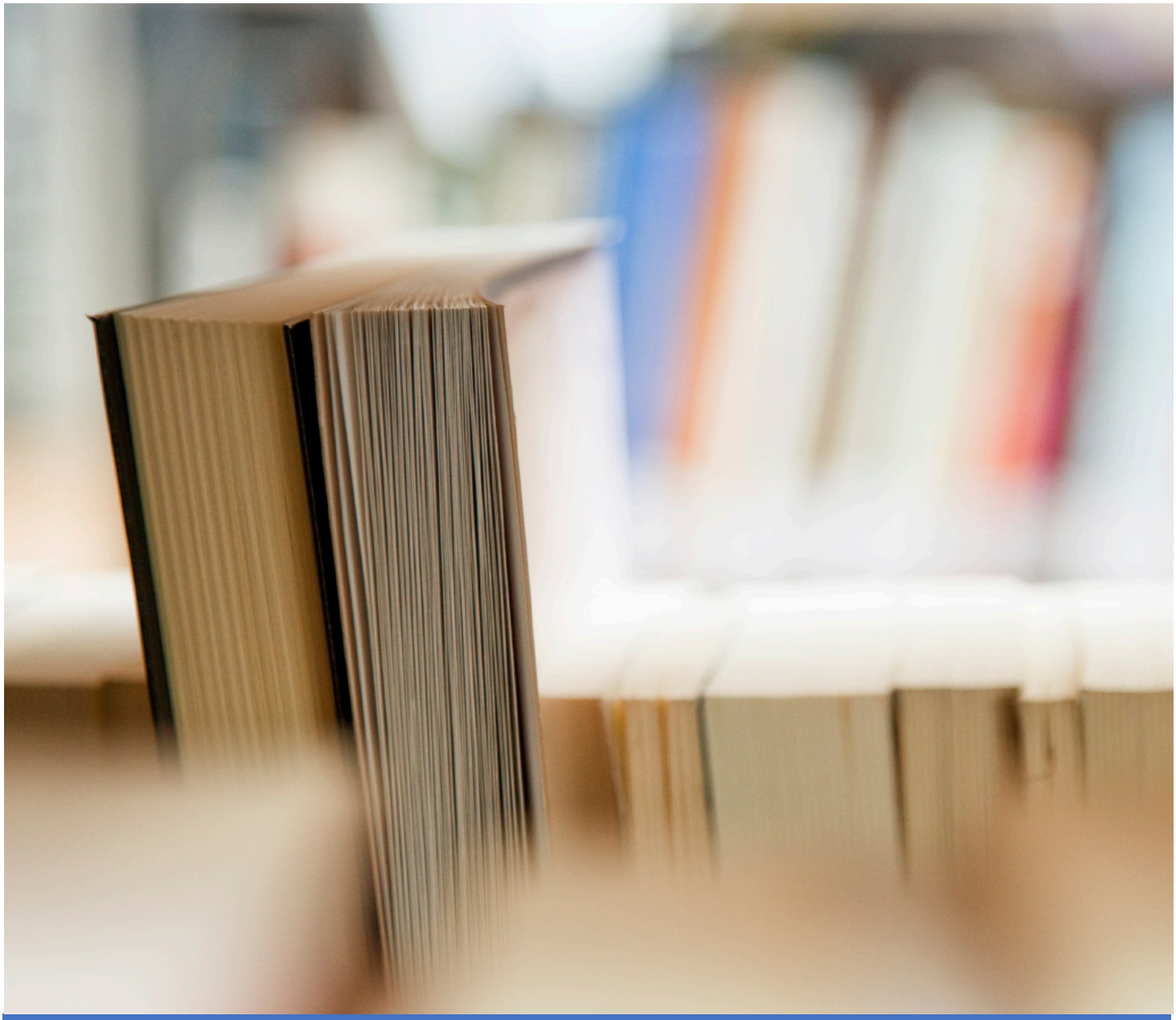

Transformation in the Publishing industry - 2022

Commissioned by the Publishers Association of South Africa

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EXECUTIVE SUMMARY

PASA undertook a survey in 2020 to 2021 to investigate the state of transformation in the South African publishing industry. This was in line with its commitment made in its 2005 Transformation Statement[1] where it undertook to regularly monitor the state of transformation in the industry.

A new survey was commissioned in 2022 – its purpose being to build on the results of the previous survey. A key objective of the survey was to gain a broad understanding of the industry's perception of transformation and whether stakeholders saw progress regarding transformation.

Transformation is a multi-faceted and complex matter – its whole constituted by a range of principles such as equality and equity, inclusivity, diversity, and affirmative action amongst other key principles. Transformation, for the purposes of this survey, refers to the extent to which the industry is aligned with the elements of the Broad-Based Black Economic Empowerment ("B-BBEE") Codes of Good Practice ("The Codes"). Although this alignment does not speak to every facet of transformation it does provide a foundation for investigation and analysis. The survey consequently does reflect an investigation of the extent to which the industry is aligned with the various elements of the Codes. The less tangible measurements of transformation – particularly the perceptions concerning its implementation and impact are however brought to the fore. Without an environment that welcomes and facilitates transformation; it is unlikely that compliance alone with the Codes will bring about meaningful transformation.

The industry consists of a diverse range of stakeholders – from large corporate entities to small micro enterprises and those that play adjunct roles such as industry bodies and learning institutions. The survey reflects the range of stakeholders – a total of 36 respondents out of a total of 92 PASA members participated – of those respondents 22 were small to medium-sized enterprises with the remainder being large organisations (with an annual turnover of R50 million or more). Because of the range of respondents there are instances where a particular question or response would not easily apply to all participants.

Nevertheless, there are common threads that run throughout the responses – Training and development particularly are seen as being critical to facilitating the entry of Black persons into the industry as well as subsequent progression. The lack of training and development was seen as the most significant barrier to transformation in the industry. The industry must be seen to be attractive new entrants – an industry that provides learning opportunities will lead to a more diverse workforce that will drive transformation forward.

Compliance with the requirements of B-BBEE, particularly for large organisations, is not always a simple process – the requirements can be filled with red-tape. This barrier looms large especially within the context of tendering for government contracts. The need for industry-wide monitoring and the possible setting of transformation targets were nonetheless seen as possible accelerants to transformation.

The context within which publishing finds itself currently is also critical – it was noted that the industry faces growth challenges and is also having to adapt to an increasingly digital environment. This means that entry into the industry is difficult for new entrants – in particular, small enterprises. Hence, support for micro-

[1] *See Annexure 1- PASA Statement of Intent regarding Transformation in the Publishing Industry – Dec. 2005*

enterprises is also seen as a key factor in enabling Black-owned businesses to enter and grow in the industry. Access to small businesses, particularly those that have Black ownership, will mean a changing industry – but this can only be achieved in an environment that facilitates growth. Government support is critical in this regard – if the industry is to grow it is essential that government play a supportive role and not an oppositional one. Increased governmental support means a reduction in complex regulations, mechanisms that will enable small players to also access opportunities that are seen to be available only to large organisations.

What the survey does ultimately indicate is that the development of transformation, with its complexities, requires a multi-faceted approach. Attempting to reach demographic milestones or targets do have a role to play but needs to be coupled with mechanisms such as skills development and enterprise development that will provide a platform for a sustainable transformation. It is hoped that this survey, its results, and analysis will provide some insights that will enable the industry to continue in its transformation journey

INTRODUCTION

PASA set out its committment to industry transformation in its 2005 Transformation Statement. The Statement acknowledged the need for industry transformation within a broader context where Black South Africans were excluded from participation in the economy. Consequently, PASA committed itself to furthering the aims of Broad-Based Black Economic Empowerment (B-BBEE) within the publishing industry to enable a more equitable environment while also supporting economic growth in the industry.

PASA conducted a survey in 2020 as part of its committment to transformation. This current survey continued the commitment to perform periodic monitoring and assessment of the implementation of B-BBEE in the industry.

The survey subsequently had the following objectives:

- *Capture baseline data on certain transformation indicators in the publishing industry that could be used as to measure transformation in the future considering their compliance with the BEE indicators as defined in the BEE Codes*
- *Provide information to all PASA members that could serve as a valuable resource*
- *Obtain reliable data on which to base transformation efforts and targets for the industry to measure ongoing progress*
- *Build on the survey conducted in 2020 and reported on in 2021 and to augment the data collected by the initial survey*
- *Establish data regarding the profiles of large companies (generics), medium sized companies (QSEs) and small companies (EMEs) that could provide broad overview of transformation in the industry*
- *Inform the goals and activities of the government Masterplan for Growth in the Creative Industries*

The objectives listed above are largely quantitative - they do not always provide indications of what the industry perceives as "transformation". In its construction, the survey consequently contains questions that would elicit more qualitative responses to gauge perceptions around transformation. However, transformation is a very nuanced concept - apart from the racial demographic component, there are also facets regarding gender and identity and inclusivity amongst others. As one respondent noted, there is a need to deepen the concept of transformation to include democracy and human rights- looking at numbers alone detracts from the debate.[2]

This document however takes its brief from the *Transformation Statement* that the publishing industry has committed to promoting *"an environment conducive to transparency, fairness and consistency when considering matters relating to Black economic empowerment.*"

[2] *The comment was: "Transformation is not just about who MAKES, it's about who BENEFITS. That includes readers and learners. Transformation should include gender and ethnicity… The debate…lacks nuance - we need to deepen the understanding of transformation to include human rights and democracy rather than simple labels.*

In turn, the principles of Black economic empowerment and its measurement are set out in the B-BBEE Codes of Good Practice *(Government Gazette 36928, 11 October 2013).* The Transformation Statement also underlines the role that B-BBEE plays in transformation through its committment to *"effectively implementing the promotion and effective implementation of Black economic empowerment in respect of each of the indicators of the Generic Scorecard and in accordance with the respective principles applicable under the Codes".*

The B-BBEE Codes are the pillars on which transformation in the industry and the broader economy rests. This survey aligns itself with those pillars through initially focusing on key BEE elements as they play out in industry and thereafter moves towards gaining an understanding of qualitative factors. It was envisaged that a combination of results focusing on numerical data as well as perceptions would subsequently provide a more holistic analysis of transformation in the industry.

