
Appendices

Supporting documentation for the study on
Printing, Distribution, Circulation and Marketing
of the Grassroots
Press in South Africa

***This section is a storehouse
of ideas and additional
resources. Lengthier case
studies and the growing
database will be found at
www.pressroots.co.za.***

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Terms of Reference

Doc 1: Contract terms

September 2005

TERMS OF REFERENCE FOR STUDY

[A] MARKET OVERVIEW:

- [A.1] Overview of the 'community' or grassroots media market
- [A.2] Overview of current & projected advertising trends
- [A.3] Overview of strategies & trends in conglomerate 'community' media
- [A.4] Overview of existing ad procurement agencies
- [A.5] Overview of strategies & trends amongst 10 largest advertisers
- [A.6] Overview of factors inhibiting participation by grassroots media
- [A.7] Other

[B] OPPORTUNITIES:

- [B.1] GCIS co-ordination of central government advertising
- [B.2] DoC Public Service Announcement (PSA) content programmes
- [B.3] Local Government Elections 2005/6
- [B.4] Banking Charter / ITC Charter / loveLIFE literacy programmes
- [B.5] Caxton's resignation from CAPRO
- [B.6] Joint community print/radio ad sales
- [B.7] Other

[C] STAKEHOLDER VIEWS:

- [C.1] Views & 'needs assessment' from 'Big Five' ad agencies
- [C.2] Views & 'needs assessment' from GCIS, DoC & other State agencies
- [C.3] Views & 'needs assessment' from key parastatals (Telkom, et el)

- [C.4] Views & 'needs assessment' from AMASA, MCC & others
- [C.5] Views & 'needs assessment' from loveLIFE & other key civil society
- [C.6] Views & 'needs assessment' AIP, NCRF, & other grassroots bodies

[D] THE COMPETITION:

- [D.1] Assessment of CAPRO
- [D.2] Assessment of NAB
- [D.3] Assessment of ADS24
- [D.4] Assessment of INC
- [D.5] Assessment of ad procurement in community radio sector
- [D.6] Assessment of other possible competitors

[E] CHALLENGES:

- [E.1] Credible data on grassroots media sector
- [E.2] Credibility & quality of grassroots media products
- [E.3] Fragmented & fiercely contested markets
- [E.4] Technical delivery systems & coherent after-care
- [E.5] Operational overheads vs. minimal sales commission
- [E.6] Inclusive representation vs. merit-based representation

[F] RECOMMENDATIONS:

- [F.1] Overview of possible intervention strategies / mechanisms
- [F.2] Overview of possible structural / operational media reforms
- [F.3] Overview of possible strategic partners
- [F.4] Overview of possible research strategies
- [F.5] Overview of possible revenue & marketing strategies
- [F.6] Overview of possible funding models

Terms of Reference

The Consultant is commissioned to conduct research into Distribution (including sales) and Printing Costs affecting the Small Commercial and Community Print Media Sector in South Africa.

1 Objectives of the research

The aim of the research is essentially to assess what gaps/challenges there are in distribution of print publications in South Africa in order to develop strategies for the MDDA primarily and the sector to address these. It would include:

- The extent of the distribution (including sales) and printing networks/grids in South Africa and gaps if any
- Details of who is doing distribution and printing (including big companies and their ownership)
- The costs of distribution and printing
- Whether there are any alternative successful distribution and printing methods utilised by media and the impact of these
- Problems if any experienced with distribution and printing by independent media groups (over and above those of cost and distribution area) including whether or not there is unfair competition (as alleged by some publishers) in placement of publications at selling points and in numbers distributed and printed.
- Desk top research into how other countries have addressed distribution and printing difficulties
- Recommendations on solutions to the problem (both for MDDA and other structures/government)

The research would culminate in a workshop with MDDA and possibly other stakeholders to finalise a way forward.

At the roundtable in November [2005] the following will be the deliverables:

1. Rough models discussed at the September roundtable will now take the form of proforma business plans. Detail will come later but some clarity by on what different sectors of the grassroots print media are capable of undertaking.

Doc 2: Service Level Agreement

October 2005

2. A report-back on the Survey will be given with some preliminary conclusions.

3. International comparisons (related to modelling, also to survey findings) will be offered. Historically and structurally these comparisons may facilitate some quite penetrating discussion and analysis of where our grassroots media are now and where they are going.

4. The Research company are toying with the idea of building future scenarios around the models. A “model” tends to be a static thing but we think that we need to show an evolutionary path. During November the nature and direction of this evolution can be sketched for discussion. This is again related to the models and to the survey findings, contextualised in terms of international experience.

The final research report will thus provide an accurate picture of what is happening in the media sector regarding print and distribution.

2 Research Methodology

Please see information attached.

[No information attached].

Our interpretation of these two somewhat distinct documents is given in Chapter 2 on Methodology and Concepts. We drew out the common threads and focused on market development issues. The Service Level Agreement was written following the September 2005 Roundtable. The “November” Roundtable was actually held in May 2006. Both events influenced the work in hand – particularly the question of what constitutes the grassroots press. Definitional debate affects how problems and solutions are framed. See following appendices, however, for key assessments done as data was being collected on distribution and marketing.

Deliverables

Months of painstaking data collection has gone into attempting to compile the first complete list of community newspapers and magazines in the “mass media” field. The list comprises mostly “grassroots” (both AIP members and not); a few confirmed municipal and State print media; parts of the corporate community press; and a sprinkling of newspapers owned by smaller commercial chains, churches, and NGOs. It does not, however, cover all possible titles under the broader definition of the grassroots discussed in our Methodology chapter.

