acquiring African books at marked up prices to send back to Africa appears to be strange. However, BAI gains many advantages from having ABC administer its schemes and may, otherwise, not be able to operate them. Hence, the marked up prices could even be considered as an opportunity cost as otherwise BAI may incur substantial expenditure dealing directly with a large number of African publishers if they decide to purchase the books directly.
2. At the same time, ABC's involvement in the Scheme means that only the books published by its member publishers are made available to the recipients. This in turn means that the recipients do not have access to the full range of African published materials or even to the best selection. In order to overcome this important lacuna, ABC could, for example, enlarge its membership to encompass as many African publishers (and in as many African nations) who are publishing children's books and teenage fiction. However, ABC argues that in doing so, it will distort its original core mission. As a result of the IABSS evaluation conducted in 1999, ABC and BAI have thus agreed that BAI should attempt to make non-ABC books available through direct purchase in Africa. As ABC itself points out, this will inevitably lead to the phasing out of ABC's role in BAI's programme.
3. One stated aim of IABSS that is currently not being fulfilled at all is "promoting an intra-African trade in books". Indeed, an increasing number of book sellers (and even some publishers) have begun to criticise the Scheme on this score¹⁶. The development of a healthy publishing industry is heavily dependent on a strong and extensive network of book sellers and library suppliers. If the purchase of books under IABSS could somehow be routed through the African book trade, it would go some distance to serve this purpose. Certainly, this must be the long-term aim of ABC, BAI and its donors.

¹⁶ Discussions during the field visit revealed this criticism. Furthermore, during the 1998 ZIBF Buyers and Sellers Meeting, ABC's "operations in Africa" were criticised by some, in particular book sellers. While some of the criticism stems from a lack of understanding of ABC, one informant stated "to supply books to Africa from Africa via the UK and BAI could be hijacking funding intended to develop intra-African trade".

Figure 3: The Intra African Book Support Scheme



5.7 Concluding Remarks

The weak capacity of many African publishers naturally creates some difficulties for ABC's operations. New books do not always arrive in time for new catalogues. This means that the date of a new book can be a year old even though it is listed as new in the ABC catalogue. In addition, some African publishers can often take more than a year or even two to publish a book, typically because of financial constraints. However, the copyright year that they print in the book is usually when they started work on it. Hence the book is already a year or two "old" by the time that ABC gets it, which seriously affects the sale potential. Customers have complained about this. Furthermore, there are not enough new titles being produced by member publishers to ensure increased sales. About half of the publishers that replied to the questionnaire indicated a decrease in the number of new titles published by them in the period 1997 to 1999.

ABC plays a unique and vital role in being the most important provider of African books in the north and thereby disseminates African culture and heritage in Europe and North America. If it ceases to exist, it will leave a major hole in terms of the availability of African books in the north. It serves as a one-stop service for customers (i.e. bookshops, libraries and readers) in the north, as well as a one-stop service for African publishers. Its strategy is unique in that it remits the lion's share of its sales income to African publishers. No other distributor in the world does this. Further, "normal" distributors do not even come close to marketing books to the extent that ABC does. ABC is neither "fish nor fowl" – it is both commercial and non-profit, acts like an NGO and a business at the same time.

6 Finances and Relations with Donors

The following chapter begins by an analysis of ABC's financial development and cost-effectiveness. This is followed by section that outlines ABC's relationship with its donors. The final section focuses how the organisation relates and is relevant to Sida's policies and strategies.

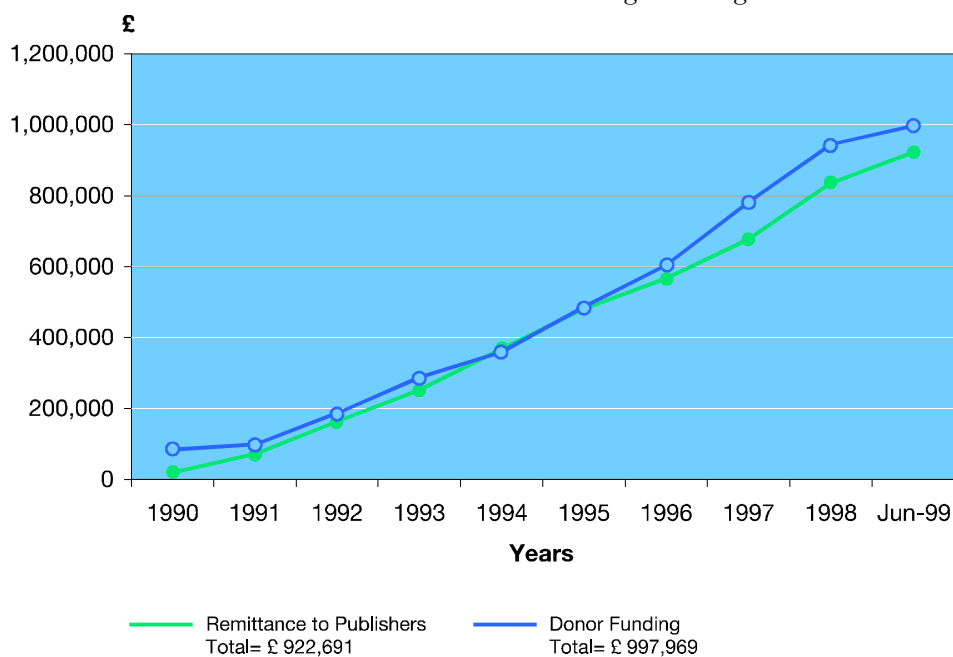
6.1 Cost Effectiveness

The cumulative amount that ABC has remitted to its member publishers since its inception is nearly equivalent to the donor funding over this ten-year period. Funds for promotional and core work amounted to £ 997,969 whereas remittances to African publishers amounted to £922,691. In 1995, remittances were actually higher than donor funds received in that year. The financial difficulties experienced in 1995, when sales dwindled, is one of the main reasons for the slightly growing gap between donor funds and remittances from 1996 to 1998. The gap began to close again in 1999. Thus, in the total period of ten years, the difference between remittances and donor funding is just 7.5%.

It should be kept in mind that although ABC has been reliant on donor funds, ABC's net profit, i.e. the difference between ABC's sales and costs, amounted to nearly 16% in 1998. This is a respectable amount for most businesses and suggests that ABC is operating effectively in commercial terms. Considering this and ABC's lean management, the Collective can be regarded as a fairly efficient mechanism for enhancing the economic base of African publishers.

About 43% of the remittances went to five publishers. This "inequality" however is mainly a function of the sort of books that are more easy to sell in the north as well as the differing output and types of books published by the member publishers. It is not, for instance, only founder members or members of the Council of Management whose books sell the most through ABC. In fact, the top five publishers represent three types of memberships: 2 founder members, 1 full member and 2 associate members. Meanwhile, there are some founder members whose books sell comparatively little through ABC.

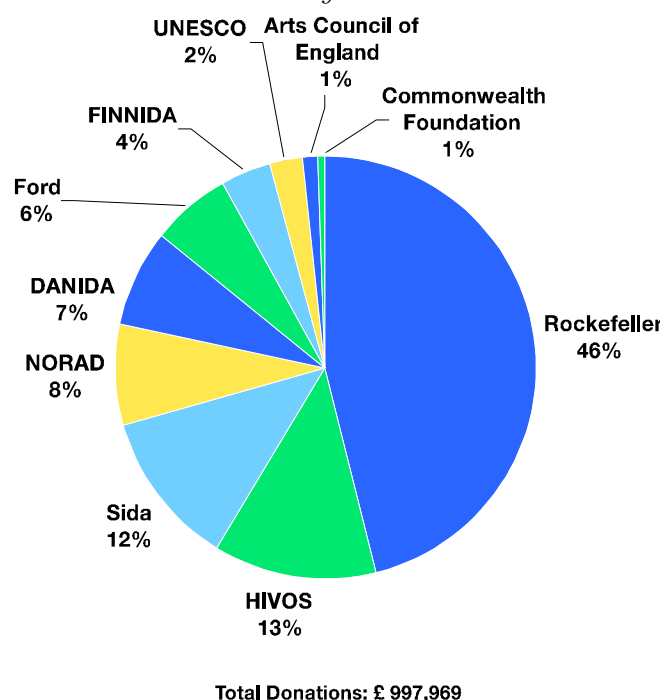
Figure 4: Cumulative Remittance to Publishers and Donor Funding excluding IABSS – 1990 to June 1999



6.2 Donor Relations

ABC has generally enjoyed a good relationship with Sida as well as with its other donors. Donors have on the whole been very satisfied with ABC's reporting. Most of the donors and ABC have regularly met during meetings of the Bellagio Publishing Network. These meetings have provided an important forum for discussions. However, the BPN secretariat itself has not been involved in funding issues related to ABC. This is partly because ABC was already in operation at the time BPN was formed and had quickly established strategies and management structures. Since it has been running on fairly smooth lines and shown a steady growth, donors have been less disposed to be directly involved in both policy and operational issues. In fact, to date there is no evidence of a donor influencing the policies and strategies of the organisation. This can partly be explained by the fact that donor agencies often have a limited understanding of the intricacies of the commercial book trade.

