

Sida Evaluation 06/10

African Books Collective

Mid-Term Review 2006

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**Department for Democracy
and Social Development**

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Acronyms and Abbreviations

ABC	African Books Collective Ltd
ADEA	Association for the Development of Education in Africa
APNET	African Publishers Network
AU	African Union
BAI	Book Aid International
BDC	Book Development Council
BME	Benefit Monitoring and Evaluation
CoM	Council of Management
Danida	Danish International Development Agency
DIDC	Ministry for Foreign Affairs Department for International Development Cooperation, Finland
DHF	Dag Hammarskjold Foundation
DTP	Desk Top Publishing
ECA	UN Economic Commission for Africa
EU	European Union
Hivos	Humanist Institute for Cooperation with Developing Countries
IABSS	Intra-African Book Support Scheme
ICB	International competitive bidding
LCB	Local competitive bidding
MIS	Management Information System
MOE	Ministry of Education
MSUP	Michigan State University Press
NEPAD	New Partnership for Africa's Development
NGO	Non-Government Organisation
NORAD	Norwegian International Development Aid
NTIC	New Title Information Card
PABA	Pan-Africa Booksellers Association
PAWA	Pan-African Writers Association
pdf	portable document format
POD	Print on Demand

SADC Southern Africa Development Community
Sida Swedish International Development Cooperation Agency
UNESCO United Nations Educational, Scientific and Cultural Organisation
UNICEF United Nations Children's Fund
WB The World Bank

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Executive Summary

Background

African Books Collective (ABC) is a not for profit cultural organisation that markets and distributes African published scholarly and culture books in the North. It was established in 1989 as a self-help initiative by a group of 17 founder publishers and is registered in the UK as a company limited by guarantee. A Council of Management elected by the founder members from among the 105 participating publishers from all regions of Africa governs the collective. Its secretariat and UK/Europe outlet is based in Oxford (ABC/UK), and it has a Northern American outlet based in Michigan State University Press (ABC/MSUP). ABC's annual income from sales is over £200 000, more than half of which is remitted to the publishers. The surplus is used to run the secretariat, and to carry out the cultural activities together with support from donor agencies

An Evaluation of ABC was commissioned by Sida in 1999, and was completed in February 2000, at which time there were 45 participating publishers. This evaluation led to a more focussed, medium-term programme of support based on a five-year strategic plan: ABC's Strategic Plan 2002–2006 is supported by Hivos, Norad, and Sida. The present partnership is a joint funding agreement, in which the grant support broadly equates to one-fifth from Hivos, and two-fifths each from Norad and Sida.

ABC has functioned within the parameters and framework of the Strategic Plan 2002–06 for three and a half years. Its activities have been guided by regular meetings of the Council of Management (CoM), which have been immediately followed by Strategic Meetings attended by the CoM and the funding partners. The present review is intended to examine the results and effects of these activities and to make recommendations for the future.

ABC set up distribution outlets in Europe and the USA to enable its participating publishers to sell their books in Northern markets. Stock of all titles is held in both warehouses (Oxford and MSUP).

ABC 'buys' the distribution services of MSUP by giving them 30% discount on sales. This means that about 15% of the North American sales proceeds are remitted to Oxford. Publishers receive the same remittance levels whether books are sold through ABC/Oxford or ABC/MSUP.

The activities of the last three and a half years have increased sales significantly and expanded ABC's resource base (in terms of publishers, titles, customers and internal systems as well as income). This has led to more financial stability. Within ABC this surplus income has been seen as an opportunity to invest in and develop its systems and to contribute to improving the effectiveness of the organisation in its cultural and commercial roles. The creation of a financially self-sufficient organisation was not the intention of the current five-year plan agreed with donors.

Below, the key findings are expressed as a function of the questions raised by the Terms of Reference for the Review.

Key Findings

1. The relevance of ABC's mission to the development of literature and reading in Africa

ABC revised its mission statement in response to the Evaluation 2000 to emphasise its commercial and cultural roles. The new mission statement has sharpened ABC's identity as a cultural organization whose core values are to enhance the manufacturing of Africa's cultural wealth and to promote its global appreciation, particularly in the North. The mission is elaborated in distinctly cultural aims and attained through specific target activities. In providing support to strengthening indigenous publishing

through collective action ABC has doubled its membership base to over 100 African publishers spread across the continent. ABC supports these publishers by marketing their books and raising their profile outside Africa as well as through training and advisory services. Better known and more professionally skilled publishers are also able to attract better writers. Publishers themselves feel that the earnings through ABC have made useful contributions to their capital base. In collaboration with Book Aid International on the IABSS, ABC made over 160 000 copies of African titles available to libraries in 39 African countries. As these books continue to be utilised in these countries, they will generate some orders. This is expected, in the longer term, to strengthen intra-African book trade and cross-cultural exchange between African countries.

As publishers broaden their lists and become more financially stable, they are able to provide more and better titles for their domestic markets, which increases access to reading materials and in turn improves literacy levels.

2. The relevance of ABC's methods and aims for publishing development in Africa

ABC's mission and activities are aimed at supporting indigenous African publishing, which has been unable to flourish within such an underdeveloped environment. In particular scholarly and cultural publishing in Africa is in dire need of capital to enable its growth. Book exports to the better priced Northern markets are one way of generating such capital. Unfortunately, individual indigenous African publishers do not yet have substantive lists, the required financial muscle, marketing skills or international contacts to undertake independent promotion and distribution of their scholarly and cultural books in the North.

ABC is unique in its approach to supporting publishing development as it channels assistance to publishers through demand-side activities rather than supply-side. By helping to provide markets and marketing opportunities to publishers (demand-side), ABC assists publishers to improve their own products and their own organisations. It works as far as possible in collaboration with other regional book chain organisations such as APNET and PABA. Although there are existing and potential exporters and distributors of African books, the evaluation established that none have the potential or interest to maintain the kind of diversity of materials that ABC handles as well as offer returns to African publishers at the level that ABC does.

ABC is an initiative by African publishers to help themselves and their industry: as any commercial venture, it is a response to a market need. However, as well as being commercially relevant to publishing development in Africa, ABC's non-commercial activities give it a strong cultural relevance as well.

3. The general relevance of the ABC's methodology to the broader view of poverty and 'multi-dimensional efforts' on poverty reduction

As an African trading organisation, ABC positions itself as a campaign partner of the Make Poverty History campaign. However, ABC does not presently see itself as an organisation with a direct role in poverty reduction. Nevertheless, ABC does in fact have both direct and indirect impacts on poverty reduction with primary and secondary beneficiaries in both the South and the North.

Its activities play a very important role in reaching secondary beneficiaries. Direct inputs to primary poverty reduction beneficiaries are limited to the earnings of the participating publishers and their employees and in helping to create sustainable livelihoods for individuals within the industry. While this is certainly an important contribution, ABC's reach is far greater in indirect terms. By promoting and strengthening African publishing, ABC is able to make a contribution to policy dialogues, both within African countries, and through exports, within northern countries: titles dealing with economic and structural policies, equity promotion, social inclusion, gender mainstreaming, good governance, etc. are part and parcel of ABC's publishers' lists.

From sales proceeds through ABC, African publishers are able to improve their businesses, which is a source of livelihood for them and their employees. ABC's work distributing African books in the North is an important and necessary contribution to the debate on poverty reduction in Africa, in which the voices of Africa itself are often not heard. Also, the distribution of African books helps to combat intellectual poverty in the North, in terms of the understanding and appreciation of African societies, problems, life experiences, paths for development.

As part of its efforts to position itself within current development strategies, ABC (and the CoM in particular) needs to examine more closely its role in the issue of poverty reduction.

4. The extent to which ABC's objectives have realised its cultural/commercial mission

The ABC is a good model of a public/private partnership, which is utilising development aid funds in combination with commercial investment by an African industry to achieve cultural, developmental and commercial objectives. There are many lessons to be learned from this partnership, both in terms of the ABC itself, and also on a broader front in terms of development modalities, fair trade principles, etc. for Africa.

Following the recommendations of the 2000 evaluation, ABC has been able to fulfil both its commercial and its cultural mission over the period under review. It continues to raise the profile of African authors, scholarship and publishing as well as providing financial and other capacity building support to publishers. It provides an invaluable service to libraries, booksellers, funding agencies and individuals as a "one-stop" shop to make available a very broad range of published disciplines, and to enable the North to access African culture and scholarship as written and presented by Africans. As a pathway for funding support to African cultural activities it is efficient: there is virtually no overhead cost to the donor funding provided, as management of the funds is effectively paid for from the commercial income of the Collective (i.e. the donor funds received more or less equal the remittances made by ABC to the publishers – if the donors were paying direct supplier subsidies to the publishers, there would be additional(overhead) costs for the management of the subsidy). The ABC is a focused organisation which provides a unique blend of cultural and commercial support to African publishing.

The fourteen recommendations to ABC in the 2000 evaluation were generally adopted, and these are reflected in the ABC Strategic Plan 2002–06.

In line with the recommendations, ABC re-articulated its mission statement to provide a better focus on its activities. The aims and strategies of the ABC are now clearer and relate better to its fundamental mission.

Three of the recommendations concerned income generation, the improvement of financial stability and the need to close the gap between commercial income and total expenditure. ABC publishers agreed to reduce the remittance levels they receive from ABC (resulting in over GBP 40 000 extra income to the Collective), and ABC has expanded its volume of sales, brought prices into line with northern market norms and established an outlet for the North American market through a distribution agreement with the Michigan State University Press (ABC/MSUP). Two recommendations were related to digital technology and ABC has made excellent progress in this regard. ABC's database has been upgraded to a Windows platform and now links stocks, customer files, invoicing etc. with the bibliographic database. Significant time-saving is anticipated once the systems have been run in and sales analysis has been enhanced. Similarly, accounting and book-keeping have been computerised to make the financial procedures clearer and more easily handled. ABC has adopted print on demand (POD) technology, and continues to expand this type of production by showing the publishers the kinds of savings and efficiency improvements that can be made, as well as helping the publishers with the actual digitisation of their titles. Additionally, it has established a successful revolving fund to help the publishers finance the POD services.

In terms of raising its profile and positioning itself within Africa, ABC has improved upon its information dissemination (through its web-site, and through direct contacts to its members and customers), and its networking with governments and regional institutions. Unfortunately, information is not always absorbed or passed on within participating publishing companies or partner organisations. ABC therefore needs to continually strive to get its message across. Efforts to strengthen collaboration with APNET have seen some promise, but a long-term strategic partnership would probably be more effective and may also help APNET itself.

ABC has a well-defined strategy to achieve its mission and is implementing that strategy with a good degree of success. The specific cultural and commercial objectives are being met. It is very clear that the development of the five-year strategic plan and the strategic funding arrangements with the joint funding agencies have had a huge positive impact on the work of the Collective. Assured funding has permitted more activities to take place; it has released manpower from fund-raising tasks to actual operational activities. In contrast to its earlier “hand-to-mouth” existence, the ability to plan for the medium term has allowed ABC to develop systems and take longer-term views of its activities, as well as allowing the Council of Management and the funding agencies to play a stronger role in monitoring and guidance.

5. Post 2006: Challenges of the ABC commercial activities

ABC has shown overall high growth in sales during the period under review. Until 2004, growth was higher than anticipated (67% actual against 58% projected), though the annual growth levels varied greatly. The variation was mainly due to investment of time and resources into the expansion into the North American market and setting up the new database. The fact that ABC was able to maintain any level of growth while moving into new premises, opening the outlet in MSUP, etc., is testimony to its effectiveness.

Although the cumulative growth 2002–2005 will be about 40% instead of a projected 98% due to the closure of the Intra-African Book Support Scheme (IABSS) in 2004, it should be noted that 2005 should, in any case, see growth of about 7% over 2004 in terms of non-IABSS sales.

The nature of ABC as a non-profit sharing organisation means that, once it has paid its bills, it effectively spends everything that is left on fulfilling its cultural mission. The more resources it has available, the more work it is able to undertake. In view of this, notions of financial growth targets are somewhat esoteric. ABC does not invest its income in assets other than those required to perform its activities. The main justification for commercial growth is therefore that higher sales and income translate into increased income to cover ABC’s operations and higher returns for the participating publishers, and thus greater commercial support to African publishing. ABC needs to re-examine this policy with regard to establishing specific growth targets linked to both commercial expansion and to possible investment to fund future cultural activities.

ABC cannot be financially independent and simultaneously retain its present cultural mission. If proposals were to be made for ABC to be financially self-sufficient, such proposals would require a drastic change in the mission and or structure and objectives of the Collective. A commercially independent ABC could be operating by the end of 2006, but it would no longer be recognisable as a cultural organisation offering support to African publishers. It would be forced to become just another commercial distributor of African books to the North. It would have to narrow its publisher and list base considerably and, as a way of reducing overheads, cut back on marketing costs and limit its stocks to highly profitable books. Most culture books, such as Literature and children’s books, would have to be offloaded. Clearly, such a focus on high-selling titles would be detrimental to the publishing industry in Africa, particularly in terms of scholarly and cultural publishing. It should also be noted that such a change would reduce ABC’s impact on poverty alleviation by reducing the number of beneficiaries of its activities in the South.

The main lesson learned from the present support to the ABC is that medium-term planning and strategisation have been and continue to be essential, linked with assured funding and that regular monitoring and guidance clearly benefit operations, outputs and outcomes. The challenge is therefore how to make the necessary external funding sustainable. ABC has been examining ways to encourage African governments and institutions to contribute to its work. In reality, this kind of support has been and is likely to continue to be linked to expressions of support for the ABC and its activities rather than physical or financial support. The demands for provision of basic health, education and social services on most African governments create a climate of crisis management in which cultural needs are often seen to be of secondary importance.

Recommendations

In general terms, the proposed way forward for the ABC is to build on the achievements of the present phase and enhance the impact of these initiatives, to maintain the commercial and cultural roles and strategy of the Collective, to look to a second phase of market and member development together with a consolidation of the new systems, and to seek a broader donor funding base. In its second five-year strategic plan, ABC should include specific, realistic commercial targets and specific growth plans for both the commercial and cultural activities. The plan should also indicate levels of funding from external sources, and indicate “fall-back” strategies to ameliorate situations where overall funding targets fall short. The sustainability of ABC should be considered as a financial issue rather than as a commercial one.

Specific recommendations are collated in Section 6 (p. 41) and are also to be found throughout the main body of the report after the background and justification for each recommendation. In Section 6 they are collated in terms of priorities within three broad areas, and are numbered for ease of reference: Group A is the first priority area, including all operational recommendations which could be adopted more or less immediately, or which are supporting actions which are already being undertaken or planned by ABC; Group B includes those operational and strategic recommendations that will require some form of review (with CoM?) and elaboration before they can be adopted, and which are anticipated to have an impact in the medium rather than the short term; and Group C comprises the strategic recommendations, with an anticipated medium to long-term impact, and relates mainly to external funding issues.

Conclusion

Inasmuch as Africa needs a breathing space to solve its fundamental problems, the still fledgling publishing industry in Africa needs assistance to grow and to be able to participate fully in Africa’s intellectual growth. Without that growth, Africa’s visions will not flourish. The African Books Collective, its founders and its members are making a strong contribution to Africa’s future. That contribution deserves continuing support.

1 Introduction

1.1 Background and Overall Purpose of the Evaluation

The African Books Collective Ltd (ABC) is a non-profit sharing cultural organisation that markets and distributes African books in the North. It was established in 1989 as a self-help initiative by a group of 17 founder publishers. Today, ABC consists of 105 publishers from 19 African countries representing all regions in Africa. It distributes 1800 titles with 200 new titles being added each year. The range of books is diverse: from academic and reference sources to creative writing, children's books and African culture.

ABC's mission statement is:

African Books Collective, founded, owned and governed by African publishers seeks to strengthen indigenous African publishing through collective action and to increase the visibility and accessibility of the wealth of African scholarship and culture.

ABC's funding is a mixture of grants from partner donor agencies and proceeds from its commercial activities.

Sida has supported ABC from its inception. From 1990 to 1999, Sida/DESO provided core support amounting to SEK 2 370 000, and from 2000 to 2002, when the present joint funding agreement became effective, Sida/DESO/Kult provided SEK 1 480 000. In addition, from 1989 to 2002, ABC received project support or core funding from different donors at different times: (1) for the Intra-African Book Support Scheme: SAREC, Danida, The Netherlands Ministry for Foreign Affairs, Norad; (2) for Promotion: The Rockefeller Foundation, Arts Council England; (3) for Trainee Manager: Danida; and (4) Core support: Danida, Ford Foundation, Hivos, Norad. Small grants were made in the initial years from The Commonwealth Foundation and UNESCO.

An Evaluation of ABC was commissioned by Sida in 1999, and was completed in February 2000, at which time there were 45 participating publishers. This evaluation led to a more focussed, medium-term programme of support based on a five-year strategic plan (ANNEX 1): ABC's Strategic Plan 2002–2006 is supported by Hivos, Norad, and Sida (Danida and the Finnish DIDC expressed their support in principle, but had no budget from which to provide funds).

The present partnership is a joint funding agreement, in which the grant support broadly equates to one-fifth from Hivos (EUR 396 000), and two-fifths each from Norad (NOK 5 901 034) and Sida (SEK 6 000 000).

The Sida contract provides for a study of financial sustainability as part of this evaluation.

The present evaluation has been a joint evaluation between Sida (lead agency), Norad and Hivos. Its purpose has been to:

- evaluate ABC's achievements so far and compared to the Strategic Plan 2002–2006, and
- evaluate to what extent ABC is reaching sustainability without external grant funding.

During the course of this evaluation it was made clear that Norad and Sida will not be able to continue the support to ABC after the end of the present agreement. For Hivos, financial support to ABC after 2006 is still uncertain.

1.2 Evaluation Logic and Purpose

After 10 years of operations, in which funding for ABC was ad hoc and short-term, proposals were made to funding agencies to initiate a longer-term programme of support. As a pre-requisite, the ABC was evaluated in 2000,¹ and the findings of the evaluation were built into a strategic 5-year plan.²

The development process included internal discussions leading to a Statement by the Founding Publishers that gave the ABC's response to the findings and proposals of the evaluation, and proposed changes to the structure and organisation of the ABC in preparation for a longer-term funding plan. Continued discussions with funding agencies (predominantly from Northern Europe) led to the present system of co-financing.

ABC has functioned within the parameters and framework of the Strategic Plan 2002–06 for three and a half years. Its activities have been guided by regular meetings of the Council of Management (CoM), which have been immediately followed by Strategic Meetings attended by the CoM and the funding partners. The present review is intended to examine the results and effects of these activities and to make recommendations for the future.

The TORs of this evaluation refer specifically to the development of sustainability of the ABC's activities: "evaluate to what extent ABC is reaching sustainability without external grant funding". It must be noted here that the attainment of sustainability is not one of the specific objectives of the Strategic Plan 2002–06. However, examination of sustainability is part of the TORs for this review. The activities of the last three and a half years have clearly expanded ABC's resource base and led to more financial stability. Within ABC this has been seen as an opportunity to invest in and develop its systems and to contribute to improving the effectiveness of the organisation in its cultural role, rather than to the creation of a financially self-sufficient organisation. This issue is discussed further in Section 5.3.

The ABC is clearly a good model of a public/private partnership, which is utilising development aid funds in combination with commercial investment by an African industry to achieve cultural, developmental and commercial objectives. There are many lessons to be learned from this partnership, both in terms of the ABC itself, and also on a broader front in terms of development modalities, fair trade principles, etc. for Africa.

1.3 Evaluation Process and Key Outputs

The evaluation has been carried out by a team of three consultants, based in Belgium, Finland and Kenya. All three participated in interviews in Oxford at the beginning of the assignment (which was also the only opportunity for the team to meet together), and all three have contributed to the writing of this report, with specific responsibilities for specific sections (Jane Katjavivi, commercial and publishing aspects; Ruth Makotsi, cultural and publishing aspects; and Nigel Billany acted as team leader with overall responsibility for the questionnaires and reporting).

The team has selected three documents as the baseline for this work: the Evaluation Report from 2000, the response of the Council of Management to that report's recommendations (Statement of the Founder Publishers) and the Strategic Plan 2002–2006. The first two documents enable a better understanding of the operational status of the ABC when the Strategic Plan was put into effect, and also the background to those strategies. These three documents together provide a broad and detailed background to ABC's operations and systems when the present phase of funding began. The evaluation process is detailed in Annex 2.

¹ The African Books Collective, Sida Evaluations 00/06, Dept. for Democracy and Social Development, Stockholm, Feb. 2000. ISBN 91 586 8906-0, ISSN 1401-0402

² ABC Strategic Plan 2002–2006

1.3.1 Relevance, Effectiveness and Sustainability

The Terms of Reference of the evaluation (see Annex 11) emphasised that the role of ABC should be examined with regard to its *relevance* to the development of literature and reading in Africa.

The evaluation was to examine ABC's *effectiveness* in terms of its cultural/commercial mission.

It was also to consider the future directions and challenges for ABC, post 2006 by providing an analysis and recommendations on the commercial activities and challenges of *sustainability*.³

1.4 Target Readers

In line with the terms of reference, the report has several functions. As a mid-term review (despite being carried out well into the second half of the programme), it aims to inform ABC and its partners on progress to date and make recommendations on possible changes to the strategy, to planned activities etc. to take account of developments since the original Strategic Plan was agreed. In addition, the evaluation examines the financial feasibility of the ABC with a view to long-term financing and funding requirements beyond the present agreement.

The report is therefore targeted mainly to the funding agencies and to the Council of Management. However, it is anticipated that the other ABC stakeholders (in particular participating publishers and potential new participating publishers, but also the operational staff of the ABC) will use the findings to guide their own planning and future activities within the ABC.

2 ABC – The Evaluated Intervention

2.1 Background and History, Organisation and Stakeholders

The mission and aims of ABC are essentially cultural. The mission statement is:

African Books Collective, founded, owned and governed by African publishers seeks to strengthen indigenous African publishing through collective action and to increase the visibility and accessibility of the wealth of African scholarship and culture.

The aims of ABC are to promote and support:

- *A vibrant, self-sustaining and independent publishing industry emanating from within African culture.*
- *African writers and scholars publishing with indigenous African publishers.*

³ EFFECTIVENESS The extent to which the development intervention's objectives were achieved, or are expected to be achieved, taking into account their relative importance. *Note:* Also used as an aggregate measure of (or judgment about) the merit or worth of an activity, i.e. the extent to which an intervention has attained, or is expected to attain, its major relevant objectives efficiently in a sustainable fashion and with a positive institutional development impact. *Related term:* Efficacy.

RELEVANCE The extent to which the objectives of a development intervention are consistent with beneficiaries' requirements, country needs, global priorities and partners' and donors' policies. *Note:* Retrospectively, the question of relevance often becomes a question as to whether the objectives of an intervention or its design are still appropriate given changed circumstances.

SUSTAINABILITY The continuation of benefits from a development intervention after major development assistance has been completed. The probability of continued long-term benefits. The resilience to risk of the net benefit flows over time. (*Definitions from Annex C in Looking back, moving forward. Sida Evaluation Manual. 2004.*)

- *African literature in the mainstream of international literary output.*
- *African scholarship strongly represented in the international intellectual community.*
- *Appreciation of African aesthetics and cultural identity.*
- *An efficient cost-effective ABC, maximising sales income, reducing the gap between income and expenditure in the long term, working towards self-sustainability, with strong capacity to carry forward its mission.⁴*

The abiding principle of the ABC's strategy to fulfil these aims is that they can only be achieved through a combination of commercial and cultural activities.⁵ Thus, ABC's strategy is to:

- *Work in partnership with publisher, donor and other cultural organisations in Africa and elsewhere to disseminate information and promote African publishing and book interests.*
- *Promote, market and distribute African-published materials world-wide outside publishers' domestic markets; and through a full range of marketing activities to increase sales of African-published books.*
- *Draw on new technologies and evolving marketing developments, to develop existing markets and establish new markets.*

Prior to ABC, there were hardly any distributors of African books in the North. The few in existence tended to exploit African publishers by buying their books at local prices and selling them marked up to match northern market prices. The establishment of ABC, an African-owned institution, has provided a real channel for African publishers to identify market gaps and to service information needs for African books in the North. In addition to distributing African books through individual sales, bookshops, libraries and educational institutions, ABC participates and exhibits its list at major international book fairs, academic and professional conferences.

In keeping with one of its core principles, participation in the activities of the ABC is strictly limited to indigenous African publishers. Effectively this is taken to mean any publishing company based in Africa and in which 100% of the shareholding is African-owned. Subsidiaries of northern publishing companies and groups are excluded from participation.⁶ A number of institutions and NGOs have been accepted as members of the collective, especially where their publishing activities are relevant to the aims of the ABC. In the past, ABC was seen as being quite exclusive because of this. However, the policy does ensure that 100% of ABC's efforts are directed at African business ventures and not at non-African ownership. Moreover, changes since 2000 have opened membership considerably while holding to the principle of supporting indigenous publishers.

ABC's strategy is, in part, commercial in order to achieve its cultural aims. Its legal status is a company limited by guarantee in the UK. The founding publishers each paid GBP 1000 as their investment into the company (17 publishers made this payment and the 16 remaining are the de facto owners of ABC). A second category of membership was established once the collective was operational, and those companies paid GBP 500 to join. The class of membership was reflected in variations in the remittance

⁴ ABC Strategic Plan 2002–2006

⁵ "ABC's strategy is, in part, commercial in order to achieve its cultural aims. The mission can only be achieved through commercial activities." <http://www.africanbookscollective.com/>

⁶ This is justified by the fact that these companies already have representation in the North (through the parent companies), and that they tend to promote northern authorship into Africa rather than African authorship into the North.

levels.⁷ In order to increase financial support for the ABC, publishers agreed in 2001 to increase the discount levels so that ABC would be able to retain a greater part of the sales proceeds. Today, discounts are set at 40%, 45% and 50% for founders, paid members and participating publishers, respectively. This change in remittances from 2001 has meant that ABC has retained an average of 45.5% of sales income (instead of the previous 40.7%) to contribute towards its running costs.