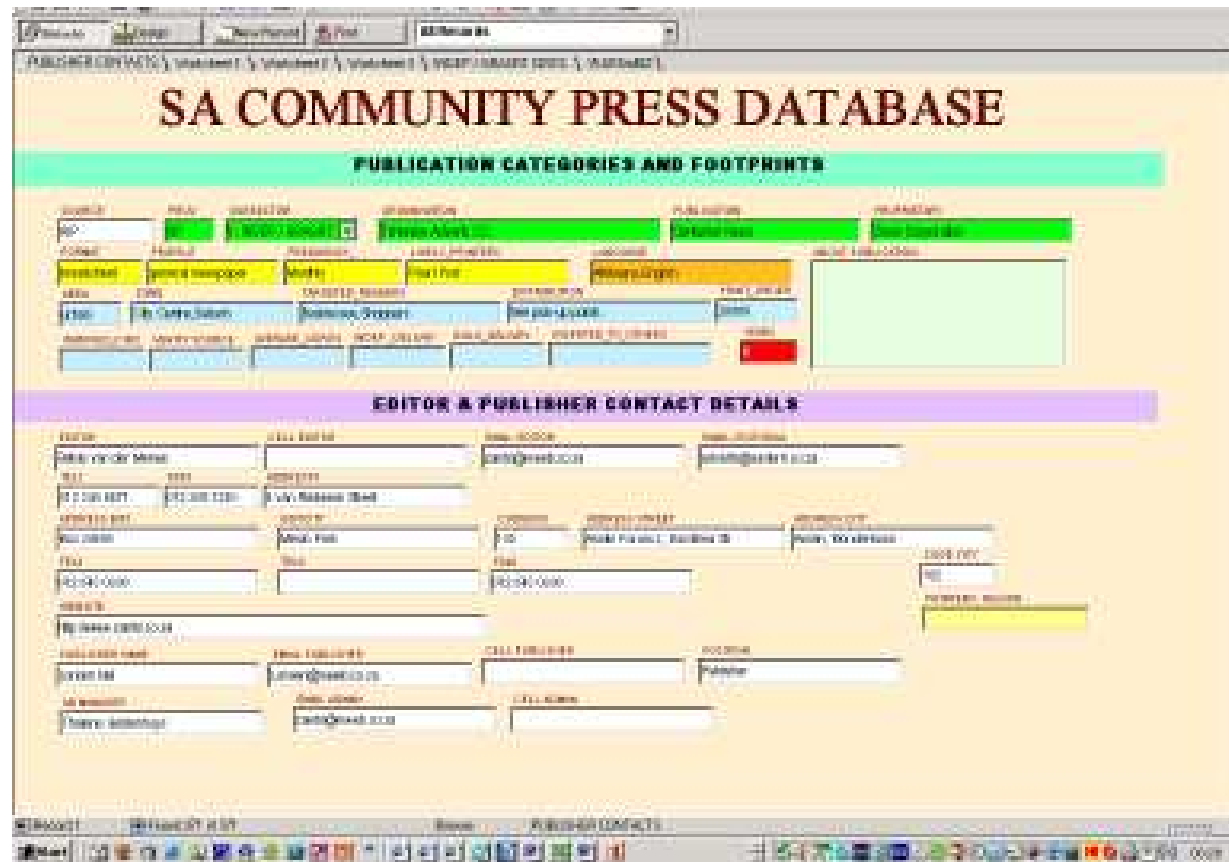
It has been a useful tool, helping us to analyse circulation data and study the regional makeup of the grassroots. But we are not satisfied with the database as it stands, for a variety of reasons. To cut a long story short, a consolidated effort needs to be made to pull together a reliable database. We are going to put the existing one online in hopes that publishers will go there to correct details and add missing names.

The list contains 371 names, which should indicate immediately that it is far from complete (there are at least 500 “mass media” titles in this country, we think. We did not manage to get comprehensive names and details from corporate media houses. The AIP provided their list, which was accurate, detailed, and up to date. But to find grassroots publications not in the AIP list we worked with a number of possibly corrupt earlier databases, finding contacts, checking where we could by phone or email, and picking

Database of community press

up freebie newspapers wherever we found them.

Database compilation and maintenance needs to become a special project of the MDDA. When we started this job there were hardly any contact lists to go on. If an appeal is made to all publishers to come forward, enter their details online (or send by fax or phone), there will be progress. Failing that, hopes of profiling the full grassroots will be frustrated.