Figure 5: Donations for Promotional and Core Work from 1989 to 1999



ABC is by and large obliged to apply for funding every year. Over the ten-year period, Rockefeller Foundation, Hivos and Sida have been the largest contributors. Sida and Hivos have been particularly important in providing crucial core funding. Each donor requires separate funding proposals and reporting, which is time consuming. A significant portion of senior management resources is used up for this purpose. Furthermore, the slow process of donor responses to applications and the late receipt of funds has at times impeded ABC's operations. There is no co-ordination structure in place between the donors although many donors have expressed the desire to work more closely together.

6.3 Relevance to Sida's Policies and Strategies

ABC's work supports many of Sida's policies, strategies and action plans. Firstly, Sida's Strategy for Cultural Development Co-operation is addressed by the assistance to ABC. This strategy points out that "vital culture has an intrinsic value" and that cultural development contributes to self-confidence, self-esteem, identity, fellowship, quality of life and hope for the future – although this is hard to measure. In that publishing is regarded as an integral part of culture, the support to ABC is highly relevant to this strategy.

A key concept in Sida's strategy for cultural development is cultural pluralism. It includes giving everyone equal access to cultural activities and experiences.

- regardless of race, sex or ethnic affiliation;
- documenting and preserving indigenous traditions, stimulating renewal and bridging the old with the new;
- strengthening individual, group and national identity and self-knowledge without encouraging intolerance¹⁷.

By producing and disseminating books in a wide variety of fields, the publishing industry can play a significant role in enhancing cultural plurality.

Another component of Sida's Cultural Development Strategy is to support organisations and networks to promote and encourage co-operation and exchanges across geographic, cultural and ethnic borders¹⁸. Further, Sida sees south-north co-operation as "essential for reciprocal understanding and for counteracting isolation – out of both the southern and northern perspective". By being an initiative of African publishers from around Africa and by disseminating African published books in the north, ABC also fulfils these aspects of Sida's Cultural Development Strategy.

The 1997 document *Partnership with Africa* commissioned by the Swedish government sees culture as "the basis of all democracy". It also sees culture and exchange as important vehicles for rectifying the "inadequate and lopsided negative image of Africa in Sweden". The report goes on to emphasise the need to improve Swedish knowledge of Africa as this has a bearing on the quality of Swedish partnership with Africa. The availability of ABC's African published books in Sweden has and significant role to play in these regards.

Partnership with Africa, Sida's 1999–2002 *Action Programme for Development Co-operation in Africa* and the *Swedish Guidelines for Regional Co-operation in sub-Saharan Africa* emphasise the importance of establishing conditions that promote a mutual and wider engagement between Sweden and Africa. Again, access to African published books in Sweden is an important means for this process.

In addition to its relevance in the cultural field, Sida's support to ABC is relevant to economic development. Economic Growth is one of Sida's six development co-operation goals. Along with private sector development it is discussed in Sida's 1999–2002 *Action Programme for Development Co-operation in Africa* and the *Swedish Guidelines for Regional Co-operation in sub-Saharan Africa*. As ABC's activities enhance the economic base of its members, the Sida support to ABC contributes to economic growth and private sector development.

ABC's awareness of gender perspectives is in line with Sida's policy for Promoting Gender Equality between Women and Men. Gender equality is also a component in Sida's strategy for cultural development. ABC has recently taken on a couple of woman publishers as members and has given prominence to gender studies in their promotional and marketing efforts. ABC has also published an annotated directory entitled *Women in Publishing and the Book Trade in Africa*. While both men and women are represented in ABC, the gender ratios are not perfect. Seven out of nine staff members in the ABC office are women, which includes the senior management. On the other hand, there is only one woman on the Council of Management.

¹⁷ *The Role of Culture in Development*, Sida, Department for Democracy and Social Development, Division for Culture and Media, March 1995. p. 15

¹⁸ Sweden's current *Guidelines for Regional Co-operation in Sub-Saharan Africa* also identifies co-operation across borders in African civil society as a main target area for regional support.

Sida's objectives regarding freedom of expression include "serving citizens' right to all-round information and the free exchange of ideas and opinions". Sida primarily addresses these objectives through support to the media in the developing world. The support to ABC is complementary to these objectives.

Sida's development goal of Democratic Development "to contribute to people being able to exercise greater influence over development", is also an integral part of Sida's cultural development strategy. This goal includes contributing to democratic processes, participation and democratic culture. When ABC was established, it functioned in a truly democratic way as all members had a say. Today, as discussed in section 3.2.1 , ABC's structure of governance is not inclusive and does not encourage the participation of all its members.

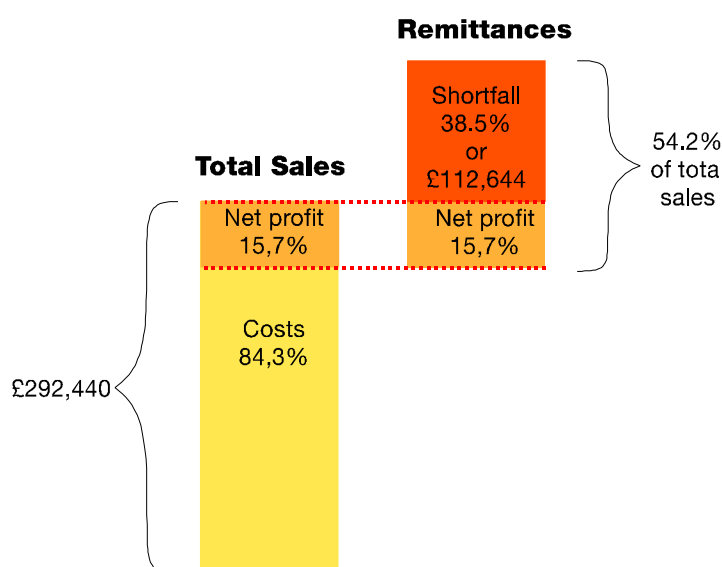
7 Future Prospects

This concluding chapter discusses the challenge of self-sufficiency, new opportunities for ABC and the future role of ABC’s donors.

7.1 Sustainability

Initially it was hoped that ABC would attain self-sufficiency within a period of 5 years. That is why ABC asked for “seed money” to get the Collective started. Although studies were undertaken, at that time, there was very little information available to enable the necessary analysis, as distribution of African books in the north had been minimal. ABC’s initial goals of self-sufficiency in a short period were thus unrealistic. After nearly ten years of trading, ABC does not see self-sufficiency as a realistic goal in the foreseeable future. Meanwhile, some members claim not to be preoccupied with ABC’s reliance on donor funding.

Figure 6: ABC’s Total Sales, Net Profit, Total Remittances and Shortfall Using 1998 Figures.



There are many factors that make attaining self-sufficiency very difficult. Consider the diagram above. In 1998, ABC’s total income was £292,440. Its costs amounted to 246,591, or 84.3% percent (yellow area above). The net profit was thus £45,849 or 15.7%.

However, in order to continue providing its members with preferential terms, ABC sends back an average of 54.2% of its sales. Thus, ABC in effect operates as if its “net profit” is 54.2% of sales. As a result, there is a shortfall that has to be covered by donors (dark orange area above). Can ABC’s profit margin ever equal what it is sending back to Africa, i.e. 54.2% of its sales income?

Consider the table below using 1998 figures. Projection A attempts to illustrate what income would be required to assure a 54.2% level of remittance to African publishers and at the same time with no shortfall or donor funding. As increased income usually requires entails higher costs (e.g. more postage and operational overheads), the model assumes a cost increase of 30%.

Table 1: Hypothetical Projection of Zero Shortfall Using 1998 Figures

	1998 Actual	Projection A
Total sales	£292,440	£699,928
Less remittance to publishers	£158,493 (54.2%)	£379,361
Costs	£246,591	£320,667
Shortfall	£112,644	0

The model presupposes that there is a market for more units and/or new products that can be sold at a suitable price to generate more sales. The total sales required would be £699,928 or in increase of 139% compared to ABC's sales in 1998. In reality, achieving such a huge increase in income would require significant investments, a factor not taken into account in the above model. Hence, the hypothetical projection shows how difficult achieving zero shortfall will be.

If ABC ceases to exist it will create a huge hole in the availability of African books in Europe and North America. However, I doubt if ABC will ever be financially viable. This is a function of the nature of the books they are handling. – *Robert Molteno, Zed Books, London*

Below is a list of other factors that should be considered in the aim of attaining greater self-sufficiency:

1. Unlike a purely commercial distributor, ABC actively markets its titles, which of course entails significant costs. At the same time, it does not have any control over production quality or what types of books it has available for sale. (See section 5.1)
2. Again, unlike a purely commercial distributor who chooses the titles it wishes to distribute, ABC takes on all books on the lists of the member publishers, no matter how difficult they may be to sell in the north.
3. African book output is relatively small and irregular which means it is difficult to increase ABC's products significantly with the current level of membership. The customer analysis conducted in 1996 revealed that many customers had the means to purchase more books but that ABC was not providing enough new books.
4. The prices of African books, even when marked up into pounds/dollars, are comparatively inexpensive.
5. African publishers generally do not publish for the non-African market.
6. African publishing largely comprises educational texts followed by children's books, which is what sells best in Africa but which have minimal markets in the north (besides being low priced).
7. Budgetary constraints faced by northern libraries and educational institutions have a negative impact on ABC's sales.
8. ABC relies excessively on the sales from IABSS, which currently constitutes an average of well over 40% of ABC's turnover.
9. The mortality rate of African publishers is high. The risks are considerable and several publishers have gone bankrupt. This is compounded by frequent and sudden changes in the economic and political climate.