The ABC could probably more easily achieve its cultural objectives as a charitable organisation. However, under existing UK legislation it would not be possible for ABC to have such status because of its commercial activities. This situation may change in the near future as a new charities law is being promulgated. A similar issue relates to the placement of the ABC secretariat within the UK rather than in an African country; in line with international marketing practice, the marketing wing of an enterprise should be located as close to the points of sale as possible. In addition, when ABC was founded, foreign exchange controls and logistical barriers would have prevented it from operating from an African country. While those foreign currency restrictions generally no longer apply, the logistical obstacles and the need to be situated within one's market are still relevant.

Of the approximately 50 000 copies of African books sold annually through ABC, over 50% of the income from sales is remitted to the African publishers. This remittance represents a re-investment in indigenous companies, improving their economic viability and enabling them to develop further books.⁸

ABC's reach into the US market was previously limited because it was unable to maintain stocks in the USA. A Market Feasibility Study done in 2001 looked at the pros and cons of different distribution arrangements in the USA and came out in support of entering an agreement with a US publishing house as an ideal route. An agreement was entered into in 2002 with Michigan State University Press (MSUP) for them to distribute ABC books from 2003.

2.2 ABC's Cultural Activities

ABC works with its participating publishers in both the creation of culturally significant African products and in their dissemination worldwide. In this respect, the products are specific titles, whether of children's literature, law, sociology or one of the other 50 disciplines it stocks. In addition, ABC works to expose and promote African scholarship and authorship in the world at large.

From the point of view of African culture, ABC's work is both outwardly and inwardly oriented. ABC's promotional activities are directed to spreading African scholarship and culture from within Africa to the North. At the same time it is helping to build the capacity within Africa to develop Africa's voices and the means to make those voices heard.

ABC works in collaboration with numerous funding agencies and cultural organisations to promote both the books and authors of its publishers as well as the more general interests of African publishing as a whole. It achieves this through attending book fairs and conferences, by participating in author and publisher visits, by helping to get titles and authors nominated for various literary awards.

As an example of cultural activities, in 2004, ABC and/or its participating publishers were represented at Book Fairs in Beijing, Bologna, Ethiopia and Gothenburg as well as a book launch and three book exhibits in the UK. ABC sponsored an African author to two Book Festivals (Niger Crescent Festival, Slovenia, Oxford Literary Festival, UK), and a publisher to the meeting of the African Studies Association (USA). The Chairman and the Head of the Secretariat presented papers at the 2nd International

⁷ Effectively, founder publishers granted a 33.33% discount to the ABC and non-owner members were required to grant a 45% discount to the ABC. Publishers were also allowed to participate without making any investment (Associate Members), and those publishers were required to give a 50% discount to the ABC. On average, this meant that ABC retained 40.7% of sales income.

⁸ Replies to questionnaires and telephone interviewed publishers statements

Conference on the Book in Beijing.⁹ Some direct sales result from these functions (e.g. ABC attendance at the African Studies Association meetings), but the main function is profile-raising and networking. Presently, ABC does not maintain specific analyses of direct sales at conferences, and there are presently no criteria defined to assess the impact of these activities on ABC sales or operations.

ABC also functions as a lobbyist on behalf of the African publishing industry, approaching governments and regional bodies to promote recognition of culture and publishing's role. In 2004, ABC held discussions with the African Union, UN Economic Commission for Africa, and UNESCO. In this regard, the ABC Marketing Manager attended the 4th African Development Forum in Addis Ababa. In order to raise the profile of the ABC and thereby its participating publishers, ABC is seeking recognition of its cultural role from African governments. To date it has received letters of support from Tanzania and Kenya, and is actively seeking such support from the governments of Nigeria and Ghana.

ABC's cultural activities are considered in greater detail in sections 3 and 4.

2.3 ABC's Commercial Activities

ABC's commercial aim is to build an efficient and cost-effective organisation, maximising sales income, reducing the gap between income and expenditure in the long term, working towards self-sustainability¹⁰, with strong capacity to carry forward its mission. In short, ABC markets and sells books: this encompasses, however, a multitude of activities that are directly related to marketing and selling.

ABC makes agreements with eligible African publishers to represent them outside Africa. ABC stocks, markets and sells the publishers' books and remits the funds received to the publishers, less a discount which is used to cover part of the costs of the activities. Publishers provide their books on consignment (they remain the property of the publisher and ABC does not pay for the books until they are sold) or in digital format (pdf) for print on demand (POD) sales (see below). Generally, ABC receives and warehouses the books (or stores the pdf files) and enters information about the titles into its catalogues, brochures etc. as well as into the various bibliographic databases.

ABC has developed and manages a broad sales network of customers (trade, libraries and individuals). It knows the buying history and usual disciplines preferred by a customer, as well as preferred methods of purchase, shipping, invoicing etc. ABC sells the books to these customers through direct selling using various methods: direct customer orders from catalogues/databases, repping (visits by a representative to a library or trade outlet), web-site sales, direct sales at conferences, etc.

Once the books have been sold, ABC handles all financial transactions and finally remits to the publisher a percentage of the receipts from sales. This amount depends on the type of agreement the publisher has with ABC (average remittance today is 54.5% of sales receipts).

ABC provides a range of services to its members that are not normally part of a distribution agreement. This includes marketing, training and attachments, assistance with ISBN classification, various work on the digitisation of books for print on demand (see below and Annex 9).

The fixed costs of development, publication and dissemination of its catalogues (six different catalogues produced in 2004) as well as other promotional materials, flyers, NTICs and the maintenance of the web-site are currently covered by income from commercial sales. In addition, costs of attendance at Book Fairs (but not salaries), exhibits and some conferences are paid from sales returns.

⁹ ABC Annual Report 2004

¹⁰ Self-sustainability for ABC could be defined as acquiring sufficient commercial income to meet its business costs and to supplement stable external funding that is necessary to maintain its cultural operations.

ABC receives physical book stock from participating publishers and holds the books at its warehouse, selling them on to customers. However there are sometimes problems of supply and poor printing. Shipping costs are also high, both for publishers to ship the books to ABC and for ABC to clear them through customs. Since 2002, therefore, ABC has also started to use the new Print on Demand technology to allow for multiple stock locations, printing books as close to the point of distribution as is feasible. This enables ABC to hold 'virtual stock' and thus to overcome stock supply problems and poor technical quality. It cancels the costs incurred by ABC publishers to get their books to Oxford, which consumes much of the income from sales remitted to the publishers (see also Annex 9).

Twenty-four publishers are now involved in POD, with 197 titles being printed under the POD programme by July 2005.

POD provides a successful new model of possible publishing development, especially for small and scholarly publishers or books that have limited market appeal, because the capital investment needed to publish books in this way is small. It can facilitate more diverse publishing where there is a small market and develop African publishing capacity.

ABC's commercial activities and financial considerations are covered in greater detail in sections 4 and 5.

2.4 Management and Organisation

ABC has distribution outlets in Europe and the USA to enable its participating publishers to sell their books in Northern markets. Its main office and warehouse are in Oxford, UK. The North America Manager is based at Michigan State University Press (MSUP). Stock of all titles is held in both warehouses (Oxford and MSUP). ABC 'buys' the distribution services of MSUP by giving them 30% discount on sales. This means that about 15% of the North American sales proceeds are remitted to Oxford. Publishers receive the same remittance levels whether books are sold through ABC/Oxford or ABC/MSUP.

The North America Manager handles the ABC business and deals with orders, receipts, marketing and customer relations. He is employed by MSUP for administrative purposes but reports to Oxford.

Originally the MSUP agreement was that they would cover the salary of the ABC Manager there but they pulled out of this due to funding cuts and ABC now covers this.

2.4.1 Council of Management

A Council of Management (CoM), elected from among the over 100 participating publishers governs the collective. Until 2002, only founder members could sit on the Council of Management, which met on an ad hoc basis as funds permitted. The Evaluation 2000 report recommended that the CoM meet annually and that the organisation be democratised by allowing the non-founder members to elect and participate as CoM officers, and to make gender and regional balance key considerations. These proposals were adopted. All participating publishers are now eligible to stand for election to the CoM but the election body remains the founder publishers as the constituent body of the company. The current Council of seven is composed of three founder publishers from Tanzania (Chair), Kenya and Senegal and four participating publishers, two of whom are from Nigeria, one from Ghana and one from Swaziland.¹¹ Two of the members are female. Ownership of the collective by the founder members has been retained in their authority to elect the Council of Management.

Within the current plan, as costs of AGMs can be met from the grant funds, the CoM is able to meet annually to examine the past activities and to set the policies, strategies and targets for the following

¹¹ The constitution provides for four founder members and three participating publishers to sit on the CoM, but the founder publishers decided this ratio could be varied if the electorate decided that a variation could give the best representation at any given time.

year, usually in collaboration with its funding partners. Two non-executive directors act as trustees of the ABC to comply with UK company laws that require British citizenship for at least two directors.

The Council of Management is effectively a Board of Directors which is mainly concerned with setting policy and strategies, while operational management is vested in the Secretariat, whose Head is directly responsible to the CoM.

2.4.2 Management and Staff

The ABC operations are managed by the Head of Secretariat (HoS; based in Oxford for logistical reasons), who retains overall responsibility for the management and decision-making, contacts with the CoM and donors and final approval of finance issues, as well as personnel issues.¹² The staff organisation is collegiate rather than hierarchical, and there is clearly a lot of discussion and input from the members of staff into operational issues. Once a year, staff have a more formalised opportunity to contribute to policy and strategy dialogue through the Annual Think Tank.

The ABC staff are skilled, committed and supportive of each other. They have developed and maintain good working systems and procedures. They are proactive: they take on board problems and external constraints and look for ways to deal with them/improve the situation. The 10 members of staff in Oxford work (and are paid for) a total of only 35 person-days a week (i.e. average 3.5 days per staff member), reflecting a very efficient use of resources available. (See Annex 10 for details of staffing.)

Although only four of the staff are full-time, the working hours are scheduled to good advantage so that all services are basically available at all times (or within 24 hours). Almost all functions are back-stopped within the staff complement. There are six female and five male members of staff, reflecting a good gender balance. The Head is female, and other positions of responsibility/decision-making are more or less equally shared between the genders. ABC does not have a written gender policy, but management and staff are aware of gender questions.

The ABC/Oxford (and to some extent ABC/MSUP) staff deal with specified contact persons in each of the participating publishers, so lines of communication between Africa, Oxford and Michigan are clearly defined.

2.4.3 Financial Management

ABC's operations are funded by a mixture of grants from partner donor agencies and the proceeds from the commercial activities. The bulk of its administrative costs and cultural activities are currently covered by the grant funding. Marketing and distribution costs are covered from the sales turnover, as are the remittances to participating publishers. Any commercial surplus from the sales is used to defray extra operational and cultural costs.¹³

ABC employs one accountant/bookkeeper. Accounting is on a monthly basis. There is one US dollar account and nine sterling accounts. The reason for the high number of sterling accounts was to allow physical control of cash under the old system of multi-donor funding; and currently for receipt of donor funds, ring-fenced publisher remittances due, revolving fund for POD, Girobank (for European payments), etc.

ABC uses "Quickbooks" software adapted to its specific needs. This is able to produce statutory accounts, and the accountant maintains the ledgers. Back-up of the files is automatic through the main server and has so far been reliable. Internet banking is being set up and this will streamline the systems even further. Cash flow is managed by the Accountant.

¹² She is employed nominally for four days a week but in practice her hours appear to be much longer.

¹³ ABC's budgets are designed as a plan for the use of the funds available to ABC. They therefore only state net commercial income, i.e. what is retained after paying publishers for the books. The cost of the books is not itself stated in the budget, but this can be misleading. It would be better if the gross income and the cost of books were shown in future.

The accounting software is not directly linked to the database at present, which means some duplication of data entry, but this does not appear to be too time-consuming. Once data has been entered, there are various types of reports that can be produced: sales by title are used to identify trends and popular/saleable titles, sales by region are used to monitor trends, etc.¹⁴

2.5 The Baseline – Evaluation Report 2000, Founder’s Statement and Strategic Plan 2002–06

In general, the recommendations of the 2000 Evaluation were adopted, and the ABC committed itself to becoming more efficient and effective. The need to sustain and strengthen the role of ABC as an institution for cultural development was reaffirmed. Targets for significant growth in sales were set. These are all articulated in the Strategic Plan for 2002 to 2006, which defines ABC’s new mission, strategies, aims and activities and is therefore the basis for the current evaluation.

3 Findings

3.1 Achievement of Agreed Objectives by ABC

ABC bases its monitoring and evaluation on outputs and outcomes. That said, the more difficult area to monitor is the impact of cultural activities (see the report on Hivos workshop with the ABC Annual Report 2004). How does one set verifiable targets and indicators of success that can examine ABC’s contribution to cultural sector development in Africa? Similarly, what impact is ABC having on promoting cultural awareness in the north? ABC is presently working on developing indicators for the Workplan 2006. This issue is further discussed in Section 4.1.

3.1.1 Impact of ABC’s Cultural Mission, Strategies and Aims

The emphasis of the ABC mission statement has been revised from *improving the free flow of communication through published material from Africa to the North to strengthening indigenous African publishing through collective action and increasing visibility and accessibility of the wealth of African scholarship and culture.*

The new mission statement has sharpened ABC’s identity as a cultural organisation whose core values are to enhance the manufacturing of Africa’s cultural wealth and to promote its global appreciation, particularly in the North. The mission is elaborated in distinctly cultural aims and attained through specific target activities.

By applying a tripartite strategy of working with publishers, donors and other cultural organisations in Africa and drawing on new technologies to market and distribute African-published materials, ABC has successfully attained the following:

- a) increased the number of African books on Northern markets by expanding export opportunities for African publishers, especially to North America. Partnership with Michigan State University Press (MSUP) increased sales by 20% in 2004;

¹⁴ In terms of reporting, the accountant provides monthly reports to the Head of ABC in the form of budget follow-ups to control invoicing and budget heads. All invoices are handled by the Accountant/Bookkeeper and are first signed off by the originator of the order before being passed to the Head for final approval for payment.

Credit control falls under the accountant together with the Customer Services Department at present. Long-term debtors are followed up in collaboration with Customer Services (these are all institutional customers, as individuals and e-orders pay cash or by credit card up front before goods are despatched).

- b) expanded the information base of African culture and thought in the North through increased selection of relevant titles from a wider scope of African publishers. Since 2000, the ABC titles list has increased from 1700 titles to 1800;
- c) improved the quality of books and efficiency of its distribution systems through the adoption of Print-On-Demand technology;
- d) widened the democratic space for indigenous African publishers by extending the services of the collective to all publishers with appropriate titles. The number of participating publishers increased from 43 publishers from 11 countries in 2000 to 105 publishers from 19 countries across the continent in 2005;
- e) raised the profile of indigenous African authorship and publishing by promoting selected African writers at book festivals in the North and through increased collaboration with other book sector and cultural organisations such as Book Aid International (BAI) on Intra-African Book Support Scheme (IABSS) Zimbabwe International Book Fair (ZIBF) on Africa's 100 Best Books, Dag Hammarskjöld Foundation (DHF) on the scholarly seminar, etc.;
- f) strengthened the forum for African publishers to strategize on mechanisms for consolidation, facilitation and distribution of African books world-wide by improving the operational systems and efficiency of the secretariat. Additional staff have been hired, new offices secured and IT systems upgraded;
- g) harnessed new technological opportunities to expand information and facilitation services for publishers and to improve internal working;
- h) raised its own profile, and improved methods of communication

ABC has not completed all of its proposed activities under the Strategic Plan (nor should it have at this stage). It will need to continue to develop certain aspects of its operations in order to fulfil its mission, including:

- a) further develop the use and functions of its web-site for both customer use and as a point of contact for publishers and CoM, including the establishment of an on-line publishers discussion group;
- b) continue to explore potential areas of partnership with African governments and African institutions such as the AU, as well as with foreign embassies based in Africa;
- c) continue to work with partner organisations to raise the profile of publishing in Africa and to lobby governments for recognition of publishing as strategically crucial to any development initiatives;
- d) monitor publishing throughout Africa with a view to identifying potential members from those geographical and linguistic areas not represented in ABC;
- e) consider the place of national languages publications in its lists;
- f) consider how to assist with the promotion of intra-African book trade;
- g) focus resources on increased capacity building for member publishers through exchanges, workshops, seminars etc.

3.1.2 ABC's Commercial Performance

ABC aims to make a surplus on its commercial activities and sets its prices accordingly. It does not pay dividends or operate any surplus-sharing schemes, however. Any surplus made is re-invested into ABC operations, allowing flexibility, contributing to special projects, and currently paying the salary of the marketing manager at ABC/MSUP.

3.1.2.1 Commercial income¹⁵

As can be seen from Table 1, gross commercial income earned by the sale of the books fairly closely matches donor funding received, and in 2004 surpassed it. So the income-generating activities of ABC are providing half the total income. This is unusually high for a cultural organization. Funds remitted to publishers (effectively the cost of the books sold) average 29.6% of the ABC's total income (donor support plus sales income).

Table 1: Comparison of gross commercial income and donor funding received 2002–2004

	Income from sales	Donor funding received	Funds remitted to publishers
2002	£218 343	£242 630	£114 624
2003	£234 438	£258 684	£145 821
2004	£289 659	£251 490	£184 659

Sales have increased significantly under the 2002–06 Strategic Plan. A cumulative growth of 58.1% was projected for 2002–2004 (including growth of 2002 over 2001). However, the actual growth achieved over that period was higher, at 68.6% (Table 2a).

Table 2a: Projected against actual growth in sales 2002–2004

	Projected sales growth	Actual sales growth
2002	10%	27%
2003	15%	7,3%
2004	25%	23.6%
Cumulative Total 2002–2004	58.1%	68,6%

NB: These figures are taken from the Workplan 2005

The pattern of growth was, however, different from what was anticipated. The projections aimed at a steady rise in growth, whereas the reality was a large growth of sales in 2002 (when the list of titles carried was opened up), followed by a slower rate of growth in subsequent years.

For 2005, the picture is not quite so good. Sales figures for the first six months of 2005 are slightly below last year's. However, ABC/MSUP is over target and ABC/Oxford is under target. For ABC/Oxford the academic buying season is still to come. However, they have revised overall projected sales growth for 2005, from 25% to 7.5%. This would give a cumulative growth from 2002 to 2005 of 39.5% instead of the original projected 97.7% (see Table 2b).

Table 2b: Projected sales against planned growth in sales 2005

	Projected sales growth (Strategic Plan)	Projected sales growth (2005 Work Plan)
2005	25%	7.5%*
Cumulative total 2002–2005	97.7%	39.5%**

* 7.5% is the revised growth projection for 2005 over the actual growth in 2004 and taking into account the cessation of IABSS sales

** Based on an estimated sales of GBP 239 659, which equals a projected growth of 7.5% over non-IABSS sales in 2004

¹⁵ In examining ABC's commercial performance, three sets of financial figures have been considered: (a) the figures for the overall plan 2002–06, (b) the figures for budgets for individual years, and (c) the actual figures after year-end. The figures for the budgets for individual years differ from the plan because full funding for the plan was not found. Also, revisions are made based on a review of performance and factors affecting performance. Unless otherwise stated, the following examines the figures in the annual budgets and notes thereto (there are, however, some discrepancies between the actual figures as declared in the budgets – which are effectively management accounts of income and expenditure and do not include information on exchange rate gains/losses, depreciation, bad debts, etc. – and the audited account figures in the 2004 Summary of Income and Expenditure, which includes the previous years).

Sales through ABC/MSUP are an increasing percentage of total sales (see Table 3) and ABC explains the need to revise projections as due to the new US distribution mechanism. The ABC Oxford secretariat receives only 15% on US sales. *Therefore building sales through ABC/MSUP is good in overall terms and good for publishers, but does not bring as much income to the Oxford secretariat as had been projected.* Because of this, the increase in sales in 2003 produced a lower net income than in 2002. The 2004 projected sales growth was revised to 8% to take this into account. However, late sales in 2004 produced a much higher percentage growth, very close to the projected target. For more analysis of sales figures, see Annex 3.

Table 3: ABC/MSUP percentage contribution to total sales 2003–2005

ABC/MSUP percentage of sales

2003	26,70%
2004	25,75%
2005	51,20% to end June

Another reason for slower growth in 2005 is the end of the Intra-African Book Support Scheme (IABSS), which contributed some 23–26% of sales to ABC between 2001 and 2004. Under this scheme, ABC consolidated orders of literature, children’s and scholarly books for libraries across Africa, with the support of special donor funds. IABSS ended in 2004.

Today, ABC has a strategy for continued growth, but does not have a specific strategy for how to replace the lost IABSS sales. In order to cover the shortfall, ABC will need either to increase its overall sales or find ways to cut costs.

3.1.2.2 Commercial surplus

ABC uses its commercial income to cover costs that are directly related to sales. These are the cost of the books themselves (remitted to publishers), marketing and distribution.

ABC has achieved a growth in net commercial income (after remittances) over the projections and an actual increase over the three years 2002–04, though this was not very large (£8 836). However, the net commercial surplus achieved (after covering marketing and distribution costs as well) was significantly higher than projected in all three years 2002–04. The overall surplus achieved for the three years combined was over double the projection (£101 779 as opposed to £50 655) (see Table 4). This is a significant achievement.

Table 4: Net commercial income after remittances 2002–2005

Net commercial income and surplus after remittances				
	Projected income	Actual income	Projected surplus	Actual surplus
2002	£95 000	£103 719	£7 000	£26 757
2003	£92 500	£88 617	£12 080	£26 022
2004	£101 000	£105 000	£31 575	£49 000
Total	£288 500	£297 336	£50 655	£101 779

The percentages on which remittances to publishers are based were reduced in 2001 following recommendations in the Evaluation 2000. This has contributed an extra £44 512 to ABC’s income between 2001 and 2004 (see Table 5, and a comment in Section 4.2).

Table 5: Difference in retained income after changing discount levels in 2001

Differences in retained income 2001–2004					
Total sales	Retention using old discount levels	Percentage retention using old discount levels	Actual retention (using new discount levels)	Percentage retention using new discount levels	Difference (extra invested in ABC by publishers)
£914 205	£372 118	40,7%	£416 630	45,57%	£44 512

With the present budget format, the only way to cut commercial costs is by reducing marketing and/or distribution costs. In fact, the figures show that budgets and actual costs for marketing and distribution have gone down during the review period (Tables 6 and 7).

Table 6: Breakdown of marketing and promotion costs

Marketing and promotion costs				
	Projected	Actual	Actual marketing costs	
			as % of sales income	as % of net commercial income
2002	£68 000	£59 032	27,0%	56,9%
2003	£62 920	£50 065	21,3%	56,5%
2004	£54 425	£42 401	14,6%	40,4%
2005	£31 270			

Table 7: Breakdown of distribution costs

Distribution costs				
	Projected	Actual	Distribution costs	
			as % of sales income	as % of net commercial income
2002	£20 000	£18 808	8,61%	18,1%
2003	£17 500	£14 747	6,30%	16,6%
2004	£15 000			
2005	£16 459			

If ABC is to further maximize the net commercial surplus, it needs to examine its total sales figures, remittances and costs of marketing and distribution, to see where changes could be made. These issues are discussed further in section 4.1.2.

3.2 Publisher Views

The participating publishers are the major direct beneficiaries of the ABC as well as effectively being its production unit. The relatively low return rate (30%) on the questionnaires is therefore disappointing. On the other hand, a return rate of 30% is what could be generally expected in a study of this nature. Responses were received from 13 of the 19 countries with participating publishers (almost 70% representation), though some respondents did not answer all the questions. As only four Founder member/CoM questionnaires were received (out of a total of 29 received), the replies are not disaggregated from the figures below.

The responses are analysed on a qualitative rather than quantitative basis. However, it is clear that the responses are generally representative of the range and types of publishers in the ABC, and so response figures are provided. In terms of size, employee numbers range from 1 to 131 full-time staff. Participation periods ranged from 16 years (founders) to under 6 months. The percentage of scholarly titles in the product mix ranged from 4.3% to 86%. In terms of technical capacity, only two respondents (7%) rely entirely on external services for typesetting/DTP, with seven of the respondents doing all typesetting/DTP in-house, and nine using both in-house and external, which implies a relatively high level of investment by these publishers (this compares with 26% of respondents to a study carried out in

1996/97 who had no in-house type-setting/DTP facilities).¹⁶ Ten of the respondents are using the POD facility (and one was unaware of the entire concept of POD).

The publishers are overwhelmingly satisfied with the performance of the ABC: ten of 22 respondents expressed themselves as highly satisfied, 12/23 are satisfied and one respondent felt it was too early in the relationship to take a stand on satisfaction or on the impact of ABC on business. Almost all the respondents felt that their business has benefited from both the commercial role of ABC (17/19 replies) and from its cultural role (18/19). Similarly, the majority of respondents see ABC continuing to play a significant role in their business (13/17 expect the significance to expand and 3/17 expect it to remain at today's level; none of the respondents envisage ABC having decreasing importance to their business).

On the question of further expansion of the coverage of ABC, none of the respondents see expansion as being detrimental to their own businesses. On the contrary, 16/19 see expansion as having a positive impact on their own business, one respondent would prefer to see a period of consolidation rather than expansion, and one was agreeable to expansion if the ABC has the capacity to manage new members without reducing services to existing publishers. One respondent was not in favour of expansion at the expense of existing titles (i.e. if de-stocking titles is necessary to make room for new titles).

The respondents had noted a variety of effects on their business. While the majority of effects are linked naturally to exports, 15 of the 18 respondents felt that working with ABC has had a direct effect on their domestic business as well, though several tempered this by saying this was an impression rather than something they could identify concretely. This effect was felt mostly in terms of attracting authors. In addition, 13 out of 21 respondents stated that potential sales through ABC are a factor in their decision to publish a particular title (though not necessarily for every title), while 8 stated it was not a factor.