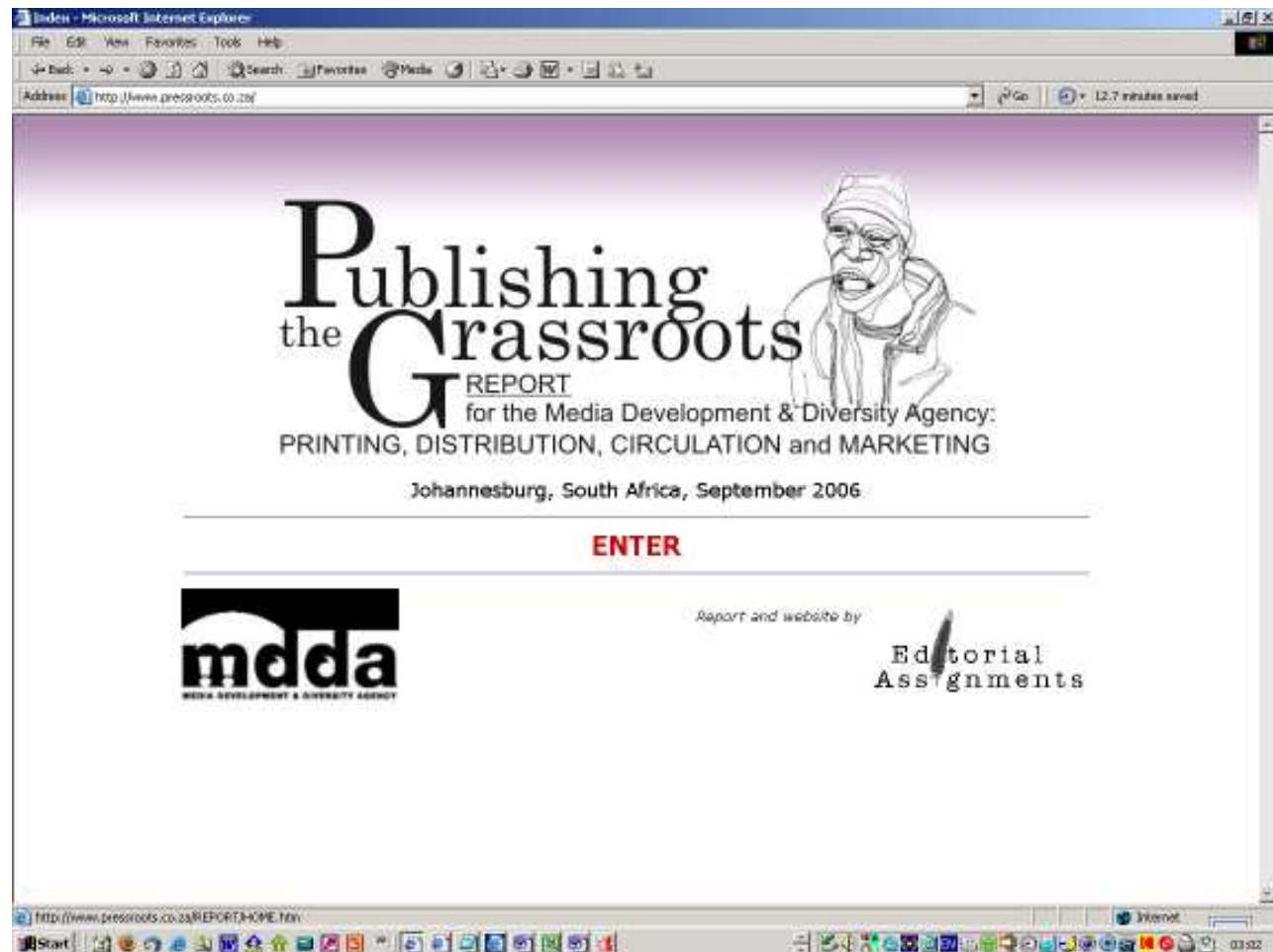


The “pressroots” website was in preparation as this Report was going to print. The intention is to allow those who contributed directly to the interviews, case studies, data collection and listing of contacts to react to the report, and in due course to make it available to the entire grassroots.

The website is expected to have a fairly short active life. It is not the beginnings of the iPop spine and shopwindow for grassroots, described in the preceding pages. It is restricted to showing what went into the research. But it adds a good deal of information for which there was no room in print:

- Write-ups on case studies;
- Resources: the database including publication contacts and further useful contacts;
- Documentation of relevance to community press here and abroad;
- Small enterprise development documentation;
- Feedback form; and
- A discussion forum linked to a blog maintained by Editorial Assignments.

Responses to the Report will be gladly received, and we hope that the website exercise will prove its worth as a means of getting the ideas and information out and starting debate on the proposals.



www.pressroots.co.za

Strategic partners

Schema for negotiating linkages

Talks with potential partners have to start somewhere. Institutional linkages have to be forged, so we put together this list to help the MDDA and the grassroots sector as a whole identify organisations and clusters that could possibly assist with market development. Fuller details and more names are in the electronic database. Where the function of the organisation is development we have classed it as such. Other groupings – such as the civics and educators – are not focused on market development or media affairs but belong in the list. Either they share common interests in community affairs, or they have media of their own that could benefit from, and contribute to, the development.

The “levels” – micro, meso, macro – are somewhat arbitrary here. Some institutions like the Banking Council could be regarded as macro (covering the whole economy); yet the Banking Council’s members are likely to have direct dealings with grassroots enterprises. The bodies largely classed micro fall into this direct interaction category, but at the same time they may deal with sector representatives (aggregation) and with other partner institutions at the macro level (synergies). Most of the marketing agencies and researchers would be serving the sector with statistics to improve its image and pulling power. Similarly, media associations are sectoral bodies. But some, like PIFSA, can create synergies across the whole spectrum of print and publishing, and PIFSA might also deal with businesses such as Sappi (in hopes of getting bulk paper discounts).

The MDDA therefore has to approach all these potential allies with several kinds of relationships in mind. The best would be to begin exploratory talks and see where they lead.