Nevertheless, closing the gap between self-generated income and expenditure should be possible over the long-term. This would require greater determination on the part of ABC and its members with the active support of the donors. At the moment ABC does not seem to be actively exploring solutions to improve its financial base and hence getting closer to sustainability. This is not to say that ABC has not taken some actions to address the issue of self-sufficiency. For example, in 1996, after analysis revealed that in the first half of the year, ABC had failed to reach targets for all but one month, ABC conducted a customer and a new product analysis. As a result, slow selling titles were de-stocked. Discussions concerning a North American distribution point and digital printing also shows initiative. However, the evaluators have detected a lack of preoccupation among some ABC members. This seems to stem from the general recognition that it will be a long time before ABC will be fully self-sufficient. The fact that ABC has not made forceful attempts to explore solutions to improve its financial base can to some extent be explained by the limbo-like situation that has been induced by the two-year wait for an evaluation.

To attain greater self-sufficiency, ABC should, in consultation its members, rethink the basis on which remittances are being sent to African publishers. Despite the genuine constraints it faces, ABC needs to chalk out a long-term strategy to progressively reduce the gap between self-generated income and expenditure. Some suggestions are outlined below:

1. ABC could actively identify and recruit more members who have suitable lists. This would give ABC more books to sell. For example, publishers from Kenya and South Africa could be canvassed.
2. There is a relatively untapped market in North America that could be exploited by establishing a distribution point in the U.S. This is discussed further in section 7.2.1.
3. The evaluators feel that there are good grounds for the preferential terms that the publishers have received to date. Furthermore, it is important that the original mission of the Collective is maintained and that ABC does not become like any other commercial distributor. Nevertheless, the percentage of sales remitted to publishers can be lowered slightly. A possibility discussed with some founder members is remitting the full local price of each book plus proportionate freight to Oxford. This would have the added advantage of allowing for more precise budgetary planning on the part of the member publisher when calculating expected revenue from ABC. Members who have paid a higher “share” or membership fee, could for instance receive five to ten per cent more than the local price. This suggestion, however, needs further analysis.
4. ABC could revise its fee structure as well as introduce a membership fee for all categories of members.
5. Non-African publishers availing of ABC’s distribution services, such as ADEA and the Bellagio Publishing Network, could receive less favourable terms than at present.
6. The cycle of remittances can be changed from bi-annually to annually. However, given the fragility of some members, there is a risk that some publishers would be unable to publish new books or even fold up while waiting for their remittances.
7. ABC could explore the possibility of taking on suitable Francophone publishers – particularly indigenous publishers with scholarly lists.
8. In general, ABC could improve its marketing strategies, work on penetrating existing markets and explore new markets such as the African Diaspora.

9. ABC could explore the possibilities of using digital printing technology to increase the availability of books and thus expand its revenue.
10. ABC could explore the availability of private sector grants. For instance, Sida provides private sector development grants and soft loans. Recently, a soft loan was granted to the Soros Foundation for providing credit to a media investment group in Eastern Europe. Sida's terms and conditions can be very advantageous, including a maturity period of 10 to 15 years, a grant component up to 50% and no interest. As ABC is unlikely to become fully self-sufficient in the medium term, it may be difficult to find a way of applying for soft loan facilities. One option is to identify a distinct project, such as digital printing, which could be a self-financing entity within ABC. As all of ABC's functions are integrated and have one main purpose (to sell African published books), no part of ABC's current operations can suitably be "carved out" and made self-financing¹⁹.

7.2 New Opportunities

ABC has recognised that there are new opportunities for ABC that may help it close the gap between self-generated income and expenditure. Firstly, the North American market can be penetrated deeper. Secondly, the IT revolution offers potential opportunities. With regards to the latter, ABC has investigated the benefits of digital printing. ABC's proactive efforts regarding this new technology are commendable. ABC should continue to monitor how technological advances may be applied to benefit African publishing.

7.2.1 North American Market

The growth of ABC's sales is seriously hampered by the lack of a North American distribution point. There is a considerable unrealised sales potential in the North American market for ABC's books, which can only be fulfilled if it sets up its own distribution arrangement in that region. For instance, most North American customers require an American address – buying from abroad is considered "risky" and is not common place. Furthermore, North American libraries do not want to pay carriage and book traders ask for as much as a 60% discount. The Internet bookshop "Amazon" does not list books which are not available in America and which cannot be delivered within a certain number of days. At present it takes ABC a considerable amount of time to send books to North American customers.

ABC has for many years discussed the need for a US distribution point. Responses to the questionnaire responses and interviews with stakeholders in the book trade emphasise the importance of an American presence:

ABC provides a vital and valuable service. However I see two problems. The first is the lack of a North American presence, which I would describe as a huge weakness. – *Margaret Ling, International Director, ZIBF*

I feel that a US presence would make a massive difference to ABC. – *Chris Tyzack, Director, International sales, Blackwell's Book Services, Oxford, UK*

Since ABC has consolidated its operations after ten years of trading, it is in a position to try to expand: it has the systems in place and has learnt the peculiarities of the market. Given the fact that

¹⁹ When ABC was established, the founding members looked into the possibility of having a charitable body and a separate trading organisation. However, due to the UK's charity laws, an impasse was reached, as the requirements would have resulted in an overall loss of control by the member publishers. Since ABC was established as a self-help initiative, African ownership has been both a major impetus and characterising element.

North Americans are generally used to and even prefer mail order, selling to individuals and institutions via the Internet and by catalogue may prove to be relatively easy provided ABC upholds its current high service standards.

Another advantage with a North American operation is that it may be possible for ABC to receive full charitable status in the US. Furthermore, it is likely that there are American charities or institutions that would like to support a North American ABC operation.

In short, ABC and its donors should actively pursue setting up a North American distribution point as soon as possible.

The key to launching an operation in the US is to start small. This could for example mean having a warehouse manager working out of a garage or a basement. As the operations develop and provided that it yields sufficient additional revenue as is expected, the office can be expanded. Nevertheless, additional funds, albeit probably a fairly low investment, will be necessary to embark on this project. Donors should be willing fund this initiative. North American donors and foundations should be approached. ABC's current donors could play a role in linking ABC with new potential donors.

7.2.2 Digital Printing

ABC has been pro-active in analysing how the new technology of digital printing could profit African publishing. Background research has been carried out and a workshop on the subject was conducted in 1998 for some of its members²⁰. On balance, a digital printing facility appears to have several potential benefits for ABC's members. A consequence of performing such a function, however, is that ABC would have to assume the role of a publisher while the books selected for printing in this manner would be mainly those where the demand is in the north.

Thanks to recent developments in the electronic industry, the technology of book printing is undergoing rapid changes. One of the more significant developments is the application of digital techniques in book printing which has led, among other things, to the emergence of "digital printing". The salient features of this method are:

- The complete final text of a book is kept on a diskette. It can even be sent electronically to the printer or through any intermediate service (such as ABC).
- It involves printing directly from the diskette, eliminating the need for both negatives and plates.

The advantages of this method are:

- Since there are virtually no "fixed costs", the cost per copy does not change based on the number of copies printed. Hence, digital printing allows for small print runs at a fairly low cost.
- Short print runs also mean reducing the burden on warehouse space.
- Digital printing is very quick so that fresh stocks can be ordered at short notice, especially as the text will already be available on a diskette.

²⁰ The publishers selected for this workshop represented different countries, different types of members as well as a few newer members.

Among the drawbacks are:

- Digital printing is not suitable for books with colour illustrations
- The quality of printing is at present not quite as good as offset printing.
- Binding remains a separate operation though those who are offering a digital printing capacity are also, by and large, installing binding capacity. However, books printed by this technology cannot at present be bound in hardback.
- The paper required is usually of a higher grammage (and hence more expensive) than can be used in offset printing.

ABC visualises a number of advantages for itself and its members from digital printing.

These include:

- If one of its members has declared a book out of print (or is unable for financial or sales reasons to reprint a book) but where ABC is still getting orders, the concerned book can be reprinted by this method. It will also enable the printing of preview copies of textbooks to be used in tendering processes in Africa.
- Should ABC get a time-bound order for a book, it can be printed at short notice using digital printing rather than waiting for stocks to arrive from Africa.
- If a member publisher has a new book where the main market is in the north, then the text of the concerned book can be sent electronically (or on a diskette) to ABC who can print it by digital printing and ship back to the concerned African publisher the quantities it requires for local sales.

On the face of it, digital printing does appear to offer a number of opportunities to ABC in terms of acquiring more books to sell. However, a great deal of investigation, planning and thought is required before moving ahead. Given the way ABC currently functions, it also raises a large number of questions that need to be addressed and resolved. Some of these are:

1. Whether African publishers by and large have the necessary technologies and related infrastructure to send books to ABC electronically or on diskette. ABC would need not only to determine this but also to establish through careful investigation how many African publishers are likely to use this technology on a regular basis and how many books are likely to be involved every year.
2. ABC does not currently pay for any books. It holds all stocks on consignment terms and the member publishers are even required to pay the freight costs to get their books to Oxford. If ABC ventures into digital printing, it will have to invest in producing the books. This not only raises the question of where ABC will get the resources to make such investments but will lead to questions of how such books will be priced and what proportion of the sales income should be sent back to the original publisher.
3. In the case of previously published books which need to be reprinted, ABC will need to investigate the logistics and costs of converting the printed book into electronic form.
4. Digital printing also has staffing implications. In the first instance, ABC will need to acquire the requisite skills for print and paper buying. Next, it could even require proof reading and/or editorial skills especially for new books where ABC is to become the primary publisher.