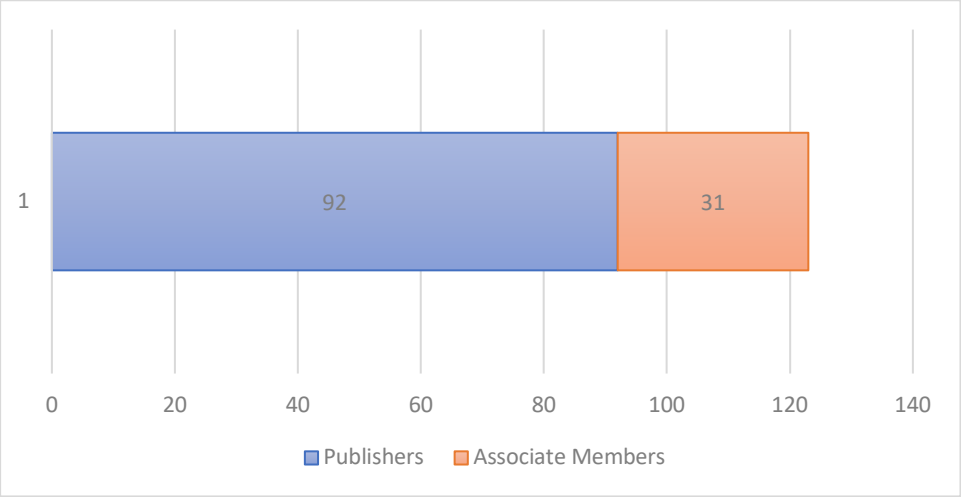
1. RESPONDENT INFORMATION

1.1 Respondent numbers

The number of respondents is important as it provides us with the sample size in relation to the number of PASA members. It is also important to note the number of current PASA members and their breakdown in terms of their industry activity. Not all PASA's members are publishers in the strict sense of the word - some are industry bodies or universities or bookshops for example.

Taking the above into account PASA currently has 123 members. 31 are associate members (non-publishers) and 92 are ordinary members (publishers) Of the 92, 7 are imprints of other publishers and do not operate as separate companies. Of the 92, 36 or 40% responded.

Figure 1: PASA Membership



The composition of the response is important - In the BEE sphere there are 3 categories of organisations:

- Generic enterprises - with an annual turnover more than R50 million
- Qualifying Small enterprises (QSEs) - with an annual turnover between R10 million and R50 million
- Exempt Micro-Enterprises (EMEs) with an annual turnover less than R10 million.

One of the key objectives of the Transformation statement is to advocate for the development of small enterprises - particularly Black-owned. It was important therefore that a sufficient proportion of the responses be from small enterprises. In terms of BEE categories, the response breakdown was as follows:

Figure 2: Respondent Categories

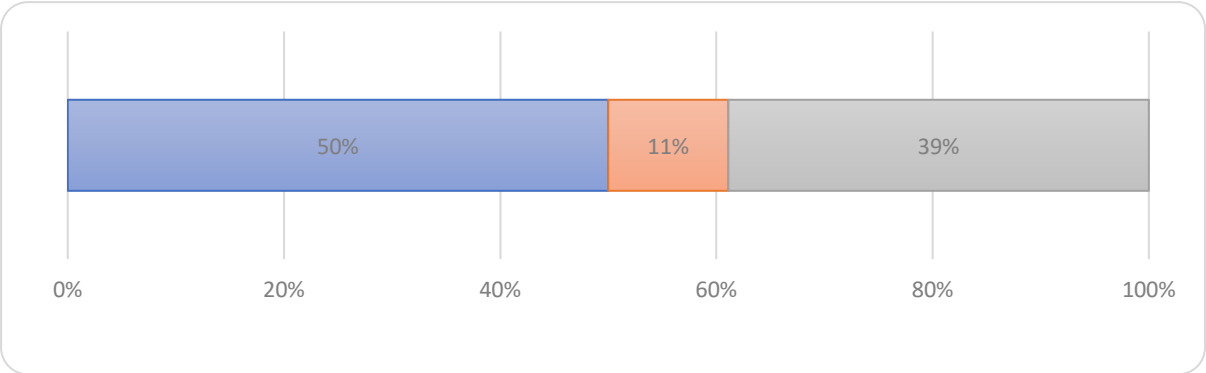


Table 1: Types of enterprises

Response	*Count*	*Percentage (%)*
Exempt Micro-Enterprise (EME) - with an annual turnover of less than R10 million	18	50%
Qualifying Small Enterprise (QSE)- with an annual turnover of between R10 million and R50 million	4	11%
Generic Enterprise - with an annual turnover above R50 million	14	39%
Total Responses	36	

The numbers show that most respondents (18 or 50%) were Exempt Micro-Enterprises (EMEs) that have, as per BEE categorisations, annual turnover of R10 million or less. Significantly, the second largest respondent group was the Generic Enterprise grouping. These enterprises have an annual turnover of R50 million or more – they therefore have a significant impact on the industry. 14 responses were received from this grouping. Lastly, 4 enterprises or 11%, indicated that they were Qualifying Small Enterprises (QSEs).

1.2 BEE Status and Compliance

The next question asked related to the evidence of BEE status. Respondents were asked what proof they had of their BEE status. Where the enterprise is an EME, it is sufficient to have an affidavit setting out the details of the enterprise with confirmation of its turnover[3]. This document is free and is available online[4]. QSEs[5] and Generic organisations need their BEE status to be confirmed by accredited verification agencies – the process can be costly depending on the extent of the work to be done by the verification agency. Compliance is important because organisations wanting to do business with government are particularly compelled to have proof of their BEE status. Simultaneously, private organisations are requiring suppliers to have proof of BEE status – these requirements are especially important for EMEs.

[3] *This document is free and is available online.*
[4] *See http://www.thedtic.gov.za/wp-content/uploads/BEE_Affidavit-EME-Gen.pdf*
[5] *Where the QSE has a Black ownership of at least 51%, an affidavit is sufficient proof of compliance*

The response was the following in relation to the question of compliance:

Figure 3: Type of compliance

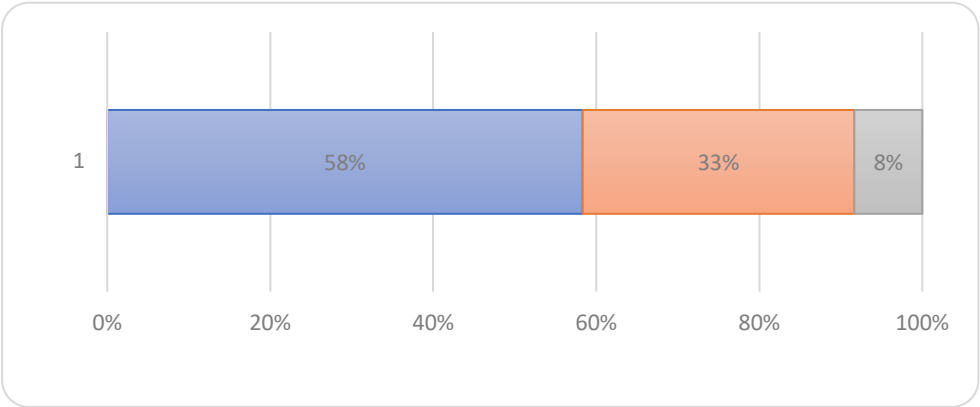


Table 2: Types of compliance

Response	*Count*	*Percentage (%)*
BEE Affidavit	21	58%
BEE Certificate	12	33%
None	3	8%
Total Responses	36	

Most respondents indicated that they have some form of compliance; with the majority indicating that they used affidavits. The fact that 58% indicated that they have affidavits means that most of these respondents were EMEs that were automatically able to receive BEE affidavits setting out their turnover and ownership status.

2. INDICATORS OF EMPOWERMENT

The following 2 questions delved deeper into the BEE status of respondents by asking what the respective BEE levels of respondents were, followed by a question about the extent of Black ownership of respondents. BEE levels and Black ownership are in many respects the key indicators of empowerment – the BEE level indicates the overall extent of BEE compliance with all the BEE requirements while Black ownership remains a key component of transformation because, to some degree, reflects the extent to which Black people can access the economic benefits of ownership.

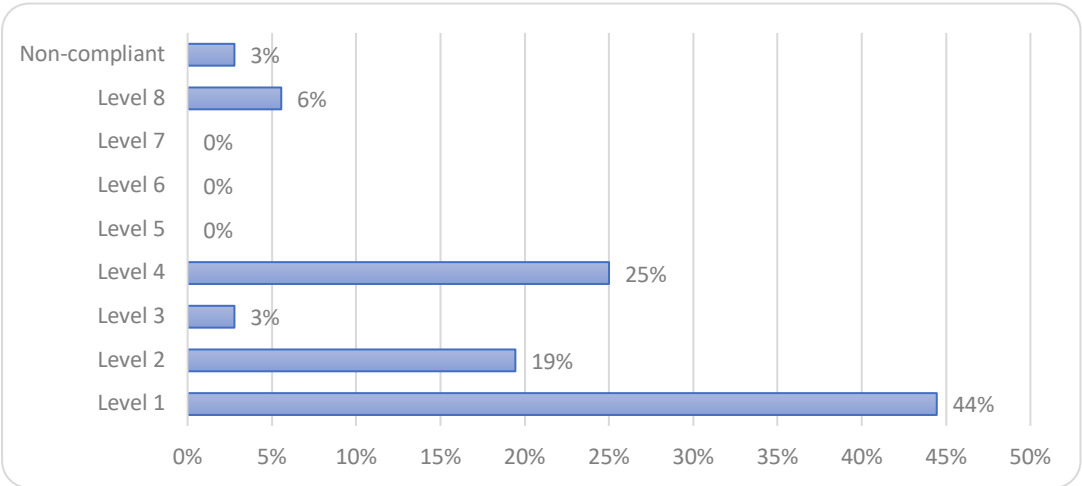
In this regard, it is accepted that transformation is difficult to define – a respondent remarked that transformation requires a "nuanced" approach that avoids a simplistic and stereotyped approach transformation.[6]

Transformation, for the purposes of this survey, takes, as its departure point, the extent to which industry organisations comply with the principles of Black Economic Empowerment. From there it moves towards perceived barriers to transformation with a view to providing a greater depth to responses.