TYPE	LEVEL	ABBREV	NAME	WEBSITE
Business	MICRO	BCSA	Banking Council of South Africa	www.banking.org.za
Business	MACRO	SACOB	South African Chamber of Business	www.sacob.co.za
Business	MACRO	NAFCOC	National Federated African Chambers of Commerce	www.nafcoc.co.za (not functional)
Business	MICRO	BPL	Business Partners Ltd	www.businesspartners.co.za
Business	MACRO	SAPPI	SA Paper and Pulp Industries	www.sappi.com/sappiweb
Business	MACRO	GEDA	Gauteng Economic Development Agency	www.geda.co.za
Business	MICRO	SEDA	Small Business Development Agency	www.seda.org.za
Business	MICRO	FRAIN	Franchise advice and information network	www.frain.co.za
Business	MICRO	SEF	Small Enterprise Foundation	www.sef.co.za
Business	MACRO	BMIT	BMI-Technology	www.bmi-t.co.za
Civics	MESO	COSATU	Congress of Trade Unions of South Africa	www.cosatu.org.za
Civics	MACRO	SACC	SA Council of Churches	www.sacc.org.za
Civics	MACRO	LL	LoveLIFE	www.lovelife.org.za
Civics	MACRO	MCJ	Muslim Judicial Council	www.mjc.org.za
Civics	MACRO	SAJBD	SA Jewish Board of Deputies	www.jewish.org.za
Civics	MICRO	SN	StreetNet - Federated Association of Informal Traders	www.streetnet.org.za
Development	MACRO	IDC	Industrial Development Corporation	www.idc.co.za
Development	MESO	NiZA	Netherlands Institute of Southern Africa	www.niza.nl/media
Development	MACRO	IEC	Independent Electoral Commission	www.iec.org.za
Development	MACRO	USA	Universal Service Agency	www.doc.gov.za
Development	MACRO	DFID	Department for International Development	www.dfid.gov.uk/countries/africa/southafrica.asp
Development	MACRO	GI	Goethe Institute	www.goethe.de/johannesburg
Development	MACRO	DBSA	Development Bank of Southern Africa	www.dbsa.org
Educators	MESO	CTP	Committee of Technikon Principals	www.technikons.co.za
Educators	MESO	SAUVCA	South African Universities Vice Chancellors' Association	www.sauvca.org.za
Educators	MESO	MAPPP-Seta	Media Advertising Print, Packaging and Publishing Set	www.mapp-p-seta.co.za
Educators	MACRO	SAQA	South African Qualifications Authority	www.saqa.org.za
Educators	MESO	IAJ	Institute for the Advancement of Journalism in SA	www.iaj.ac.za

Strategic partners contact list

Educators	MACRO	NEMISA	Department of Communications educational arm www.nemisa.co.za	Media	MACRO	SANAC	South African National Aids Council www.info.gov.za/issues/hiv/sanac.htm
Marketing	MESO	AMASA	Advertising Media Association of SA www.amasa.org.za	Media	MESO	NA	Newspaper Association of SA www.printmedia.org.za (not functional)
Marketing	MESO	IMC	International Marketing Council of South Africa www.southafrica.info	Media	MESO	MPASA	Magazine Publishers Association of SA www.printmedia.org.za (not functional)
Marketing	MESO	CAPRO	Community press advertising procurement body www.capro.co.za (No functional website)	Media	MESO	MWASA	Media Workers Association of SA www.mwasa.org.za (not functional)
Marketing	MESO	AMF	Advertising Media Forum www.amf.org.za	Media	MESO	FXI	Freedom of Expression Institute of SA www.fxi.org.za
Marketing	MESO	ASASA	Advertising Standards Authority of South Africa www.asasa.org.za	Media	MESO	POM	Press Ombudsman www.pressombudsman.org.za
Marketing	MACRO	FCB	FCB South Africa www.fcb.co.za	Media	MESO	NAB	Newspaper Advertising Bureau www.nab.co.za
Marketing	MACRO	ADS24	Advertising arm of Media24 newspapers www.ads24.co.za	Media	MESO	NLD24	Media24 knock and drop distributors www.media24.com/hub.asp?category=distribut
Marketing	MACRO	OMR	Ogilvy & Mather Rightford www.ogilvy.com	Media	MACRO	ICASA	Independent Communications Authority of SA www.icasa.org.za
Marketing	MACRO	N-BBDO	Net#workBBDO www.bbdocapetown.co.za	Media	MESO	NCRF	National Community Radio Forum www.ncrf.org.za
Marketing	MACRO	JWT	J Walter Thompson www.jwt.com/	Media	MACRO	PIFSA	Printing Industries Federation of SA www.pifsa.org.za
Marketing	MACRO	TWBA-HL	TBWA Hunt Lascaris www.tbwa.co.za	Media	MICRO	SM	Spaza Media www.spazanews.co.za
Marketing	MACRO	JDR	Jupiter Drawing Room www.jupiter.co.za	Research	MESO	BMAP	The BusinessMap Foundation www.businessmap.org.za
Media	MESO	GCIS	Government Communication and Information System www.gcis.gov.za	Research	MICRO	GIBS	Gordon Institute of Business Science www.gibs.co.za
Media	MESO	SANCO	South African National Civic Organisation www.sanco.org	Research	MACRO	IDASA	Institute for a Democratic Alternative in SA www.idasa.org.za
Media	MESO	SANEF	South African National Editors Forum www.sanef.org.za	Research	MESO	SAARF	SA Advertising Research Foundation www.saarf.co.za
Media	MESO	MISA	Media Institute of Southern Africa www.misa.org	Research	MESO	ABC	Audit Bureau of Circulation www.printmedia.org.za (not functional)
Media	MICRO	BUA	BuaNews and Magazine www.gcis.gov.zadocs/publications/buanews.	Research	MACRO	80-20	Eighty-20 www.eighty20.co.za
Media	MICRO	MPCCs	MultiPurpose Community Centres www.gcis.gov.zampcc/index.html	Research	MACRO	CAN	AC Nielsen www.acnielsen.com/za/
Media	MESO	FCJ	Forum of Community Journalists www.fcj.org.za (not functional)	Research	MACRO	SAMRA	Southern African Marketing Research Association www.samra.co.za
Media	MESO	AIP	Association of Independent Publishers www.independentpublisher.org	Research	MACRO	CAN	AC Nielsen www.nielsenmedia.com/nc/portal/site/Public/
Media	MESO	WAN	World Association of Newspapers www.wan.org	Research	MACRO	MK	Markinor www.markinor.co.za/resource-press.html
Media	MESO	OSF	Open Society Foundation www.osf.org.zahome/	Research	MACRO	CASE	Community Agency for Social Enquiry www.case.org.za

