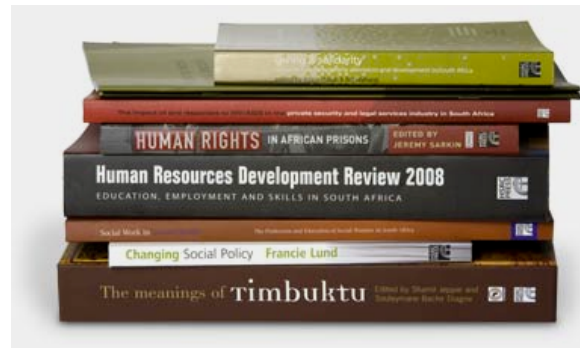




Scholarly publishing in South Africa



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The landscape – slim for the picking but rich with opportunities

- Scholarly publishing is coming off a low base – extremely small market size in South Africa and Africa
- Generally low literacy rates in SA and Africa are coupled with highly complex and demanding social issues
- An underdeveloped reading culture is coupled with weak regional trade in intellectual materials
- In SA, the scholarly publishing sector amounts to approx 1% (+-R3 million) of total spend per annum in the publishing sector as a whole (2010 PASA Industry Survey) (Excluding imports, English language outputs only)

Landscape 2

- The uncertain prognosis of the economic downturn = unpredictable spending patterns + unpredictable budget shifts
- Steadily declining sales and take up, year on year, of monographs
- Rise in stature and importance of journal publishing (existing performance outputs), but ...
- Renaissance of the “scholarly book” (new or additional performance outputs)

Landscape 3

- Changing strategies of scholarly publishers to create additional revenue streams:
diversification of frontlists = weakening of scholarly focus?
- Digital revolution continues: e books; blended publications, bundled publications, online, etc.
- Online retail on the rise
- The rise of the mobile/cellular publishing models (e.g. India)
- Market for book content in e-formats not yet robust in Africa (access is a problem)

Landscape 4

- Intellectual property revolution: new complexities around rights and agreements
- Impoverishment of academic/research staff at institutions
- Low library budgets in SA
- Universities facing growing pressures on their finances
- Rudimentary distribution channels in Africa (as in India)

Landscape 5

- Title-by-title marketing required/generic campaigns not really viable = costly
- Complex supply chains
- Small print runs, low margins, labour-intensive publishing but ...
- High impact: social and economic development, policymaking, curricula, etc.
- Global messages (research and analysis) = global impact = global markets

Landscape 6

- Increasing potential for prescriptions/ adoptions
- Possible new funding models: ASSAf report, NSBPF, accreditation ...
- The return to centre stage of research and analysis in publications
- New emphasis on the humanities