5. Again in the context of those books where ABC will act as the primary publisher, ABC will need to investigate what the unit cost plus freight costs will be for that portion of the print run to be sent to the African publisher and ensure that it is not higher than what it would be if the book were printed in Africa. In this framework there is also the question of taking business away from African printers though it could be argued that since the publisher was not able to publish/reprint the book in the first place, there is no business that is being taken away.
6. If ABC ventures into digital printing, it will more clearly start assuming the role of a publisher which it so far has not done except in purely marketing terms.

Overall, donors should look into the possibilities offered by digital printing. One method would be to give a grant or a loan to set up a revolving fund to use for the production of the books.

7.3 The Donors' Role

While significant overall progress has been achieved in the 1990s, there is evidence that the African publishing industry has many years to go before it is sufficiently strong. The questionnaires received for this evaluation revealed that slightly more than half of the publishers experienced a decline in the output titles over the period 1997 to 1999. Less than a handful showed a significant increase in the number of new titles they published. African publishers are therefore likely to continue to need assistance for many years to come.

The terms of reference for this evaluation raised the issue of directing the support to Africa. This implies that support to ABC is not directed at Africa. Considering that the Collective is African owned, is an African initiative and that the financial beneficiaries are African publishers, treating it as support that is not directed at Africa would be erroneous. There are of course several other ways of supporting the book industry in Africa, including at the Pan-African, regional and national levels. Support can be given for instance to APNET, various African book fairs (ZIBF, GIBF, etc.), the Pan African Book Sellers Association, regional book events, national book development initiatives, library support and campaigns to encourage reading. In addition, textbook procurement by aid agencies can support African publishing by establishing criteria to ensure the participation of indigenous African publishing houses. Further, the 1999 APNET evaluation²¹ revealed the enormous demand for credit among publishers. National publishing associations are often chronically weak and could benefit from some sort of support. Some publishers seek financing for professional northern volunteers with computer and publishing skills.

Can the same or better results be achieved for African publishing if the support to ABC was instead directed through one of the above channels? The answer would have to be no – no other form of support has the added advantage of disseminating African published books in the north. When ABC member publishers were asked, for the sake of argument, if it would not be better if Sida bypassed ABC and gave them a yearly sum of money instead, all publishers answered that this was not desirable: dissemination and exposure of their books in the north was more important. Secondly, apart from credit programmes, of which to date there has only been one,²² and textbook procurement initiatives that have ensured the participation of indigenous African publishing, there are very few other channels of directly enhancing the financial base of African publishers.

²¹ Christensen, Lars, P, Cecilia Magnusson Ljungman, J.R. Ikoja Odongo, M. Sow, B. Folke Frederiksen. *Strengthening Publishing in Africa: An Evaluation of APNET*. Sida Department for Democracy and Social Development.

²² This is the Loan Guarantee Programme for the Development of Autonomous Publishing Capacity in Kenya administered by the Dag Hammarskjöld Foundation.

However, the evaluators hold that one form of support to the African book industry should not be regarded as necessarily excluding assistance to another form. Donors such as Sida often do combine assistance at different levels, using the appropriations at their disposal. A holistic approach using a combination of mechanisms to strengthen the various parts of the book chain is likely to have the best overall effect.

The evaluators therefore recommend that Sida continue funding ABC as:

1. ABC does not simply remit sales to African publishers, it also serves to meet the need for African published material in the north. In this way it promotes reciprocal understanding and counteracts isolation out of both the southern and northern perspective.
2. ABC has proven itself to be a well functioning and efficient African self-help initiative.

However, Sida should encourage ABC to initiate some changes in its structures and strategies. This includes revising its governance and membership structures as well as developing a coherent five-year plan²³ for its operations that addresses increased self-sufficiency.

ABC should aim at securing longer-term commitments from donors by producing a five-year strategic plan that serves as a joint funding proposal. It is likely that the costs of achieving self-sufficiency will be higher in the short-run as certain investments may be necessary to ensure the necessary future growth.

Besides some of the activities outlined above that can be funded on a project basis, such as digital printing or even a North American distribution point, ABC's donors should consider core funding, particularly as a large part of its costs are related to personnel.

Further, ABC's donors should increase the co-ordination amongst themselves and should accept a common reporting framework including a joint audited financial account in which all donor contributions are specified. The donors contacted by the evaluation team were all in favour of increased co-ordination. The donor co-ordination that has been achieved in connection with the funding of APNET should serve as an example. Sida can play an instrumental role in this process.

²³ ABC intended to undertake a three-year work plan for 1997-99 but decided to await the results of the pending evaluation, which was subsequently delayed until the end of 1999.

Annex 1: Terms of Reference

TERMS OF REFERENCE FOR THE EVALUATION OF AFRICAN BOOKS COLLECTIVE, ABC, AND AN APPRAISAL OF SIDA'S SUPPORT IN THE FUTURE

1 BACKGROUND

ABC is a self-help, non-profit initiative by a group of African publishers to promote and distribute their books worldwide. The Secretariat is situated in Oxford.

ABC was established in 1989. Sida's support started the same year. Since then approximately SEK 2 500 000 has been granted mainly as a core support to the organisation.

When Sida decided to support ABC also in 1995/96 and 1997 it was felt that an evaluation should be carried out before Sida could consider a continued longterm support to ABC. For different reasons the evaluation could not be carried out when planned and had to be somewhat postponed. Bridging funding was approved by Sida to enable ABC activities to continue without interruption.

Other donors providing support are: (for the Intra- African Book Support Scheme) Sarec, Danida, The Netherlands Ministry for Foreign Affairs, Norad; (for promotion) The Rockefeller Foundation, The Arts Council of England; (Trainee Manager) Danida; and core support in 1997-1999 from Norad.

From an initial 17 founder member publishers in 1989, as of 1995, ABC represents 48 publishers from 14 African countries with a remaining long waiting list of publishers who wish to join. Currently ABC stocks around 1200 titles with 200 new titles being added each year. The range of books distributed is diverse; from academic and reference resources to creative writing, children's books and African culture.

For further information on ABC activities and the utilization of Sida support please refer to ABC's documents: Financial and Narrative Reports (1989 onwards), African Books Collective Ltd - The Experience of Three Years Trading and Activities, Dec 1993 and Project Document and Funding Application 1995- 1997.

2 PURPOSE AND SCOPE OF THE EVALUATION

The Agreement between Sida and ABC expired December 31, 1997. Bridging finance was arranged for 1998 to enable ABC activities to continue awaiting the result of the evaluation. Since the cooperation with ABC has been going on since 1989 and the support has reached a considerable level it is recognized that an evaluation is necessary before any further long term support can be granted. (Furthermore, core support to a Europe based organisation should be considered as a temporary and exceptional way of utilizing development funds.) Thus, the purpose of the evaluation is to evaluate the Swedish support to ABC and to make

recommendations on future cooperation. The evaluation will also assess the impact of the different book projects within the Sida programme and assess how they complement and support each other and to assure that there is no overlapping

Important issues to be considered in the evaluation are:

- ABC's development since its establishment / indications for future development;
- the time aspect / is ABC a permanent or interim set-up?
- sustainability and possibilities to direct the support to Africa;
- future possibilities and constraints facing ABC? / assessment of technological economic developments affecting the book industry;
- the business aspect and commercialisation of ABC activities
- possibilities to project-orient the support instead of giving core support
- the role and relations of the organisations working towards the same objectives i.e to promote publishing and book development in Africa.

3 THE ASSIGNMENT (ISSUES TO BE COVERED IN THE EVALUATION)

The evaluation shall in all aspects consider and be guided by:

- the overall objectives and strategy for the Sida development cooperation.
- the Strategies for Gender, Poverty, Democratic Development and Sustainable Development, -the Sida Guidelines for Result-based planning, management and monitoring,
- the Sida policy for development cooperation for the specific geographic region,
- the Sida strategy/guidelines for Private Sector Development, (liaise with Sida Private Sector Development Division).

Furthermore, the following should be covered in the evaluation:

- a short description of the sector and problem area
- a description of the development of ABC and also the roles and relations to similar organisations

-an assessment of Swedish support in terms of Sida's guidelines and in terms of the objectives of ABC.

-an analysis of the sustainability of ABC [and on the possibility to direct the support to the African continent!]

-an assessment on how gender aspects have been included in the project and comments on how gender can be further enhanced

-a description and analysis of the organisational structure of the project

-an assessment of the cost effectiveness of the support given in terms of inputs and outputs

-a description of the Swedish contribution in relation to other donors

-an assessment of the interaction of the donors and how they influence the operations of ABC

-an assessment of the Capacity of ABC in administrating support, accounting and reporting procedures.

Cross-cutting issues

4 METHODOLOGY, EVALUATION TEAM AND TIME SCHEDULE

4.1 Method

The task shall be carried out through studies of available documents at Sida, ABC and other relevant organisations. Interviews will furthermore be carried out with representatives from the above organisations. A fact finding visit to one or two relevant African countries will take place for discussions with stake holders and to look into the possible development of the book sector and publishing on the African continent.

4.2 Evaluation team

Two team members (one from the South and one from the North) will be needed for the assignment. They shall have adequate expertise and be approved by ABC and Sida. The evaluators shall have knowledge of book development and publishing in Africa, development cooperation and experience of evaluations including cost benefit analysis.