Grassroots press

Census 2006, Grassroots Print Media

Airport Grand Hotel, Johannesburg 17 May 2006

What is AIP

The **Association of Independent Publishers (AIP)** is southern Africa's largest industry body of independent grassroots newspapers, news agencies, journals, magazines, & other community-based publishers.

- Functioning as a non-profit Section 21 entity, AIP is one of three constituent associations that comprise Print Media SA (PMSA) – the country's primary umbrella body for publishers.
- AIP has executive representation & full voting rights on the following regulatory/industry bodies: PMSA Executive Board, the Press Ombudsman Council, the MAPPP-Seta Print Chamber + the SGB, the Forum of Community Journalists, & NASA's Community Press Council.

AIP Strategy

AIP's guiding principles are those of 'self help' & 'nothing for mahala'.

- No one is going to fix our problems for us. We have to develop the solutions ourselves.
- Solutions must be pragmatic, cost effective + sustainable.
- Solutions must never create donor dependency or otherwise undermine the independence of publishers .

- Experience by AIP's predecessors, the CPA & IMA, have proven that collective action is the most sustainable & effective way to tackle problems that seem huge.

Who's Who?

- **GRASSROOTS:** Roughly 238 independent grassroots community-owned, small commercial, advocacy (NGO, rights-based, faith-based, etc) & other hybrid publications.
- **CONGLOMERATE:** Roughly 221 neighbourhood & regional publications operated by large corporate & conglomerate media.
- **STATE MEDIA:** An estimated 40 state-funded publications operated by national, provincial, municipal and parastatal agencies.

Grassroots Media

- **MICRO:** A5 size publications with between 10% & 40% editorial content published at least 6 times per yr.
- **MINI:** A4 size publications with average 40% editorial content published at least 6 times per yr.
- **TABLOID:** A3 size publications with between 40% & 80% editorial content published at least 6 times per yr.
- **MAGAZINES:** A4 glossy publications with minimum 40% editorial content published at least 4 times per yr.
- **ONLINE / ELECTRONIC:** Internet, email, & facsimile publications with regularly updated editorial content.

What Are They?

- An in-depth AIP scoping exercise of roughly 25% of these grassroots publishers indicates that:
 - 96% of respondent publications are tabloid-size newspapers
 - 82% of these publications serve 'local' communities
 - 80% are based in small towns or townships
 - 70% operate as commercial profit-motivated companies
 - 60% have no access to national advertising representation
 - 55% publish at least once per week
 - The 58 publications in the survey jointly publish 1,1 million copies per edition

What Are They?

- The publications are overwhelmingly small commercial entities operating as Closed Corporations (cc).
 - A large majority publish in English, on a Friday, for a general interest LSM 1 to 6 readership.
 - The publications, on average, employ 11 people: four in fulltime positions & seven in paid part-time or commission-based positions.
 - Over 90% of polled publications operate on an advertising-based revenue model.

Where Are They?

- Largely confined to the margins & fringes of the traditional media markets, in rural, township, and LSM 1 through 6 inner-city districts.
 - Many of these already parochial markets are being further fragmented by new state-funded media, & aggressively expanding conglomerate media.
 - There are also a growing number of vernacular language, advocacy & speculative contract publications.
 - Their biggest competitors are neighbourhood papers operated by [1] Caxton, [2] Media24, [3] Independent Group, & at [4] JohnCom.

Needs

- AIP's scoping exercise tried to determine grassroots publishers' six most pressing needs or challenges:
 - **ADVERTISING:** Systematic & consistent access to local, provincial & national advertising, marketing & sponsorship.
 - **FINANCIAL MANGEMENT:** Systematic & timely revenue collection, resource & payroll management, & tax compliance.
 - **TECHNICAL:** Technical production skills, cost effective equipment, & access to competitive print slots.
 - **DISTRIBUTION:** Access to distribution networks, market research, management tools, & urban markets.

Needs

- **MANAGEMENT:** Technical business management skills (esp. financial planning), as well as business development skills, actual manage-

AIP Census 2006 overview

ment tools, resources (manuals & tipsheets), & access to business networks / alliances.

- **CONTENT:** Access to cost effective, original, relevant content & images, + proper design skills, journalism manuals & guidelines, & then only access to (on-site) ongoing basic journalism training.
- 80% of respondents indicated a preference for physical resources (such as software tools, manuals & tipsheets) over traditional training due to two primary reasons: headhunting & time/resource constraints.