Respondents listed twelve different important advantages/benefits of participation in ABC. The most common is international exposure of their titles through ABC's marketing systems or being part of a collective marketing organisation (stated in one form or another 19 times). Next most important (in terms of numbers, but not necessarily in any order of priority for individual respondents) are the sales related to this marketing (7) and the provision of hard currency remittances (7) as a result of those sales. Four respondents stated that the availability of sales through POD is an important advantage. Other benefits mentioned (each one once only) are: participation in ABC gives a publisher credibility; ABC's ability to get titles reviewed; opportunities for consultancy work; encouragement of authors by entries for awards and prizes; early profile building for a new publisher; opportunity to refer overseas buyers directly to ABC; assisting publisher to reach an intra-African market (presumably referring to IABSS sales?); public value for the company.

Of fifteen respondents, six had had titles rejected by ABC. All but one of them felt they had received sufficient information about the reasons for rejection, but only one felt able to put that information to use in improving its publications.

Respondents gave nine suggestions for ways in which ABC's services could be expanded. The bulk of the suggestions relate to capacity building, with the most popular being the provision of different kinds of training, either through training workshops or through exchanges/attachments (5 respondents), or through a sub-contracting agreement. Three respondents suggest that ABC should help to establish the capacity for intra-African trade, either as a subsidiary arm of ABC or by providing consultancy and skills transfer to an NGO to help set up a pan-African version. One respondent gave concrete proposals with an offer of resources to set this up (that information will be passed to the ABC Secretariat for consideration). Three respondents proposed that ABC should provide publishing services (editing and design), of which two specifically called for this in relation to POD. One respondent proposed extending the POD system to small format books, one proposed ABC should try to carry more children's titles,

¹⁶ Study on the Economics of Publishing Educational Materials in Africa, Bgoya. W. et al., ADEA, 1997

and one proposed that ABC should try to get more reviews. One respondent suggested setting up a joint venture to be a clearing house for foreign books into Nigeria, another for ABC to expand into the sale of African journals and subscriptions. All the proposers stated their willingness to pay extra for these services.

On the question of whether participating publishers would be willing to see ABC's cultural activities paid for more through ABC's commercial activities the response was more varied. Five respondents agreed to this suggestion whereas nine were against the idea, and two were definitely of the opinion that external funds should be accessed for all cultural activities. The five respondents who agreed with the suggestion all stated that any reductions in remittances could only be small and should be discussed and agreed in advance. *To put remittance levels in perspective, in terms of income for the publishers, the 2004 remittances would have provided an average £1 759 to each participating publisher for an average 476 copies sold, from which the publisher would have to pay author royalties, production costs and freight costs to the UK.*

In terms of skills transfer, replies to the section on training opportunities reflected the broad range but low availability of training opportunities. Generally, training opportunities arose only occasionally, and fields such as editing had more opportunities than bookselling or publishing management. Training providers were named as the national publishers' association (12), APNET (4), foreign donors (4), National Book Council (3), NGOs (3) Association for West African Book Editors (3), national governments (2) and own company sponsorship (1).

In terms of direct skills transfer between ABC and the publishers 6/21 stated they use lessons or techniques learned from ABC in their domestic business, while 14 do not; two respondents stated that they are not aware of the systems used by ABC. Twelve out of 19 respondents feel that working with ABC has helped in the professionalisation of their staff, while the remaining 7 do not.

It is interesting to note that the responses of a small number of publishers indicate either that they receive no information about various activities from ABC or (more likely) that the information received is either not shared within their organisations or is not acted upon: not all respondents were aware of the partnership between ABC and MSUP; not all were aware that they have access to different break-downs of sales; not all were aware of the availability of POD services. The Secretariat reports, however, that its records do show that full information was sent to all publishers.

With four notable exceptions (all with high sales in the USA), generally the publishers felt they were unable to make concrete statements about the effect of sales through ABC/MSUP. Three felt they could see a rising significance of these sales, whereas seven were either unsure ("too soon to say") or did not see any significant North American sales of their books. This would indicate that publishers need to be shown how to analyse the reports they receive from ABC.

In general, it can be concluded that at least the great majority if not all of participating publishers benefit in a variety of ways from being members of ABC, and that they expect the working relation to continue and often to flourish. All fifteen respondents to the question of whether the ABC model is the best way to get their books exposed and sold on the international market said yes, with some provisos: the ABC model is effective, but needs to be measured against other strategies such as rights selling and co-publishing; remittances should be higher and freight costs treated differently; and does the fact that ABC is partly donor-funded affect the stocking of certain publications? (This is interpreted to be asking whether the donors have any say in the types of titles that are accepted by ABC.)

The founder publishers were generally in agreement with the above responses (some specific responses from founder publishers are included in the figures given above). Interestingly, there were fewer proposals for expanded activities. With two exceptions, (capacity building activities and expansion of the range of printed materials to be sold), the view seems to be that it would be better to consolidate existing activities and improve the quality of existing services rather than look for new fields at present.

In terms of future policy with regard to creating greater financial self-sufficiency, the founders are unanimous in wanting to consider the cultural and commercial aspects of ABC together: “the dual role is often not understood (by donors) – it is really a question of two mouths feeding the same stomach”; “while the commercial side of ABC is important, the cultural side is more beneficial in the long term”. The least desirable route for ABC would be that of focusing on marketing only books that sell well, and dropping less popular titles or publishers. If the ABC cultural role could not be maintained in any other way, the founders would consider some form of (further) reduction in remittance levels, but only if introduced gradually (and with specified targets to increase overall sales/turnover).

In summary, the founders see ABC as continuing to be necessary to African publishing and publishers in the medium to long term. It fulfils a function that no other distributor has ever offered, and that probably no other distributor would be capable of doing in today’s markets. ABC is and should be perceived as an African organization operating regional offices in Oxford (for the European market) and Michigan (for the North American market).

3.3 Partnerships

The 2000 Evaluation report urged ABC to locate itself more strongly within Africa. As ABC is itself an export organisation located within the target market areas, this has been interpreted as a need to expand its participating publishers as well as partnerships in Africa. The expansion of the number of participating publishers from a broader range of countries has itself strengthened ABC’s base as an African institution.

In terms of partnerships, ABC has tried to strengthen its relations with both APNET and PABA. Relations with APNET in the past were sometimes awkward as some people in the African book sector viewed the two organisations as somehow in competition with each other, rather than as complementary. Agreements for cooperation reached between the Head of the ABC secretariat and the Executive Secretary of APNET unfortunately did not come to much, partly because of the difficulties currently being experienced by APNET. ABC states that its relations with PABA are good but they have not really developed areas of cooperation, since they are working in different geographical zones.

With the closure of the Bellagio Secretariat in Oxford there is no coordinating network of government agencies and private foundations working on publishing in Africa. This is a gap that has not been filled, and is to be regretted.

Regarding links with African governments, ABC has also approached a number of participating publishers to see if they can get letters of support from their governments for ABC’s work. They have been successful in getting a letter from the President of Tanzania, one from Kenya, and efforts are being made to get similar letters from Ghana and Nigeria. (There are some opportunities for closer collaboration with the AU, which are being followed up by ABC.)

This is commendable. However, the bigger task is to get African governments to recognize publishing as a strategic industry, and to recognise ABC’s place as an export and promotional agency within the African book chain.

Efforts have been made for some years in this regard by APNET, by local publishers associations, book development organisations, UNESCO, and others. The combined efforts of these institutions have not yet managed to break through to governments and it is no easy task to do so. Even where governments develop book policies they are usually narrowly interpreted to cover textbook provision. The value of local books as cultural products is generally not acknowledged by African governments. Different ministries (e.g. trade, education, culture, information) often have overlapping responsibilities regarding publishing. There is often suspicion because of the commercial component of publishing. There are

widespread taxes and customs duties on books that have not been lifted in most African countries. It would be necessary to provide governments with concrete data regarding the real economic impact of the book industry in order to raise interest in developing the legal and economic environments of the industry. ABC should contribute to such activities, though it should not lead them.

Evidently, ABC's activities advance APNET's mandate of strengthening indigenous publishing in Africa. On the other hand, as APNET is the natural focal organisation of African publishing, strengthened collaboration with APNET would raise ABC's profile on the continent.

- *ABC should maintain and strengthen current links with APNET and should take advantage of the ongoing restructuring process at APNET to entrench the 2002 agreement based on a long-term arrangement.*
- *However, there is more ABC can do in regard to networking. It should work with other organisations such as PABA, book development councils, Sida, NORAD, Hivos, etc. to get African publishing valued by African governments by contributing to the provision of data to help governments understand the economic and social impact of the publishing industry.*

In order to raise its profile as an African book sector organisation ABC has, under its research and development programme, developed partnerships with several book sector organisations, which have materialised into successful implementation of various activities. These include a joint seminar on 'Strengthening African Scholarly Publishing' with the Dag Hammarskjold Foundation (DHF) in 2002; researching and compiling of Africa's 100 Best Books list for the Zimbabwe International Book Fair (ZIBF) in 2002; co-publishing of *The Electronic African Bookworm* with The International Network for the Availability of Scientific Publications (INASP) in 2002; and ongoing planning of *The African Scholarly Writers' Handbook* with DHF from 2003. Additionally, ABC marketed and distributed publications on African publishing by the Association for the Development of Education in Africa (ADEA), INASP, ellagio Publishing Network and ZIBF. Further development of such forms of dialogue and the publication and dissemination of research findings may be the best way to build awareness of these issues at government levels. ABC's role in this respect should be to support rather than lead.

ABC has also recognised the need to secure additional sources of funding by raising its profile as a cultural institution in Africa. Already, various key organisations have been contacted with plans to contact others in the pipeline. Members of the Council of Management have visited their respective governments and regional organisations to advance ABC's mission and seek support for its activities (see above).

Following a visit to the UN Economic Commission for Africa (ECA) a Memorandum of Understanding is underway to enable ABC to distribute ECA publications. A partnership with UNESCO on translation of African language books has been formulated. ABC has made contact with several other organisations, which are likely to further spread its networking. These include the African Union (AU), Southern African Development Community (SADC), the British Library, and ADEA.¹⁷

- *ABC should increase the number of organisations it collaborates with especially those with publications on Africa's book sector, which it should stock*
- *ABC should seek collaboration with all major book fairs in Africa to organise joint seminars to encourage scholarly and cultural publishing.*

ABC's partnerships must also be viewed in relation to its funding partners. The present basket funding and 5-year strategic support has created stability for ABC's operations (and also for its employees), and

¹⁷ NEPAD stands for New Partnership for Africa's Development

has allowed the secretariat to focus on activities other than fund-raising and to plan the use of its resources more effectively. If we accept the premise that cultural work is a question of long-term, planned activities as opposed to crisis response activities, the benefits of strategic funding cannot be denied. This issue is discussed further in Section 6.

3.4 Customers

ABC maintains 35 different in-house customer mailing lists, including a main list of 4000 customers (libraries, trade and individuals), New Title Information Cards (NTICs) list and subject lists. The different lists reflect the different requirements of customers in terms of information. With the new database, ABC maintains individual customer files, which are linked to customer accounts and the customer database. The customer database is linked also to the bibliographic and warehouse databases, giving access to customer files and sales history. The system is still being developed for customer analysis, but will allow ABC to use information on buying history to target new titles to potential customers. This will be particularly beneficial for trade and library customers, who want to receive information that will be useful to them and not be bombarded with general catalogues and flyers for titles in which they have no interest.

Customer relations are a crucial area of ABC's activities. Apart from standard customer-related services such as invoicing, filling orders, handling order-related claims and credit management, ABC has to provide information to customers in a variety of ways. Bibliographic database management is essential for both marketing (getting the information out to the customer for buying decisions) and for reference (providing a resource for librarians, collection-building etc.). ABC also has to ensure that ISBN information is correctly supplied (most publishers have access to ISBN's though sometimes they make errors in allocating them, or in providing the data to ABC, resulting in a book of a different title being supplied, or inability to locate the correct title; in the case of books from Ethiopia, which does not yet have an ISBN agency, the books are given an ABC ISBN). Similarly, providing review copies, getting books reviewed and getting the reviews published is both a marketing activity (pre-sale) and also a form of post-sales service to customers.

Once an entry has been made into the ABC bibliographic database, it can be downloaded and transmitted in appropriate form to various worldwide databases (Nielsen BookData, US Library of Congress, Ingrams, Marnes & Noble, Baker & Taylor, Amazon, etc.). However, different types of customer want to receive bibliographic data in different formats. Institutional buyers want specialised lists of titles focused on their own fields: librarians, journals, trade customers often prefer to receive separate file cards about new titles (New Title Information Cards).

For individual customers, ABC works on the principle of payment in advance. Orders must be accompanied by payment and payment is cleared before dispatching the books. For e-orders, ABC has a secure credit card payment system which also allows payment to be cleared before releasing the goods. For institutional customers, payment conditions vary, but ABC has a strict policy that a firm order is a sale, and does not generally allow sale or return deals (there are exceptions to this – e.g. a trade customer given sale or return conditions for sales at a specific function such as a conference or an author signing).

The customer lists and customer files are clearly a very valuable resource, and the ABC is constantly looking for ways to find new customers. One way may be through links to specialist web-sites, such as the "black diaspora" web-sites. It would be possible to set up direct links on those sites to the ABC website and permit e-ordering. However, there are several issues that the ABC has already considered. Some sites require a percentage of sales if an order results from a re-direction; and that is time-consuming and expensive, particularly given those sites will be occasional individual purchases rather than systematic checking and buying. Some sites which have asked for links have contained inappropriate material, or, because they are hosted free, are subject to spamming with advertisements they cannot

control. There are, however, currently two sites under consideration. ABC believes it is more productive to post new title information to diaspora listserves, most of which are in the US (and therefore under MSUP territory). More research on this is one of the tasks of a current placement to ABC from the University of Milan.

Adoption orders for literature titles, and getting into schools for children's books are currently high priority in marketing. There may be opportunities from a new UK Dept. of Education policy on 'multicultural' books for schools; importantly, money is being made available for this.

ABC/MSUP is showing high potential (indeed these sales have topped sales from ABC/Oxford during the first half of 2005). ABC was previously not so effective in the US market because of the particularities of the market there (highly insular, quality-driven). For example, many customers will not place orders for books which are not already stocked in the US. This situation has changed with ABC's agreement with MSUP for them to distribute ABC books, as customers know that stocks are immediately available. POD, while still a new technology, will also help to alleviate this situation as the titles are held in "virtual" stock (i.e. in digital form).

The nature of marketing and sales strategies in the US means that retail customers need advance notice of new titles, together with specific deadlines for release on to the US market. This has been and continues to be a problem for ABC, as many of the participating publishers are either unwilling or unable to give firm advance information on publication and release dates. ABC will need to drive this point home even more to its publishers, and could be one of the subjects for the proposed capacity building activities.

4. Evaluative Conclusions

4.1 Effectiveness

Despite the successes of the ABC and other organisations such as APNET, the state of the African publishing industry is still largely unknown in the North. Also unknown are the individual African publishers themselves. Promotion of African publishers, especially those with the most popular books, would uncover the potential of their lists and expand markets for ABC. ABC should place more emphasis on promoting the African publishing sector by:

- *Assisting all its publishers to develop web-sites*
- *Profiling publishers and providing information on publishing trends in Africa for example through regular contributions to the African Publishing Review (this could be treated as a priority area for collaboration with APNET)*
- *Continuing to brand its list to maintain its specialised identity i.e. "The best of African publishing from a single source of supply," but also to profile the types of books it handles.*

4.1.1 Effectiveness Of Cultural Support Activities

4.1.1.1 Expanding the product base through increased publisher participation

As the first organisation to bring together a cross-continental group of indigenous African publishers to jointly initiate a developmental project, ABC has been instrumental in consolidating unity among African publishers on the basis of which cross-border partnerships have been built and intra-African book trade expanded.

Publisher participation

In order to strengthen its African identity and to widen the product base, ABC has revised the participation criteria to allow access to its benefits by more autonomous African publishers with appropriate titles. Since 2000, the number of new titles it carries has risen by 756 and the number of participating publishers more than doubled. During the same period, some 600 titles have been de-stocked as they have become out-of-date, out of print or not selling, and so the overall rise in the number of titles carried is about 6%.

However, ABC still represents a small percentage of African publishing and only 10 out of the present 105 participating publishers are from Francophone Africa. This is mainly because most publishers in Africa focus on textbooks, which are not marketable in the North, and their majority shareholders are non-indigenous multinational companies.

The change of policy to represent publishers based on the marketability of specific titles rather than the publisher's entire list has enabled ABC to take on more publishers, both large and small. Newly registered but specialising publishers, like Kimathi Publishers in Zimbabwe, are now able to sell books through ABC whereas, previously, their small list would have rendered them undersize.

The acceptance of a new publisher is always a judgement call. That is, whether ABC should look only to "strong" publishers or devote resources to assist weak publishers in the name of promoting publishing. When assessing new publishers, the main factors considered are:

- Ownership
- Getting more scholarship into the public domain
- Supporting more publishing
- Supporting ABC

ABC is specifically interested in women publishers and makes efforts to look out for them. They published and distributed *Women in Publishing in the Book Trade in Africa (1997)* and the later *Courage and Consequence: Women and Publishing in Africa (2002)* as a demonstration of their interest to promote women in publishing.

ABC has made considerable efforts to be more transparent, but continues to be perceived by some as 'an exclusive club'. For example, even though the criteria for participating publishers is displayed on the ABC web-site, Africa makes the fewest hits to the site, so the information is perhaps not getting through to the right audience. There is a continuing need to disseminate information about ABC, its terms and conditions, and about the criteria for participation of publishers and for acceptance of titles onto its list.

- *This information should be publicised in wider fora; for example, as part of the content of the ABC brochure which should then be distributed to national publishers associations for onward circulation to their members.*

ABC uses various ways to monitor the developments of African publishing to identify potential publishers. They include an annual visit to an African book fair, the Internet, journal and bibliographic sources and nominations by the Council of Management members. The Head of Secretariat also has other contact networks related to her work for the Noma Award for Publishing in Africa, which keep her informed of authors, books and publishers.

However, this approach is not comprehensive enough to do justice to the African publishing scene.

- *A more systematic and periodic approach to identifying new publishers should be applied to enable more exhaustive representation. For example, national publisher's associations?*

(NPAs') catalogues, where they exist, or regional surveys would give ABC more qualitative information on the availability of product and publishers' potential in their countries.

- *More effort should be put into enlisting publishers from Northern and Francophone West Africa so as to give the collective a truly pan-African outlook. This recommendation is clearly linked to issues of language (and scripts with regard to Arabic texts), as well as marketing resources.*
- *If the above proposal is adopted it will require further market research and networking into the Francophone Northern markets: ABC/MSUP for Canada, ABC/Oxford for Europe*

De-stocking

Responses to questionnaires showed that de-stocking of titles on the ABC list can be a source of contention, with some publishers being unaware of the criteria for de-stocking, even though this is clearly stated in the ABC-Publisher agreement. Understandably, the ABC commercial activities are focused on maximising sales by marketing books that are in demand. Books which are not in demand (not selling) are simply a drain on resources, hence the need to de-stock. On the other hand, de-stocking can have negative effects on a publisher that has linked its marketing plan into projected sales of those titles through ABC.

- *With the advent of Print-On-Demand (POD), ABC should encourage publishers as far as possible to provide new titles in pdf format. This would allow ABC to receive fewer books on consignment and reduce the volume of 'dead' stock being remaindered, wasted or returned to publishers*
- *In addition to defining the subject range, the criteria for identifying titles should be expanded to state the preferred quality of production (especially for children's books), the African market price range, submission format (whether pdf format is preferred for scholarly works and literature) and the expected production capacity of the publisher (minimum number of new titles per year).*

Adopting a Specialised Identity by Focusing on Scholarly and Culture books

The ABC list carries more scholarly than culture books. Scholarly titles, which sell better, constitute two thirds of the new titles received annually and contribute more than 70% to the total sales.¹⁸ Owing to the rising levels of poverty, markets for culture in Africa are small and so is their output. In the area of African Literature, for example, publishers only accept manuscripts with the highest chances of getting prescribed as study texts in schools as this would guarantee some sales.

The subject range of the ABC list has remained as wide as 50 with a steady growth in the number of new titles per year from 100 to about 200.¹⁹ In addition to Children's Books, subjects with over 10 new titles a year include History, Politics and International Affairs, Sociology, Economics and Development, African Literature, Auto/Biography and African Languages and Linguistics.

Over the last two years, titles on Art, Gender Studies and Human Rights are among those that have sold over 100 copies per year. Because they are highly priced their productivity ratio is high. Ironically, stocks in these subjects have remained low over the years. It is encouraging to note that 19 of the 58 new publishers publish in the "Gender" category, and gender is one of the criteria considered for membership.

¹⁸ Of the 378 new titles sold in 2003 and 2004, Scholarship titles totalled 271 compared to only 107 of Culture (Art, Photography, Music, Guide Books, African Literature and Children's Books)

¹⁹ 176 new titles were received in 2003 and 202 titles in 2004

- *ABC should make deliberate efforts to stock more of such titles as part of its sales growth strategy.*

The appearance of a book on Kiswahili grammar among the top selling 12 signifies an interest in the study of African Languages by the northern markets. Notably, the number of new titles on African Languages and Linguistics increased from 3 in 2003 to 19 in 2004 and, despite their relatively low prices (average £18), were the 4th highest contributor to the sales. This trend should be encouraged.

- *Language books should be promoted as an integral part of culture.*
- *In increasing stocks of scholarly books, the aesthetical aspects should not override suitability of content.*²⁰ *At the same time ABC should look to improving the physical aspects through POD production, and find ways to assist the publishers to improve the editorial content.*

The area of children's books is growing because of Universal (free) Primary Education programmes recently adopted by governments and through which donors are financing the purchase of storybooks for schools. The total number of copies for the 12 most selling titles in 2004 on the ABC list was 2814, of which 1459 copies (52%) were from three children's books.²¹ However, although they have continued to top the sales on the ABC list, the productivity ratio of Children's Books is low.

African ministries of education require that the prices of Children's Readers must be low and that content should aim at developing literacy skills among children. In addition to their low production quality, their content and structure is therefore distinctively local. This weakens their saleability against the more expensively produced and highly priced children's literature in the North, whose content has more universal appeal.

Nonetheless, children's books, especially folktales, carry an important aspect of African heritage and culture, which needs to be widely disseminated for it to be appreciated.

- *Where content and style are universal, publishers should be advised to produce higher quality versions of their children's books for the northern markets, even if these are more expensive/highly priced*

4.1.1.2 The development of authorship and publishing in Africa

Local authorship development is an important factor in the development of local publishing. It is helped by the international outlets for ABC books. Authors are thereby subject to international scrutiny and review. This can help them to develop. ABC sends such international reviews to the publishers. International reviews might help to promote authors locally.

- *ABC's archive of reviews and other material could be made available for researchers on African writing and publishing. This could be publicised on the website.*

Many African scholars and well-known literary writers are based outside Africa, where they often have access to better research funding and other resources. This has benefited a publisher like James Currey Publishers, which is based in Oxford, but makes it hard for African publishers who do not have access to many of Africa's best authors.

²⁰ One participating publisher, founder member and member of the Council of Management said that the ABC list should reflect an African identity 'warts and all'.

²¹ These figures are exclusive of IABSS and Delta orders

All too often, African publishers nurture local authors who then move on to multinational publishers once they are successful. Access to external markets through ABC might encourage such authors to stay with African publishers.

Almost all of the publishers reported that participation in ABC has either raised the publishers' profiles with African authors or is expected to do so soon. It is hoped that the same effect will be seen from the ABC/MSUP outlet.

POD provides another means of developing African authorship. It potentially allows publishers to take risks on new authors and new types of books, without high up-front capital investment required for printing. By the same token, POD allows the possibility of new, and small publishers developing without large capital backing (access to capital always being a problem for publishers in Africa).

POD also supports the development of scholarship since it allows research to be published where sales would not be high and surplus could not be made, and by allowing more diverse publishing. This includes local languages books, plus keeping titles in print and bringing backlist titles back into print that no longer have real commercial value but do have cultural significance.

Also, POD, by being a virtual warehouse, could mitigate censorship. It would be impossible for governments to destroy stock (local pdf book files could be destroyed but through ABC copies of the files are kept in different countries), thereby also promoting scholarship, authorship and democracy.

The selection of books

ABC rejects a lot of books because they are too old to sell in the North. They see it as important to be front-list driven, which means a constant search for new titles.

ABC does not stock books published by the subsidiaries of multinational companies, e.g. Longman, Macmillan, Heinemann. Although these publishers do sometimes publish locally outside the education system, stocking their titles would go against the ABC mission to support locally owned publishing companies that are already at a disadvantage when competing with the multinationals.

Although stocking grey literature would fulfil even more the idea of being a one-stop shop for publications from Africa, ABC does not stock such publications since the US Library of Congress does a first-class job in this area. Because the Library of Congress is subsidized, it would be difficult for ABC to compete with them.

ABC does distribute some occasional titles published by African non-governmental organizations. However, it is much easier for ABC if those books are collected locally and they can deal with one local publisher, e.g. Lightfoot Books in Botswana, who distribute NGO publications, or Weaver Press in Zimbabwe, who distribute the Women in Law in Southern Africa books. ABC cannot however handle very locally oriented self-help books, as they do not sell in the export market. In terms of content, ABC is looking for the 'best cultural product'. For example, they prefer 'literary fiction', which has a stronger cultural message, to pulp fiction.

In pursuit of new titles, ABC regularly goes through *The African Book Publishing Record* quarterly bibliography and APNET networks and publications. It undertakes Internet and newsletter trawls for information. There is now also the new CODESRIA *Africa Review of Books* and an older online *African Review of Books*, which are useful resources.