2.1 Ownership & BEE Levels

Ownership is seen as a primary BEE element – Black ownership has been seen as a key driver in the economic transformation of the country. Within BEE terminology reference is made to "effective Black ownership" – this refers to the extent that Black persons can properly access the benefits of ownership. The survey did not drill down to this level to determine the extent of effective ownership, but the BEE levels and extent of Black ownership percentages do provide some key information. The BEE levels reported were the following:

Figure 4: BEE levels



[6] *See Footnote 2*

Table 3: Organisations per Level

Response	*Count*	*Percentage (%)*
Level 1	16	44%
Level 2	7	19%
Level 3	1	3%
Level 4	9	25%
Level 5	0	0%
Level 6	0	0%
Level 7	0	0%
Level 8	2	6%
Non-compliant	1	3%
Total Responses	36	

It is important to note that only 1 respondent indicated non-compliance. Again, organisations – particularly smaller ones – should all be compliant especially where only affidavits are required. 16 respondents indicated a Level 1 status.

Regarding Black ownership the following applies:

Table 4: Black ownership in organisations

Response	*Count*	*Percentage (%)*
0%	9	25%
Greater than 0% but less than 51%	11	31%
51% or more but less than 100%	3	8%
100%	13	36%
Total Responses	36	

Of the 36 respondents, 13 indicated that they are 100% Black-owned with 9 indicating no Black ownership. Previously it was indicated that 18 EMEs had responded to the survey – 10 of the 18 EMEs reported a Black ownership of greater than 51% - meaning that they obtained a Level 2 or Level 1 BEE rating.

2.2 BEE Element Scores

In addition to Black ownership, a question was asked regarding the scores of individual BEE elements. The BEE elements are:

- *Ownership* — addresses the extent to which Black people hold effective ownership in the business
- *Management Control* — addresses the extent to which Black people have executive and management responsibility in the business
- *Skills Development* — assesses the annual expenditure[7] on the training of Black people
- *Enterprise and Supplier Development: consists of*
  - *Preferential Procurement* — assesses the extent to which the business has purchased from BEE compliant entities
  - *Supplier Development* — looks at the extent to which the business has assisted small Black owned enterprises that are suppliers to the business in their development
  - *Enterprise Development* — looks at the extent to which the business has assisted small Black owned enterprises that are not in its supply chain in their development
- *Socio-Economic Development* — looks at the extent to which the business has contributed in terms of corporate social investment to organisations that have a Black beneficiary base.

*Ownership, Skills Development, Preferential Procurement, Supplier and Enterprise Developmen*t are referred to as "Priority Elements." Where an organization does not meet certain subminimum points for these elements, they are penalized[8]. Generic organisations (with a turnover of more than R50 million) must comply with all the priority elements. QSEs need only comply with ownership and one other priority element.

The points available for each element are:

	Generic	*QSEs*
Ownership	25	25
Management Control	15	15
Skills Development	20	25
Enterprise & Supplier Development	42	30
Socio-Economic Development	5	5

[7] *Expenditure may be on employees as well as unemployed persons who do not work for the entity*
[8] *The BEE level achieved is dropped by 1 level*

All the responses were made by Generic organisations as they must comply with the 5 elements. For the purposes of assessment, the score for each element has been averaged.

Table 5: Scores per BEE element

Element	*Average points*
○ *Ownership*	*18,80*
○ *Management Control*	*13,34*
○ *Skills Development*	*15,85*
○ *Enterprise and Supplier Development (includes Procurement)*	*32,97*
○ *Socio-economic Development*	*4,98*

2.2.1 Ownership

8 out of the 10 Generic organisations that responded indicated a score of 20 or above for ownership. Of those organisations, 2 indicated a Black ownership percentage of 100%.

(Although not included in the above table 10 EME organisations reported a Black ownership greater than 51% while 3 QSEs also indicated Black ownership more than 51%.)

2.2.2 Management Control

The scores for Management Control are excellent. This indicates that there is good representation of Black people at management level. To delve deeper into management control, further questions around recruitment focusing on the recruitment of Black persons and the levels at which they entered the organization were asked. The following commentary relates to those matters.

a) Recruitment

To assess the extent of the recruitment of Black people a question was asked regarding recruitment over the previous 2 years prior to the survey and the extent to which recruitment into the management band had occurred.

The responses indicated that it was largely the Generic organisations that had recruited – 141 people had been recruited over the 2-year period. Of this number, only 9 were recruited into EMEs or QSEs[9]. This is understandable given that Generics would most likely have the resources to recruit; particularly in the light of the economic effect of the pandemic over the last 3 years.

Of the 141 recruits, 105 or 74% were Black. Of the 141 recruits, 80 or 57% were Black females. Furthermore, 12 persons recruited indicated persons with disability.

It was previously indicated that the Management control score was above average indicating that there was a good representation of Black people at management level. The recruiting pattern of Black people echoes this – The responses indicated that 3 Black persons were recruited at the executive level – meaning that they were directors with executive authority.

[9] *Only 1 person was recruited by a QSE*

A further 3 had been recruited into the senior management level. 18 had been recruited into the middle management category and 58 had been recruited at the junior management level. A further 64 had been recruited at the entry level category.

Table 6: Recruitment Summary

○ *Number of recruits*	*141*
○ *Number of Black recruits*	*105 (74%)*
○ *Number of Black female recruits*	*80 (57%)*
○ *Number of Black disabled recruits*	*12 (9%)*

b) Management profiles

Further to investigating recruitment patterns, questions were also posed to assess the number of Black people at the various management levels of the respondents. For the purposes of this question only the responses of Generic organisations will be considered. The response was the following:

Table 7: Management representation

Category	*Total*			*% Of Total*
Senior Managers	*60*	*Black Senior Managers*	*25*	*42%*
		Black Female Senior Managers	*12*	*20%*
Middle Managers	*184*	*Black Middle Managers*	*94*	*51%*
		Black Female Middle Managers	*67*	*36%*
Junior Managers	*182*	*Black Junior Managers*	*127*	*70%*
		Black Female Junior Managers	*86*	*47%*

The table above correlates to the overall good score of Management Control – Black managers are well represented across all categories; particularly at the Junior management level with Black managers forming 70% of the total management category. Another significant figure relates to Black female managers – Black managers form 42% of that category but of that number 20% are Black females

c) Demographic representation in organisations

Overall race and gender representation in organisations remains a key marker, albeit superficially, of transformation. The Management Control element sets certain targets and provides points based on the extent to which (large) organisations can match the country's demography in terms of their overall management profile.[10] The survey subsequently asked respondents whether they respondents thought the industry was sufficiently representative of the country's demographics. The following responses apply:

Figure 5: Perceptions of representation

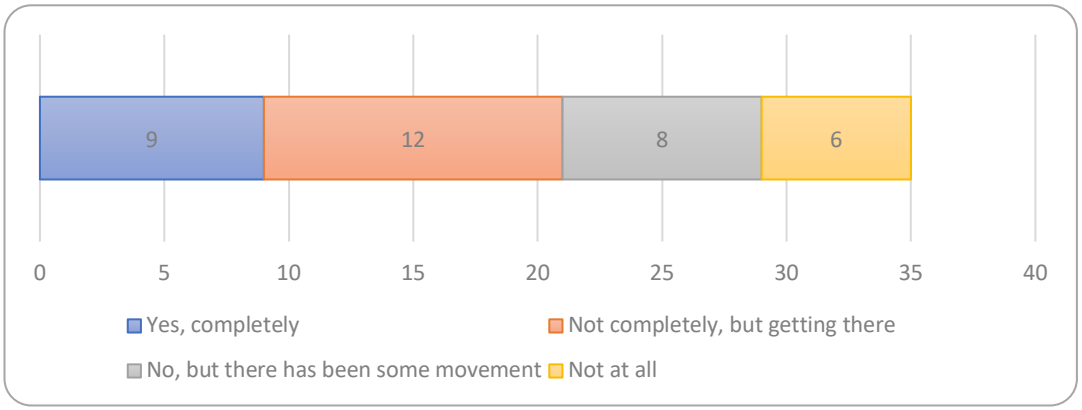


Table 8: Perceptions of demography

Response	*Count*	*Percentage (%)*
Yes, completely	9	26%
Not completely, but getting there	12	34%
No, but there has been some movement	8	23%
Not at all	6	17%
Total Responses	35	

What can be inferred from the responses is that most respondents (34%) think that while full representation has not yet been achieved, there has been some positive movement in that direction.