Urgency

- **THE BORG:** 'Community' print is the only (print) advertising sector to show dramatic yr-on-yr growth over the past 5yrs. In 2004, conglomerate community media posted a 51% increase, earning R605m – excluding revenue from inserts.
 - The old gentlemen's agreements amongst the conglomerates around territorial spheres of interest & language markets have broken down, leading to aggressive turf wars & expansion.
 - The stellar ad performance, the imperative to grow new markets & the rush to establish rural & vernacular media has sparked a feeding frenzy that includes buy-outs, new titles & aggressive headhunting.
 - The primary battlefields are: KZN (Caxton/Media24/IG), E.Cape (JohnCom/Media24).

Urgency

- **BIG BANG:** The Borg & a number of other converging factors have created a 'tipping point' for the continued sustainability of existing grassroots publishers:
 - MDDA's funding of new greenfield publications & rise of State-

funded media in already contested markets, often fatally fragmenting marginal revenue 'pie'.

- More seriously: consolidation & expansion of conglomerates, their tightening control on access to national/prov ads (+ gov centralisation), & the impending collapse of CAPRO.
- Adding to urgency: increasing importance of basket or bundled ad offerings, the increasing importance of credible market research, print/paper cost increases, & rocketing telecomm & IT licensing costs.

Self Help

- The grassroots print sector has, thanks largely to the MDDA process, finally become self aware – resulting in a number of attempts to network & organise.
 - This includes the establishment of AIP, the reinvigoration of FCJ, & the repositioning of media support NGOs away from radio (+ a linked growth in grassroots membership of bodies like MISA-SA.
 - This growing activism has resulted in grassroots-driven lobbying and research into mechanisms to improve access to advertising (AIP's GAP initiative), better networking (AIP's annual Grassroots Newspaper Summit), competitive strategies (AIP's Media Innovation Awards), better tools (AIP's NiB initiative), & proactive policy lobbying (MAPPP-Seta, etc).

AIP Goals

- **SINGLE UMBRELLA BODY** representing Sac's currently 'invisible' small print sector.
- **TECHNICAL TRAINING** in business skills + product & markets research
- **MANAGEMENT TOOLKITS** for small media, including marketing & research aids

- 'ONE STOP' CONSORTIA for advertisers, researchers, & development agencies
- SINGLE CLEARINGHOUSE for research, policy debates, & setting industry standards
- COHERENT LOBBYING & policy input on small media issues
- SOFTWARE PRODUCTS to help ID & manage trends, audiences + circulation
- ONLINE DATABASE giving access & comparative info on the small media sector

Flagship Projects

- **Grassroots Ad Procurement (GAP):** Multi-pronged approach, focusing on research, lobbying, and collective action. Not yet prescribing nature of intervention.
- **Systems & Resource Development:** Publishers need more than just skills – they need practical management tools. AIP's 'Newspaper-in-a-Box' initiative is developing proof-of-concept stringer payroll, budget planning tools, ad booking, & FTP transfer tools, + is in the process of developing a circulation management system, & basic market/audience research toolkits. Also busy publishing 1st manual (Court Reporting).
- **Census 2005 & Website:** None of this helps if we don't know who & what our target market is. AIP has therefore embarked on a comprehensive Census of grassroots publishers & will be posting results on a comprehensive data-driven website.

Innovation Awards

- AIP showcases the most successful business & revenue models from these & other initiatives in an annual awards programme that stresses creative yet pragmatic solutions to common challenges.

- [1] Award for Innovative Editorial/Content Systems
- [2] Award for Innovative Management/Business Systems
- [3] Award for Innovative Circulation/Distribution Systems
- [4] Award for Innovative Revenue Generation Initiatives
- [5] Award for Innovative Advertising/Marketing Campaigns
- [6] Award for Innovative Audience/Market Research
- Prizes are designed to help winners exploit their business ideas, ranging from scholarships, to tech training, consultants, hardware + software solutions, & JV twinning agreements.

Grassroots Summit

- But awards are not enough. AIP uses the event to stage SA's only Grassroots Newspaper Summit, bringing together over 400 publishers & editors from across the spectrum & country two days every September. The summit includes:
 - **TRAINING:** Between 12 & 14 practical workshops by focusing on advertising, business, production & editorial skills + 4 policy roundtables to develop grassroots policy positions.
 - **AGMs:** AGMs & leadership elections for AIP, FCJ, & CAPRO.
 - **RESEARCH:** The release of relevant research by academic & media support institutions.
 - **EXPO:** 20 exhibitors ranging from j-training, to media support orgs, & product & service providers.

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Grassroots Press

A report that reveals the intensive nature of discussions surrounding the goals working arrangements of an editorial collective.

Homeless Talk Workshop, July 2006

The Homeless Talk Workshop was held at Wits University, on Saturday July 30, 2005. It followed on a series of meetings that included a meeting with the Sunday Times in February; a Writers meeting on May 9; a mass meeting of Sellers on April 4 (attended by writers and several Board members) and a meeting with Board members held in June.

These meetings reached general agreement that the publication Homeless Talk had served several purposes well during its 11 years of publication, but would need to be revamped as a new publication with a different vision and purpose and certainly with black readers.

Various issues identified at the workshop were fully discussed:

1. THE PROPOSAL TO TRANSFORM HOMELESS TALK INTO A NEW PUBLICATION was seen as the need to serve the people of the modern City of Jo'burg and the hundreds of thousands of people coming into the city each day to work.