Training exchanges

Pursuant to the Working Partnership Agreement issued with APNET in 2002, APNET invited ABC to a "Marketing Skills" workshop in Ghana in 2003 to examine the training needs among publishers.²²

²² Marketing Skills Workshop Report, ABC 2003, Appendix D to ABC 2003 Annual Report

This information has been useful in selecting publishers to benefit from ABC's capacity building programme. Under this programme ABC and publishers exchange attachments to strengthen capacity and knowledge about publishing and marketing conditions, and to share and exchange skills.

The main objective of this capacity building is two-fold. For ABC staff it has been to enhance their understanding of the realities of African publishing as well as to share their skills with their hosts. For publishers, the programme provides an opportunity to enhance professional skills in key publishing functions and to benefit from the expertise available among ABC staff to understand the realities of northern markets and conditions and how the ABC works. Each attachment lasts three weeks and in most cases staff are involved in varied assignments. Since 2002, six publishing houses have benefited. ABC staff members have gone on attachment to Nigeria, Ghana, Malawi and Zambia.

When planning these attachments, ABC looks at which countries and companies might benefit most from the attachments, and also, where ABC needs to recruit more publishers. In addition to working in various publishing houses, the staff attended the countries' book fairs as a way of marketing ABC. As a result, several publishers are now participating in ABC. Conversely, employees of publishing houses in Nigeria, Uganda and Zimbabwe have benefited from on-job training while based at the ABC secretariat. These attachments have resulted in the transfer of specific skills to publishers, especially in the areas of POD and marketing.

Some publishers that hosted the exchanges identified some areas where the exchange had been useful to them in terms of skills exchange, but the main benefits have clearly been to the ABC visitors. This poses the question of how many more such attachments are necessary.

The attachments of ABC publishing personnel to ABC have been more difficult to arrange. ABC was hoping to work with APNET to make sure the training component of those attachments was clear and fitted in with the APNET training programme. However, weaknesses at APNET hindered this process. There were visa problems with one attachment and when he eventually came his report suggested that he was evaluating ABC as a potential distributor, rather than learning systems. A general question regarding attachments is to what extent they benefit only the individual involved without providing any institutional capacity building. The overall value of attachments might therefore be questioned in terms of efficiency, even where there is evidence of skills and knowledge transfer.

- *It is recommended that a series of workshops/seminars be carried out in 2006, perhaps in conjunction with Book Fairs, to reach as many of the participating publishers as possible. Possible subjects would include mobilisation of the publishers to access local funding for ABC, new technologies/POD, e-marketing, warehousing, sales and distribution and accounting (the ABC IT sales, distribution and accounting software could be adapted for publishers), etc.*

Intra-African Book Support Scheme (IABSS)

As a way of supporting book provision to African libraries, encouraging intra-African book trade and generating income for indigenous publishers, ABC has supplied books through Book Aid International (BAI) to the Intra-African Book Support Scheme (IABSS) since 1990. This scheme ended in 2004 and has not been renewed in the absence of current donors to it.

An evaluation of the scheme revealed that its major achievement to ABC publishers was increased levels of income, which significantly improved their capacities.²³ Between 2001 and 2004, income from IABSS totalled £ 220 160, which constituted about 23% of ABC's sales over the 4 years (see Annex 3). At least half of the amount was shared among the 39 publishers whose books were selected by the benefiting libraries. One of the publishers was able to utilise the income to acquire a desktop publishing unit.

²³ BAI undertook an independent evaluation of the scheme in 2004–2005

Although books travelled across the continent to 15 countries over the years of IABSS, no impact on direct dealing between publishers and the benefiting libraries was made. This is because most African libraries have little or no funds to make acquisitions of their own. A more realistic approach to activating intra-African book trade would therefore be through consolidated orders from booksellers.

- *ABC and BAI should, through PABA, share information on the orders it received through IABSS with booksellers in Africa*
- *ABC's market territory is well defined in the mission statement. Africa is "open market" and can be supplied either by ABC or by the publishers. However, in the absence of an Africa-based consolidator for such a wide range of African books, ABC can provide an interim option for acquisitions by book donors.²⁴*

Writer tours/publisher visits

In partnership with African organisations and European cultural institutions, ABC organises tours for African writers to literacy festivals and visits by publishers to book fairs in the North. This is aimed at promoting and mainstreaming African writers, raising the profile of African publishers and raising awareness about ABC. ABC is able to piggy-back its promotional activities onto those of organisations such as the Arts Council England, so that costs of such activities are shared. This is an example of this efficient use of funds by ABC through combining inputs with other organisations and events.

The programme has proved to be very effective, especially because the selection of publishers and authors is based on the suitability of their titles to the themes of the events. In addition to instant increase in sales of titles by the profiled authors, it strengthens the identity of ABC as an African organisation at the various events attracting more visitors to the exhibit. From the exposure, benefiting publishers have established valuable business contacts resulting in publishing contracts, co-publications and sale of translation rights.

Again, considering the dire need for marketing opportunities by African publishers, promoting one or two publishers at a time is a drop in the ocean.

- *ABC should seek more sponsors to ensure that as many of its participating publishers as possible, together with their authors, are considered for these tours and visits*
- *Such programmes should be combined with forums for African publishers to give lecturers or talks so as to attract northern-based African writers to publish with them.*

4.1.2 External Effectiveness and Internal Efficiency of Commercial Activities

4.1.2.1 External factors

African publishing

As part of the African book chain, ABC is affected by the external constraints that affect African publishing in general. Over the past fifteen years – the period of ABC's existence – African publishing has taken off in fits and starts: in some areas it has flourished and in other areas there are still enormous difficulties. The IABSS Evaluation talks of a 'hugely expanding demand for reading material overall, both in schools and in the general population,' which suggests that African publishing is in a growth phase.

Many opportunities have indeed been created by the opening up of education systems and international donor funding inputs into textbook/educational material provision and purchase. Local publishers

²⁴ This would raise the question of pricing policy for such schemes – domestic prices, intra-African market prices, Northern market prices?

and local subsidiaries of multinational publishing companies as well as the multinational publishers may all benefit from such book support schemes. However, the latter two have the greater capacity and often benefit most, especially when it comes to international competitive bidding.

Therefore, although some African publishers have benefited from the expansion of education and developed into strong companies that invest surplus from educational publishing in general titles that are good for ABC, many African publishers have not been able to benefit. There has been a flourishing of publishing activity across the continent but many companies that set up do not survive (Of the 17 founder publishers of ABC, 12 remain active).

Market conditions

ABC is positioning itself in a difficult market. Many of ABC's books are scholarly titles but the overall market for such books has shrunk over the past twenty years, though indications from Nigeria and Kenya are of an expanding scholarly books market. The market for scholarly books on Africa has gone down both in the USA and in Africa itself over the same period. As an example, James Currey, a British publisher well-known for co-publishing with African publishers, observed that, when he started co-publishing, his African publishing partners took 1000 or so copies of the books. Nowadays they may not even take 100 copies. This is likely due to a combination of factors – dwindling purchasing power is certainly foremost, but increased competition for those resources is almost certainly another as there is today a wider range of materials available. Still, publishers were optimistic about their own domestic markets.

Interviewees were optimistic about the US market, which agrees with the ABC/MSUP analysis of the situation and bodes well for future US sales.

Technical quality

The technical quality of the books that ABC sells is often poor although it is improving. Many African publishers still wrestle with poor printing facilities/technology in their home countries, poor equipment, lack of capacity in in-house or external design and production departments, electric power failures, etc. This makes it harder to sell the books in the Northern markets where technical standards and expectations are high, especially to bookshops.

Editing quality

The quality of editing of some of the books is also poor. High levels of English editing are expected in Northern markets but are not always available to African publishers. Some ABC books could do with more editing before being published and would be better for it.

Receipt of stock

ABC has always had problems with book stock. Many of ABC's publishers are not good at sending books to them in a timely fashion. This is partly because of their own lack of human resources but also because of the costs of shipping books to ABC. Few publishers respond immediately to an order which can take on average 6–8 weeks, and sometimes longer, from receipt of order to delivery at ABC. In 2003, US\$20,000 worth of orders was cancelled because the publishers did not supply the books that were ordered. Some do special deliveries for urgent orders, although the time of supply by publishers has improved over the years. ABC is now ordering smaller quantities, directly related to what they sell.

In some cases e.g. Ghana, ABC publishers have shipped books together but this is not possible in many countries.

Sometimes, publishers do not pack the books properly and stock is damaged in transit. The quality of the packing has improved over the years, but has caused significant lost orders. The POD programme is helping to minimise these problems.

- *Since most publishers are yet to go on POD, it is recommended that a page on stock handling guidelines be included on the web-site, including photos of damaged packages and stock received.*

4.1.2.2 Internal factors

The demands of book-selling

As James Currey pointed out to the Evaluation team, it is easy to publish books; the hard thing is to sell them: the critical issue is mixing the passion and the practicality which, he feels ABC does well.

Selling books is very detailed work, requiring good systems which are kept up to date: stock systems, records, sales reports, customer details, mailing lists, invoicing systems, statements, debt recovery, etc. ABC is good at this work.

ABC now distributes some 1800 titles. Obviously individual marketing work for each title is not possible. However ABC has 105 participating publishers and must market the books of each with equal care and attention and report to all.

Human resources

The staff at ABC are skilled and committed and work well together. They have developed good working systems and procedures and are proactive in dealing with problems. They have built up considerable skills in customer relations, invoicing, credit control, stock management etc.

The growth potential with existing staff is estimated to be fair once the new database is running without bugs. At present, ABC handles about 200 new titles a year, and this should be able to increase without taking on new staff, particularly if the focus is on getting new titles from existing ABC participating publishers.

However, the ABC human resources are not only those based in ABC/Oxford, ABC/MSUP and the Council of Management. Publishing is a human resource based industry, and the human resources (authors, editors, managers, etc.) of the participating publishers are vital components of the book industry. Their abilities determine whether or not ABC has good products to sell. In terms of training, publishers views are mixed: some have clearly benefited directly from training sessions organised by ABC and/or the attachments from and to Oxford, but others have not. Some publishers have also benefited indirectly from studying the ABC's systems and applying them to their domestic operations, while others state that they do not really know how ABC operates. Those publishers with a longer history with ABC are clearly those who feel they have benefited most. This shows that participation in ABC can have a positive effect on the operations of the publishers.

ABC publishers stand to benefit from utilising the ABC sales analyses, reports etc. to improve their own planning and record keeping.

Stock management

The difficulties that publishers have in shipping stock to ABC, plus the slow sales of some titles and ABC's desire to keep stock of a wide range of titles, has meant that some stock has been carried for up to 10 years – cluttering up the warehouse and clogging systems, including the database. However now ABC is de-stocking more aggressively.

There has been an improvement in stock management now that the ABC office and warehouse are on the same site for the first time. The new site is bigger and provides better physical conditions for the books, and has resulted in improved communication between administration staff and the warehouse.

The warehouse is now linked on the same computer/database system, including e-mail access. Stock orders and deliveries are now faster and receipt of books can be ticked off against orders.

The system also calculates the weight of the books ordered so that publishers can see how their order compares with the 75 kg weight limit, which is very helpful.

If an order is not received within one year, it is cancelled. If, during the year, sales have been lost through non-delivery of stock, the order to the publisher is changed.

- *To this end, ABC should programme the system to send reminders to publishers automatically and more frequently.*
- *Once a customer order has been received and handled by the ABC, costs have been incurred, which should be recovered from the actual sale. If the sale cannot take place due to the non-delivery of books from the publisher, ABC should levy a penalty to recover at least some of this cost from the defaulting publisher*

Sales

A basic indicator of the efficacy or success of commercial activities is sales. There has been good growth in this regard. ABC's goal was to increase sales during the period of the plan (see Table 2a on p. 15). Total growth was projected at 58,1% over the three years to 2004, and 68,6% was achieved, but the pattern of the growth was different from what was anticipated. The projections aimed at a steady rise in growth, whereas the reality was a large growth of sales in 2002 with the opening up of the list, then a slower growth in subsequent years (see Tables 2a and 2b). For 2005, the result is likely to be poorer, mainly due to the cessation of IABSS sales.

- *ABC should intensify the search for a donor to support the revival of IABSS.*

Pricing

ABC increased prices in 2004 for the first time in three years. So far there has been no apparent price resistance from customers. Trade terms are 20–35%: single copies 20%, 2–5 copies of single titles or assorted titles 33 1/3%, 6 or more copies of one title 35%. Short discount is 20% for any quantity ordered of certain titles. A wholly exceptional order can get 40% discount. This compares with other UK distributors' trade discount levels of 40% to (exceptionally) 70% depending on the subject area, order volume, etc.²⁵ Pricing is one of the most difficult tasks in the book trade. ABC performs this function on behalf of the publishers (publishers price the books themselves for their domestic markets, and often base prices closely on the actual development, production and distribution costs plus a small margin). In the case of ABC, prices for the northern markets are set according to market forces rather than against actual production and distribution costs. Similarly, ABC/MSUP sets the prices of books for the US market, using information on competitors' titles etc.

- *It is recommended that price levels be examined annually, and maintained at sufficiently high levels to meet operating costs without discouraging buyers.*
- *Postal charges are an issue which ABC is looking at, but it may not be wise to increase prices and introduce or vary cost recovery mechanisms at the same time. In 2006, it may be sufficient to examine recovery of postal charges.*

²⁵ Generally, distributors were not willing to disclose specific details of their discounting policies, in contrast to ABC, which publishes some of these details on the web-site.

Sale reporting and analysis

The new database system is more flexible and allows for more types of sales analyses. This allows a deeper knowledge of the sales patterns, and deeper in-house understanding of which titles are selling and to whom, knowledge of the buying patterns, seasonal variations, etc.

It also helps to fulfil part of the requirements of the 2002–06 plan regarding more reporting and analysis as part of monitoring and evaluation. It is also providing excellent data for planning purposes.

ABC is also looking at the question of how to maximise sales income. Productivity tables are prepared to show which titles produce the greatest returns to ABC. This allows ABC to see which books are more worthwhile selling and to focus its marketing resources more effectively. This has, for example, identified the importance of having high-priced scholarly books that can be sold to libraries.

ABC/MSUP

An agreement was signed with Michigan State University Press in 2002 for them to distribute ABC books in North America from 2003. MSUP already had their own African studies list and wanted to expand in that area, so the agreement benefited them as well as ABC. An ABC marketing officer was transferred to the US to oversee the hand-over of stock and to set up systems and establish the ABC database there, and has since stayed on to manage the work. MSUP had anticipated funding his salary but were unable to do so because of budgetary cuts imposed on them by the state of Michigan, and so ABC/Oxford therefore continues to cover his salary.

Initially, stock was shipped from the Oxford warehouse to ABC/MSUP. They started with 200 new and recent titles but began to receive orders for the backlist as customers began to order books to complete their collections. Today ABC/MSUP stocks the backlist as well and sells across the whole list. They take 30–50 copies of each new title.

Some US sales were lost in the first six months because the time and cost of installing the systems was underestimated at MSUP. The market therefore suffered a bit but has since recovered.

The development of POD technology has improved ABC/MSUP sales by allowing books to be printed in the US for orders already made. This has cut the need for warehousing of those titles and the costs and time taken to ship books from Oxford to the US. It has also benefited sales, which are now higher than the targets (See Annex 3).

A continuing rise in ABC/MSUP sales is anticipated. MSUP themselves think that their ABC section can become self-sufficient in the future, able to pay the salary of the North America Manager and other marketing and distribution costs from the retained earnings.

4.1.3 Internal Factors (Management Systems, Operations, Communications, Monitoring)

Governance

The 2000 Evaluation suggested a formal constitution but steps were not taken in this regard as there are the Memorandum and Articles of Association by which ABC is already constituted. The Council of Management (CoM) is made up of four founder members and three others elected by the founders, although currently (2005) there are actually three founder members and four others. Others are elected for three year terms with full regard to ‘the need to ensure geographic and gender balance’ as well as the necessary skills and experience for running ABC.

The CoM currently has two members from Nigeria and one from Ghana, which countries fall within Anglophone West Africa. Additionally, there is a member based in Francophone West Africa (Senegal), but who publishes for the whole of Africa.

Although regional spread was considered as important to CoM membership, there is currently no evidence that geographical representation actually has any significance within the CoM. Similarly there does not seem to be any conflict between the founder publishers and the non-founder publishers in their work on the CoM. This is testimony to the way in which ABC upholds the principles of democracy and fair play. One of the key impressions of the ABC is that it holds the trust of all its members and customers – this is an invaluable asset.

The CoM actually functions as the Board of Directors: it is not involved in operational management, which is left to the Secretariat.

The founder members are successful African publishers of long experience. They bring their professional knowledge to the work of ABC. They have been strong in maintaining the vision while keeping in touch with changing times. Where other African publishing support organisations have weakened, ABC has remained strong.

Prior to 2000, the founder members were rarely able to meet. The secure funding within the current five-year plan has enabled annual meetings of the CoM to be held. They are followed by annual strategic planning meetings with donors. The benefits of these opportunities to plan and to monitor progress are visible as supported by the meeting minutes and reports.

- *It has been suggested that it may be more efficient to have an Executive Committee – a smaller and more tightly focused group than the CoM – which may then be able to meet more regularly. This suggestion is supported to the extent that it would be feasible without compromising transparency and equity in decision-making.*

Management

The working atmosphere at the ABC secretariat is open and consultative. The CoM set the policy and staff hold annual think-tank meetings to review progress of activities and to develop work plans and budgets.

For a relatively small organisation working in the field of African publishing ABC is very lucky to be managed by an individual with such dedication, commitment, skills and professionalism.

There is a lot of skills development and skills sharing, as well as back-stopping of different functions amongst secretariat staff. They share commitment, have solid professional skills in the different areas they are working in, and increasing knowledge of the environment within which African publishers work. Knowledge is not only confined to the Head of ABC, and that makes the work sustainable as well.

Short in-house training courses are provided for staff – they get information from Reed Training, Book House Trust, etc. Some have been on short courses such as library acquisitions; use of Quark software at Oxford Brookes University; use of Quick Books accounting package, etc.

There are clear job descriptions which are amended in discussion with relevant employees as job and tasks and skills change. Also self-assessments are carried out with a fixed format and confidential submission to the Head and subsequent discussion.

ABC produces a lot of documentation, perhaps in a bid to be as transparent as possible. In order to free up time for marketing of specific titles, email links, packages, specific leaflets, targeted marketing, etc, perhaps some information could be put on a secure part of the website with a code for CoM and participating publishers to access that section.

4.1.3.1 Enhancing efficiency by adopting new technologies: Print-On-Demand (POD)

Although the advantages of POD are known, the number of publishers utilising the technology is still low. Only 23% of ABC's publishers are presently using POD or have been requested to approve titles for POD formatting. While the ABC-Publisher Agreement on POD is articulate and clear on the roles of each party, publishers whose titles have not been digitised do not seem to be aware of its existence. This is a clear example of the difference between perceptions of how information is provided and how it is received and digested. While the staff of the ABC feel that POD information is clear and available to all, many of the publishers are ignorant of the criteria for selecting POD titles, the requirements for digitisation etc. (See also Annex 9.)

- *ABC should review and disseminate its policy statement on POD, with guidelines on ABC's own capacity to handle pdf formatting, and with suggestions for each publisher on which titles to consider for POD. Priority should be given to titles whose initial orders are high but which rapidly become 'dogs'.*
- *ABC should undertake another POD training for publishers not covered by the first workshop.*
- *To ensure that the skills acquired through individuals remain within the publishing houses, the training manual should be reprinted (POD) and distributed to all ABC participating and potential publishers.*
- *With the experience gained so far, ABC should advise publishers on areas that require improvement such as ISBNs, pagination, prelims and blurbs instead of making the corrections at the secretariat. This approach would strengthen skills among publishers and expedite the uploading to the printer.*

4.2 Relevance

4.2.1 Relevance To The Commercial Activities Of Participating Publishers

There are a few distributors of scholarly and third-party books that include some titles about Africa but none with which ABC's work can be compared. Africa Book Centre represents some 15 publishers from Africa (mostly southern Africa), Eurospan distributes books from some 60–70 US and Australian university presses to Europe. Marston Book Services hold the distribution rights for a group of publishers, including two UK publishers with African Studies titles. Like ABC, they have signed agreements with the rights of distribution for certain territories; they have both direct and on-line customers; some of them produce catalogues or other hard copy blurbs and other marketing materials.

However, these companies are entirely commercial distributors and do not undertake the cultural activities that ABC undertakes, do not have the same wide spread of titles and do not play the developmental role that ABC does. A few of ABC's publishers might be able to get some of their titles distributed commercially through these other agencies but most would not be able to find a distributor because the sales volume would not be high enough for the work involved.

The other difference is that purely commercial distributors will generally only take on commercially viable projects and provide little in the way of complementary services to the publishers. It may be possible for an African publisher to receive a higher level of remittance from a commercial distributor than from ABC, but this would be limited to specific, strong titles as the commercial distributors tend to "cherry-pick" from publishers' lists and are generally not interested in taking on what may well be an important title if it is seen to have limited sales potential. It must be remembered that ABC is no longer required to take on entire lists, which is also a form of cherry-picking. Participating publishers are free to sell through another distributor any of their titles that are not being distributed by ABC (though a title rejected by one distributor may be unlikely to be taken up by another distributor).

It is important to examine the context of African publishing again in this respect. The rule of thumb for a company to enter an export market is that the domestic market is saturated (i.e. there is no longer potential for growth in the home market and so growth is looked for outside one's own borders). This is not the case in Africa. Generally, there is huge potential for growth in the African market and demand for books is certainly higher than supply, the problem is the lack of money at the household level and at the government level to be able to purchase the products of the publishing industry. Thus export sales have a proportionately greater significance for an African publisher. ABC's work is therefore still directly relevant to the needs of African publishers.

ABC provides foreign exchange earnings for publishers that can be of particular significance in countries with weak currencies: 33% of the publishers stated that the receipt of hard currency from their remittances is important to their business. Publishers' stock is sent to ABC on consignment and publishers do not know how sales are doing until the six-monthly report, which accompanies the remittance cheque. This income from ABC therefore is generally not factored into company cash-flows and income expectations. It is literally seen as windfall income and is used as extra income, often for investment purposes or payment of royalties.

It should be noted that the most commonly acknowledged benefit of being an ABC publisher is the exposure of authors and titles to the Northern market (50% of respondents), again demonstrating the strong links between the commercial and cultural aspects. ABC provides exposure for their books to markets they would not be able to otherwise reach. The benefits of this come in terms of sales but also in the exposure to critical review provided by the Northern market, and useful feedback on technical production, design, editorial work, content. This is valuable in helping to improve publishing standards and make African books 'world-class'.

Commercial distributors complain that ABC's access to support from funding agencies gives it an unfair advantage. This advantage is reflected mainly in ABC being more attractive to publishers because its cultural activities, often in partnership with other cultural organisations, lead to author and publisher profile-raising and better market access for their books. From a commercial viewpoint, donor support does not seem to create bias (other than helping to increase turnover). Remittance levels to ABC publishers seem to be generally at the same level or slightly higher than what other distributors would pay (it is not possible to give exact figures on this issue as commercial distributors would not disclose discounting and pricing information except on a confidential basis).

4.2.2 Relevance of ABC to Cultural Development

Culture is the *context in which people construct their identity*²⁶ based on their religion, their traditions, their values, etc through the Arts. *Artists often have the capacity, and often hold a position in society allowing them to provoke, through their art, a debate on issues in a creative and eye-opening way. Artists also build bridges by expressing the feelings and aspirations that people share, thus fostering feelings of recognition and belonging.*²⁷ As an artistic expression of culture, indigenous publishing is instrumental to achieving cultural diversity and pluralism. Global cultural pluralism creates understanding and appreciation of diverse identities and promotes tolerance and co-operation among different societies.

Promoting cultural activities from South to the North aims to better inform the northern populace about aspects of the African continent, rendering both hemispheres more sensitive to a pluralistic and diverse world.

4.2.2.1 The relevance of ABC to development of indigenous African publishing

In an effort to sustain general publishing and in search of the much needed income to shield their businesses against multinational competition, African publishers are proactively exploring additional

²⁶ Hivos Arts and Culture Policy Document

²⁷ Ibid.

markets for their books across borders and overseas. Expanded markets for general titles would justify investment in larger print-runs, reduce production costs and lower local prices. It is in this context that the existence of ABC becomes relevant to the development of indigenous African publishing, first, in providing a source of income and second, activating publication of general books. As long as these requirements continue to be critical, ABC's mission and aims will remain as valid as they were at the time of establishment.

The added value of a collective identity, the promotion and marketing activities and its non-profit making status make ABC the most viable avenue through which African publishers can actively and profitably participate in the Northern book trade. On average, 50% of income from ABC sales is remitted to African publishers twice in a year. This income, which averages £115 000 annually,²⁸ is re-injected into the publishing activities and contributes to the expansion of indigenous African publishing.

Some of the ABC publishers have benefited from ABC's market intelligence to grow their lists in the areas of scholarship and culture. This is evident from the increase in the number of new titles submitted to ABC annually.

4.2.2.2 *The Relevance of ABC to Poverty Reduction through Support to Publishing*

In terms of poverty alleviation, ABC's activities play a very important role in reaching secondary beneficiaries. Direct inputs to primary poverty reduction beneficiaries are limited to the earnings of the participating publishers and their employees and in helping to create sustainable livelihoods for individuals within the industry. While this is certainly an important contribution, ABC's reach is far greater in indirect terms. By promoting and strengthening African publishing, ABC is able to make a contribution to policy dialogues, both within African countries, and through exports, within northern countries: titles dealing with economic and structural policies, equity promotion, social inclusion, gender mainstreaming, good governance, etc. are part and parcel of ABC's publishers' lists. "The process of in-country dialogue is an integral element in ongoing efforts to establish strong, effective partnerships for reducing poverty."²⁹

As an African trading organisation, ABC positions itself as a campaign partner of the "Make Poverty History" campaign (listed on the website). However, to judge the real effects of ABC's activities on poverty alleviation, we must consider the contribution of publishing to economic development as well as the value of publishing and the role of the book. UNESCO defines books as cultural products. As UNESCO states in its 1982 guide *National Councils for Book Development*, books are essential and strategic tools for development.