4.3 Time schedule

The estimated time for the study is 7 (4+3) personnel weeks and it shall be completed before December 31, 1999.

4.4 Contacts

The evaluators shall liaise with Sida, DESO, Culture and Media, Stockholm where the Head of the Division for Culture or Mrs Inger Iemberg represents Sida. Furthermore, representatives from the Private Sector Development Division and other possible contact persons will be consulted. Mrs Mary Jay represents ABC and will be responsible for giving the consultant access to all available information.

5. REPORTING

5.1 Inception report

The evaluation team shall submit a brief inception report explaining how the assignment will be carried out. The report shall be submitted to Sida before the field work to allow Sida to comment on the report and agree on how the team shall pursue the assignment.

5.2 Draft report

The evaluation report shall be written in English and should not exceed 40 pages, excluding annexes. Format and outline of the report shall follow the guidelines in **Sida Evaluation Report - a Standardized Format** (see Annex 1). 5 copies of the draft report shall be submitted to Sida and ABC no later than December 31, 1999.

5.3 Final Report

Within 2 weeks after receiving Sida's and ABC's comments on the draft report, a final version in 10 copies and on diskette shall be submitted to Sida. Subject to decision by Sida, the report will be published and distributed as a publication within the Sida Evaluation series. The evaluation report shall be written in Word 6.0 for Windows (or in a compatible format) and should be presented in a way that enables publication without further editing.

The evaluation assignment includes the production of a Newsletter summary following the guidelines in **Sida Evaluations Newsletter - Guidelines for Evaluation Managers and Consultants** (Annex 2) and also the completion of **Sida Evaluations Data Work Sheet** (Annex 3). The separate summary and a completed Data Work Sheet shall be submitted to Sida along with the (final) draft report.

Annexes 1, 2 and 3 are retrievable from 'Sida-mallar'/Sida Evaluations.

Annex 2 List of Persons Met

Anita Theorell	Former Head of Culture and Media Department, DESO, Sida
Catherine Nicholson	Book Aid International
Catherine Salahi	Bellagio Secretariat
Chris Tyzack	Blackwell's Book Services Director, International Sales
Hans Zell	Hans Zell Publishers. Former consultant for ABC
Helen Nordensson	DESO, Sida
Inger Jernberg	Senior Programme Officer, Culture and Media Department, DESO
Jan Engström	Senior Advisor, INEC, Sida
Karl-Erik Eriksson	Nordiska Afrika Institutet
Lars Liljeson	Deputy Director, INEC, Sida
Margaret Ling	International Director, ZIBF
Mikael Söderbäck	INEC, Sida
Nancy Larsen	BOKUS
Olle Nordberg	Dag Hammarskjöld Foundation
Olle Nørgaard	Centre for Development Research, Library
Pelle Knutsson	DESO, Sida
Per Gedin	MD Gedins Förlag, Sweden
Robert Molteno	Zed Books, London
Sarah Harrity	Director, Book aid International
Victor Nwankwo	MD Fourth Dimension Publishing Co., Nigeria. ABC Founding Member
Walter Bgoya	MD Mkuki Na Nyota Publishers. Founding member of ABC. Chairman of Council of Management

APNET Secretariat

Richard Crabbe	Chairman APNET, MD ACP Books, Ghana
Karel Chambille	Hivos
Lisbeth Rubenstein	Danida

A. KENYA

Daisy W. Ouya	ICIPE Science Press*
Henry Chakava	East African Educational Publishers Ltd.
J.N.K. Mugambi	Acton Publishers*
J.W. Kabugi	Phoenix Publishers Ltd
Janet W. Njoroge	Longhorn Kenya Ltd.*
Omari Gichogo	Nairobi University Press
Serah W. Mwanycky	Academy Science Publishers
Wairimu Gichohi	Kenya Publishers Association

* (* Publishers marked with an asterisk are not members of ABC, though many of them have applied for membership)

B. GHANA

Adu Boahem	Sankofa Educational Publishers
Akos Ofori-Mensah	Sub-Saharan Publishers
Courage Kwami Segbawu	Sedco Publishing Ltd.* and President, Ghana Publishers' Association
George Braye	Afram Publications (Ghana) Ltd.
John K. Bosomiwe	Ghana Universities Press
Kwaku M. Ganu	Ghana Universities Press
Kwesi Sam-Woode	Sam-Woode Ltd.*
Mark Motey	Royal Gold Publishers Ltd.*
Woeli Dekutsey	Woeli Publishing Services
Yaw Owusu-Asante	Black Mask Ltd.

* (* Publishers marked with an asterisk are not members of ABC, though many of them have applied for membership)

Annex 3 List of Documents Reviewed

ABC Documents

1. ABC Catalogues.
2. ABC Correspondence with Sida 1987–1999.
3. ABC's Activity Report January to June 1993.
4. African Studies Association 39th Annual Meeting, 23–26 November 1996, San Francisco – Report on Participation of African Books Collective.
5. Alternative strategies and revised anticipated funding requirements.
6. Business Enterprise Project.
7. Business Plan 1990/91. Report to the Council of Management, Directors, and ABC Founding Members.
8. Council of Management Reports from 1988, 1991, 1993, 1994, 1995 and 1998.
9. Cox, Hinkins & Co., Accountants, Oxford ABC Ltd. Report and Accounts.
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11. Danida Financial Statement/Income and Expenditure Account and Narrative Report for IABSS 1991/1992.
12. Danida Intra-African Books Support Scheme and Trainee Manager Application, 1996.
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28. Memorandum of Agreement.
29. Minutes and Council of Management Meeting Agendas for 1988, 1991, 1994, 1995, 1996 and 1998
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37. Report to the Council of Management, Directors and ABC Founding Members
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Annex 4 SWOT Workshop Report

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- 4 Weakness index cards and their distribution in thematic clusters
- 5 Opportunity index cards and their distribution in thematic clusters
- 6 Threats index cards and their distribution in thematic clusters

1 Introduction

On October 13, 1999, the entire ABC staff participated in a full day's SWOT Analysis Workshop, facilitated by the evaluation team.

SWOT Analysis is a useful participatory tool. It was originally developed at Harvard University in 1920 as a tool to obtain an overview of an organisation's internal strengths and weaknesses and the external opportunities and threats affecting it. Today, the SWOT Analysis is widely used for evaluations and for organisational learning. This analytic tool was used for the systematic assessment of the Strengths, Weaknesses, Opportunities and Threats perceived by the UK staff of the African Books Collective (ABC).

In brief, the main purpose of the evaluation of ABC *is to evaluate the Swedish support to ABC and make recommendations for future co-operation*. Therefore, the SWOT Analysis focused on the strengths, weaknesses, opportunities and threats in relation to achieving results in ABC. The SWOT elements are defined as follows:

- **Strengths** are those internal organisational aspects within ABC that work well and contribute to its high performance and the achievement of results
- **Weaknesses** are those internal organisational aspects which make ABC less effective and constrain the achievement of results; the opposite of strengths
- **Opportunities** are factors in the external environment of ABC (outside ABC's direct control) that support the activities of ABC – factors which could contribute to further improve ABC's work.
- **Threats** are factors in the external environment of ABC (outside ABC's direct control) that constrain the implementation of ABC's activities - factors which thus affect the achievement of results negatively; the opposite of opportunities.

The SWOT Analysis was conducted by an initial silent brainstorming by the individual participants in order to note down on the cards at least three thoughts (ideas, observations, opinions) on each of the four elements. A separate card was used for each idea. The cards were subsequently fixed to the wall and arranged in clusters. Facilitated by the evaluators, the participants analysed, compared, contrasted and prioritised the ideas presented. The following chapters present the thoughts and clusters established during the workshop, as well as an account of the workshop discussions.

A draft of the present report has been read and commented on by ABC. The participants of the SWOT Analysis workshop were:

1. Mary Jay Consultant
2. Rosalind Sherwin General Manager
3. Graham Speers Bookkeeper/Credit Controller
4. Krisia Cook Customer Services Manager
5. Sam Cook Warehouse Manager
6. Susan Trafford Administrator/Office Manager
7. Naomi Robertson Customer Service Assistant
8. Jatinder Padda Administrative Assistant.

2 Summary of Conclusions

From the results of the workshop, it can be concluded that all ABC staff members feel that they are part of a well-functioning and dedicated team. Job satisfaction is high. The staff performs the important task of supporting indigenous African publishing as well as ensuring dissemination of African culture, heritage, creativity and scholarly activity to the northern public. With the help of well-developed systems, ABC maintains that it carries out its unique mission professionally. This has gained it considerable respect and confidence.

ABC's most apparent weakness is viewed as its financial insecurity, a fact that has constrained its activities. Insufficient resources are seen as the main cause for the heavy workload that most staff members experience. To a certain extent, lack of resources also weakens ABC's marketing efforts. In addition, it has meant that processing as well as usage of management information has not been systematic and well developed. ABC's unique mission of being a non-profit commercial organisation that plays both a publishers' role as well as that of a distributor, is considered a difficult undertaking. The weak capacity of some of its member publishers does not make their work easier.

ABC staff members see several opportunities that could contribute to further improve ABC's output. These include establishing a distribution point in the United States, setting up a digital printing facility for its members and significantly reinforcing its marketing efforts.

A drop in sales and funding are considered the most direct potential threats. The termination of the Intra-African Book Support Scheme, which assures a significant amount of income for ABC, would also have serious ramifications.