[10] *EMES are not required to match demographics. QSEs are expected to aim towards representation of Black managers. "Black" refers to persons who are identified as African, Coloured, Indian and Chinese)*

2.2.3 *Skills Development*

Skills development is seen throughout the survey as a means of encouraging greater representation of Black people in the industry – more training equates to capacity-building that will facilitate the progress of persons in organisations. The average score of 15.85 out of 20 points is an excellent score.[11]

The inference is that entities are taking seriously the principle of Skills Development. To elaborate on the issue of Skills Development organisations were requested to provided information on their skills development initiatives – namely:

- Whether organisations submitted a Workplace Skills Plan ("WSP")
- The extent of expenditure on training and development
- Whether organisations participated in internship or learnership programmes

a) Skills Development Compliance

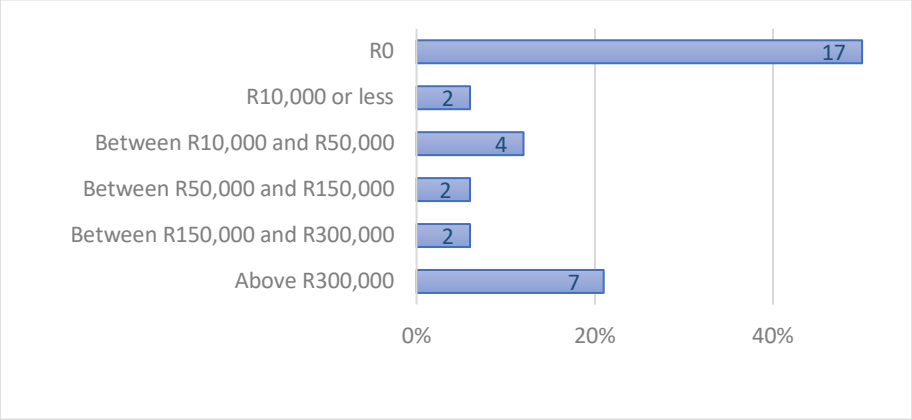
Generally, it is only larger organisations that are compelled to submit Workplace Skills Plans to their Sectoral Education and Training Authority ("SETA").[12] Any organisations wanting to claim points for Skills Development must provide proof that they are registered with the SETA and that they submit a WSP. For this survey, 1 QSE indicated that they submit WSP's.

1 Generic organisation noted that they did not submit a WSP while 13 indicated that they had done so. Submission of a WSP is critical in order to be assessed for Skills Development points – non-compliance with this aspect also means that the organisation drops by 1 level because Skills Development is deemed to be a priority element.

b) Skills Development Expenditure

While training and development are critical factors such as cost do often impact on the ability to provide structured programmes. When asked about the amount of expenditure on training programmes, the following pattern occurred:

Figure 6: Skills Development Expenditure comparison



[11] *The score is based on the scores of Generic organisations*
[12] *The SETA for publishing is the Fibre Processing and Manufacturing Sectoral Education & Training Authority ("FP&M SETA")*

Amount	*Count*	*Percentage*
R0	17	50%
R10,000 or less	2	6%
Between R10,000 and R50,000	4	12%
Between R50,000 and R150,000	2	6%
Between R150,000 and R300,000	2	6%
Above R300,000	7	21%

The challenge of skills development expenditure is clear when we see that 17 respondents (50%) indicated that they spent nothing. However, 7 organisations – all being Generic indicated that they spent more than R300,000 annually on training. 2 Generic organisations indicated an expenditure between R150,000 and R300,000 while 2 indicated an expenditure between R50,000 and R150,000.

The targets for Skills Development expenditure are based on the organisations' payroll – the target being 3.5%. Other aspects of expenditure that are measured relates to expenditure spent on bursaries or scholarships[13] as well as expenditure on persons with disabilities. A question was posed concerning the extent of expenditure as a percentage of payroll – On average, organisations indicated that they were spending 5% of their payroll on skills development. Of the organisations that indicated a spend of R300,000 or more the lowest spend was 3% of payroll while 7% was the highest.[14] Note that the BEE Codes provide for expenditure on different types of training – the survey results do not indicate the categories of training. The categories are

- A *Bursaries or scholarships*
- B, C, D *Practical training coupled with a theoretical component – Learnerships and Internships*
- E *Accredited short courses*
- F, G *Informal training, work-based, not accredited*

c) Internships and Learnerships

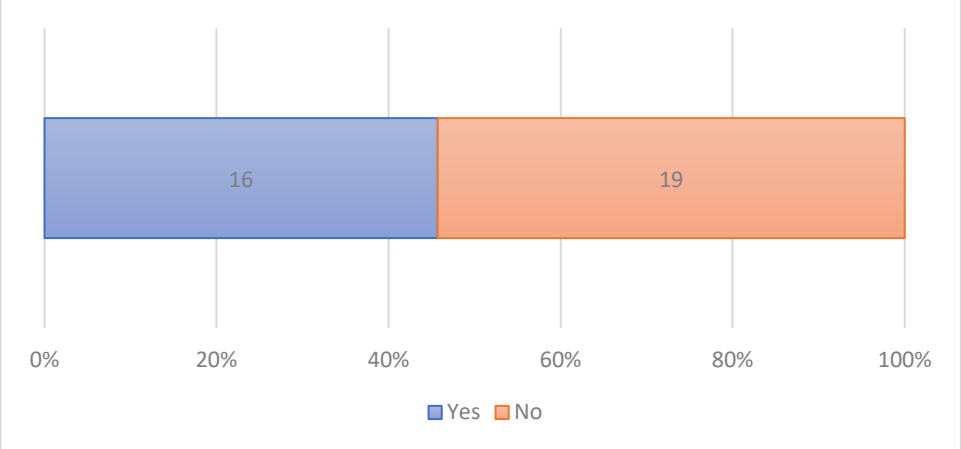
While skills development can be costly it should also be noted that there are alternative avenues that would enable a wider range of organisations to be involved in training. Learnerships, where a trainee is required to gain practical workplace experience can be underwritten by the relevant Sectoral Education Training Authority (SETA). [15]One respondent commented on the success of the SETA learnership, albeit that increased training would be welcome.[16] The prospective

[13] *The target for bursaries is 2.5% of payroll*
[14] *Training expenditure can be spent on courses, bursaries and stipends or salaries for interns and learners*
[15] *The SETA for Publishing is the Fibre Processing and Manufacturing Sectoral Education & Training Authority ("FP&M SETA")*
[16] *The full comment was "Seta internship programme has been incredibly successful, and very strong candidates come through this process. So, the training available works. More SETA funding would be wonderful, however.*

mentoring organization need only supply the practical experience required. The target for learnerships or internships is 5% of the total number of employees.

Respondents were subsequently asked whether they had some form of internship programme. An internship is an opportunity for a newly graduated person to gain practical experience. In some instances, the practical experience is the final requirement of a qualification. [17]

Figure 7: Internships & Learnerships



Responses	*Count*	*Percentage*
Yes	16	46%
No	19	54%

The responses were evenly split with a small majority saying that they did not have a programme. All the Generic organisations indicated that they had some internship or learnership programme. 3 QSEs indicated that they also participated in such programmes. The demographic breakdown in terms of Black learners, Black Female learners and Black disabled learners showed the following:

Table 9: Learnerships and Internships

		Percentage of total
Total number of Internships/Learnerships	117	
Total number of Black Interns/ Learners	115	98%
Total Number of Black Females	75	64%
Total Number of Black Disabled persons	13	11%

The numbers for Learnerships and Internships are significant – of the 117 persons participating in programmes 98% were reported as being Black. Of that number, 64% are Black females and 11%

[17] *Note that the Internship does not have to be approved by the SETA, it can simply be a programme of practical learning experience provided by the organisation*

were reported as Black Disabled persons. These numbers are significant because they demonstrate a commitment to skills development at entry level. In the B-BBEE framework recognition for providing employment opportunities post-training is rewarded with the acquisition of additional points

2.2.4 Enterprise and Supplier Development

The element of Preferential Procurement drives BEE – organisations want to (and in some cases, are compelled to purchase from suppliers that have good BEE scores. In turn, a good BEE score or level depends on the degree of compliance with all BEE elements.

Supplier Development refers to instances where one organisation identifies a Black-owned EME or QSE and provides developmental support to the small business.[18] The beneficiary is in the organisation's supply chain.

Enterprise Development occurs where the organisation identifies a Black-owned EME or QSE, not in its supply chain, and provides support to that business with a possible view to enhancing its status to become a supplier.

If small EMEs and QSEs are to grow it is essential that enabling opportunities are created – this can occur where there is targeted procurement – where organisations engage in procurement designed to stimulate growth of small Black-owned business – or through supplier and enterprise development mechanisms that are aimed at providing developmental support. The survey sought to investigate the extent of targeted procurement and development initiatives through focusing on the following:

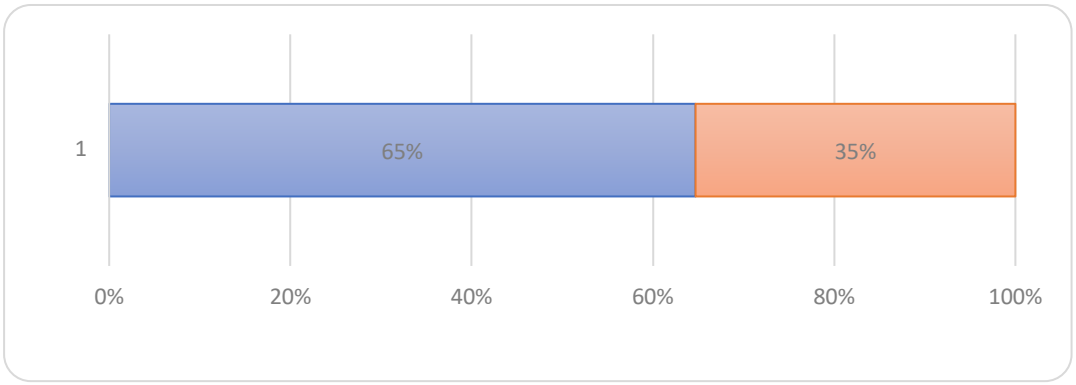
- The extent of targeted procurement
- The extent of development programmes
- The type of support provided

a) Targeted Procurement

34 responses were received in relation to the question of whether respondents had a policy of targeted procurement. 12 responded that they did not. Of the remaining 22 respondents that responded psositively,11 were Generic organisations. 1 generic organisation responded negatively.