Books serve as the repository of the cultural heritage of a people and also as a means of disseminating it. They are the most important vehicle for expressing new ideas, minority views, dissent and criticism. They are also an indispensable instrument for economic growth, particularly in modern technological societies. Thus, books need to be promoted as they play a vital role in educational, cultural, social, economic, and hence in overall national, development.

Books have *intellectual and cultural value* in that they impart, share and distribute knowledge. Publishing books is a creative, cultural and intellectual process that adds value to knowledge and thought through the stages of research, writing and editing, as well as through the stages of design, illustration, packaging and promotion.

ABC looks for the best cultural product. It is helping to develop the intellectual/cultural wealth of Africa and is combating intellectual poverty.

²⁸ Based on ABC total sales 2001–2004

²⁹ DAC Guidelines: Poverty Reduction. OECD, 2001

Reading as a cultural activity leads to the development of civil society and an educated populace. A populace educated in the broadest sense is needed for a country to develop, educated as in people who are well-informed and searching for solutions.

Books have *economic value* in that they contribute to business development; job creation; the development of skilled human resources, both within the publishing companies and the associated manufacturers and service companies they work with, such as paper manufacturers, printers, designers, booksellers; through the payment of taxes; etc.

Books have *commercial value* as products that are traded/sold. The sale of books is an efficient means of distribution of the knowledge and information they contain. However, books that are sold through the bookshop networks reach wider audiences than books that are given out free of charge to specific known networks.

4.3 Sustainability

4.3.1 Sustainability of ABC's Cultural Mission as a Tool for Development in Africa

In recognising culture as 'the essence of development', Sida's cultural development policy underscores the need to re-invent the concept of culture "to provide a strategic logic of connection, and to place it firmly on mainstream public and policy agendas: to reveal its connections to economics, to politics, to environment and to human rights."³⁰ Understanding the rudiments of culture provides an ideological and philosophical foundation for informing the planning process for social, political and economic development.

In this respect, books, as reservoirs of indigenous knowledge, skills and practices, provide the 'qualitative baseline' for guiding policy formulation. They influence people to think and act within the moral rubric by providing a platform for society to dialogue with itself. Therefore, sustaining indigenous publishing, especially of scholarship and culture, guarantees an expanded knowledge base requisite to developmental planning.

Yet, the policy also recognises that, 'culture has not only escaped academic control but has also moved beneath and beyond the horizons of visibility of the major national and international policy agencies established to have jurisdiction in the field.'³¹ This advocates the restoration of culture-led research and planning by scholars and among policy makers. Strengthening the identity of ABC as a cultural agency in the North promotes African studies in academic institutions. The distribution of African books in the North provides a resource for discourse and formulation of Africa's development agenda, which is still heavily reliant on northern donors and investors.

Subsidising publishing in Africa

ABC is an example of beneficial donor intervention in the book sector in Africa. ABC's contribution to African publishing has not been in terms of grants but through support to market activation, which has in turn boosted local production.

4.3.2 Sustainability of ABC Cultural Activities

The Hivos arts and culture policy document describes culture as a society's way of life – *A dynamic concept that refers to a people's practices, values, beliefs and aspirations, and how they give shape to their existence.*³² Scholarly and cultural publishing is the research into and preservation of cultural heritage. These books are a sustainable medium for transfer of moral values to the next generations. Indigenous publishing

³⁰ Mercer, Colin, Towards Cultural Citizenship: Tools for Cultural Policy and Development, The Bank of Sweden Tercentenary Foundation, Sida, 2002

³¹ Ibid.

³² Excerpts from Hivos Arts and Culture Policy Document, 2002

thus contributes to cultural advancement.

Culture is also a significant industry in itself. Cultural products, including books, are a source of capital for economic growth, whose manufacturing should be facilitated. Expansion of the book trade, including ABC's commercial activities, increases revenue to indigenous publishing businesses and, through tax contributions, to national governments. It also secures employment and income for more citizens to sustain their families.

Marketing is the promotion of products and ideas: it is thus difficult to define where cultural promotion ends and commercial marketing begins. Perhaps the most pertinent demarcation would be to define marketing activities as those which make a commercial contribution (i.e. have a positive market value), and cultural activities as those which have no direct market impact, or which have a negative market value. By this definition, therefore, cultural activities would generally have a negative effect on commercial profitability. In a business, any activity which generates more expense than income will soon be axed in the name of efficiency, even when, as in the case of cultural activities, there may be long-term promotional benefits. Without some degree of external funding for cultural activities, ABC is unlikely to be able to maintain a significant cultural agenda.

ABC spends what it earns. In order to maintain a situation in which it is not liable to pay corporate taxes, ABC cannot be seen to make a surplus within the financial year. This means that any increases in operating surplus must be applied more or less within the same financial year to activities in order to show a zero result. This means that ABC is unable to create reserves which it could use to fund activities in leaner years. One way to circumvent this problem would through establishing a trust fund. For example, if ABC is able to acquire Charity status, it may be possible to create a cultural trust fund into which surplus income could be transferred (The ABC Foundation?). As this capital base expanded, ABC would be able to use the income from the trust fund for cultural activities. Clearly, this would also require that ABC's strategic plans should include specific targets for income growth as well as clear budgets for expenditure on cultural activities.

- *ABC should examine the opportunities it may have to establish a trust fund into which commercial surpluses could be paid with a view to long-term funding of cultural activities (investment of commercial surplus, savings made if export support schemes are successful, etc.). The fund could take the form of a Foundation, and the income from the trust fund applied to non-commercial activities.*

Literacy, Indigenous Languages and Poverty Eradication

The development agenda of any nation revolves around the expansion of its human resources. Education is central to providing the necessary knowledge and expertise for the workforce. Books as the main medium for transfer of literacy and other skills are therefore a prerequisite for economic empowerment. And, because communication is most widespread and effective when it is in the language of primary use, local language books are invaluable to literacy. Sustained literacy in local languages would ensure that the relevant information reaches as many people as possible.

Sadly, few African governments have bothered to formulate policies for the development and use of indigenous languages. On the contrary, in Sub-Saharan Africa English, French and Portuguese are the official languages and main medium for instruction in schools in many countries. Consequently, most books are published in these languages.

Lack of access to vital information by the majority on small-scale agriculture, fishing, micro enterprises, health, disease prevention, environmental management, etc. has escalated levels of poverty in Africa.

ABC has entered into an agreement with UNESCO to translate and distribute several popular titles into African languages. This will ensure wide access to relevant information and knowledge requisite for poverty eradication to African communities.

- *As a way of contributing to the promotion of local languages publishing, ABC should include formulation of local language policies as part of its advocacy agenda during visits to organisations such as AU, NEPAD and SADC.*

4.3.3 Sustainability of ABC Commercial Activities

The model of ABC funding

ABC has benefited from investment from its participating publishers as well as from donor agencies. It was originally established as a commercial company, not for profit, with the £1000 investments of each of its seventeen founder members. Publishers also invest in the development of the books that are at the centre of ABC's work. The financial benefit that accrues to publishers is through the selling of their books on fair trade terms.

Donor funds have also been essential to the development of ABC's work since inception. The original understanding when ABC was set up was that donor funding was necessary in order to enable ABC to operate and that the time would come when it would be self-sufficient. This has, however, proved harder to achieve than originally hoped. In retrospect, given the underdeveloped state of the African publishing industry of which ABC is an export arm, this is not surprising.

The 2000 Evaluation recommended that ABC continue to explore means of becoming more self-sufficient and the founders accepted this challenge in their statement that followed. The remittances received by all participating publishers from sales of their books were reduced by five percentage points, and in the case of founder publishers by 6 2/3%, i.e. publishers give ABC a higher discount, which provides extra operating income for the organisation. This has contributed an extra £44 512 to ABC (See Table 5, page 12).

However, the ensuing five-year plan agreed with donors did not specify steps for ABC to take in order to increase self-sufficiency. Its focus was rather on greater investment in ABC, with the view to strengthening it in the longer term, through growth in sales, and therefore commercial income. While the present funding agreement is clearly delineated in terms of its duration, perceptions of the potential for future support have clearly differed between the ABC and the funding agencies. The agreed minutes of the Annual Strategic Meetings of 2003 and 2004 include phrases such as "... could not guarantee support for ABC beyond 2006." and "... for future funding for international and cultural organisations such as ABC there were 'problems and possibilities'" and "funding support post-2006 was unclear". From the point of view of the funding agencies, these statements are perceived as clear indications that ABC needed to be considering other funding modalities/sources in order to sustain its activities. The ABC CoM has interpreted these statements more positively (i.e. that renewal of the funding agreement may be possible) and focused resources on strengthening ABC's operations with a view to sustainability in the longer term.

Donor priorities and funding patterns are changing and Sida and NORAD have indicated clearly during the 2005 Strategic Meeting that there will be no further funding after the period of the 2002–06 plan. Thus increasing emphasis has been placed on the question of the future sustainability of ABC.

Can ABC sustain itself?

The bottom line is that the commercial activities of ABC can continue as long as books continue to be produced by African publishing companies that can be sold in Northern markets. ABC is building the market for such books through its new outlet at MSUP and through the POD programme. It has

expanded its publisher base and increased the number of titles it distributes. The quality of the book products is improving in terms of technical production and therefore saleability. ABC's own internal systems have improved, thus enhancing efficiency. Despite the end of the IABSS scheme, trends are good for increased sales.

However, ABC does not have control of the product it is selling. It is not a publisher and cannot make the publishing decisions to ensure that the right books are published. It is therefore difficult for it to achieve the critical mass of high-selling, high-price titles necessary for it to cover all its costs from sales income.

The model agreed with donors in the current 2002–06 plan is that of a commercial organisation, of which part of its activities are supported by donor contributions. If that model continues, ABC is sustainable. If all external funding were to stop at the end of 2006, ABC would be in serious difficulty and would have to change radically in order to survive.

David Brookes (one of ABC's UK directors) postulated a model of ABC as a purely commercial distributor with no donor funding. He predicted that it might be able to exist but as a very different organization, employing two people and focusing entirely on scholarly titles. It would not be able to undertake any cultural activities, such as the promotion of authors. It would have to concentrate on a few highly successful scholarly publishers. Most of the publishers would be dropped. Other categories of books would also be dropped.

The ABC Secretariat staff have extrapolated figures from their financial data that show just what would be required for it to continue in its current form without donor funding. They show that to generate sufficient income to cover present levels of expenditure, ABC would need to represent about 50 medium-sized publishers, each of which would need to publish six well-selling titles a year. An injection of 300 new titles a year, combined with strict management of the backlist would negate the need for any external funding. Nevertheless, complete financial self-sufficiency would mean a specifically market-driven company with no funding available for development of the industry, or advisory and training services to the members. In other words, the mission and goals of the ABC would have to change drastically, and its cultural objectives be dropped.

In reality, there are in Africa today only a handful of publishers able to produce six well-selling titles a year, and so the above calculation is highly theoretical. An additional point is that ABC's cultural mission prevents it from concentrating solely on sales of those titles that make the best sale and make most money. So it is supporting the occasional titles produced by small presses, the unusual books, variety of categories, poetry and fiction, which sell in very small quantities. A purely commercial distributor would not be able to afford to market and sell many of these books and they would not be seen outside their country of origin. They would be lost to the world outside Africa.

The broader question is whether income from sales can increasingly cover ABC's operational costs. In the period of the plan, surplus has grown significantly above targets (see Table 4). The number of titles on sale continues to grow. Analyses of sales show areas to concentrate on and ABC is focusing more and more on 'the best cultural product' and therefore what could be termed 'the best sale': good books at high prices.

ABC staff are mindful about being cost-effective. They look at the quality of books in terms of content and production. They look at sales by category, titles by price, and have a productivity index that indicates which titles and which types of books are most profitable for ABC. All these are analytical tools that help ABC to be efficient in their work and that should help them to focus on selecting the types of books that will increase sales income. Marketing activities are also combined with functions funded from other sources in order to save travel costs, promote, writers, raise profiles, etc.

Finally, it is worth considering the future of African publishing in general. The following statement indicates that there is even more need for an organisation such as the ABC. ‘The UN Education for All campaign has resulted in more and more children enrolling in schools, thus the literate population is increasing. Many of the APNET publishers are now publishing children’s books that for ten years ago were looked upon as not feasible. Today there is a market for children’s books in Africa. This has resulted in multinational companies taking a new interest in the book market in Africa. In the Stobb evaluation [of APNET in 2004] many of the APNET members expressed a concern that the multinationals would take over and make it impossible for small local publishers to survive. The difference is that multinationals now publish books that are relevant for the African social, political, economic and cultural reality and many works in collaboration with national people.’³³ Is African publishing again in danger from foreign multinationals?

Financial self-sufficiency?

ABC has made great progress in improving its financial position and in building itself into an effective and efficient organisation. There are realistic opportunities for further improvement from a commercial point of view, but these should be seen as medium-term goals and should be defined with clear targets. We must therefore analyse in more detail the measures that can be taken to work towards financial self-sufficiency.

Building ABC’s financial stability is a question of building up the number of titles, of the sort that will sell well in Northern markets, and increasing sales income while keeping administrative costs low and efficient.

In the simplest terms, in order to achieve self-sufficiency, costs must be matched against income. Thus, there are basically two options to improve the financial position of an organization: one is to increase the turnover (in the case of ABC, to increase the number and/or price of books sold); and the second is to cut costs. As these are linked, a combination of the two options would result in greater financial stability.

There are various methods which might be instrumental in increasing the operating margin (the turnover less the cost of sales) :

1. Increasing sales volume
2. Cutting the cost to ABC of book sales
3. Cutting operational costs, e.g. staff, marketing products, exhibitions
4. Increasing prices
5. Increase the volume of titles
6. Selecting more titles that sell – best product

These are each discussed in turn below:

1) Increasing sales

ABC is steadily building sales, building the market. The end of IABSS was not anticipated at the time the plan was drawn up so revised targets have had to be put in place to cope with changing reality.

Sales reporting and analysis continues to be important here to develop an understanding of the patterns of sales. There should be a focus on the best customers.

³³ Completion memo of Sida support to the African Publishers’ Network APNET, Agreement period 1999–2004, Sida, 29.04.2005

The ABC/MSUP sales continue to rise and ABC is currently considering the terms of the agreement with MSUP beyond 2006 in order to maximise benefit and to increase marketing work in the USA and Canada.

- *ABC must keep working to build sales in Europe and North America and to cover the IABSS shortfall. It should look for funding for other IABSS-type schemes, possibly on a thematic basis, eg. HIV/AIDS or books for the girl-child.*

2) *Cutting the cost of sales*

This can be achieved by reducing remittances, or by reducing ABC's marketing and distribution costs or some combination of both strategies.

As stated earlier, remittance levels were reduced significantly in 2001. Publishers are not keen on cutting remittances any further. To do so contradicts the basic tenet of ABC, which emphasises fair trade³⁴ and tries to maximise returns to the publishers so that they can continue to invest in new books. It could therefore also be counter-productive to ABC if it were to jeopardise the new product development.

Thus if any further cut of remittances is proposed, it should be gradual, e.g. possibly 1 per cent per year over an agreed number of years.

The costs of marketing and distribution have been decreasing during the period under review but could be cut further with donor support into this sector of ABC's operations (see section 4.3.4 below). The extension of the POD programme may further cut distribution costs by reducing the need to ship books to ABC/MSUP and by eliminating clearing and forwarding costs.

3) *Cutting operating costs*

In theory, it can be relatively easy to reduce expenditure by cutting operating costs. Under the current budget system, many of these costs are covered by donor funds and if they were cut, this would reduce the amount of external funding needed by ABC.

However, there are no obvious areas to cut here. The ABC team is already efficient and does not have a lot of extra human resources or sinecures. Similarly, the office and warehouse space is well suited to the volume of trade and activities, and the lease terms appear to be relatively advantageous considering the location in Oxford. There is room to negotiate better terms for the ABC/MSUP agreement, which is actively under consideration.

Extension of the POD programme may allow a reduction in warehouse volume. ABC could cut marketing materials and exhibitions but then that can affect sales and be counter-productive. There may be some scope for increasing mailings of virtual catalogues but it is always necessary to print some, so complete costs for that could not be cut. The ABC/MSUP manager is proposing that marketing catalogues for Europe and the USA be done together to cut costs.

- *ABC should pursue such ways of cutting marketing costs.*

4) *Increasing prices*

Prices have been tackled better in recent years. Prices for the backlist had been unchanged for 3 years and were increased in 2004. Customers showed no price resistance, so ABC noted that prices were probably not high. MSUP proposed increasing all prices including the backlist, and ABC has followed. Most ABC customers are libraries and individuals with developed reading habits and an interest in

³⁴ "Fair trade" here is taken to mean that ABC sells books at market prices in the North and pays a reasonable rate of return to the publishers

African books. This is in contrast to the markets within African countries themselves, where price sensitivity is usually high.

- *ABC should undertake annual price reviews in order to keep income up.*

5) *Increasing volume of titles*

ABC is trying to tackle the issue of achieving a greater volume of high-income-generating titles and is looking at the possibility of reaching a critical mass that would enable it to take off commercially. However, there is no magic number. Again, ABC does not control production or publishing: the growth rate of African publishing is slow, and it is therefore difficult to find large numbers of appropriate titles. Opening up the list has improved product levels and helped to increase sales income. However, a 50 per cent increase in the number of participating publishers has led to only a 6 per cent increase in the number of titles (although this is partly because of de-stocking of dead titles).

- *ABC should continue to look for more participating publishers, especially those with bigger lists.*

6) *Selecting more titles that sell well – best product*

ABC has become more selective in recent years in terms of realising which books sell best and bring best returns to the organisation. Because of its cultural mission it does not exclude books that cost more to market or that sell fewer numbers, as long as books do continue to sell. They have become much more active in terms of analysing dead stock and de-stocking, so that such titles do not attract unnecessary costs.

The issues related to the selection of publishers and titles discussed in 5.1.1.2 above are also very relevant here. The impression gained is that ABC are currently making considerable efforts to identify suitable publishers, and suitable titles. The results of this are likely to be steady rather than dramatic, and do not offer hope for a sudden increase in sales income.

4.3.4 Future Donor Funding for ABC

It is worth noting, once again, that in the period up to the 2000 evaluation the amount of donor funds given to ABC almost exactly matched the amount of money remitted to publishers by the secretariat. This pattern has continued under the present plan, though not at exactly the 1:1 level. In reality, the ABC secretariat is recycling those funds and sustaining itself in the process. However, this process also includes investing in the building of the participating publishers' companies, in the books themselves, in getting those books to the Northern market, and in promoting scholarship. If money had been given directly to the publishers and not through ABC, there would not have been the spread of African scholarship, nor the building of the export market, nor the cultural value to the North, nor the professionalisation process for the participating publishers. It would have been a difficult path trying to identify which African publishers to support. Under the present procedures, the market decides and the 'best cultural product' is promoted. The remittances therefore equate to an investment in African publishers and *publishing*.

The ABC is a successful organisation, which the donors have helped to build and is a successful development intervention, which has the potential for expansion. It is hoped that this success will not be viewed as a reason for ABC not to receive funding support, because this potential is not yet firmly grounded in ABC's internal financing.

- *The team strongly urges ABC to seek, and donors to provide, inputs for a new five-year period.*

ABC has benefited from the basket donor funding provided during the current five-year plan but acknowledges that it needs to look for other funding partners in new and creative ways. It is already anticipating changes in the UK charity law expected in 2006 that might enable it to register as a charity and raise funds within the UK.

- *ABC should intensify its efforts to seek a broader funding base to spread the funding inputs.*

New Nordic donor agency policies require funding to be channelled through countries' embassies in the countries of participating publishers, and many foundations require requests to come through regional centres in Africa. ABC could decentralise some of its funding requests to access such sources.

Participating publishers could make contact with donor agency representatives within their countries and perhaps get donor agencies to identify local libraries for IABSS-style book donation schemes through ABC that would promote Africa-wide selection, benefiting libraries, ABC and publishers.

- *Participating publishers should be mobilised to discuss their work and their links with ABC with Nordic and other embassies in their countries, and to see if they can source financial support for IABSS-style schemes.*

ABC could also approach donors for support to cover distribution and marketing costs that are currently paid from the commercial income, so that more of that income could be released to cover other costs. This would entail raising funds to pay for the costs of shipping books to Oxford, from Oxford to the USA, and the customs clearance in the UK and USA, and then also for the costs of marketing. Requests to cover the costs of distribution could be done on a national or regional base from Africa and the actual funds paid mostly within Africa to the shippers and partly through the Oxford secretariat to cover customs clearance (although it might be possible to pay this also within Africa). The benefits of this would be to:

- Enhance the spread of African authorship directly, by getting books overseas;
- Support poverty reduction through supporting exports and thereby help local economic activity and employment;
- Support the development of local publishing because participating publishers could then retain all their remittances and develop further;
- Support product development because publishers could invest in more books.

Marketing costs could also be charged on a pro rata basis. The Oxford secretariat could allocate a charge to different publishers or groups of publishers for the marketing work they undertake, and the funds could be sourced within Africa to cover this. The benefits would be

- To enhance the spread of African authorship;
- To promote the sales of African books and thereby support local publishing companies and the economies of which they are part.

- *ABC should explore ways of raising funds to cover marketing, shipping and distribution costs and thus release more of its commercial income to cover other costs.*

5. Lessons Learned

The main lesson to be learned from this review is the benefit of medium-term strategic planning. The vision of the ABC and its partners in establishing the Strategic Plan and budgets released a large amount of energy and resources that had previously been spent on sourcing funds and fund-raising (and reporting individually to many different funding agencies), and which have now been channeled into improving and consolidating its operations. In answer to the question of whether strategic funding has reduced ABC's fund-raising abilities, the answer is probably no. ABC has not had reason to seek for a lot of extra funding, and therefore has not done so. Faced with the need to find new funding sources, ABC has access to fund-raising networks and resources, and will need to start using them again to embark on a new phase of fund-raising. At the same time, as far as possible ABC should try to maintain the habit of strategic planning, and set medium-term goals for both its commercial operations and cultural activities.

Another major lesson is the need to ensure that all members of the partnership agree with and understand in the same way the long-term development goals. In the case of ABC, there are clearly different views of what is meant by sustainability and the extent to which ABC should be working towards it. The Strategic Plan clearly defines specific commercial growth targets as well as funding requirements, but it fails to define the purpose of the growth. The view of the funding partners seems to be that the growth should have led to greater self-sufficiency in financial terms, whereas ABC has taken the view that the growth should lead to improvements in and consolidation of the company's operations. ABC has made commercial surpluses (actually higher than planned), and has used those surpluses to upgrade systems and equipment as well as to contribute more to the cultural activities. Had sustainability been a priority goal, at least part of those surpluses could perhaps have been invested or utilised differently.

One of the most striking features of the ABC is the degree of trust that exists between the publishers, the secretariat and the Council of Management. One of the greatest obstacles to book-selling in Africa (and elsewhere) is usually a lack of trust between the publisher and bookseller. The bookseller wants credit and the publisher wants cash in case the bookseller sells the books and pockets all the proceeds. Thus there is a tendency for publishers to try and be retailers, and for booksellers to struggle to keep reasonable numbers of titles in stock. This situation does not arise with ABC. Publishers send their books to ABC on consignment (which means high costs up-front for the publisher) and are confident that they will be paid what is due to them every six months. This degree of trust has been built over the life of the ABC, and seems to be due greatly to:

- the clear conditions and criteria for participation as defined in the ABC/Publisher Memorandum of Agreement
- the secretariat's detailed record-keeping and reporting
- the integrity of the management and staff
- in addition, there seems to be a genuine feeling among the participating publishers that ownership of the organisation resides in them all, and that each publisher is treated equally and fairly.

ABC has developed a comprehensive system for capturing and analysing quantitative data on commercial activities. Additionally, minutes and reports on activities undertaken are available. However, these do not evaluate the attainment of the cultural aims and impact of ABC's cultural activities on the overall mission i.e. to strengthen indigenous African publishing.

- *ABC should develop a monitoring and evaluation system through which periodic assessments of the cultural aims can be documented to guide publishers, ABC, donors and collaborators in identifying areas that require strengthening. Such a system should include:*
 - *Activity-based evaluation forms by authors and publishers participating in cultural activities*
 - *Bi-annual questionnaires to participating publishers on effectiveness of ABC and the impact of income from ABC on their businesses (capacity built through training, equipment purchased, personnel employed and titles published-including subject range)*
 - *Annual reports from CoM members on national or regional trends and developments in indigenous publishing in Africa.*

The communication between the ABC secretariat and the CoM and participating publishers is routine and satisfactory. This has been enhanced by access to email by most publishers. However, the communication seems to report more on already implemented activities than seeking input and feedback. Interviews of the CoM, indicated that, while CoM discusses and agrees in advance on certain activities (eg. attachments, sponsorship to book events), the selection criteria/details of implementation are not always known to the CoM in advance

- *The ABC secretariat should consult more with its publishers and CoM to get their input on planned activities.*

In terms of the process of the review itself, a number of issues arose. Despite publishers being approached at least twice by the team and at least twice by the secretariat with requests to assist the review by filling in the questionnaire, the final return rate was only 30%. While this is a normal return rate for a study of this nature, the team had anticipated that the return could be higher as publishers have a commitment to the organisation being reviewed. The questionnaires were sent only by e-mail (only 5% of the ABC publishers do not have e-mail addresses), and about 20% of the sendings failed at least twice. On the other hand, where a publisher had several e-mail contacts, they were all used, so only some 15% of publishers probably did not receive the questionnaire. Why, then, were there no replies from the other 55%?