3 Strength index cards and their distribution in thematic clusters

Cluster	No. of Cards	Major points or issues on cards
Team Spirit	9	<ul style="list-style-type: none"> a) A great team – very co-operative and committed b) Small committed team c) Unity of staff d) Team work (x2) e) Size of company – all play an important role f) Small friendly office g) Each member of staff has value within the organisation h) Motivated, integrated "family" team – high output of small no. of staff
Our Attitude	3	<ul style="list-style-type: none"> a) Feel accomplishing something of real benefit b) Worthwhile job – satisfaction from ABC's purpose c) Commitment to main objectives
Communications	8	<ul style="list-style-type: none"> a) No barriers to consultations or ideas from all – participation b) Kept informed of all ABC activities c) Very open office information d) Good "Open Door" communication e) Accessibility to all team members f) Good communication – both internally and with publishers and other organisations g) Excellent relationship with publishers h) Communication internally and externally excellent (facilities)
Unique Mission	9	<ul style="list-style-type: none"> a) Status: African founded, owned, governed b) Support to African publishers: finance, resources and services c) One stop service for our publishers/customers d) A vital role – serving publishers and the needs of those who wish to purchase the books e) Sole provider/source of books f) Needs of the north – dissemination of African culture and heritage g) Needs of the north – education h) Ethos i) Real money back to publishers
Responsive and Effective Systems	6	<ul style="list-style-type: none"> a) Review of procedures facilitates improvement/honing of skills/ways of doing things b) Good procedures/systems – highly computerised c) Everyone knows what is expected from them – well structured systems d) Team/staff – tight ship e) A tight ship – good procedures and organisation f) Ability to adapt to changes
Standing	2	<ul style="list-style-type: none"> a) Confidence of Council of Management b) Good reputation (customers, companies, member publishers)
Pro-active	1	<ul style="list-style-type: none"> a) Take initiative, e.g. New Title Information Cards (NTICs)

Skills	3	<ul style="list-style-type: none"> a) Expertise of a consultant b) Experienced personnel in their chosen fields c) Adaptable workers
Work Environment	5	<ul style="list-style-type: none"> a) Reasonable autonomy: trust b) Reasonable autonomy within departments – job satisfaction c) Friendliness, tolerance, willingness to help a) each other, b) customers d) Environment – physical and work e) Room for personal growth

The strengths identified were grouped into the clusters of **team spirit, our attitude, communications, work environment, pro-active, standing, skills, unique mission** and **responsive and effective systems**.

There was a consensus that there is a strong sense of commitment and **team spirit** among the staff members. Emphasis was put on the small number of staff, which meant “everyone knows what is going on”. Staff members maintained that teamwork encouraged a productive inter-dependency. There was a high degree of trust that colleagues would do their segment of work.

It was noted that teamwork was enhanced by the **attitude** of the staff members. They were united by the satisfying feeling that they carried out a useful job which contributed to something worthwhile.

Another strength that enhanced the team spirit was participatory and transparent **communications** within the office. An example of this is the staff meeting held every Monday where the previous week’s work is reviewed. All sorts of information is discussed, including strategic issues such as funding concerns. Staff members are free to contribute ideas at these meetings, which are discussed, adopted or dismissed. Furthermore, information is regularly circulated through a “circulation file”. It was felt that everyone gets information without having to ask for it and that “the doors are open” within the office.

Communication *practices* were also considered a strength. Apart from a free flow of information within the office, the staff held that their communication practices with the member publishers were excellent and that the dialogue with other partner organisations (e.g. Hans Zell Publishers, BAI and INASP) was satisfactory. It was admitted that communications with member publishers were often of a one-way nature, which sometimes was a problem. However, it was felt that the member publishers did have genuine constraints such as poor communications infrastructure. Although a majority of member publishers now had access to e-mail, malfunctioning phone lines often meant that e-mails bounced back.

ABC’s **unique mission** was regarded as an important strength. Firstly, ABC has a special status because it is founded, owned and governed by African publishers themselves. It is guided by an ethos. The staff maintained that ABC served a vital role in being the most important provider of African books in the north and thereby disseminating African culture and heritage in the north. At the same time, ABC provides financial support (in the form of remittances in cash transfers) as well as resources and services (including practical advice and help) for the member publishers. As a result, it was stated that ABC fulfils the unique role of being a one-stop service for customers i.e. bookshops, libraries and readers in the north, as well as a one-stop service for African publishers. In a sense, ABC could be considered the “European office” of the African member publishers.

The ABC office highly valued the **responsive and effective systems** it had developed “from day one”. The procedures were continuously reviewed and skills were regularly honed. This allowed ABC to adapt to changes when necessary. An important part of the systems was the elaborate database that had been developed to suit ABC’s requirements. The procedures and their detailed documentation made it clear exactly what was expected of each team member. This furthermore enabled staff members to perform each other’s tasks in each other’s absence. The staff considered its systems to be cost-effective and productive and felt that ABC made efficient use of resources. When it described its systems, the staff used the phrase “tight ship”, i.e. a solid boat without leaks.

In addition, it was felt that each staff member had suitable experience and **skills** to fulfil his or her job, as well as the ability to adapt to changing circumstances. The expertise of the top management was highly valued. It was also held that ABC was pro-active by taking initiatives such as producing and disseminating New Title Information Cards (NTICs) for new books.

The ABC staff members maintained that ABC’s unique mission, in-house skills and its effective systems and procedures gave ABC an important **standing**. It had gained a good reputation among customers and book-selling companies in the north and member publishers, who had experienced that ABC can “deliver”. It had also led to gaining the confidence of the Council of Management, who trusted the ABC office to carry out day to day activities without feeling the need to intervene.

Last but not least, the staff considered the **work environment** in the office to be of great benefit and strength. “Reasonable autonomy” based on trust was experienced and seen as an advantage as it gave job satisfaction and space for personal growth. There was a sense of friendliness, tolerance and willingness to help among staff members that enhanced ABC’s work.

4 Weakness index cards and their distribution in thematic clusters

Cluster	No. of Cards	Major points or issues on cards
Financial Insecurity	9	<ul style="list-style-type: none"> a) Budget constraints b) Financial restraints c) Lack of financial resources d) Financial insecurity e) Uncertain financial future f) Not self-sufficient g) Lack of money for known projects (ideas) h) Dependence on donors and timing of donations, e. g. this can affect the effectiveness of promotion work i) Anxiety caused by financial status
Heavy Volume of Work	13	<ul style="list-style-type: none"> a) Insufficient time/ Time pressures - work volume (x2) b) Under-resourced c) Heavy work-load/ work-load pressure (x3) d) Deadlines coming together e) Lack of time/staff resources for increased promotional activity f) Promotional methods restricted by budgets – e.g. repping. g) Inability to be sufficiently pro-active in marketing – under-resourced h) Lack of time/resources to give titles increased attention and monitoring i) Insufficient management information j) Downside of IT – pressure to act immediately k) Small specialised team – (sickness, staff leaving) (x2)

Physical Work Environment	9	<ul style="list-style-type: none"> (a) Ageing equipment i.e. photocopier (b) Customer service office too small (c) Lack of office space (x2) (d) Distance between office and warehouse (e) Office and warehouse separated (x2) (f) Warehouse is not networked (g) Hypothermia in warehouse
Technical Blips	4	<ul style="list-style-type: none"> a) Highly computerised (everything comes to a halt if problem) b) Systems can be restrictive c) Systems (technical) failures d) IT breakdown
Constraints on Distribution	3	<ul style="list-style-type: none"> a) Distribution to USA takes 6-8 weeks b) Lack of US presence c) Lack of US distribution point
Resources for Growth	1	<ul style="list-style-type: none"> a) New members
Visibility	2	<ul style="list-style-type: none"> a) Misconceptions about UK location b) Low profile – outside of those already in the know
Weak Capacity	5	<ul style="list-style-type: none"> a) Communication from publishers not forthcoming b) Effectiveness of ways of communicating with publishers (e.g. IABSS/DP questionnaires) c) New production not on time (in line with catalogues) d) Shortage of new titles e) Difficulties in obtaining books (much improved recently)
Downside of Mission	5	<ul style="list-style-type: none"> a) Variety of books – variations in production quality – affect customer trust b) Authors are in Africa. Harder therefore to mainstream c) Neither fish nor fowl - commercial/non-profit d) Performing both publisher marketing and distribution role e) Large number of slow selling titles

There were 8 clusters of weaknesses identified by the group. These included **financial insecurity, the heavy volume of work, the physical work environment, technical “blips”, constraints on distribution, resources for growth, weak capacity, the “downside” of the unique mission** and the issue of **visibility**.

Every staff member presented at least one card referring to the **financial insecurity** of the organisation. It was felt that not only did the financial constraints at times threaten on-going operations, it hindered the development of new projects and strategic planning for the future. The financial difficulty experienced in 1996 had a profound effect on the organisation, inducing a feeling of anxiety among the staff members. It was pointed out that anxiety could potentially affect effectiveness and commitment among staff members. The lack of resources had made it impossible to establish a distribution point in the US or to develop a digital printing project and had hindered promotional activities.

The staff felt that the **heavy volume of work** weakened ABC. Time pressures, frequent deadlines, a heavy workload combined with too few resources meant that staff often felt that they were too busy with day-to-day operations and “stamping out fires” (when they arose) to be adequately pro-

active. Five cards reflected the desire to be able to take more initiatives in the areas of marketing and promotional activities, including giving new titles increased attention. Likewise, there was a concern that insufficient time and resources hindered adequate monitoring as well as the generation of management information. For example, little time was spent on processing information from the database to use for taking strategic decisions.