[18] *Support refers to a range of mechanisms – including cash grants, interest free loans, early payment terms and professional support among others*

Figure 8: Participation in Targeted Procurement

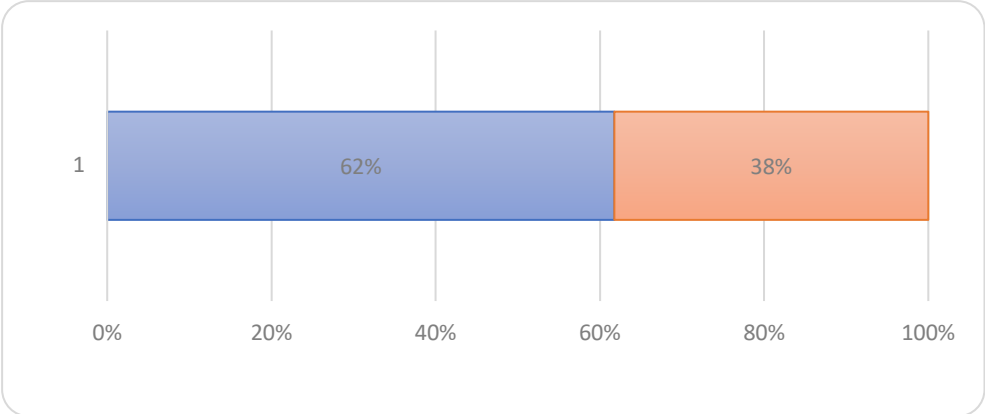


Responses	*Count*	*Percentage*
Yes	22	65%
No	12	35%

b) *Supplier Development (includes Enterprise Development*

The number of businesses providing support programmes was very similar to those engaging in targeted procurement. 62% indicated that they did support small enterprises. 9 Generic organisations reported that they do provide some form of business support while 3 Generics indicated that they did not – this would mean that those businesses with generic status not providing support would automatically drop by 1 BEE level because Enterprise and Supplier Development is seen as a priority element.

Figure 9: Enterprise and supplier Development participants



Responses	*Count*	*Percentage*
Yes	21	62%
No	13	38%

c) *Type of Support*

The BEE Codes provide for a range of support mechanisms. The survey asked of those organisations participating in Enterprise or Supplier Development to indicate the nature of the support provided[19] In practice the most used are cash grants, loans, professional support, and early payment terms. The table below indicates the type of beneficiary support provided by respondents.

Table 10: Types of support mechanisms

Responses	Count	Percentage
○ *Cash contributions*	4	20%
○ *Early payment terms*[20]	8	40%
○ *Loans*	2	10%
○ *Mentoring or business development advice*	9	45%
○ *Administrative support*	4	20%
○ *Professional support services*	8	40%
○ *Training*	6	30%
○ *Other (Please specify)*	2	10%

From the above it is evident that early payment terms and mentoring are the most common support mechanisms. Where "Other" is indicated, one respondent indicated that they provide discounts while another indicated that they provide publishing-related services such as publishing, editing, and proof-reading.

d) *Socio-Economic Development*

The support mechanisms of Socio-Economic Development (SED) are the same as those for Enterprise Development – however, they fall within the scope of corporate social investment where businesses focus on supporting community-based organisations or individuals.

Respondents were asked to identify the contributions that they most often made to beneficiaries.[21] The responses show that SED is being implemented in the industry – 5 points are allowed for this element and an average of 4,98 was achieved. Only 1 Generic organisation indicated that it did not participate in Socio-Economic Development. Cash grants were the most prevalent initiative. "Other" referred to initiatives such as book donations.

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[19] Respondents could select more than 1 option in responding. The percentages reflect the extent to which certain response was chosen by all respondents. The question was "Q26. If your business does participate in enterprise or supplier development programmes, please select the type of support that you provide (You can choose multiple responses)
Respondents could choose multiple responses – the choices therefore do not add up to 100%, but instead reflect the ranking of the answer dependent on how many times a certain response was chosen.

[20] "Early" means payment occurs within 15 days of invoice.
[21] The question was" Q. 30. If you do participate in socio-economic development programmes, what type of support do you provide?" Multiple responses could be chosen. The percentages therefore reflect the extent to which one option was chosen over others.

Responses	*Count*	*Percentage*
Cash grants or donations	15	79%
Admin. or other support services	4	21%
Training	7	37%
Other (Please specify)	2	11%

2.3 *Factors affecting representation*

Following the question of representation, respondents were asked about the factors that impacted on demographic representation. [22]These responses are critical as they can provide the foundation for future strategies that impact on the BEE profiles of organisations in a positive manner.

Table 11: What affects representation?

Responses	*Count*	*Percentage*
There are no obstacles	6	17%
Not enough training and development opportunities	16	46%
There are no clear career paths for industry entrants	11	31%
There is a lack of recruitment strategies that would help a more representative profile	7	20%
There are no industry targets to create a more representative profile	15	43%
There is no industry monitoring and evaluation of workforce profiles	13	37%
There is not enough input at Executive level to drive a more representative profile	5	14%
Other (Please specify)	9	26%

The responses indicate a common thread – Training and development coupled with the absence of clear targets affect the representation of Black people in the organisations surveyed. 20% of the responses indicated that the lack of clear transformation targets affected demographic representation.[23] Based on the perceptions gathered from the data, training and development with career pathing are seen by the respondents as 2 of the factors that can provide a longer term, more sustainable impact.

[22] The question was "In the publishing industry what do you see as the obstacles to achieving a more demographically representative workforce profile?"
Respondents could choose multiple responses – the responses are therefore weighted and show the extent to which one option was more predominant than others.
[23] One respondent felt that a sole focus on numbers would not assist proper transformation: "Focusing on Black representation - though needed - is limiting actual transformation required in the industry"

9 responses detailing the respondents' choice of other factors were received. These responses included factors such as the following:

- *Limited staff turnaround in the industry is slow and jobs are not seen as being well-paid. New entrants do not see publishing as an attractive option and employment opportunities are limited*
- *The need for a commitment to the mentoring and development of Black entrants.*

The commonality in the responses is that there appears to be a realisation that transformation of the demographics can happen but that it is a slow process largely because the industry is perceived as a low growth industry with low salaries and a few opportunities for career development. One respondent commented that the demographics could change over time provided that Black new entrants could be attracted to the business – however, this would be difficult in an industry with slow growth and limited employment opportunities.

3. Transformation – What does it mean?

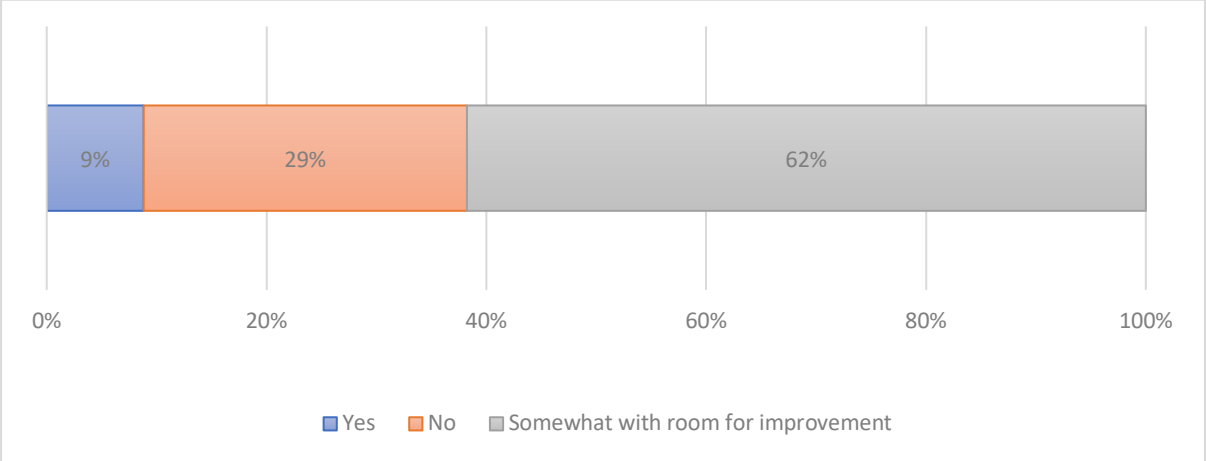
The matters discussed previously can be referred to as external or visible markers of transformation even though those indicators do not necessarily reflect the full spectrum of transformation. Consequently, one of the objectives of the survey was to try to go beneath the surface to gain a better understanding of what industry bodies perceive as transformation.

It should be noted that there are widely differing meanings that are attributed to transformation.[24] The full spectrum of those perceptions however lies beyond the scope of this document – Transformation, for our purpose, is restricted largely to an understanding of a workplace that is reflective of the country's demographics and moreover, a workplace that values inclusivity – particularly from a race and gender perspective.

3.1 How transformed is the industry?

The gateway question was therefore to ask whether respondents saw the publishing industry as transformed.

Figure 10: Transformation in the Industry



Responses	*Count*	*Percentage*
Yes	3	9%
No	10	29%
Somewhat, with room for improvement	21	62%

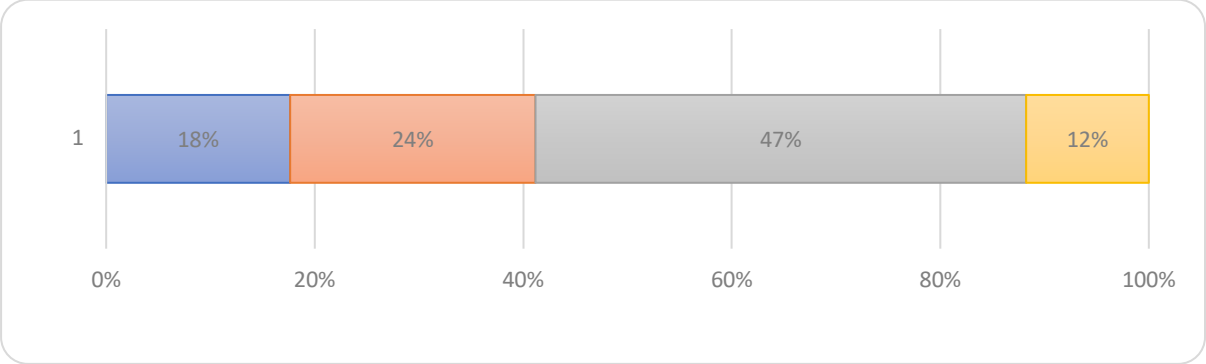
As was the case with the question concerning demographic representation, most of the respondents indicated that transformation was happening but that there remained room for improvement. 10 organisations however indicated that there was no transformation at all. Understanding the factors that impacted on transformation are critical and respondents were consequently able to expand on their responses. These will be discussed in the remainder of this document.