The key for the need to change was that most of the generation of homeless writers and sellers who were homeless at the start-up of the newspaper, were no longer homeless in the sense of living on the streets. But now had a sense of belonging to the city, and of being 'insiders' rather than 'outsiders' or welfare cases that depend on handouts. Most now live in informal settlements and are part of the growing informal sector.

The first policy of the project was to train writers, photographers and sub-editors to become self-supporting and to enable them to move on to other media jobs; and to provide sellers with a living by empowering them by making

them independent agents, buying and selling the newspaper at a profit. A third element, was an advocacy one, to make known the situation of the homeless, especially to the white population in the northern suburbs of the city. What has been unique about the method of publishing and distribution is that each edition is sold out before the next comes on sale. Each copy of the newspaper has a value that cannot be diminished during the month of sale, with print orders ranging from 25 000 to 35 000 each edition.

The new population of writers and sellers has become more reliant and expectant on jobs and services provided by the Jo'burg Metro, and the commercial and industrial sectors. There is a new focus on health and education services, transport, housing, sport and entertainment in the city – the stuff of the new publication. Jo'burg as a 'new city' has plans for its big populations that include the 'townships' of Soweto and Orange Farm in the South and West, Alexandra in the East and Diepsloot in the North. Besides providing services, the Metro is developing new economic plans that focus on poverty alleviation.

2. A CHANGE IN THE NEWSPAPER WOULD NEED A CHANGE OF IDENTITY, in which the newspaper as a city 'insider' newspaper sold on the basis that people want to buy it to read it, instead of a cap-in-hand welfare project, in which most of the clients are whites looking out for the interests of the sellers. To date there had been no momentum to develop a black readership and no sense of future planning of the newspaper.

It is agreed that the paper had done a wonderful job lobbying privileged people and the city leaders. But the story has changed and that there is a need to consider repositioning the paper and to alter its operations and focus. At the same time it is suggested that the name and the ethos of Homeless Talk, standing up for the homeless in the city, not be lost.

As insiders now the newspaper needs to change the perceptions and stereotypes associated with unemployment and homelessness and to lobby for the new newspaper's alternative voice.

3. It was agreed that SUCH A PUBLICATION WOULD NEED TO BE ECONOMICALLY VIABLE: That sales should cover the cost of printing; and that

A survivor newspaper

advertising should cover the costs of a premises, staff, fees for writers, running costs, management and marketing. A new impetus towards developing a proper advertising department with a team of people would be necessary.

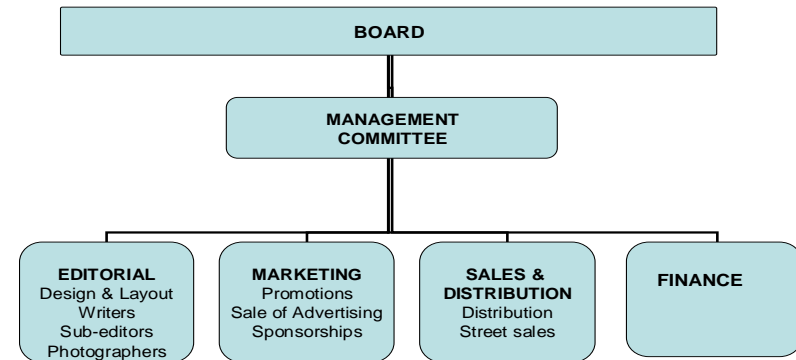
4. RECOMMENDATIONS FOR A PLAN OF ACTION.

Transformation: It was recommended that there needed to be careful consideration of the change in the identity of the newspaper so as to maintain that part of the ethos of Homeless Talk that addresses the needs of the poor and the homeless, and ensure that it not lose its current market. It was also suggested that consideration be given to the development of a totally new publication in tandem with Homeless Talk.

However, the meeting endorsed the idea of a new identity for Homeless Talk that would specifically appeal to black readers and reflect the aspirations and expectations of the whole Jo'burg population. The change should be gradual, but clear and unambiguous. It should include a change in name and in content. It should be a modern tabloid newspaper losing the welfare tag yet able to attract new partners, in particular the city's government, the Jo'burg Metro.

That there be a new focus on what role a community publication plays in the community and how best for it to represent the interests of the community. Homeless Talk has been a newspaper that is geographically bound to Gauteng, mostly to the greater Johannesburg but at times includes Pretoria and East and West Rand townships. It has also clearly been a 'community of interest' publication, that of the homeless. The future focus will be on the City of Johannesburg and its plans for its population.

Structure of the organisation: It would be important to review the structure of the organisation and to develop a proper organogram signifying the relationships between different elements of the newspaper. For example there should be a direct line from the management to the Board. The management committee could/should consist of a representative of the editorial (writing, design, editing, photography), marketing (promotions and sale of advertising), sales and distribution (the sellers), and finance.



A key aspect of the recommended need to reconsider the structure of the organisation is to ensure routine meetings are held of the different sections of the newspaper as well as the management committee.

Editorial changes: The workshop said it is important to develop media capacity in layout and design, photography, writing and sub-editing by working with MDDA and by bringing in new writers and personnel to help develop the new profile of the newspaper. These might include journalism students at Wits, the University of Johannesburg, Wits Technikon, the Institute for the Advancement of Journalism or any of the colleges teaching journalism.