It is possible that publishers were unable to download the attachment and did not request it to be resent. It is perhaps more likely that the amount and type of information requested was off-putting. The questionnaire was designed to be user-friendly, but also required quite a lot of data which publishers would not necessarily have at their fingertips. Indeed, many respondents did not answer all the questions, and the questions mostly left unanswered were those requiring data, rather than opinions. The Evaluation 2000 included country visits and direct interviews, but budgetary and time constraints precluded that methodology for the present review. It seems that a review of this kind, which needs to solicit quite a lot of data as well as opinions, should include a greater proportion of direct interviews.

6. Recommendations

The following is a summary of the recommendations from the main text (overlapping recommendations are consolidated here). They are collated in terms of priorities within three broad areas, and are numbered for ease of reference.

The first priority area includes all operational recommendations which could be adopted more or less immediately, or which are supporting actions which are already being undertaken or planned by ABC.

The second group of recommendations includes those operational and strategic recommendations that will require some form of review (with CoM?) and elaboration before they can be adopted, and which are anticipated to have an impact in the medium rather than the short term.

The third group of recommendations is strategic, with an anticipated medium to long-term impact, and relates mainly to external funding issues. The numbering of the recommendations in this group also serves as a guide to their order of priority, though this ordering is not meant to be prescriptive.

A. Operational recommendations

Stocks are one area in which tighter procedures may be helpful.

1. Publishers need to be reminded constantly of stocks and stock handling issues, and the team recommends that a special stock handling page be set up on the web-site, for example, with photos of consignments that have been damaged due to poor packing and suggested remedies.
2. The system could be set up to send reminders to publishers automatically. Once a customer order has been received and handled by the ABC, costs have been incurred, which should be recovered from the actual sale. If the sale cannot take place due to the non-delivery of books from the publisher, ABC should recover at least some of this cost from the defaulting publisher through a penalty system. The mere existence of a penalty system may help to solve this problem.

The Print on Demand (POD) programme clearly has strong potential and should be further encouraged.

3. With the advent of Print-On-Demand (POD), ABC should encourage publishers as far as possible to provide new titles in pdf format. This would allow ABC to receive fewer books on consignment and reduce the volume of 'dead' stock being pulped or returned to publishers.
4. With the experience gained so far from POD, ABC should continue to advise publishers on areas that require improvement such as ISBN, pagination, prelims and blurbs instead of making the corrections at secretariat. ABC should limit its role in the set-up process to enable the publishers to maximise their income from POD by submitting titles in pdf format. This approach would strengthen skills among publishers and expedite the uploading to the printer.

Capacity Building:

5. ABC should undertake another POD training workshop for publishers not covered by the first workshop.
6. To ensure that the skills acquired through individuals remain within the publishing houses, the training manual should be reprinted (POD) and distributed to all ABC participating and potential publishers.
7. We strongly encourage publishers to utilise the ABC sales analyses, reports etc. to improve their own planning and record-keeping.

In terms of reports and information to publishers and the CoM:

8. Some information could be put on a secure part of the website with a code for CoM and participating publishers to access that section. That could free up Secretariat time for other activities.

9. ABC's archive of reviews and other material could be made available for researchers on African writing and publishing.

ABC should place more emphasis on promoting the African publishing sector by:

10. Assisting all its publishers to develop web-sites
11. Continuing to brand its list to maintain its specialised identity i.e. "The best of African publishing from a single source of supply," but also to profile the types of books it handles.
12. Profiling publishers and providing information on publishing trends in Africa; for example, through regular contributions to *The African Publishing Review* (this could be treated as a priority area for collaboration with APNET).

B. Recommendations requiring prior review and/or elaboration

1. ABC must keep working at sales to cover the IABSS shortfall and look for funding for other IABSS-type schemes. (ABC's market territory is well defined in the mission statement. Africa is "open market" and can be supplied by either ABC or by the publishers. However, in the absence of an Africa-based consolidator for such a wide range of African books, ABC can provide an interim option for acquisitions by book donors -NB. This would raise the question of pricing policy for such schemes – domestic prices, intra-African market prices, Northern market prices?)
2. ABC should review and disseminate its policy statement on POD, with guidelines on ABC's own capacity to handle pdf formatting, and with suggestions for each publisher on which titles to consider for POD. Priority should be given to titles whose initial orders are high but which rapidly become 'dogs'.
3. ABC should ensure that as many of its participating publishers as possible, together with their authors, are considered for author tours and visits, and invite publishers to give lectures or talks during the events so as to attract northern-based African writers to publish with them.
4. In theory, the new database would allow ABC to implement some cost-saving measures through staff reductions. However, the team strongly recommends that, after a full review of staff functions, the saved time be applied to extra customer networking, raising author profiles and recruiting more publishers to the collective.

The Team acknowledges that ABC is not a training organisation and that the transfer of professional skills during attachments is vastly different from the delivery of formal training, for which most ABC staff are not qualified (with the exception of POD training). However, the team believes that ABC staff could provide valuable inputs into the design (as opposed to the delivery) of marketing and sales training programmes.

5. ABC should examine ways in which it could assist APNET and PABA to design a comprehensive training programme based on the professional skills available at its secretariat and to ensure staff on attachments train their hosts in specific skills.
6. It is recommended that a series of workshops/seminars be carried out in 2006, perhaps in conjunction with Book Fairs, to reach as many of the participating publishers as possible. Possible subjects would include mobilisation of the publishers to access local funding for ABC, new technologies/POD, e-marketing, warehousing, sales and distribution and accounting (the ABC IT sales, distribution and accounting software could be adapted for publishers), etc.

In terms of partnerships and information sharing:

7. ABC should increase the number of organisations it collaborates with especially those with publications on Africa's book sector, which it should stock

8. ABC should seek collaboration with all major book fairs in Africa to organise joint seminars to encourage scholarly and cultural publishing.
9. ABC should, through PABA, share information on the orders it received through IABSS with booksellers in Africa

With regard to attracting new members and new titles:

10. A more systematic and periodic approach to identifying new publishers should be applied to enable more exhaustive representation. For example, national publishers' associations' (NPAs') catalogues, where they exist, or regional surveys would give ABC more qualitative information on the availability of product and publishers' potential in their countries. Considering that Africa makes the fewest hits to the ABC site, the terms and conditions of membership should be publicised in wider forums; for example, as part of the content of the ABC brochure which should then be distributed to national publishers associations for onward circulation to all members.
11. In addition to the subject range, the criteria for acceptance should be expanded to state the preferred quality of production (especially for children's books), the African market price range, submission format (if pdf format is preferred for scholarly works and literature) and the expected production capacity of the publisher (minimum number of new titles per year).
12. More effort should be put into enlisting publishers from Northern and Francophone West Africa so as to give the collective a truly pan-African outlook. This recommendation is clearly linked to issues of language (and scripts with regard to Arabic texts), as well as marketing resources.
13. In increasing stocks of scholarly books, ABC should place less emphasis on the physical aspects and accept titles for suitability of content. The list should reflect an African identity. At the same time it should look to improving the physical aspects through POD production, and find ways to assist the publishers to improve the editorial content.
14. Where content and style are universal, publishers should be advised to produce higher quality versions of their children's books for the northern markets, even if this makes them more expensive/highly priced

Translation of books into African (indigenous) languages, and their distribution to/among African communities, would ensure wide access to relevant information and knowledge requisite for poverty eradication. While ABC should not be expected to lead this process, it should develop its policy on promotion of indigenous African languages. Its specific activities should include:

15. Implementation of the UNESCO project and expansion to cover distribution of books translated into African languages to community libraries. The selected titles should be on 'poverty eradication activities.'
16. Supporting research into indigenous African languages whose findings should be shared with regional economic communities
17. As part of its advocacy programme, lobbying governments and the targeted organisations such as AU, NEPAD and SADC to set up book funds for the publication and distribution of indigenous languages books at national or regional levels and enact national book policies mainstreaming indigenous languages in the school curricula.
18. ABC should consider an increase in the proportion of books in African languages to encourage their publication (after relevant market research).

ABC should take advantage of the ongoing restructuring process at APNET to entrench the 2002 agreement based on a long-term arrangement. In addition to the already identified areas of collaboration with APNET, ABC should undertake:

19. Joint marketing and promotion in the North – joint exhibits and catalogues and sharing of market information.
20. Support The African Publishing Review in its work on market research through national publishers' associations or at regional levels, to collect and upgrade data on books in print.

C. Strategic recommendations: medium/long-term impact

ABC is an organization that is doing good work and it provides a focus for donor input that produces a variety of different outputs and outcomes – authors, publishers, Northern readers, spread of ideas, contribution to employment creation, African economic and educational development. ABC is succeeding in its mission, and is at a stage where it must not be punished for its success by being denied further support – it is doing well, although it is not yet self-reliant. Its commercial activities are sustainable, and they should be supported to help the commercial side to continue to grow.

1. ABC needs to seek continued funding for a period of at least another five years as a means of building sales income and therefore commercial contribution to the budget. There should be further investment of some years beyond the end of the current period of the plan. ABC is financially less stable in this post-IABSS era, and until it has found ways to replace the lost income: donors are urged to maintain their commitments at least until the end of 2006.
2. At the same time, ABC must seek for ways it can increase/strengthen/consolidate commercial income gradually – on an incremental basis
3. During this period, ABC should continue to pursue its sales analyses, aim at maximizing commercial income, be aware of areas where costs may be cut, ensure that marketing catalogues and exhibitions are cost-effective, build on POD work, etc. Price levels should be examined annually, and maintained at sufficiently high levels to meet operating costs without discouraging buyers.
4. To address the issue of donor funding decisions being decentralised to recipient country representative offices, ABC should propose to its members a model programme for export support to be requested by publishers from the donor offices in their countries. This should preferably be on a national basis, with members in a particular country joining forces to apply for and implement such a programme. Such direct support to ABC publishers would alleviate the problems of freight and forwarding costs to both ABC and the publishers and could permit revisions to the remittance rates without burdening the publishers.
5. Participating publishers should be utilized/mobilized more to inform/discuss their work and their links with ABC with embassies and country representative offices.
6. ABC should examine the opportunities it may have to establish a trust fund into which commercial surpluses could be paid with a view to long-term funding of cultural activities (investment of commercial surplus, savings made if export support schemes are successful, etc.). The fund could take the form of a Foundation, and the income from the trust fund applied to non-commercial activities.

ABC should develop a monitoring and evaluation system through which periodic assessments of the cultural aims can be documented to guide publishers, ABC, donors and collaborators in identifying areas for that require strengthening. Such a system should include:

7. Activity-based evaluation forms by authors and publishers participating in cultural activities

8. Bi-annual questionnaires to participating publishers on the effectiveness of ABC and the impact of income from ABC on their businesses (capacity built through training, equipment purchased, personnel employed and titles published-including subject range)
9. Annual reports from CoM members on national or regional trends and developments in indigenous publishing in Africa to contribute to the provision and analysis of data to help governments understand the economic and social impacts of the publishing industry. Annex 1: ABC Strategic Plan 2002–2008

Annex 1: African Books Collective Strategic Plan 2002–2006

Introduction

African Books Collective (ABC) was established in 1989 as a self-help initiative by a group of African publishers. It is collectively owned by its founder publishers and is registered in the UK as a company limited by guarantee. It is governed by a Council of Management comprising elected representative publishers. ABC markets and distributes African published books worldwide outside Africa. It is non-profit making on its own behalf and an average 55% of net sales proceeds are remitted to Africa. ABC is supported by funding agencies in meeting the gap between income and expenditure.

Purpose and uses of the plan

- Provide the basis for partnership between ABC and funding agencies; and for collective funding agencies' support.
- Serve as the governing policy and financial plan for publishers, partner organisations, funding agencies, and ABC staff and consultants.
- Chart work operations and monitoring and reporting over the five years, 2002–2006.

Mission

African Books Collective, founded, owned and governed by African publishers seeks to strengthen indigenous African publishing through collective action and to increase the visibility and accessibility of the wealth of African scholarship and culture.

Strategy

- Work in partnership with publisher, donor and other cultural organisations in Africa and elsewhere to disseminate information and promote African publishing and book interests.
- Promote, market and distribute African-published materials worldwide outside publishers' domestic markets; and through a full range of marketing activities to increase sales of African-published books.
- Draw on new technologies and evolving marketing developments, to develop existing markets and establish new markets.

ABC's *strategy* is, in part, commercial in order to achieve its cultural *aims*. The *mission* can only be achieved through commercial *activities*.

Aims

- A vibrant, self-sustaining and independent publishing industry emanating from within African culture.
- African writers and scholars publishing with indigenous African publishers.
- African literature in the mainstream of international literary output.
- African scholarship strongly represented in the international intellectual community.

- Appreciation of African aesthetics and cultural identity.
- An efficient cost-effective ABC, maximising sales income, reducing the gap between income and expenditure in the long term, working towards self-sustainability, with strong capacity to carry forward its *mission*.

Cultural Context

The strategy to market and distribute books internationally is inherently cultural. It enhances the profile of African books and culture. ABC contributes to the fulfilment of the cultural development policies of its partners and donors.

- Culture is a precondition of development, development being a dialogue and a process of social change and progress, rooted within the local cultural context. This acknowledges that culture goes hand-in-hand with increased social and political consciousness; and that writing and literature are an integral part of a culturally dynamic society.
- Publishing is a cultural activity through which literature, science and ideas can be articulated. Books contribute to the reconstruction of history and identity, to scholarship and education; they provide pleasure and enjoyment and bring other benefits to the social and spiritual development of individuals and societies.
- The publishing situation in Africa is one of extreme underdevelopment.
- Publishing has a key role to play in ensuring that reading does not remain the preserve of an élite literate minority; or an activity that is confined to schools and universities for the purpose of passing examinations.
- Indigenous publishers have a particularly important role to play in seeking to promote literature and publishing in African languages.
- ABC's remittances to Africa translate into a major source of income for publishers. Publishers' core income is increased through ABC services thereby contributing towards economic viability and capacity building.
- ABC promotes and disseminates knowledge and scholarship from Africa, and African literature in the North. Promoting cultural activities from the South to the North aims to better inform the Northern populace about aspects of the African continent. Rendering both hemispheres more sensitive to a pluralistic, culturally diverse world is achieved through better communication between North and South. Genuinely diverse global culture is located in this communication between peoples.

Strategic Analysis

Strengths

Funding support over ten years' trading has been just over £1m. This funding support has generated 45% additional income. This has enabled ABC (i) to remit over £1m. to Africa, from sales revenues; and (ii) to utilise the 45% generated income to give publishers access to Northern markets – stimulating economic activity, rather than grant dependency; to provide additional support services to publishers, and to meet all its overheads. Funding support is therefore highly cost-effective, and an investment in African cultural development. The support to publishers is both developmental and material.

The mission can only be fulfilled through collective action. The ethos of collective action by indigenous African publishers is supported within the African Studies community. ABC is unique in the world, in

marketing and distributing African published books, and remitting the major share of sales incomes to the publishers. The product is unique, covering a vast range of subjects. ABC's own resource publications, and its distribution of specialist lists about African books, publishing and the book trades, provide information, training and networking information and support for publishers, as well as disseminating information outside Africa. The Intra-African Book Support Scheme (IABSS) is a vital means of access to books from within one part of Africa to another; it is also working towards the foundations of intra-African trade. Customer relations are strong with the core market. The staff team is hard working and committed, with a clear sense of purpose. ABC's operations are lean.

Weaknesses

African publishing has a weak infrastructure. Literacy levels are low, and the reading culture is weak. Much book production reflects this in terms of content, editorial and production standards. There is correspondingly insufficient suitable new product, in terms of subject, editorial standard, production and price, being published by indigenous African publishers.

In the North, African books and scholarly output are not in the mainstream. Marketing is diffused, due to the great range of subjects. The market is in any case difficult: library funding cuts adversely affect ABC sales, as do increasing use of library access and sharing – often through electronic media; the trade market is difficult to penetrate, particularly in the US; and libraries in Africa are under-resourced. Stocks receipt from Africa is slow, strengthening dealer competition (Northern suppliers, purchasing within Africa at local prices). ABC's profile is not high enough, particularly in Africa, and its support and partnerships need demonstrating and strengthening. Additionally, there is limited internal capacity in terms of staff and equipment resources.

Opportunities

New print technologies present far-reaching opportunities for more cost-effective production, marketing and distribution. Shorter digital print runs, or print-on-demand, will result in less waste of physical stocks. Warehousing costs will be reduced. High quality production can contribute materially to higher sales; and the opportunities create openings for publishers to publish more responsively to market demand. This in turn contributes to the strategic re-positioning of ABC in its markets.

A higher standard of books will be offered through stocking individual titles, not necessarily whole lists. This flexibility should facilitate better coverage of the continent and communicate more widely the cultural identity of Africa. ABC will thus become a more inclusive and culturally effective organisation.

A consultancy report on the North American market has provided valuable intelligence, and partnership with a US university press to provide marketing and distribution within North America can increase sales in that market.

There remains a severe shortage of books in Africa, and little purchasing power.

Support for IABSS provides cultural and economic benefits to local publishers, as well as support to ABC in seeking to reduce the gap between income and expenditure.

Strengthening support and partnerships within Africa will identify ABC more closely as an African organisation, and provide a better basis for partnerships and relationships in the North, for example with funding agencies.

Activities

ABC will carry out the following activities in 2002–2006.

Technology

New technology opportunities will be harnessed. Information and facilitation services for publishers will be expanded, and internal work enhanced. Activities will include:

- Upgrade computer systems in 2002. A new database with integrated features will be central.
- Facilitate digital printing and print on demand services for publishers.
- Establish an ABC publishers on-line discussion group.
- Monitor developments in e-commerce and e-publishing.
- Investigate organising/promoting partnership workshops on:
 - Web/Internet use and opportunities
 - E-publishing and e-commerce
 - Print-on-demand and digital printing
- Further develop the on-line ordering Web site, including: analysis of visits and orders; positioning on search engines; increasing reciprocal links.
- Develop email marketing.
- Strengthen capacity through additional member of staff to monitor and manage technological opportunities for publishers and ABC, and to manage improved management information systems.

Operational (governance, growth and future development)

ABC will seek overall to develop the organisation firmly within an African framework, and strengthen its partnership working with African countries and institutions. It will seek to:

- Explore potential areas of partnership working with African governments and institutions such as SADC and the African Union.
- Secure commitments from African governments and institutions such as SADC and the African Union to:
 - (i) support the organisation in principle and in kind;
 - (ii) recognise publishing as a strategic industry in Africa; and
 - (iii) pursue policies conducive to the economic development of indigenous publishing.
- Identify funding support beyond 2006 from within and through Africa. Potential sources will be identified amongst development agencies and cultural funds – including, for example, regional divisions of international organisations; pan-African and regional development banks; the African Capacity Building Fund; and the UN Economic Commission for Africa.

Governance and publisher participation will be expanded:

- Hold annual meetings of the Council of Management.
- Hold meetings of all founder publishers every 4 years.
- Hold meetings of all participating publishers e.g. at African book fairs.
- Expand publisher participation so as to: (i) find new titles/lists with sales potential; (ii) expand coverage in under- or un-represented countries; and (iii) increase women publisher representation.

- Monitor publishing in countries in other language groups in Africa – francophone, lusophone, and Arabic-speaking – for any suitable English language publishing.
- Investigate inclusion of some French language titles in 2002, as a pilot project.

Research & Development

Raise ABC's profile

ABC will seek to raise its profile, particularly within Africa, about its mission, work and services. Methods of communication will include:

- Networking, and promoting partnership with APNET, PABA, PAWA and other African book organisations.
- Publishing information about ABC in *The African Publishing Review*, newsletters of national publishing associations, and other review media.
- Participating in African book fairs.
- Issuing a widely disseminated quarterly newsletter, in print and electronic format.

Institute training exchanges

- Organise regular exchanges between ABC publishers in Africa and staff in Europe, to strengthen overall capacity and communications. For each year in 2002–2006, there will be two separate publisher attachments to ABC, and two separate ABC attachments to publishers. Attachments will have regard to type of publishing house, regional and gender balance. Both needs of publishers and of ABC staff will be incorporated. Funding for publisher attachments will be sought locally in Africa.

ABC/APNET co-operation

Partnership will be promoted in areas of common interest, for example, in:

- Planning and implementation of training content for publisher/ABC exchanges.
- Promoting writer tours in the North.
- Publishing resources jointly or in association.
- Profiling ABC in e.g. *African Publishing Review* and disseminate information about ABC through APNET.
- Profiling APNET in the North at e.g. Northern book exhibits attended by ABC.
- Holding joint meetings at e.g. Nigerian International Book Fair in May 2002.
- Organising a secretariat exchange in 2002 to strengthen co-operative work projects, exchange information and share experience.

Promote access to African books within Africa

The Intra-African Book Support Scheme (IABSS) is a partnership between Book Aid International (BAI) and ABC. It provides African-published books to African libraries – tertiary and public – and to schools and community organisations. It provides recipients with access to books from 13 African countries. The African partners select the books, and they are provided free through funding agencies' support to BAI. ABC will:

- Continue to work in partnership with BAI to manage and develop the scheme.
- Supply books from African publishers for the current phase, ending 2005, maximising the foundations for intra-African trade.

Produce and disseminate information about the African publishing and book trades

- Continue to distribute specialist lists from non-profit making organisations worldwide i.e. resource publications for and about the African publishing and book trades.
- Co-publish *The African Scholarly Writers' Handbook*, October 2003 with the Dag Hammarskjöld Foundation in association with the International Association for the Availability of Scientific Publications (INASP). The publication is linked to the Arusha IV Seminar (see below).
- Co-publish *The Electronic African Bookworm. A Web Navigator*. Print Version. 3rd. rev. ed., 2002 with INASP.
- Seek funding to donate ABC and other resource publications to individual African publishing houses, and to African publishers and book trade organisations.
- Jointly with the Dag Hammarskjöld Foundation, hold a seminar – Arusha IV – in 2002 on “Strengthening Scholarly Publishing in Africa”.
- Work in partnership to promote the objectives of the Sida-sponsored initiative, “World Literature – International Partners for Literary Diversity” to, *inter-alia*:
 - (i) promote institutional capacity building and new partnerships;
 - (ii) increase African literature on the Swedish and Northern markets through finding mechanisms to stimulate translations of literature between languages and countries; and
 - (iii) promote the use of new printing technologies to overcome constraints along the book chain.

Writer tours/publisher visits

- In partnership with African organisations and European cultural institutions, African writers' tours of Europe and visits to e.g. literary festivals, will be organised and promoted seeking to: (i) promote and mainstream African writers; (ii) raise the profile of African publishing; and (iii) raise awareness about ABC.
- Provide opportunities for African publishers to attend Northern book events and exhibits

Marketing

Product

- Seek advance information on forthcoming titles from publishers.
- Provide more detailed feedback – issue quarterly reports for publishers.
- Identify new publishers/titles in the best selling categories.
- Expand the print-on-demand pilot project to more publishers; work with publishers to tailor titles to Northern markets; advise on the most marketable aspects of a book.

Price

- Increase the price of all pre-2000 scholarly books by 20%.
- Increase literature, children's and other general backlist titles by 10%.
- Implement a new pricing schedule from 2002.
- Offer special terms to Web site purchasers.
- Offer discounts to customers ordering through traditional channels to encourage multiple purchases.

Place

- Enter into partnership with Michigan State University Press (MSUP), for marketing and distribution in North America. Separate funding will be sought within the US, jointly by ABC and MSUP, for an ABC-designated manager at MSUP.
- Seek separate funding in the US for ABC-designated manager at MSUP.
- Promote and preserve ABC's identity and visibility to the benefit of both parties in the MSUP agreement.
- Twice-yearly repping visits to trade outlets in the UK.

Promotion

- Carry out a full standard range of activities, including catalogues production, exhibit displays, review copy mailings, entries in international bibliographic databases, maintenance of internal mailing lists, and purchase of outside lists.
- Expand email marketing through direct mail and listserves.
- Promote ABC as a resource through the Web site. Update monthly with news, online extracts and down-loadable catalogues.
- Implement distinctive marketing strategies for academic, literature, and children's books.
- Broaden subject classifications to widen markets.
- Source more external mailing lists; consult an external broker on best deals.
- Give special attention to titles with potential to appeal to audiences outside existing markets.
- Monitor effectiveness of activities, through incentives for customer feedback.
- Tap market potential for N. America adoption orders, in partnership with MSUP.
- Exploit informal distribution channels.
- Expand customer awareness of ABC; and build on existing awareness.

Research

Support strategies with research on:

- Specific markets at publisher requests.
- Format, price and design to achieve most effective product.
- Prices of African studies publishers in the North.
- Mailing lists additions.
- New listserves, particularly for specialist titles.
- Internet resources – listserves, discussion groups etc. – for marketing to the diaspora.
- Adoption order procedures and policies, in conjunction with MSUP.
- Literary events with which to link writer tours.
- Sales generated from subject catalogues.

Monitoring, evaluating, reporting

Monitoring and evaluating

To measure improved publisher performance in Africa:

- Feedback from publishers on overall benefits to publishing houses i.e. growth/survival through ABC. Individual examples will be included e.g. new title output, new staff, more training, new equipment, etc.
- New/changing title output, including subject, production and price.
- Publisher income trends.
- Utilisation and adoption of new printing technologies.
- Information from publishers on wider benefits e.g. greater profile, networking with other publishers, co-publications, etc.

To measure the performance of ABC as an organisation, and monitor annual progress:

- Statistics of new titles, disciplines, average prices.
- Numbers of titles utilising new print technologies, and their contribution to income.
- Comparisons of performance of digitally printed/print-on-demand titles as against conventional offset printed titles.
- Quarterly analysis of sales trends by discipline and by publisher.
- Quarterly analysis of income and expenditure figures, to monitor/illustrate trend towards sustainability.