A discussion was held on the setting of priorities within ABC. The issue of whether ABC gave sufficient priority to pro-active activities such as promoting books forcefully was raised. It was concluded that, in general, efforts were first focused on day-to-day operations – such as receiving and processing orders. This was considered an immediate priority because if this work was not conducted properly, then “we might as well close shop”. As a result, additional pro-active efforts could be undertaken only in the time left over, of which there was very little.

Nine cards dealt with the cramped physical work environment, which was considered poor by several of the staff members. For example, it was noted that out of necessity the printers and the photocopier are placed in the administrative office where two staff members also worked, a set-up that is not in line with UK safety regulations. Staff members also found it difficult to find place to store materials and files. Some staff, nevertheless, liked the cosiness of the office and thought it had a nice atmosphere. The equipment was also old – the photocopier had to be used with great care so as to increase its longevity. Nevertheless, breakdowns were becoming frequent. While the computer equipment used by the staff is far from modern, most staff members were fairly satisfied with its performance.

The **distance between the warehouse and the office** was considered a weakness. It takes about forty minutes to drive to the warehouse. The distance can cause a delay in processing orders and leads to inefficiencies in customer servicing. The warehouse is not connected to the office database. As a result, there is a certain amount of duplication. As the warehouse is not networked, orders need to be faxed or given to the customer service manager, who happens to be married to the warehouse manager and can thus hand over the orders in the evening. If the warehouse was connected to the database, inventory management would be much easier and stocks could be monitored continuously. While the current warehouse manager is “immune to cold”, the warehouse has no heating and has thick stone floors that radiate cold.

Technical “blips” were identified as a weakness. While a computerised system was a great advantage, the downside was that if problems occurred, operations were hampered. For the most part, such problems were eventually solved. However, having a full-time in-house trouble-shooter (as opposed to the current unsatisfactory arrangement) would improve output.

ABC felt that **distribution** was considerably constrained by not having a distribution point in the US. While a large portion of ABC’s current sales are to North America, the staff felt that there was still considerable unrealised potential in the American market for ABC’s books. However, many American customers require an American address – buying from abroad is considered “risky” and is not commonplace. Furthermore, American libraries do not want to pay carriage and book traders ask for as much as a 60% discount. The Internet bookshop “Amazon” does not list books which are not available from an American address and which cannot be delivered within a certain number of days. At present it takes ABC a considerable amount of time to send books to American customers.

Taking on new member publishers was viewed as necessary but difficult for ABC as there were few **resources for growth**. A new member entailed overhead costs related to administration, warehouse space, cataloguing the titles, entering information into the database and communications with the new publisher. Overall, it was felt that new members were needed but that ABC’s ability to take on more publishers was constrained by insufficient capacity.

The **weak capacity** of many of the African publishers created difficulties. New books did not always arrive in time for new catalogues. This meant that the date of a new book could be a year old even though it was listed as new in the ABC catalogue. In addition, some African publishers can often take a year or even two to publish a book, typically because of financial constraints. However, the copyright year that they print in the book is usually when they started work on it. Hence the book is already a year or two “old” by the time that ABC gets it, which seriously affects the sales potential. Customers had complained about this. Furthermore, ABC felt that there were not enough new titles being produced by member publishers.

While it has improved considerably in the last year or so, ABC has experienced great difficulty in **receiving books** from several publishers. Rundown stocks are not replenished in time. Reminders are sent out to the publishers but are sometimes not acted upon. Some customers have returned books because they arrived too late. However, once the members realised that IABSS has helped their sales considerably, they have tended to be more forthcoming of late in sending books.

The fact that communications are not forthcoming from the publishers was believed to be caused by insufficient capacity within African publishing houses - they were busy surviving. ABC wondered whether this could also be partly due to its own methods of communication which could be less effective than presumed. Should different approaches and communication techniques be applied?

Some of ABC’s weaknesses are intrinsic to its **mission**. ABC is neither “fish nor fowl” – it is both commercial and non-profit, acts like an NGO and a business at the same time. Furthermore, it has the unusual task of performing the role of a publisher as well as that of a distributor – a publisher normally markets its books, while a distributor usually plays a minimal role in promotional efforts. On the other hand, a distributor gets to choose the titles he or she wishes to distribute. This is not the case with ABC whose mission includes taking on all books on the list of its member publishers and promoting all of them. Some of these books are slow selling but still require attention and warehouse space.

As ABC is not a publisher, it does not have control over the production of its “products”. Books are often of poor production quality and this can affect customer trust. Some books have been returned to ABC because of the poor quality. In particular, children’s books were considered of substandard quality, especially when compared to their northern counterparts. However, the staff was surprised that more books were not returned. Generally, libraries did not have a problem with the quality of the books, even those that are not well produced.

ABC’s unusual mission and role has led to misconceptions. Many do not understand, for instance, why it has its offices in the north and why it is involved in the IABSS scheme. Part of the problem was identified as ABC’s **visibility**. ABC could do more to promote itself and raise its profile so that the organisation becomes better known in a greater number of circles.

5 Opportunity index cards and their distribution in thematic clusters

Cluster	No. of Cards	Major points or issues on cards
Project Opportunities	7	a) Unit to co-ordinate co-publications /editions of illustrated books b) Digital printing of books (x5)
Using IT	5	a) World Wide Web (x2) b) More use of IT capabilities c) Greater general internet awareness d) E-mail communication through list servs e) Slow improvement in systems of communication in Africa
Undeveloped Market	5	a) Distribution point in USA b) ABC/US distribution/presence c) USA representation (x3)
Marketing and Promotional Opportunities	7	a) Promotional opportunities b) Libraries given budgets for multi-cultural books c) Growing popularity of multicultural education/literature in the north d) Purchase of external lists/resources e) Visits by ABC authors for promotional purposes (linking with other organisations) f) Rapid response marketing g) Larger promotional mailings h) Attend more exhibitions (x2)
Improvement of Publishers' Capacities	1	a) Improvement in quality of books (x2)
Expansion of Services to Members	1	a) Resource point for publishers
More Member Publishers	1	a) Soliciting members
Learning Opportunities	2	a) Work <u>with</u> publishers <u>in</u> Africa b) Internal expertise sharing (training)
Personal Interaction	1	a) Visits by publishers to ABC

Nine clusters of opportunities were identified. They included **project opportunities, using IT, undeveloped market, marketing and promotional opportunities, learning opportunities, improvement of publishers' capacities, expanding services to members, more members** and **personal interaction**.

The ABC staff saw **digital printing** as an important project opportunity that should be embarked upon. A digital printing facility for ABC members could have several potential benefits. Digital printing allows for speedy printing of relatively small quantities and at low cost. Publishers could simply e-mail the book to ABC who would lease or buy the necessary equipment. Digital printing could be used for preparing preview copies of textbooks to be used in tendering processes in Africa. It could also be used for printing books that are out of print.

Another **project opportunity** would be establishing a unit that facilitated the co-publications and co-editions of illustrated books – such as children’s books.

It was felt that **Information Technology** offered many facilities. ABC had developed a website with on-line ordering possibilities. Growing awareness of the World Wide Web would lead to greater visibility and the possibility of new potential customers to come in contact with ABC. In the IT kits that the British government has provided to some 50,000 students, ABC is listed as one of the 10 recommended book sites on the mouse pad. E-mail orders had now become a significant source of sales. ABC felt that there were additional IT opportunities that could help its operations. Using list serves, i.e. paying for the use of lists of targeted potential clients via e-mail, could increase ABC’s visibility and sales. The slow but steady improvements in IT in Africa were also seen as an opportunity. ABC had seen a dramatic increase in the number of member publishers with access to e-mail. However, at the moment less than a handful had their own website.

The **undeveloped market** in the US was seen as an opportunity. (See previous chapter). ABC was confident that setting up a distribution point in the US would lead to a greater volume of American sales.

The staff deemed that there were many different **marketing and promotional opportunities** open to ABC. The growing multi-cultural awareness in the north and the new emphasis on the importance of a multi-cultural education could benefit ABC.

Staff felt that there were several opportunities for a more forceful marketing effort. Rapid response marketing, where ABC conducted systematic drives, could ensure reviews and exposure. This could include facilitating visits by authors for promotional purposes. Linking up with other organisations to help represent a book could also be a way forward. Purchasing of external lists could allow for larger promotional mailings.

Some staff members believed that attending more exhibitions would enhance ABC’s activities. Others maintained that the added value of attending exhibitions was not evident.

Taking on **more member publishers** was seen as an opportunity. ABC could solicit more African publishers to join ABC, provided that they fit the selection criteria that ABC applies. More good books would provide more sales and a greater variety of titles. In addition, **expanding and developing ABC’s existing services** to members was seen as an opportunity. ABC could serve as a resource point for publishers by, for instance, assisting in the buying and selling of rights, facilitating co-publishing deals and performing an advisory role. While ABC currently provides some of these services, they are not widely used by the member publishers.

Some staff members saw **learning opportunities** and **personal interaction** as opportunities. Previously, when ABC members had passed by the ABC office when on business in the UK, the staff felt that the exchange that ensued resulted in an improved future dialogue. Meeting publishers in Africa, which was extremely rare for ABC (apart from visits to ZIBF and a visit to Kenya and Tanzania by the Consultant, ABC staff members had not visited African publishers), would give the staff a better understanding of African publishing and the difficulties.