[24] *See Footnote 2*

3.1.1 *Authors and Transformation*

Although authors are not employees of publishing organisations, their presence or lack thereof does influence perception around transformation in the industry. Participants were therefore asked about the number of Black authors that they publish.

Figure 11: Are Black Authors sufficiently represented?



Responses	*Count*	*Percentage*
Yes	6	18%
No	8	24%
Can be improved	16	47%
Uncertain	4	12%

Most respondents (47%) felt that more could be done to improve Black Author representation. 18% felt that representation was occurring while 24% said that there was insufficient representation. It was also noted that the current pool of authors will dissipate over time and the resultant pool of Black authors will decline.[25]

As to the reasons why there is a lack of representation of Black authors, respondents indicated that prospective authors, in some instances, did not have education around the publishing process. Secondly it was felt strongly that there was no industry programme to mentor or develop Black authors. A perceived exclusion of Black authors was also mentioned.[26]

[25] *The comment was "There is a small population of established authors which with time will dissipate. Added to this is the lack of a pipeline of black authors which all contributes to the lack of transformation. Lastly the non-black authors still enjoy a high degree of privilege in the form opportunities.*

[26] *Q.32: "If you feel that Black author representation is insufficient, what do you see as the cause of that situation?" Respondents had more than 1 choice – the results therefore reflect the ranking of responses – the percentages shown in the table is indicative of the choices that are predominant.*

It should also be noted that while there is a perception of a limited Black authorship, this may well be influenced by industry reasons such as the low number of Black authors when considered against the entire publishing backlist of an organisation.[27] The lack of information gathering around author profiles is cited as another possible reason for the perception that there is a limited number of Black authors. It should also be noted that some survey participants are micro-publishers who possibly publish in a very specific field where the authorship base may be very limited.

Table 12: Black author representation

Responses	*Count*	*Percentage*
○ *There is a scarcity of Black authors*	7	30%
○ *Black authors feel excluded from publication opportunities*	10	43%
○ *There is a lack of education around the writing and publishing process that would facilitate publication*	12	52%
○ *There is no programme aimed at nurturing or supporting Black authors*	11	48%
○ *Other (Please specify)*	8	35%

3.1.2 Factors impacting transformation

Questions 38 and 40 asked respectively what the barriers to transformation were in the industry and of those factors which were the predominant ones affecting transformation. The barriers were listed as follows:

- *Limited compliance with legislation aimed at transformation*
- *Excessive red tape and compliance requirements*
- *Limited representation of Black managers and executives*
- *Limited willingness at executive level to drive transformation*
- *A lack of training and development programmes - particularly for Black people - in the industry*
- *The lack of a charter to guide businesses in achieving targets*
- *The lack of funding to support training and development programmes*
- *The lack of monitoring and evaluation that would provide input into a transformation process Limited access to tender opportunities*
- *Other (Please specify)*

[27] *The full comment was "The backlist skews the profile of authors. Taking contracted authors, approximately 25% are Black authors, but stats for the past 5 years are better (50% of new authors are Black authors). All info provided is an estimate based on a rough count; we do not keep a database of demographic information on authors because of POPI legislation. Finally, as our internal employment profile has improved, so too has our ability to source a greater variety of authors.*

The ranked responses were as follows: [28]

Table 13: Barriers to Transformation

Responses	*Overall Rank*
○ *Lack of training and development funding*	1
○ *Lack of training opportunities*	2
○ *Limited compliance of legislation*	3
○ *Lack of willingness to drive transformation*	4
○ *Excessive compliance requirements*	5
○ *Lack of access to tendering opportunities*	*6*
○ *Limited monitoring and evaluation*	*7*
○ *No charter to set transformation guidelines*	*8*

These responses go to the heart of the survey in attempting to establish the status of transformation in the industry. In developing the analysis, specific comments made by respondents are also included where appropriate.

3.1.3 Commentary on some key factors impacting transformation

a) Training and Development

It is significant that the need for training and development stands as the predominant barrier to transformation – the lack of training funding and training opportunities are seen as inimical to the development of transformation. The concern is that training is necessary to develop publishing entrants, particularly Black ones. The lack of opportunities and funding implies that progression will be slow and not conducive to a more diverse employee body.

b) Executive leadership

A key factor in any transformation programme is the extent to which it is advocated for and driven at an executive or senior management level. In expanding on the role that senior executives play in transformation there was a concern that executives need to show commitment to the principles of transformation. Furthermore, it was suggested that executives receive training and education in order to take the decisions that would foster an environment of diversity, equity and inclusion. [29]

[28] Respondents were asked to rank the responses. Percentages were allocated to the responses, and this enabled a ranking analysis.
[29] The full comment was: "Lack of managerial/executive commitment is key contributor to lack of overall transformation in the industry. Though lack of knowledge/training might be one reason. Executives need to receive DE&I training covering multiple themes to empower them to make relevant decisions

c) *Legislative requirements and tendering*

Small business development, in particular those owned by Black people, is critical to enable entry to and growth in the industry. The weight of compliance is seen as often hindering growth. Apart from the legislative requirements of government there is also the perception that government provides limited support to the industry.[30] Government is seen to be competing with publishers as opposed to forming effective partnerships with them. The system of government tendering is seen to be a significant barrier to industry growth – particularly for small businesses.

Because of the onerous requirements it is perceived that larger can deal more effectively with requirements and are able to access more opportunities. Consequently, the tendering system is seen to be skewed in favour of larger organisations and this hinders industry growth. All these factors mean that industry growth remains slow – this implies that there is little room for new entrants who could assist in transforming the industry's profile.[31] Apart from these factors, the industry also finds itself having to deal increasingly with a digital world. Having to shift towards the digital environment means increased operational costs that also ultimately impact on growth.[32]

[30] *The comment was: If the publishing sector were to receive support from government, the sector would have more resource for diversifying and developing a thriving industry. Support includes a reasonable and implemented copyright regime; deeply co-operative relationships between DBE, DHET and publishers; an absence of state publishing; adequate funding for libraries and textbook procurement…."*

[31] *"The business difficulties and lack of growth in the industry make transformation more difficult and limit opportunities to grow new small businesses and for small businesses to grow into larger, more sustainable enterprises. Lack of government support through reliable purchasing of books in schools, libraries and grants for authors all impact the challenges."*

[32] *The comment was: "Print publishing is a shrinking industry migrating to digital where enormous investment and scale is required so global competitors are going to always have the advantage"*

3.2 *A transformed industry*

The previous commentary approached the issue of transformation from the perspective of what was missing – what were those factors that are hindering transformation. Respondents were then asked to reflect on what would help transformation. These are important because they could form the foundation of a strategy for the industry. The table below reflects the possible transformation mechanisms – participants could select multiple responses (in order to arrive at a ranking) and were also able to add their own commentary.

Table 14: What would help transformation?[33]

Responses	*Count*	*Percentage*
○ *More education around transformation legislation such as BEE*	12	35%
○ *More emphasis on diversity and inclusion*	18	53%
○ *Ongoing education and training that would assist career development*	22	65%
○ *An industry qualification that would enable easier access to the industry*	9	26%
○ *Clear compliance and transformation requirements that would drive transformation*	11	32%
○ *More monitoring and evaluation of transformation progress*	14	41%
○ *More funding for bursaries and scholarships that would make publishing more attractive for new entrants*	17	50%
○ *More opportunities for small Black-owned businesses to access tenders*	19	56%

a) The role of training and development and qualifications

The theme of training and development has occurred consistently throughout the survey. role of training and development is again evident – but respondents also leaned towards the idea of industry qualifications that could attract entrants together with the proposal of bursary or scholarship funding that would also underpin a commitment to attracting new entrants. Again, these options are possible but government support as well as industry commitment would be vital.

b) Small business development and support

The survey results time and time again reflect on the difficulty that small businesses have in competing in the industry – there is a perception that industry opportunities, through tendering, are dominated by larger enterprises that have the means to effectively negotiate the tendering requirements. "State publishing" as per the comment of one respondent results in government effectively being in competition with the industry. The situation could be addressed if there were a mechanism that would enable partnerships and not opposition. Clearer requirements with the

[33] *Respondents could choose multiple responses – the responses are therefore weighted and show the extent to which one option was more predominant than others*

ability to allow smaller businesses to compete effectively could result in more entrants to the industry that will, in turn, also assist transformation.

The table below highlights the pre-eminent transformation challenges facing the industry

Table 15: Challenges in the Industry

Problem / issue	*Cause*	*Possible Remedy*
○ *Lack of tendering opportunities creates inability to grow or enter industry*	○ *Government policy and red tape creates a monopolistic environment* ○ *Emphasis on larger organisations that can effectively compete*	○ *Enable easier entry for smaller organisations.* ○ *Invest in enterprise development.* ○ *Provide development opportunities* ○ *Develop procurement policies that create partnerships*
○ *Lack of Black representation and inclusion*	○ *Career pathing limited due to lack of training and funding* ○ *Difficulty for Black new business entrants to enter the industry*	○ *Industry qualification to access the industry* ○ *Access to training and development* ○ *Use of bursaries, internships & learnerships to create opportunities and produce strong entry candidates*
○ *Lack of compliance* ○ *Executive Leadership not driving transformation*	○ *Burden of red tape* ○ *Unclear understanding of BEE requirements*	○ *Reduce red-tape* ○ *Set industry targets through a Charter* ○ *Ensure education around BEE requirements*

4. Conclusion

At the beginning of this document, it was stated that a key purpose of the survey was to gain an understanding of how respondents perceived the state of transformation in the industry and how that could inform future strategies to address any shortcomings. The responses indicated that while progress has been made, there remains room for improvement.