To measure the cultural benefits of joint ABC/publisher activities, an annual analysis will be made covering:

- Partnerships and support from within Africa.
- Training exchanges.
- Impact of the Intra-African Book Support Scheme.
- Production and dissemination of information about African publishing and the book trades.

Reports will identify problems, and targets not achieved.

During 2004, the third year of the Plan, ABC will undertake a separate assessment, on the progress towards closing the gap between income and expenditure. Drawing on analysis outlined above and future projections, the assessment will cover the 5 years of the Plan. It will seek to identify potential needs beyond 2006, and progress in securing and/or identifying future sources of funding, primarily from within Africa and Africa based institutions.

Reporting

- One unified annual report (i.e. all activities, all income and expenditure) will be prepared for funding agencies. This will cover cultural and commercial activities, and assess their impact within Africa, and on ABC as an organisation; a detailed report on implementation of strategy; activities planned and undertaken; budget for the year, and actual income and expenditure and financial outcomes. Income and expenditure figures will follow the budget lines separating capital and recurrent expenditure, cultural expenditure, and commercial expenditure and income. The monitoring and evalua-

tion analyses will be included, showing achievements, failures, problems, and progress in closing the gap between income and expenditure.

- A summary report for publication will also be prepared. This will outline main activities and progress, income and expenditure.
- By the end of each year of the Plan, a detailed following year plan and budget will be prepared and presented to funding agencies.

ABC budget	£'000				
	2002	2003	2004	2005	2006
Cultural Expenditure					
Capital					
Technology	98	9	9	9	9
Recurrent					
Operational costs	10	11	32	13	14
Research and Development	35	35	35	35	35
Writer tours/ publisher visits	7	8	9	10	11
Core costs	220	231	242	254	267
Total Cultural Expenditure	370	294	327	321	336
Commercial Expenditure					
Marketing, promotion and distribution	88	92	97	102	107
Commercial Income					
Growth in Product %	10	15	25	25	20
Net sales proceeds	95	103	129	161	193
Net commercial surplus	7	11	32	59	86
Total Shortfall	363	283	295	262	250

Annex 2: The Evaluation Process

The team has examined the company's own working documents, reports to the CoM, etc., as well as carrying out face-to-face interviews with all but one of the ABC staff members, as well as eight members and one non-participating publisher. Other stakeholder opinions have been sought through questionnaires and telephone interviews, particularly from participating publishers.

The evaluation has been designed to allow the maximum input from stakeholder organisations and individuals within the constraints of time and budget available (e.g. unlike the Evaluation 2000, there has been little opportunity to visit participating publishers). Today the majority of publishers have internet access, and so e-mail was chosen as the main communications channel. This has had mixed results. Questionnaires were sent to a total of 174 contact addresses at 100 ABC publishers (five ABC publishers do not have e-mail addresses). Of these, 36 were returned as undeliverable for various reasons (over quota; address closed; addressee unknown, etc.). The initial returns were from only about 10% of the publishers. A second sending was therefore mailed to all publishers who had not replied, together with a reminder sent directly by ABC. Of the 143 e-mails sent in the second round, 15 were returned as undeliverable. The final total of responses to the main publisher questionnaire is 20.

One of the NGO publishers complained that the level of detail required by the questionnaire did not apply to the majority of NGOs, which do not publish on a commercial basis. A simplified questionnaire was therefore developed and sent out to 25 NGO/institutional publishers. Four responses have been received.

Of the questionnaire sent to six of the Founding Publishers (somewhat modified from the main questionnaire), five written replies were received and one provided the information in an interview.

Thus the grand total of written responses is 29, representing almost 30% of the participating publishers.

Evaluation criteria and key questions to be addressed

The evaluation has three identified functions of assessment, forward planning and lesson learning:

- 1) The evaluation findings and recommendations will be used to assess the relevance and effectiveness of ABC's performance since 2002.
- 2) The evaluation will support ABC's efforts towards sustainability, and serve as a tool for future financial strategy.
- 3) The evaluation will be a learning tool for the agencies as well as for ABC.

Annex 3: Sales Figures by Region, POD, IABSS and Non-IABSS, etc

The returns for POD sales are disproportionate to the percentage of the list that they form. At the end of 2004 there were 159 POD titles out of 1800, or 8 per cent of the list, but their contribution to sales was 10,5% (18% for ABC/MSUP sales). See Table 1. This is a reflection of the fact that POD is best suited to higher cost books, which have proportionately higher return. The sales of POD books for 2005 are anticipated to be higher.

Table1 Contribution of POD sales to total sales

Contribution of POD sales to total sales		
	Actual sales	% total sales
2002	£19 447	8,90
2003	£12 834	5,50
2004	£30 365	10,50
Total	£62 646	8,44

Figure 1: Growth in sales 2001–2005 and comparison of IABSS and other sales (years 1–5 are 2001–2005)

Sales comparison IABSS / non-IABSS

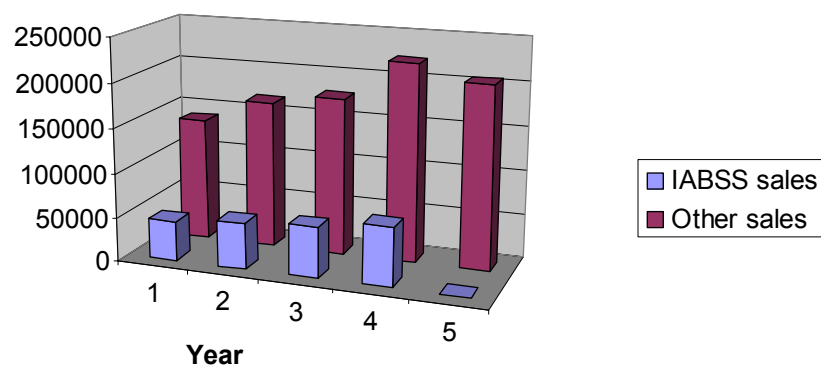


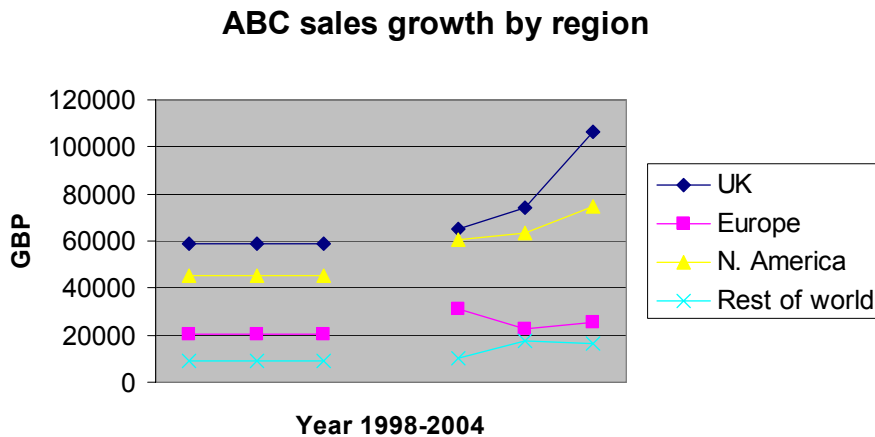
Table 2: Comparison of IABSS and non-IABSS sales 2001–2004

	IABSS actual	As % of total sales	Non-IABSS	Total
2001*	£44 750	26,05	£127 015	£171 765
2002	£51 747	23,69	£166 596	£218 343
2003	£56 953	24,29	£177 485	£234 438
2004	£66 710	23,03	£222 949	£289 659

* 2001 figures included to show the large increase in sales, subsequently maintained and increased.

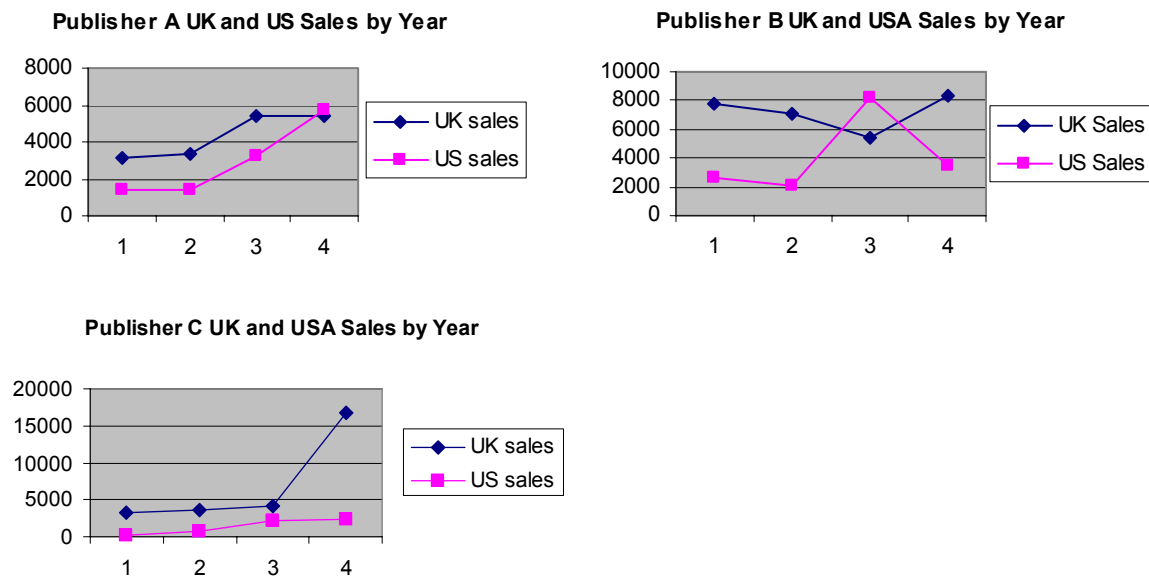
Figure 2 below shows the growth of ABC sales by region,

Figure 2: ABC sales growth by region, 1998–2004 in GBP (1998–2000 averaged figures only)



The effect of ABC/MSUP sales differs greatly for different publishers. Figures 3a, 3b and 3c show the changes in European and US sales by year for three publishers with significant sales income through ABC. Generally, publishers have stated that they do not know the effect of ABC/MSUP on their total sales, often because the sales through MSUP have only just begun. ABC does provide a breakdown of sales to individual publishers, but it seems the publishers do not generally use the figures for analysis of their markets.

Figures 3a, 3b and 3c: Sales trends in UK and US sales 2001–2004 for three different publishers (converted to GBP for ease of comparison)



Annex 4: Prizes/Awards to ABC-distributed Titles

Commonwealth Writers' Prize, Best First Book, Africa Region 2005:

Unexpected Joy at Dawn by Alex Agyei-Agyiri. Accra: Sub-Saharan Publishers, 2005.

The International Youth Library, The White Ravens, Outstanding Books for Children and Young Adults

2005: *The Croc! An Okavango Adventure* by Molly Spitta and Stefan Ille, and illustrated by Sunhild Spitta. Gaborone: Pyramid Publishing, 2004.

2004: *The Story of the Crow and the Frog* by Walter Bgoya, illustrated by Christine Steinberg-Mund. Dar es Salaam: Mkuki na Nyota Publishers, 2004.

Caine Prize for African Writing:

Winner

2004: "7th Street Alchemy" by Brian Chikwava, in *Writing Still: New Stories from Zimbabwe*. Harare: Weaver Press, 2003.

Highly commended

2004: "The Sins of the Fathers" by Charles Mungoshi in *Writing Still: New Stories from Zimbabwe*. Harare: Weaver Press, 2003.

Association of Nigeria Authors/Niger Delta Development Corporation Poetry Prize

2004: *Chants of a Minstrel* by Ezenwa Ohaeto. Lagos: Kraft Books, 2004.

Gourmand-World Cookbook Awards

2002: *Mke Nyumbani Alice Taabu's Cookery Book*. Nairobi: East African Educational Publishers, 2001.

The Noma Award for Publishing in Africa:

Winner:

2000: *Ufundishaji Wa Fasihi* by Kimani Njogu and Rocha Chimera. Nairobi: Jomo Kenyatta Foundation, 1999.

1998: *The Politics of Liberation in South Sudan* by Peter Adwok Nyaba. Kampala: Fountain Publishers, 1997.

1996: *Mfantshipim and the Making of Ghana: A Centenary History* by Albert Adu Boahen. Accra: Sankofa Educational Publishers, 1996.

1994: *A Modern Economic History of Africa. Vol. 1: The Nineteenth Century* by Paul Tiyambe Zeleza. Dakar: CODESRIA, 1993.

1991: *Waiting Laughters* by Niyi Osundare. Lagos: Malthouse Press, 1990.

1989: *Bones* by Chenjerai Hove. Harare: Baobab Books, 1988.

Bones also won the **Zimbabwe Book Publishers' Association** first prize for literature.

Special Commendation:

1998: *Manufacturing African Studies and Crises* by Paul Tiyambe Zeleza. Dakar: CODESRIA, 1997.

1995: *State of the Environment in Southern Africa* edited by Chenje Munyaradzi.
Harare: Southern African Research & Documentation Centre, 1994

1989: *Just Before Dawn* by Kole Omotoso. Ibadan: Spectrum Books, 1988.

Honorable Mention:

1998: *Women, Presbyterianism and Patriarchy* by Isabel Apawo Phiri. Zomba: Kachere Series, 2000.

1st ZIBF Award for The Life-long contribution to the African Book Industry

An initiative of the Zimbabwe International Book Fair. Awarded in August 2004 to Henry Chakava, Chairman, East African Education Publishers, Kenya.

Fonlon-Nichols Award

Awarded to Niyi Osundare in 1998.

The Award is for "Excellence in Literature" – democratic and humanistic values, and literary excellence in Africa. The Award is administered by the African Literature Association and awarded at its annual meetings. Niyi Osundare has also won the Association of Nigerian Authors (ANA) Prize, the Cadbury/ANA Prize, and the Commonwealth Poetry Prize.

Short/long-listed books and authors

The Astrid Lindgren Memorial Award 2005

This is the richest prize in the world for children's and youth literature. In 2005, the Ghanaian children's writer, Meshack Asare, was shortlisted for the Award.

International Impac Dublin Literary Award 2005

One of the largest international prizes. In 2005, *Faceless* by Amma Darko. Accra: Sub-Saharan Publishers, 2003, was long-listed for the Award.

Annex 5a: Publisher Questionnaire

(sent as e-mail attachment)

Questions to Members and Participating Publishers

Field Data Questionnaire – information received will be treated as CONFIDENTIAL and publishers/ respondents will not be identified individually in the Report

Please answer the questions as fully as possible. Where information is not available, indicate by writing N/I (no information). Where a particular question does not apply to your situation, indicate by writing N/A (not applicable). Please feel free to expand on any of the questions where you feel further information would be relevant to this Review.

1. Company details:

1.1 Company name:

1.2 Country:

1.3 Respondent(s) – Name(s):

– Position in Company:

1.4 Number of staff:

Full-time:

Regular freelancers:

1.5(a) Has the company signed a Memorandum of Agreement with the African Books Collective?

YES

In which year:

NO

1.5(b) What is your company's membership category in the African Books Collective:

1.6 Has your company used the Print on Demand facility provided by the ABC?

YES

NO

1.7 How does your company handle its typesetting/DTP needs?

Purchases services from outside

YES

NO

In-house

YES

NO

Both

1.8 Company turnover (Currency:)::

2005 (estimated):

2004:

2003:

2002:

1.9 Please indicate the year of establishment/incorporation or first operations of your company:

2. Products

2.1 Does the company publish:

YES

NO

% of your total list

General fiction titles

Scholarly titles

Children's books

Reference works

Educational books (textbooks, readers, etc.)

General non-fiction titles

2.2(a) How many new titles (not previously published by yourselves) did the company publish in:

	2004:	2003:	2002:
--	-------	-------	-------

2.2(b) How many of these titles are being distributed through ABC:

	2004:	2003:	2002:
--	-------	-------	-------

2.3(a) How many new titles are planned for 2005:

2.3(b) How many of these titles do you expect to be distributed through ABC:

2.4(a) How many titles did the company have on its active backlist in 2004:

2.4(b) How many of these titles are being distributed through ABC:

2.5 In which languages do you publish, and what percentage of your total list do these represent?

a:	% of list =
b:	% of list =
c:	% of list =
d:	% of list =

3. Marketing

3.1 What are your main marketing tools:

3.2 How do you get information on market trends to use as a basis for decision-making on new titles, print runs, etc.:

3.3 Are potential sales through ABC a deciding factor in your publishing decision:

3.4 Do You use any marketing methods in your domestic activities that you have learned directly from ABC methods?

YES <input type="checkbox"/>	NO <input type="checkbox"/>
------------------------------	-----------------------------

Comment:

3.5 Do you consider that your international exposure through ABC has any effect on your domestic business (increased sales, greater interest by potential authors, etc.):

4. Sales and distribution: ³⁵

4.1 Please state the breakdown of your sales by market:

a) Domestic sales –	% volume =	% sales =
b) Export sales –	% volume =	% sales =

4.2 Please state the breakdown of your export market:

a) Sales through ABC –	% volume =	% sales =
b) Sales through MSUP –	% volume =	% sales =
c) Intra-African sales –	% volume =	% sales =
d) Other export sales –	% volume =	% sales =

4.3 Have sales through MSUP made a significant difference to your sales figures:

4.4 How many of your titles have been rejected for distribution through ABC:

³⁵ *definitions:* ABC = African Books Collective Ltd; MSUP = Michigan State University Press; % volume = the percentage of books sold in terms of number of copies (i.e. if you sell 10,000 copies, of which 5,000 copies are sold abroad, your export % volume is 50%; % sales = the percentage of books sold in terms of the value of the books (i.e. if your total turnover is £10,000, and the value of the books you sell through export is £2,000, your export % sales is 20%)

4.5(a) Were you given sufficient information about the reasons for rejection?
YES NO

Comment:

4.5(b) Were you able to use that information to help improve your publications?
YES NO

Comment:

5. Role of ABC in your business

5.1 What do you consider the most important advantages/benefits you receive from participating in the ABC? (Please list in order of importance to your business):

5.2(a) Are you satisfied with the performance of the ABC?
Highly Satisfied Satisfied Unsatisfied

5.2(b) If you are unsatisfied with ABC 's performance, please state why:

5.3(a) Do you have suggestions for other services you would like to see ABC provide:

5.3(b) Would you be prepared to pay extra for any of these suggested services:

5.4 How do you consider the volume of your exports through ABC over the next 5 years? Please give projections if possible.
Expanding Stable Decreasing

5.5 If ABC continues to recruit new publishers, do you see this as a threat (e.g. in terms of competition) or an advantage (e.g. in terms of increased exposure)?

5.6 ABC has both a commercial role (directly related to sales, distribution, invoicing and remittances) and a cultural role (related to promotional activities, exposure of African writers to northern readers, etc.). Do you consider that your business has benefitted from both these roles?

commercial YES NO Comment:

cultural YES NO Comment:

5.7 At present, the majority of ABC's cultural role is funded through grants. Would you be able (e.g. through reduced remittances) and willing to see cultural activities funded more from the ABC's commercial activities:

6. Human Resources in Publishing

6.1 Has working with the ABC helped in the professionalisation of you and/or your staff? If so, please specify in what fields:

6.2 As a result of your participation in the ABC, how many of your staff have received formal training in the following fields?

	Locally	Abroad
Textbook writing	<input type="checkbox"/>	<input type="checkbox"/>
Publishing management	<input type="checkbox"/>	<input type="checkbox"/>
Editorial skills	<input type="checkbox"/>	<input type="checkbox"/>

Design skills	<input type="checkbox"/>	<input type="checkbox"/>	
Graphics and Illustration	<input type="checkbox"/>	<input type="checkbox"/>	
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	
Bookselling	<input type="checkbox"/>	<input type="checkbox"/>	
6.3 Are there any national training opportunities for publishing and related staff?			
	Often	Occasionally	Never
Textbook writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Publishing management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editorial skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Graphics & Illustration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bookselling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.4 Who organises training courses in these subjects?			
	YES		NO
Government vocational training department	<input type="checkbox"/>		<input type="checkbox"/>
Publishers' Association	<input type="checkbox"/>		<input type="checkbox"/>
National Book Council/Foundation	<input type="checkbox"/>		<input type="checkbox"/>
Foreign donors	<input type="checkbox"/>		<input type="checkbox"/>
Others. Who:			

7. Future activities and trends

- 7.1 How do you view the future of publishing in your country:
-
- 7.2 Do you consider that future trends will make your business more or less dependent on exports:
-
- 7.3 Do you consider that the ABC model is the best way to get your books exposed and sold on the international market:
-
- 7.4 Please describe briefly any new publishing-related policies or strategies in your country, and state how you expect them to affect your business over the next five years:
-
- 7.5 Please suggest any publishers which might be suitable candidates for membership of ABC:
-

Thank you for your assistance.

Annex 5b: NGO Publisher Questionnaire

(sent as direct e-mail message)

Dear ABC Institutional/NGO member,

we have received very few responses from NGO members of ABC.

We do understand that there is a difference between an institutional publisher and a commercial publisher, and that the bulk of the original questionnaire is related to commercial publishing.

However, as evaluators, we are not in a position to judge to what extent an institutional publisher is dependent on the income from sales through ABC (or indeed on any sales of its publications).

We have therefore simplified the questionnaire to get the basic information we need, and I hope that you will find time in the next few days to reply – I need to have your answers by Monday morning, please.

1. How important are sales of your titles through the ABC to your operations:
 - a) in terms of financial significance?
 - b) from the point of view of making your organisation and its activities more visible (promotional significance)?
2. Are you satisfied with the way ABC markets, sells and distributes your publications?
3. Do you have any suggestions on how to improve or widen the activities of the ABC.
4. As an institutional publisher, would you be willing to receive a reduced percentage of the sales of your books if the surplus was used to further the “cultural” function of ABC to promote African publishing, scholarship and authorship?

I look forward to your reply,

with best regards,

Annex 5c: Founders Questionnaire

(sent as e-mail attachment)

Questions to Founder Publishers

Field Data Questionnaire – information received will be treated as CONFIDENTIAL and publishers/respondents will not be identified individually in the Report

Please answer the questions as fully as possible. Where information is not available, indicate by writing N/I (no information). Where a particular question does not apply to your situation, indicate by writing N/A (not applicable). Please feel free to expand on any of the questions where you feel further information would be relevant to this Review.

1. Company details:

1.1 Company name:

1.2 Country:

1.3 Respondent(s) – Name(s):

– Position in Company:

– Has the company already submitted a completed Field Data Questionnaire for Members and Participating Publishers? If so, please go straight to Section 2. If not, please do so – your views and comments are essential to the review.

2. Your role in the ABC

2.1 Are you presently an active member of the Council of Management? YES NO

2.2 What is your role on the CoM:

2.2 Do you consider that the present ABC mission statement is still valid:

2.3 Would you like to see ABC's objectives expanded or reduced:

2.4 The IABSS project has been a substantial source of sales for ABC and the publishers. Now that it has come to an end, what strategies are being proposed to maintain and improve present sales levels?

3. Commercial interests in ABC (relate specifically to your company's sales and income)

3.1 Have sales through ABC made a significant difference to your sales figures:

3.2 Have sales through MSUP made a significant difference to your sales figures:

3.3 Have sales through ABC (and MSUP) had a significant impact on your financial result:

3.4 Has the potential for sales through ABC/MSUP ever been the deciding factor in your accepting a title for publication:

3.5(a) In what year would you say that the activities of the ABC began to make a significant difference to your business:

3.5(b) Have there been any years when sales through ABC have been essential to your company's survival:

3.5(c) Have there been any years when you felt your initial investment had been wasted:

3.6 Has your role as a founding publisher given any other significant benefits or disadvantages to your business?

4. Cultural interests in ABC

4.1 Have the cultural activities (promotion of African scholarship and authors) of the ABC (and MSUP) made a significant difference to your sales figures:

4.2 Do you see the ABC as being more important to its members in terms of its cultural activities or in terms of its commercial activities:

5. The future of ABC

5.1 ABC is clearly a dynamic institution, and its role has been evolving continually. Today, ABC not only acts as a sales and distribution representative, but is also involved in the publishers' role of marketing and promotion, as well as production (through Print on Demand). Do you see ABC as still having a long-term role (more than 10 years), or do you envisage African publishers being able to take over these roles individually in the medium term:

5.2 Are you satisfied with the performance of the ABC?

Highly Satisfied Satisfied Unsatisfied

Comment:

5.3(a) Do you have suggestions for other services you would like to see ABC provide:

5.3(b) Would you be prepared to pay extra for any of these suggested services:

5.4 There is a clear pressure for ABC to provide more "internal" financing of its cultural activities (i.e through commercial sales) and to rely less on grants. Please comment briefly on each of the following strategies to increase ABC income:

Focus on marketing only books which sell well, and drop less popular titles and or publishers:

Reduced remittance levels to all publishers:

Reduced remittance levels to institutional publishers with other funding sources (e.g. ADEA, CODESRIA):

Make remittance levels a function of sales volume (e.g. step-wise reduction in remittance levels as income rises so more successful publishers make a greater contribution to ABC costs):

Seek sales and distribution rights for other Africa-related institutional publishers:

This review of the ABC is intended to assist both the Collective and the funding agencies to adjust their strategies for the short and medium-term, and will certainly have an effect on future funding decisions. The Evaluators therefore welcome any further comments or suggestions that you may wish to make. If you would like one of us to call you to discuss these issues, please propose a suitable time when you return this questionnaire.

Thank you for your assistance.

Annex 5d: Interview questions to CoM

ABC as a cultural organisation: Questions to CoM Members

1. ABC's original mission was, "to improve the free flow of communication through published material from Africa to the North" and its strategy said to be "to disseminate research and information about African books and publishing in particular and African culture and scholarship generally."

Through what activities has this strategy been applied? To what extent has the mission been fulfilled?

2. ABC has since changed its constitution from a membership organisation to an open one, with a revised mission to, "Strengthen indigenous African publishing through collective action, increase visibility and accessibility of the wealth of African Scholarship and culture."

How has ABC so far strengthened indigenous African publishing?