Finally, as **publishing capacity** in Africa developed, the staff saw an opportunity in the improved quality of books that this would hopefully result in. This in turn would facilitate sales of these books in the northern market.

6 Threats index cards and their distribution in thematic clusters

Cluster	No. of Cards	Major points or issues on cards
Non-IABSS Sales	5	<ul style="list-style-type: none"> a) Loss of sales b) Further library budget cuts c) No funding – having to rely on sales d) Lack of new publishers with cost-effective lists e) Educational cuts
IABSS Sales	2	<ul style="list-style-type: none"> a) Termination/major reduction in IABSS b) Funds dry up – IABSS dries up
Donor Funding	6	<ul style="list-style-type: none"> a) Donor dependence/unsustainability b) Static sales and donor fatigue c) Cessation of funding (x3) d) Income shortfall not covered
Competition	8	<ul style="list-style-type: none"> a) Dealers b) Competition c) Competitiveness – saturation of book market and space in book shops (main streaming) d) Library of Congress e) A new “ABC” organisation starting up in the USA f) Information overload – too much choice – not enough time/desire to react g) Decrease in reading/increase in video watching etc. – fragile book trade h) Books too successful - taken over by western publishers
Deterioration of Situations in Africa	3	<ul style="list-style-type: none"> a) Political events (coups etc.) b) Deterioration of situations in Africa c) Political unrest etc. affects major publishers d) Political unrest in African countries
Globalisation	1	<ul style="list-style-type: none"> a) IT advances also give competitors the same marketing opportunities
Ignorance	1	<ul style="list-style-type: none"> a) Perception of what an African book is
External Costs	2	<ul style="list-style-type: none"> a) Transport (cost) problems with books from Africa b) World postal rates increase

Eight different “threats” clusters were recognised. These included **non-IABSS sales, IABSS sales, donor funding, competition, deterioration of situations in Africa, globalisation, ignorance** and **external costs**.

A drop in **non-IABSS sales** – i.e. all of ABC’s “regular” sales – was seen as a serious threat to the existence of ABC. Cuts in educational budgets (including cuts in Africa) and further reductions in library budgets could bring about a decline in sales. A drop in sales could also be caused by not having enough publishers with good lists or saleable books. The book market has in the past tended to enter into slumps. Even the more successful publishing houses cannot explain why the book market periodically goes into decline. Such slumps could potentially affect ABC badly and hinder its market expansion.

In recent years, sales through the **Intra-African Books Support Scheme** has proved to be crucial for ABC. This scheme is donor funded. Should IABSS be terminated or reduced in scale, ABC and its member publishers would be greatly affected.

The ABC staff recognised that it was heavily dependent on **donor funding**. ABC requires funds from donors to cover the income shortfall. Just as a drop or stagnation in sales would be disastrous for ABC, so would a fall in donor contributions. ABC's inability to become sustainable in the past ten years, combined with the tendency of donors to become fatigued, were believed to be considerable threats.

Competition was viewed as a threat. Apart from competition from other publishers, competition for people's attention from videos, magazines and other media was considered a reality. The phenomenon of information overload could be seen as a threat as it prevents people from acting and from making choices. Whether readership was declining was discussed. It was noted that sometimes other media can actually promote reading – some books have sold better after television series or films have been made from them.

Dealers who “bought around”, i.e. bought ABC books from other sources in Africa, was a problem that in fact had led to the establishment of ABC in the first place. Nevertheless, the practice still continues to some extent. The American Library of Congress was viewed as a problematic competitor in East Africa. In Kenya for example, representatives from the Library bought local books and then supplied them to American libraries on their library supply list. These libraries then do not buy from ABC. **Globalisation** also had an effect on competition: IT advances give competitors the same marketing opportunities. Thus, ABC would need to be “on its toes”.

Paradoxically, a book becoming too successful was also considered a threat to ABC. A popular title is liable to have rights sold to a northern publisher to meet the large demand. While the African publisher would stand to gain in this deal, ABC would not.

The **politically volatile** situation in many countries in Africa could threaten ABC in that it could affect the publishers' ability to produce books. Even unrest in neighbouring countries could have a significant negative impact.

The difficult transport route from Africa, including high costs and customs procedures, were a threat. Increases in transport and postal charges, both **external costs**, would adversely affect ABC's operations.

Finally, **ignorance** was a threat to ABC. The group maintained that there were many misconceptions about what an African book actually is, let alone what ABC's role is. Some people did not even know that books were actually produced in Africa. Others did not grasp the difference between a book about Africa (produced in the north) and a book produced in Africa.

Annex 5 Questionnaire

Questionnaire/Interview Guide for Publishers

1.1 Name _____

1.2 Name of publishing outfit _____

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

1.3 Year Established _____

1.4 Number of Staff _____

1.5 Type of Publishing – (rough breakdown by percentage of titles)

Scholarly _____%

Textbook _____%

Children's books _____%

General Interest _____%

1.6 Main languages published:

1. _____: _____%

2. _____: _____%

3. _____: _____%

4. Other : _____%

1.7 Number of new original books published in:

1997 _____

1998 _____

1999 _____

1.8 Number of co-publications/reprints:

1997 _____

1998 _____

1999 _____

1.9 Main destination of sales:

Local Market: _____% of sales turnover

Export Market: _____% of sales turnover

Total =100%

1.10 Breakdown of Export Market:

Sales in Africa (excluding local market):_____ % of sales turnover

Non-African sales (including through ABC): _____% of sales turnover

2. What year did you join ABC? _____

3. What do you perceive ABC's main role to be?

4. What do you perceive to be ABC's strengths?

5. What, if any, changes could be made to improve ABC's operations, structure and management etc.?

6. What have been the advantages to you of being a member of ABC (List in order of importance e.g. market feedback; sales, resource publications, networking possibilities within and outside Africa, information; facilitating co-publishing; improving book quality, etc.)

i.

ii.

iii.

iv.

6.1 In what way has this benefited your publishing house?

7. How would you describe your communications with the ABC office in Oxford?

Excellent Good Average Poor

7.1 What is your reasoning behind the answer above? Please also comment on the one-way or two-way nature of your communication with ABC.

8. Are you satisfied with ABC's services? (circle one)

Very satisfied Satisfied Reasonably satisfied Not satisfied

9. Apart from selling your books has ABC performed other services for you?

YES / NO

9.1 What has (have) this (these) service(s) consisted of? Please explain.

9.2 Has (have) this (these) service(s) been useful? Please explain.

- 10. Are there services that ABC does not currently provide that you think ABC should pursue?**

- 11. Please comment on the membership of ABC in terms of current size, types of membership/ representative nature in the pan-African sense or types of publishing, etc.**

- 12. Are you concerned by ABC's heavy dependence on donor support for funds?
YES / NO If you are, do you have any suggestions on how to make ABC financially viable independent of donor support?**

- 13. Please provide any additional observations, ideas or opinions concerning ABC.**

Annex 6 A Guide to some of the Actors in the Book Industry

A Guide to some of the Actors in the Book Industry

A **publisher** invests money to edit, typeset, proof-read and physically produce a book and is the primary risk-taker. The publisher also decides the number of copies to print. Once each book is published, the publisher tries to sell it either directly to the end customer (be it libraries or individuals) or, more, typically through the book trade. The publisher also has to create the demand for his/her books through marketing, direct mail, advertising, websites and similar methods.

At the top of the book trade structure is the **wholesaler** or **distributor**. This organisation represents a number of publishers either from within the country or even internationally. The wholesaler or distributor does not normally sell directly to the end consumer, but supplies bookshops instead (ABC does both supply directly and sell to book trade). Bookshops find this arrangement convenient since they can come to one distributor and obtain the books of a whole range of publishers instead of having to contact each publisher separately (which is both a time-consuming and expensive affair).

Wholesalers can be specialised, for example, they may handle only books on military subjects and strategic studies but will then try and represent all such publishers. Similarly, like ABC, they can handle the books published from a particular continent. Or they can be broad-based. The most common divide is between those who handle only “trade” books (e.g., fiction, cookery books and children’s books) and those who handle only academic/scholarly books.

Further, distributors can cover all relevant bookshops in one country or even beyond (e.g., Blackwell’s in Oxford) or their reach can be limited to a particular region within the country).

There are two basic types of **booksellers** – those who deal with the public and those who deal mainly with educational and academic institutions. The former are invariably shops located in main markets, high streets and large residential areas. The latter, on the other hand, are either located on campuses or in non-fashionable areas since they do not need to attract individual buyers but work instead directly with libraries and teachers. They are often referred to as “Library suppliers”.

Given this structure, the distributor or wholesaler gets a fairly high discount from the publisher (not less than 40% for scholarly books and 50% for general books). The distributor then gives booksellers a share of this discount (not less than one-third on general books and 30% on academic/scholarly books).

Most distributors are fairly conservative in deciding both the titles and the quantities of the books they purchase from the publisher since they want to limit their risk. The publisher is effectively the supplicant in this relationship since the more copies the distributor takes, the more copies of the book are likely to sell. However, other than making the books available to their client bookshops, the distributor undertakes virtually no promotion or marketing.

Given this, ABC is a fairly unique distributor in so far as they undertake extensive marketing, stock the entire range of the books published by their members, and import fairly substantial quantities. On the other hand, since ABC does not pay for any of the books they stock, it is more easily able to be liberal in its stocking decisions.

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