The responses indicated that it would be critical to any future strategy to focus on skills development and training – without these interventions, it was noted, it would be difficult to attract new entrants to the profession. From a business perspective the ability of small businesses to enter the mainstream remains a concern – the perception is that larger enterprises dominate and that opportunities for small businesses are limited. Added to this is the sense that tendering and other opportunities are burdened by red-tape and unclear compliance requirements. Responses indicated that industry clarity around requirements – possibly through educational programmes- as well as a focus on small enterprise development could result in a positive impact.

Some large organisations also see themselves as being unable to fully participate in the transformation project because of their commitments to foreign owners and executives – one respondent indicated that the statistics did not apply to their organization because of foreign control. It was therefore implied that occasionally some large business cannot easily participate in programmes such a B-BBEE.

It was said at the outset that transformation is a nuanced and multi-faceted concept – no one definition of transformation exists. Indeed, it was noted in some comments that limiting the idea of transformation to numbers undermines transformation itself.[34]

Transformation is more than numerical statistics and yet, the statistics do provide some clues. While this survey took numerical factors, such as demographic representation, into account; it also tried to go deeper to understand the more qualitative nuances around transformation. What is evident is that training and development together with an open environment that creates opportunities for small businesses will be essential for progress towards transformation.

It is hoped that this survey and its results will play a role in deepening an understanding of transformation in the industry and further to that, that it will provide a foundation for any future strategies aimed at deepening transformation in the publishing industry.

[34] The comment was: "*A thriving industry with a multiplicity of ideas and innovations is central to a democracy. A beleaguered industry, competed with by government, and lacking a partner approach with government, is antithetical to democracy, no matter what colour the industry's employees are. There is no doubt that black people should be better represented in publishing, as elsewhere in the economy - it is simply not a sufficient criterion. 'Transformation' means fundamental change, beyond skin colour.*"

Survey research, analysis, and documentation by

Anthony Hartman – Specialist Consulting & Research

Publishers' Association of South Africa
Statement of Intent regarding Transformation in the Publishing Industry

1. **Introduction**

1.1 PASA is a voluntary association whose members comprise the majority of South African publishing enterprises, local and foreign University Presses, and multinational publishing enterprises.

1.2 After consultation with its members regarding the implementation of transformation within the publishing industry and more specifically, the implementation of broad-based black economic empowerment as contemplated by the Broad-Based Black Economic Empowerment Act, 2003 (the BBBEE Act) and the Codes of Good Practice to be gazetted there under in due course (the Codes), PASA has resolved to adopt this Statement of Intent for the publishing industry, as provided for in paragraphs 2 and 3 below.

2. **PASA acknowledges that**

2.1 the majority of black South Africans (including black women) have been denied opportunities of participation in, access to, and the development and control of economic and productive resources and skills in South Africa's publishing industry, as a result of Apartheid and its racial and gender-discriminatory consequences;

2.2 these inequities must be effectively redressed for the benefit of black South Africans so that the full potential of South Africa's economy, generally, and the publishing industry, specifically, can be realized;

2.3 it must promote and support the achievement of effective participation by black South Africans in the publishing industry in the manner contemplated by the BBBEE Act and the Codes; and

2.4 the publishing industry is uniquely positioned to foster cultural diversity, authorship, creativity and a culture of reading and learning in South Africa.

3. **PASA's membership therefore endorses the objectives and principles underlying the BBBEE Act and Codes and commits itself to -**

3.1 the promotion and effective implementation of black economic empowerment in respect of each of the indicators of the Generic Scorecard and in accordance with the respective principles applicable under the Codes;

3.2 the promotion of an enabling environment conducive to transparency, fairness and consistency when considering matters relating to black economic empowerment;

3.3 fostering equity and advancing economic development and growth in the industry;

3.4 developing and supporting sustainable small enterprises in the industry; and

3.5 undertaking and co-operating in periodic industry-wide monitoring, assessment or evaluation of the publishing industry's black economic empowerment performance across all of the indicators of the Generic Scorecard.

PASA Chairperson
Lindelwe Mabandla

PASA Executive Director
Dudley Schroeder

Released by Publishers' Association of South Africa (PASA) on 12 December 2005

ANNEXURE: Survey Form

TRANSFORMATION SURVEY FOR THE PUBLISHING INDUSTRY

Purpose of the survey

This survey responds to the commitments made by PASA in its 2005 Transformation Statement to foster an environment of equity in the industry as well as to monitor and evaluate industry compliance in relation to the BEE elements set out in the BEE Codes of Good Practice.
A previous survey sought to measure the extent of compliance in relation to those elements. This survey takes the process further by inquiring into those factors that impact on transformation in the industry.
Transformation is a broad concept - for this survey it is restricted to questions of demographic representation and the factors that could impact on that issue and more generally on the creation of an inclusive and diverse industry.
Accordingly, this survey focuses on quantitative as well as qualitative information and it hopes to establish a broader picture of industry transformation through combining these elements.

PRELIMINARY INFORMATION

1. Please complete your responses and submit no later than Tuesday, 17 May
2. You can complete the survey online or print the document, complete it, and send a scanned version to Anthony Hartman at tonymindman@gmail.com
3. Please email your BEE certificate or affidavit to the email address above. If you have any questions on completing an affidavit, please mail the address above
4. Please complete the survey even though you don't have a BEE certificate or affidavit.
5. Complete all the questions in the survey and add any additional comments to your responses should you wish to do so or need to give explanations for your answers
6. The survey has 10 pages - when you reach the bottom of a page click "NEXT" to go to the following page. Don't click on any link that says "Create a Survey"
7. All information submitted remains confidential. The survey results are determined by aggregating all the information received

NOTE:
If you need more information on the BEE terms used in the survey, please check the addendum after this page.

It would be useful for you to have the following information before starting the survey:

- Your staff list with the number of managers, their race and gender
- Whether your business has recently recruited employees, their race, gender, and level of entry
- Whether your business uses freelancers and their race and gender
- Whether your business employs any persons with disabilities
- Whether your business has contracted with any authors and their race and gender
- Your annual payroll
- The amount of expenditure on training
- The number of interns/trainees you have with their race and gender
- Whether your business provided support to small business, what the support was and how much was spent on support
- Whether your business made any contributions to organisations such as NGO's that help Black people
- Whether your business was their beneficiary of support and development programmes

TERMS and DEFINITIONS used in the Survey

This page is meant to help you in understanding some of the terms used in the survey.

What is the difference between an Exempt Micro-Enterprise (EME), a Qualifying Small Enterprise (QSE) and a Generic Enterprise?
Answer: It depends on the annual turnover of the organisation -

- An EME is an organisation that had a turnover of less than R10 million in its last financial year
- A QSE is an organisation that had a turnover of between R10 million and R50 million in its last financial year
- A Generic is an organisation that had a turnover more than R50 million in its last financial year

What is a BEE level?
Answer
The BEE level is a ranking that your organisation receives. The ranking moves from Level 1 being the highest ranking to Level 8 being the lowest. The ranking is obtained after several aspects in your business are measured. The measurement results in a certain number of points that determines the level. Where a certain number of minimum points are not obtained, the organisation is deemed to be "non-Compliant"
Certain business receive an automatic BEE Level.

When does a business receive an Automatic BEE Level?
Answer:
It depends on whether your business is an EME, QSE or Generic together with the percentage of Black ownership in your business -

- An EME with a 100% Black ownership receives an Automatic Level 1
- An EME with a Black ownership percentage of between 51% and 100% receives an Automatic Level 2
- An EME with a Black ownership percentage of less than 51% receives an automatic Level 4
- A QSE with 100% Black ownership receives an Automatic Level 1
- A QSE with a Black ownership percentage of between 51% and 100% receives an Automatic Level 2
- A QSE with Black ownership less than 51% does not receive an Automatic Level
- A Generic does not receive an Automatic Level

What is the difference between a BEE Affidavit and a BEE certificate?

Answer:

A BEE Affidavit is used to prove an organisation's BEE status when the organisation receives an Automatic BEE Level. The Affidavit simply states the organisation's turnover, Black ownership percentage and the Automatic BEE level. The Affidavit can be completed by a senior person in the organisation and must be signed before a Commissioner of Oaths. Affidavits can therefore only be used by:

    - EMEs
    - QSEs with Black ownership of 51% or more
- A BEE Certificate is used when an Automatic Level does not apply. A BEE certificate is received after a full verification process where various aspects of your business are verified, and a certificate is issued. Certificates may only be issued by accredited verification agencies.