Does ABC provide a forum for collective action by indigenous African publishers? What percentage of indigenous African publishers in your country would you estimate ABC has enlisted?

Looking at the ABC list, would you say that ABC has narrowed its focus on African scholarship and culture?

How does ABC monitor the developments of African publishing in order to identify potential publishers and titles for enlisting? Would you suggest any improvement in this approach? If yes, what do you recommend?

3. Initially, ABC's approach was to take on all books on the list of each member publisher and to promote all of them. According to the ABC Consultant, a publisher was therefore enlisted by ABC depending on whether they had a substantive list for ABC to market. In consequence, only the large publishers were eligible for enlisting by ABC. This approach has since changed so that ABC is now placing more emphasis on product and enlisting publishers based on the marketability of individual titles rather than the publisher's list. This approach has enabled ABC to take on more publishers, both small and large.

Is this a correct statement?

Knowing the criteria applied by ABC in enlisting publishers, would you agree that ABC has exhausted all potential members? If Not, which others would you suggest should join ABC?

4. According to the ABC/Publisher contract, 'ABC distributes and markets titles from the Publisher's List (as offered by the Publisher and selected by ABC)'. Further, Article 6.1 '...the Publisher grants ABC exclusive sales and marketing rights for titles stocked and distributed in...', which implies that the exclusivity of the clause is limited only to those titles marketed and distributed by ABC. And yet, in Article 7.2 'The publisher agrees to supply ABC with one advance copy of finished copies of ALL NEW TITLES for consideration for distribution and marketing by ABC', which then implies that ABC is proposing to market and distribute ALL of the publisher's list?

What is the correct position? If as in 7.2., do you find that this clause limits you from undertaking your own marketing and distribution, especially for your titles not stocked by ABC?

5. Initially, it was hoped that ABC would attain self-sufficiency within a period of 5 years. However, after nearly 15 years ABC does not see self-sufficiency as a realistic goal in the foreseeable future? Moreover, CoM argued that the cultural mandate that ABC fulfils is very critical to promotion of Africa and should not be subjected to 'the vagaries of commercial markets.'

Do you agree that ABC should not and cannot attain self sufficiency? If not, what steps should it take and how long would it take ABC to become self-sustaining?

Donor policies have become more MDGs focused, or development-based. In view of the fact that this policy change has consequently reduced donor funding to cultural organisations, what would you recommend that ABC does to reduce its dependency on donor support?

Would you be willing to surrender a further reduction on the percentage of your sales remittances to support the ABC secretariat running?

6. ABC considers the IABSS scheme to have been beneficial to Africa in providing culturally relevant books in African libraries and schools. It also boosted sales especially of children's books and hence income to participating publishers. However, a major objective of this scheme was to promote intra-African trade in books.

To what extent do you believe this objective was achieved through the scheme?

Since your books were supplied by ABC, have the libraries, schools or general traders from the recipient countries ever re-ordered the titles?

Do you believe that the mandate to promote intra-African book trade lies with ABC or do you think it goes against ABC's mission? If you were to suggest a renewal of the IABSS, how do you propose the scheme be improved? Do you consider BAI to be the only suitable partner in this scheme? If Not, which other organisation could ABC partner with?

7. What areas do you propose for collaboration between ABC and:

APNET?

PABA?

OTHERS

8. Are any of your titles on ABC's PoD list? If yes, what are the benefits? (E.g. in what ways has this improved your business (a) with ABC (b) your company)?

Do you know of any disadvantages of POD?

In your opinion, are the roles and responsibilities of publishers and ABC with regard to POD clearly understood?

If No, what do you suggest they should be (Stages of POD-pre-press, transmission to)

9. ABC organised a POD workshop for some of its publishers.

Do you think the training offered is sufficient to enable all publishers understand everything about POD?

What further training would you suggest ABC undertakes? (other than POD)

Has your company participated in the cultural exchange programme (attachments)?

What are the benefits of this programme? What improvements would you recommend?

10. ABC is known for promoting African books and once in a while undertakes to promote African authors.

To what extent do you think ABC fulfils its role of promoting its publishers?

What do you suggest ABC does to strengthen this role?

11. The reason for ABC's remittance of high percentages of sales to its publishers is to enable them re-invest in their companies, in particular make them more efficient and viable. ABC expects that its publishers shall utilise their income from ABC to expand their lists in the most marketable subject areas?

Has this been the case with your company? How many new titles annually have you published since joining ABC? In what areas have you invested this income (company basis and list development)?

How has your income from ABC performed over the years? (please indicate incline, or decline)

What percentage of your total income does the ABC income constitute? (State also % income from sales to Asia, rest of Africa and within your country)

Do you see a time when ABC shall cease or reduce to be of use to you such that you shall be able to distribute and market your list independently?

12. ABC also aimed at enabling African publishers to persuade top-ranking authors to publish with them as opposed to overseas publishers, with the assurance that there now existed a channel for marketing and distributing their books in the North.

Since joining ABC, have you succeeded in enlisting any top-ranking authors? If so, which ones?

13. How does ABC help to alleviate poverty in Africa?

14. Management

Are you happy with the way you are involved in the management of ABC? If not, explain and suggest improvements.

15. Communication

Are you satisfied with the level and style of communication with ABC? Comment.

Conclusion

What are the challenges facing publishing in your country which could affect your company and by extension, ABC's activities? How do you think ABC can help alleviate some of the negative developments?

Annex 6: Bibliography

1. ABC work plans, annual reports, minutes, strategic plans, spreadsheets, catalogues, brochures
2. *The African Books Collective, Sida Evaluations 00/06*, Dept. for Democracy and Social Development, Stockholm, Feb. 2000. (ISBN 91 586 8906-0, ISSN 1401-0402)
3. *Bentham, G., Independent Evaluation of IABSS Project 2001–2004*, Book Aid International, 2005
4. Bgoya. W. et al., *Study on the Economics of Publishing Educational Materials in Africa*, ADEA, 1997
5. *DAC Guidelines Poverty Reduction*, OECD, 2001
6. Eds., Altbatch, Phillip and Teferra, Damtew, *Publishing in African Languages: Challenges and Prospects*, Bellagio Publishing Network, 1999
7. Eds. Gibbs, J, and Mapanje J., *The African Writers' Handbook*, ABC, 1999
8. *Hivos Arts and Culture Policy Document*, Hivos, 2002
9. *Looking Back, Moving Forward: Sida Evaluation Manual*, Sida 2004
10. Makotsi, Ruth with Musonda, Flora, *Expanding the Book Trade Across Africa: A Study of Current Barriers and Future Potential*, ADEA, 2002
11. Mercer, Colin, *Towards Cultural Citizenship: Tools for Cultural Policy and Development*, The Bank of Sweden Tercentenary Foundation, Sida, 2004
12. *Perspectives on Poverty*, Sida, 2002
13. *Sweden's New Policy for Global Development*, Sida, 2003
14. *Sida at Work: A Guide to Principles, Procedures and Working Methods*, Sida, 2003

Web sites visited

<http://www.africanbookscollective.com/>

<http://www.africabookcentre.com>

<http://www.centralbook.co.uk>

<http://www.meabooks.com>

<http://hanszell.co.uk>

<http://bookaid.com>

<http://msupress.msu.edu>

<http://clarkesbooks.co.za>

Annex 7: List of Persons Contacted

People Interviewed

1. Akoss Ofori Mensah, CoM member, Sub-Saharan Publishers, Ghana
2. Ayo Ojeniyi, CoM member, Heinemann Nigeria
3. David Brooks, Publishing consultant and Director of ABC, UK
4. Henry Chakava, Founder and CoM member, East African Educational Publishers, Kenya
5. James Currey, James Currey Publishers, UK
6. Janet Njoroge, Longhorn Publishers, Non-participating publisher, Kenya
7. Primus Karugendo, Founder member, Tanzania Publishing House
8. Rachel Liyayi, Participating publisher, LawAfrica Publishers,
9. Walter Bgoya, Chairman, Founder and CoM member, Mkuki na Nyota Publishers, Tanzania
10. Woeli Dekutsey, Founder member, Woeli Publishing Services, Ghana
11. Catherine Nicholson, Book Aid International, UK
12. Anthony Zurbrugg, Managing Director, Africa Book Centre Ltd, UK
13. Kristin Olson, Sida
14. Svanhild Nedregaard, Norad
15. Krisia Cook, Customer Services Manager, ABC
16. Sam Cook, Warehouse & Stocks Manager, ABC
17. Justin Cox, Manager, ABC/MSUP
18. Jason Davis, Production & Internet Manager, ABC
19. Ejemhen Esangbedo, Marketing/Sales Manager, ABC
20. Mary Jay, Head of Secretariat, ABC
21. Stephanie Kitchen, Coordinator, ABC
22. Naomi Robertson, Customer Services, ABC
23. Graham Speers, IT, ABC
24. Rachael Thigs, Accountant, ABC

Replies to questionnaires received from 29 participating publishers

Annex 8: List of documents received from ABC

Statement by Founder Publishers, July 2000

ABC Strategic Plan 2002–2006

ABC Report and Accounts for the year ended December 31st, 2004

ABC Workplans and Budgets 2002, 2003, 2004, 2005

ABC Annual Reports 2002, 2003, 2004

Minutes of the Annual Strategic Meetings, 2002, 2003, 2004

Minutes of the Meetings of the Council of Management, 2002, 2003, 2004

Minutes of the Think Tank 2003, 2004

ABC New Publisher Pack (+ POD model agreement)

ABC PDF Production and Delivery Manual

Various data spreadsheets

Model job description (Coordinator)

ABC Catalogue, Spring 2005

ABC Gender Studies Catalogue, 2005

ABC New Children's titles, 2005

ABC Peoples and Cultures of Africa, 2004

North American Sales Statistics for CoM 2006

ABC at MSUP Catalogue, Fall 2004

ABC at MSUP Catalogue, Spring 2005

MSUP Catalogue, Fall 2004

MSUP Catalogue, autumn 2005

ABC web-site pages and analysis spreadsheets

Weaver Press and the ABC – note to the evaluation team

APNET and ABC – Working in Partnership, July 2002

Annex 9: The Practicalities of Print on Demand

At present 197 titles are available for POD production: these titles are digitally stored in *pdf* (packed digital format) format at Lightning Source and have been produced at least once as finished books, or are on the production line and are stored at ABC. Of these, 68 are new titles (34,5%) and 47 are from the backlist (24%); the majority (82/41,5%) are re-issues. These titles belong to 24 publishers from 10 countries (3 publishers have 10 or more titles in *pdf* format, 8 publishers have between 3 and 9 titles in POD format, and the rest have one or two titles available). Twenty-one subject disciplines are represented.

There are currently 63 titles from 14 publishers in the production queue. On the basis of information from the publishers, ABC expects to receive a reasonable flow of new titles for POD. Seven of the publishers are able to produce their own *pdf* files to ABC specifications, which means there are no extra pre-media costs to ABC. A further eight publishers have agreed in principle to having their new and backlist titles as POD, but they require assistance from ABC with formatting and digitising.

ABC encourages publishers to make new titles available through POD. Discussions are held with new publishers to see if they want to choose POD. ABC does a cost analysis for a viability specification and calculates the break-even point for the publishers.

There are special contracts between ABC and the publishers to cover the POD books. ABC also has a contract with Lightning Source, in which ABC takes the role of publisher, acting on behalf of its participating publishers.

The book files are checked and formatted at ABC, who also help with cover design. The printing is of acceptable standard for Northern bookshops as well as libraries. The costs to the publisher are the unit printing cost of POD plus the Lightning Source set-up charges. This compares with the unit printing cost at home of traditional off-set printing plus freight of stock to ABC. If publishers want to buy back POD copies, they pay the unit/actual printing costs and freight charges to get them back to the originating country.

POD works particularly well with scholarly titles. Small literary lists do not work so well with POD because of the higher unit price and small returns to the publishers. Scholarly titles can hold a higher price and the margin returned to the publisher will thus be higher.

It takes only three days from receipt of the *pdf* file by Lightning Source to receipt of book in UK. In this way, books can be delivered very quickly. For example, eleven books by Ken Saro-Wiwa are going to POD for re-issue for a Remember Ken Saro-Wiwa commemoration later in 2005.

There are direct financial benefits to ABC from POD. They do not incur warehousing costs, customs clearance or transport costs to ship books to MSUP. This programme improves the cost-effectiveness of ABC and improves stock management and production quality.

Although the combined initial costs for setting up a literature or scholarly title to POD, averaging £ 63.75, are quite high (flat fee of GBP 17.50 for pdf + GBP 21.50 for scanning set-up + GBP 0.17 per page), the combined average break-even volume is very low (average 28 copies), which is achievable by most of ABC's publishers. Additionally, ABC has established a revolving fund that is used to pay Lightning Source for the set-up costs and is replenished directly from sales receipts before remittances are made to the publishers. They do this on specific orders (print *on demand*) so that the sales are guaranteed and there is no risk.

However, most of the costs arise from scanning and pre-press. When publishers submit titles in *pdf* format, the set-up costs are almost 10 times less and the break-even volume is reduced to an average of just 9 copies.

Annex 10: Secretariat Staff

1. The Head retains overall responsibility for the management and decision-making, contacts with CoM and donors and final approval of finance issues, as well as personnel issues. Reports to the Council of Management.
2. Coordinator and PA to the Head assists the Head with new initiatives and current programmes, coordination of management and other meetings, minuting of meetings, report drafting and follow-up as well as staff coordination. In addition she liaises with publishers; handles new titles and bibliographic data until they are taken over by the Marketing/Sales Manager; coordinates with ABC/MSUP on new titles and pricing, with the Warehouse Manager on stocks and de-stocking; coordinates the POD process with publishers and the Production Manager. General administration. Reports to the Head (Full-time)
3. Accountant/Bookkeeper is responsible for entering all financial transactions as well as managing cash flow. Handles invoicing and credit follow-up as well as maintaining the statutory accounts information. Reports to the Head. (3 days per week).
4. Customer Services Manager maintains customer records and client database and contacts with the client, mailing lists, credit control (with Accountant). Reports to the Head. (4 days a week).
5. Warehouse Manager receives and shelves stocks from publishers, pick, packs and dispatches according to invoices received from Customer Services. Liaises with the Coordinator. (3 days a week).
6. Production and Internet Manager maintains the web-site and works with POD titles (both converting to *pdf* files and also advising publishers on how to digitize their materials). Reports to Coordinator. (Full-time)
7. Marketing/Sales Manager responsible for preparation of marketing materials (with Coordinator) and close liaison with Customer Services; reps to trade and library customers, attends book fairs, exhibitions, etc. Liaises with the Coordinator (Full-time)
8. Office Manager handles all staff administrative matters, office maintenance, supplies; maintenance of customer, service, etc. files; sales reporting. (3 days a week)
9. Customer Services Assistant (shared duties with Office Manager) handles invoicing and order follow-up (with Customer Services Manager), stocks issues; reviews; collating and disseminating information to publishers, database work; general assistance to other staff as necessary. Reports to Customer Services Manager. (2 days a week)
10. IT Specialist develops and maintains the database and handles all in-house IT issues (except for the web-site maintenance). (Full-time)
11. North America Manager handles the ABC part of business at MSUP, dealing with orders, receipts, marketing and customer relations. He is actually employed by MSUP for administrative purposes but reports to the Head, and, for the time being, is paid by ABC.

Annex 11: Terms of Reference for the Review

Proposed Terms of Reference for the Mid Term Evaluation of African Books Collective (ABC) in 2005

1. Background

ABC is a self-help, non-profit initiative established by a group of African publishers. Its mission statement is:

African Books Collective, founded, owned and governed by African publishers seeks to strengthen indigenous African publishing through collective action and to increase the visibility and accessibility of the wealth of African scholarship and culture.

ABC's strategy is to:

- Work in partnership with publisher, donor and other cultural organisations in Africa and elsewhere to disseminate information and promote African publishing and book interests.
- Promote, market and distribute African-published materials worldwide outside publishers' domestic markets; and through a full range of marketing activities to increase sales of African-published books.
- Draw on new technologies and evolving marketing developments, to develop existing markets and establish new markets.

ABC's strategy is, in part, commercial in order to achieve its cultural aims. The mission can only be achieved through commercial activities.

ABC was established in 1989, and the Secretariat is situated in Oxford. Sida has supported ABC from inception.

From 1989 to 2002, ABC received project support or core funding from different donors at different times: (1) for the Intra-African Book Support Scheme: Sarec, Danida, The Netherlands Ministry for Foreign Affairs, Norad; (2) for Promotion: The Rockefeller Foundation, Arts Council England; (3) for Trainee Manager: Danida; and (4) Core support: Danida, Ford Foundation, Hivos, Norad. Small grants were made in the initial years from The Commonwealth Foundation and UNESCO. ABC's Strategic Plan 2002–2006 is supported by Hivos, Norad, and Sida.

From an initial 17 founder member publishers in 1989, as of 2005, ABC represents 101 publishers from 19 African countries. Currently ABC stocks around 1800 titles with 200 new titles being added each year. The range of books distributed is diverse: from academic and reference sources to creative writing, children's books and African culture.

An Evaluation of ABC was commissioned by Sida in 1999, and was completed in February 2000.

Following the 1999/2000 Evaluation, the Nordic group of donors decided to support a five-year ABC Strategic Plan. It was anticipated that six donors would contribute in equal parts, and applications were made to seven agencies: Danida, Finnida, Hivos, Norad, Sida, The Netherlands Ministry of Foreign Affairs and The Rockefeller Foundation. In the event 3 donors funded the Plan: Hivos, Norad and Sida. Danida and Finnida expressed their support in principle, but had no budget from which to provide funds. The support broadly equates to one-fifth from Hivos, and two-fifths each from Norad and Sida.

The present agreement is a joint funding agreement.

Agencies contribution to the agreement of the Strategic Plan:

Year	Sida	Norad	Hivos
2002	850 000 sek	1 474 260 nok	99 000 euro
2003	1 300 000 sek	1 149 338 nok	77 100 euro
2004	1 400 000 sek	1 198 073 nok	80 300 euro
2005	1 250 000 sek	1 064 050 nok	71 500 euro
2006	1 200 000 sek	1 015 314 nok	68 100 euro
Total	6 000 000 sek	5 901 034 nok	396 000 euro

The Sida contract provides for a study of financial sustainability as part of this evaluation. There are no plans at Norad or Sida to continue the support to ABC after the present agreement. For Hivos, financial support after 2007 to ABC is still uncertain.

ABC Strategic Plan 2002–2006 projections:

	2002	2003	2004	2005	2006
Capital					
Technology	98	9	9	9	9
Recurrent					
Operational costs	10	11	32	13	14
Research and Development	35	35	35	35	35
Writer tours/publisher visits	7	8	9	10	11
Core costs	220	231	242	254	267
Total Cultural Expenditure	370	294	327	321	336
Commercial Expenditure					
Marketing, promotion and distribution	88	92	97	102	107
Commercial Income					
Growth in Product %	10	15	25	25	20
Net sales proceeds	95	103	129	161	193
Net commercial surplus	7	11	32	59	86
Total Shortfall	363	283	295	262	250

This evaluation is a joint evaluation between Sida (lead agency), Norad and Hivos.

For further information on ABC activities and the utilisation of Sida support please refer to the following documents:

Sida/DESO Culture and Media:

The agreements/contracts between the three donors and ABC

Evaluation of the African Books Collective. Sida Evaluation 00/6

The evaluation of Sidas Work with Culture and Media. Sida Evaluations 04/38 + 04/38.1 + management response from May 2005

Policy for Sida's international development cooperation in the field of culture, March 2000

Swedens new policy for global development, 2003

Looking back, moving forward. Sida Evaluation Manual 2004

ABC

Statement by Founder Publishers, July 2000

ABC Strategic Plan 2002–2006

Workplans 2002, 2003, 2004, 2005

Annual Reports 2002, 2003, 2004

Minutes of the Annual Strategic Meetings, 2002, 2003, 2004

2. Purpose and Use of the Evaluation

The purpose of the Evaluation is to:

- 1) evaluate ABC's achievements so far and compared to the Strategic Plan 2002–2006, and
- 2) evaluate to what extent ABC is reaching sustainability without external grant funding.

The first use of the evaluation is to assess relevance and effectiveness of ABC's performance since 2002.³⁵

The second use of the evaluation is to support ABC's efforts towards sustainability, and to serve as a tool for future financial strategy.

Thirdly, the evaluation will also be a learning tool for the agencies as well as for ABC.

3. Scope of the Evaluation

Important issues to be considered in the Evaluation are:

- *Relevance: An analysis of the role of ABC*

Following the 2000 Evaluation and as defined in the 2002–2006 Strategic Plan, is the role of ABC still relevant to development of the literature and reading in Africa? Given ABC's mission and the role it has defined for itself, how has ABC made its mission and role meaningful?

Compared to other methods for publishing development in Africa, what relevance has the methods and aims of ABC?

What relevance in general does the method of ABC have on the broader perspective on poverty as described in the Perspective on Poverty and The evaluation of Sidas Work with Culture and Media (Sida Evaluations 04/38 + 04/38.1) + management response?

- *Effectiveness: How far ABC has achieved the objectives*

Analysis of the role in terms of the cultural/commercial mission: How has ABC implemented the recommendations of the 2000 Evaluation and with what results? How far have the cultural and commercial objectives set out in the Strategic Plan been achieved? How are these commercial and cultural objectives interacting with each other?

Describe the strengths and weaknesses of ABC from a commercial point of view in particular, but considering the cultural objectives.

³⁵ For key word definition: Annex C in Looking back, moving forward. Sida Evaluation Manual. 2004.

How effective are the results, monitoring and evaluation systems of ABC?

Give recommendations on the monitoring and evaluation system used by ABC.

Give recommendations concerning the effectiveness of the commercial objectives.

- *Sustainability: What are the future directions and challenges for ABC, post 2006?*

Commercial effectiveness: How is the commercial growth evolving?

How could the ABC position on the market be developed or improved.

What are the key aspects of concern of the ABC organisation in order to strengthen the commercial side.

Analysis as well as recommendations on future directions on the commercial aspects, and challenges.

Recommendations on what more strategic steps can be taken towards having African governments and companies to become stronger financial partners of ABC, in order to increase the sustainability of ABC.

4. Methodology, Evaluation Team and Time Schedule

4.1 Method

The Task shall be carried out through interviews and through studies of available documents inclusive of Annual Financial reports and Audit reports at Hivos, Norad, Sida and ABC and other relevant organizations. Method should be suggested by the interested consultant in the procurement.

4.2 Evaluation Team

At minimum two evaluators will carry out the main assignment. The evaluators will have knowledge of book development in Africa, publishing sector development in Africa and in the North, private sector development, development cooperation and experience of evaluations including cost benefit analysis.

ABC specifically asks for a consultant in the team from a publishing background and who is from the South. It shall be a person who understands the overall context in which ABC is working, the publishing realities, literature in relation to poverty reduction and global development, and the marrying of commercial strategy with cultural and NGO objectives.

The evaluator/s should be independent from ABC, and not from within ABC.

The evaluators need to have a relevant understanding of the policies of the three donors, represented by Sida.

Evaluators need to have knowledge in and experience of Monitoring and Evaluation systems, in order to be able to give recommendations to ABC.

The evaluation will be jointly funded by the agencies which pay to Sida and Sida will be in charge of the payment to the consultant team, represented by only one actor to sign the contract with.

The offer should include a presentation of a team. The agencies or ABC should have the possibility to ask for alternative team members.

ABC (Mary Jay) will attend the meeting in Stockholm where presentations of possible consultants will be discussed by the agencies. The costs for travel and per diem are covered by each party attending the meeting.

4.3 Time Schedule and Costs

The estimated time for the study is 8 (4+4) personnel weeks and it shall be completed before 15th of August 2005

The maximum cost for the evaluation, all included, is SEK 300 000 and will be paid in Swedish Kronor. The travel costs and reimbursables should be described in the budget.

4.4 Contacts

The evaluators shall liaise with Sida, Programme Officer on literature of Division for Culture and Media, Kristin Olson.

Other contact persons (All will be available for information sharing, but not as leading actors of the evaluation):

Hivos: Programme Officer Carola Leering, Bureau Africa.

Norad: Adviser Svanhild Nedregård, Civil Society Unit.

ABC: Mary Jay.

5. Reporting

5.1 Inception Report

The evaluation team shall submit a brief inception report explaining how the assignment will be carried out before 1st of July. The report shall be submitted to Hivos, Norad, Sida and ABC before the field work to allow for comments on the report and agree on how the team shall pursue the assignment.

5.2 Draft Report

The evaluation shall be written in English and should not exceed 45 pages, excluding annexes. Format and outline of the report shall follow the guidelines in Looking back, moving forward. Sida Evaluation Manual 2004

(see Annex B). 4 copies of the draft report shall be submitted, no later than 1st of August 2005, to Hivos, Norad and ABC. The comments shall be considered and included in a visible way to a second draft report that shall be submitted to Sida no later than the 18th of August.

5.3 Final Report

After receiving comments on the draft report from Hivos, Norad, Sida and ABC, a final version in 10 paper copies and in electronic format (PDF) shall be submitted to Hivos, Norad, Sida and ABC not later than on the 7th of September.

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 2003 for Windows (or in compatible format) and should be presented in a way that enables publication without further editing.

The evaluation assignment includes the completion of Sida Evaluations Data Work Sheet, with guidelines given from Sida. The separate summary and completed Data Work Sheet shall be submitted to Sida along with the (final) draft report.

When writing this terms of reference, the consultations carried out has been with:

Mary Jay, ABC

Hivos: Programme Officer Carola Leering, Bureau Africa.

Norad: Adviser Svanhild Nedregård, Civil Society Unit.

Lena Johansson, head of the division for Culture and Media, Sida

Pia Cameron, consultant lawyer

Joakim Molander, evaluation methodology advisor at UTV Sida

Bo Dan Bergman, private sector development at INEC, Sida

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