What is an accredited verification agency?
Answer:
An Accredited verification agency is one that has been accredited by the South African National Accreditation System (SANAS). Only these agencies are allowed to provide BEE certificates. For a list of accredited verification agencies see: https://www.sanas.co.za/Pages/index.aspx

Where can I obtain a BEE Affidavit?
Answer:
For copies of BEE affidavits see:

http://www.thedtic.gov.za/wp-content/uploads/BEE_Affidavit-EME-Gen.pdf
http://www.thedtic.gov.za/wp-content/uploads/BEE_Affidavit-QSE-Gen.pdf

SECTION 1: TYPE AND SIZE OF YOUR BUSINESS

* 1. *What category does your business fit into? (Select one option)*

Exempt Micro-Enterprise (EME) - with an annual turnover of less than R10 million

Qualifying Small Enterprise (QSE)- with an annual turnover of between R10 million and R50 million

Generic Enterprise - with an annual turnover above R50 million

* *2.* *What document do you have confirmed your BEE status: (Select one option)*

a) BEE Affidavit
b) BEE Certificate
c) None

* 3. *If you have a BEE certificate or affidavit what is the BEE level of your business? (Select one option)*

a) Level 1
b) Level 2
c) Level 3
d) Level 4
e) Level 5
f) Level 6
g) Level 7
h) Level 8
i) Non-compliant

* 4. *What percentage of Black ownership do you have in your business? (Select one option)*

a) 0%
b) Greater than 0% but less than 51%
c) 51% or more but less than 100%
d) 100%

5. *If you have a BEE certificate, please complete the scores below*

(Note:
- EMEs don't have to complete this question - they will have an automatic BEE level
- QSEs with a Black ownership percentage of 51% or more don't have to complete this question - they will have an automatic BEE level)

(a) Ownership

(b) Management Control

(c) Skills Development

(d) Preferential Procurement

(e) Supplier Development

(f) Enterprise Development

(h) OVERALL TOTAL

*6. *What is your annual payroll? (Select one option)*

a) Less than R1 million
b) Between R1 million and R5 million
c) Between R5 million and R10 million
d) Between R10 million and R20 million
e) R20 million and above

7. *How many employees does your business have? (If you are self-employed you count as an employee)*

*(a) Permanent employees

*(b) Contract or Freelance (employed in the last 2 years from Jan.2020 to Jan.2022)

*(c) Black employees

*(d) Black females

*(e) Black freelancers or contract

*(f) Disabled persons

*(g) Black disabled persons

*8 *Has your business recruited employees in the last 2 years (2 years means from January 2020 to January 2022) (Select one option)*

a) Yes
b) No

*9. *Please fill in the responses below (If there has been no recruitment use "0")*

*(a) Number of recruits

*(b) Number of Black recruits

*(d) Number of Black disabled recruits

10. *At which level did your recruits enter your business? (If there was no recruitment insert 0)*

(a) Executive level (refers to those who are directors or board members)

(b) Senior Management level (refers to those who have senior authority and who report to board members)

(c) Middle Management level (refers to those who generally head up departments and who report to senior managers)

(d) Junior management level (refers to those who have limited decision-making authority- such as supervisors)

(e) Entry or graduate level

* *11. Does your business have a Board of Directors or similar executive structure? (Select one option)*

a) Yes
b) No
c) Other (Please specify)

12. *If you have a Board or similar structure, please complete the information below: (If you are self-employed, you will be the executive member)*

(a) Number of Board or executive members

(b) Number of Black Board members or executives

(c) Number of Black female Board members or executives

13. How many managers do you have in your business (This excludes Board members or executives. If you don't have all of the levels indicate "0" where necessary)

*(a) Senior Managers

*(b) Middle Managers

*(c) Junior Managers

14. Please complete the information below:

(a) Number of Black senior managers

(b) Number of Black female senior managers

(c) Number of Black middle managers

(d) Number of Black female middle managers

(e) Number of Black junior managers

(f) Number of Black female junior managers

**15. Does your business submit an Employment Equity Plan? (Select one option)*

a) Yes
b) No
c) Not applicable

16. *Do you think that the industry is representative of our population demographics? (Select one option)*

a) Yes, completely
b) Not completely, but getting there
c) No, but there has been some movement
d) Not at all

17. In the publishing industry what do you see as the obstacles to achieving a more demographically representative workforce profile? (You may choose multiple responses)

a) There are no obstacles
b) Not enough training and development opportunities
c) There are no clear career paths for industry entrants
d) There is a lack of recruitment strategies that would help a more representative profile

e) There are no industry targets to create a more representative profile
f) There is no industry monitoring and evaluation of workforce profiles
g) There is not enough input at Executive level to drive a more representative profile
h) Other (Please specify)

SKILLS DEVELOPMENT

* *18. Does your business submit a Workplace Skills Plan (WSP) (Select one option)*

a) Yes
b) No
c) Does not apply to my business

19. *How much did you spend on training in your last financial year? (Training spend includes any amounts you paid to interns or trainees) (Select one option)*

a) R0
b) R10,000 or less
c) Between R10,000 and R50,000
d) Between R50,000 and R150,000
e) Between R150,000 and R300,000
f) Above R300,000

20. *What percentage of your payroll did you spend on training in your last financial year? (If there was no expenditure insert 0)*

21. What percentage of your payroll did you spend on the following groups of people?

**(a)* % of payroll spent on Black people

*(b) % of payroll spent on Black females

*(c) % spent on Black disabled people

**22. Do you have an internship or learnership programme in your business? (Select one option)*

a) Yes
b) No
c) Other (Please specify)

23. *If you do have an internship or learnership programme in your business please complete the responses below:*

(a) Number of interns or learners

(b) Number of Black interns or learners

(c) Number of Black female interns or learners

(d) Number of Black disabled interns or learners

The following questions look at the role your business plays in the development of small businesses and any social initiatives to which you contribute.

**24. Does your business have a purchasing policy focusing on purchasing from Black-owned suppliers? (Black owned refers to businesses that have Black ownership of at least 51%) (Select one option)*

a) Yes
b) No

25. Does your business participate in any programmes supporting small Black-owned businesses? ("small" refers to EMEs or QSEs that are at least 51% Black-owned) (Select 1 option)

a) Yes
b) No

26. If your business does participate in enterprise or supplier development programmes, please select the type of support that you provide (You can choose multiple responses)

a) Cash contributions
b) Early payment terms ("early" means payment within 15 days or less of being invoiced)
c) Loans
d) Mentoring or business development advice
e) Administrative support
f) Professional support services
g) Training
h) Other (Please specify)

27. Is your business a BENEFICIARY of an enterprise or supplier development programme? (Select one option)

a) Yes
b) No

28. If your business is a beneficiary of support or development programmes, what type of assistance do you receive? (You may choose more than 1 response)

a) Cash contributions
b) Loans
c) Early payment terms
d) Mentoring or business development advice
e) Administrative support
f) Professional support services
g) Training
h) Other (Please specify)

29. *Does your business provide Socio-Economic support to other organisations or persons? ("Socio-Economic support" refers to contributions such as grants, contributions or any other type of support that is typically provided to NGOs that support Black disadvantaged communities or Black persons) (Select one option)*

a) Yes
b) No

The following questions look at the role your business plays in the development of small businesses and any social initiatives to which you contribute.

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a) Yes
b) No

30. *If you do participate in socio-economic development programmes, what type of support do you provide?*

a) Cash grants or donations
b) Admin. or other support services
c) Training
d) Other (Please specify)

TRANSFORMATION MATTERS:
This section focuses on gaining an understanding of how transformation is seen in the industry.
NB: If possible, please try to get as broad an impression as possible from people in your business when answering these questions.
Please add comments should you wish to expand on your answers

Author Profiles:

31. *Are Black authors sufficiently represented in the industry? (Select one option)*

a) Yes
b) No
c) Can be improved
d) Uncertain

32. *If you feel that Black author representation is insufficient, what do you see as the cause of that situation? (You may select more than 1 response)*

a) There is a scarcity of Black authors
b) Black authors feel excluded from publication opportunities
c) There is a lack of education around the writing and publishing process that would facilitate publication
d) There is no programme aimed at nurturing or supporting Black authors
e) Other (Please specify)

33. *Please complete the following responses below:*

(a) How many contracted authors does your business have

(b) How many female contracted authors does your business have

(c) How many Black contracted authors does your business have

(d) How many Black female contracted authors does your business have

**34. Do you see the publishing industry as being transformed? (Select one option)*

a) Yes
b) No
c) Somewhat with room for improvement

35. Please add any comment or explanation if you wish to do so

36. What does transformation in the industry mean to you? (More than 1 response may be selected)

a) More representation of Black people at Director or Board level
b) More representation of Black people in management levels
c) More Black ownership of businesses
d) More emphasis on training and development of Black people
e) Greater access to tender opportunities for small Black-owned businesses
f) Other (Please specify)

37. Please add any comment or explanation around your perception of transformation should you wish to do so

38. What do you see as a barrier to transformation in the industry? (More than 1 response can be selected)

a) Limited compliance with legislation aimed at transformation
a) Excessive red tape and compliance requirements
b) Limited representation of Black managers and executives
c) Limited willingness at executive level to drive transformation
d) A lack of training and development programmes - particularly for Black people - in the industry
e) The lack of a charter to guide businesses in achieving targets
f) The lack of funding to support training and development programmes
g) The lack of monitoring and evaluation that would provide input into a transformation process
Limited access to tender opportunities
h) Other (Please specify)

39. Please add any comment or explanation around your perception of barriers should you wish to do so

40. Please indicate - on a scale 1 to 8- with 1 being the most important and 8 being the least important - the factors that you see as being barriers to transformation:

a) Limited compliance of legislation
b) Excessive compliance requirements
c) Lack of willingness to drive transformation
d) Lack of training opportunities
e) Lack of training and development funding
f) No charter to set transformation guidelines
g) Limited monitoring and evaluation
h) Lack of access to tendering opportunities

41. What would help transformation in the industry?

a) More education around transformation legislation such as BEE
b) More emphasis on diversity and inclusion
c) Ongoing education and training that would assist career development
d) An industry qualification that would enable easier access to the industry
e) Clear compliance and transformation requirements that would drive transformation
f) More monitoring and evaluation of transformation progress
g) More funding for bursaries and scholarships that would make publishing more attractive for new entrants
h) More opportunities for small Black-owned businesses to access tenders

i) Other (Please specify)

42. Please add any additional comments or explanation about how transformation can be helped

43. Please add any final comments that you think would be helpful

Thank you for your participation in this survey. The results will be analysed and published in a report.