The editorial team will need an editor who is also the news editor and a number of people who need to be trained to be used flexibly as writers, layout people or sub-editors and photographers.

Marketing and Sales: It was clear to the meeting that Homeless Talk needs to have a team of sales people to be trained. It was reported that the Media Development and Diversity Agency (MDDA) working with Print Media SA (PMSA) is in the process of setting up a training facility for small media. Every effort should be made to facilitate training as soon as possible.

Communication: It was emphasised that there needs to be clearer methods of communication between the Board and the Management and

between the Management committee and the Editorial, Marketing, Sales & Distribution and Finance sections of the newspaper.

One facet of the current situation that people spoke about was the lack of communication between the Board and the sections; and in particular between the editorial group and the sellers. This was true especially of the finance of the newspaper.

It was also suggested that the publication develop rapport with the Metro and the business community with a view to setting up partnerships to their mutual advantage.

Management: A number of people spoke about the lack of income generation in the editorial section; and the lack of accountability and reporting by the management of the monthly financial situation, sponsorships by outside groups and meetings of the Board. It was agreed that it was essential for the management of Homeless Talk to provide an audited statement as soon as possible and monthly statements on income and expenditure.

The Big Issue: The question of what sort of relationship was developing between the Big Issue and Homeless Talk was raised as a matter of importance as HT sellers were selling the magazine in Johannesburg and the Big Issue offices and phone were being used by HT. It was suggested that the Management Committee make a recommendation to the Board on the issue, identifying what the benefits are to HT; what the sellers feel and think about the distribution of the magazine; and whether or not HT should develop a Johannesburg edition of the magazine.

ABC figures: It was stated that prospective advertisers want ABC figures showing the monitored distribution of publications and certification of their credibility. Speakers said community media should devise their own system of accreditation that would suit them best. They were being held at ransom by the cartel of large companies that did not want to allow inroads into the advertising cake. It was noted that the MDDA and Print Media SA are looking at the issue with a view to establishing a method of certification that suits new small media operations.

5. COMMENTARY BY THE FACILITATOR

In the summing-up of the meeting: I suggested that the key to survival and development of the newspaper of the newspaper would be the way in which partnerships are developed with the Metro and with the NGO community in addition to proper commercial advertising that needs to be developed as the new identity of the newspaper develops.

And that the help of the Media Development and Diversity Agency (MDDA) be sought for the training of sales staff in particular as well as mentoring and training of production staff in the transformation of the newspaper. That support be sought to develop a proper business plan, as well as a readership research for the new publication. Subsequent to the meeting I recommend the following steps be taken:

1. That an annual general meeting be held in November at which the recommendations of the workshop be ratified and taken forward with a plan of action.
2. That as a prelude to that AGM, the Board meets and calls on each section of the newspaper prepare reports for the meeting on the state of each and its training needs.
3. That the Management ensure that an audited statement of the finances of Homeless Talk be tabled at the AGM, as well as a format and commitment to report monthly on income and expenditure.
4. That the Board mandate the management committee and chairperson of the Board to meet the Mayor and/or representatives of the Jo'burg Metro in advance of the AGM to come forward with a partnership plan.

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AIP launches Newspaper-in-a-Box (NiB) Initiative

Sep 28, 2006

AIP has launched an initiative to develop essential software tools and 'how to' manuals for grassroots publishers.

The Newspaper-in-a-Box (NiB) initiative is designed as a three-year flagship AIP project funded by the Netherlands Institute of Southern Africa (NiZA) and managed by veteran media consultant Raymond Joseph.

NiB will attempt to improve the competitiveness of community-based media by replicating the kinds of sophisticated proprietary software and management systems used by 'big media' publishers.

Once AIP has developed Free Open Source Software (FOSS) versions of the tools, it will supply them to grassroots publishers free of charge. The software and other tools will be accompanied by a series of 'how to' manuals teaching publishers the tricks of the trade.

Joseph has already begun surveying existing software and business tools, and is currently evaluating the most pressing needs amongst smaller publishers. He is also drawing on the systems showcased in AIP's 2005 Innovative Media Awards, and has begun shortlisting possible FOSS tools for development.

The automated advertising booking and billing system developed by Limpopo's Zoutnet group of rural newspapers is one of the short listed tools being considered for possible development. The system will manage the entire advertising booking processes, from calculating quotes for ad reps, through to booking adverts onto specific pages, and then issuing tax compliant invoices.

Other tools currently under evaluation include an FTP facility to

help grassroots publishers safely transmit large advertising files and other content over the internet, as well as an automated payroll system especially developed for managing advertising reps and freelance journalists who earn commission-based salaries.

Rhodes University's automated editorial production system, NIKA, is also being evaluated along with a European distribution management and billing system that could take much of the headache out of tracking newspaper sales and invoicing vendors.

Programmes selected for inclusion in NiB must be able to help small publishers cut costs and streamline their operations while also improving the accuracy and professionalism of their 'back office' systems. The improvements will, AIP hopes, help small publishers stave off growing competition from 'big media' competitors who often used expensive proprietary management tools to beat poorer publications.

NiZA is funding the first phase of the project, and hopes that many of the solutions will be applicable to publishers not just in South Africa, but also elsewhere in the region.

** AIP's project manager on NiB, Raymond Joseph, is an award-winning journalist, media consultant, and trainer who has worked throughout southern Africa. Specialising in grassroots journalism and start-ups of small publications, he has most recently helped restructure the newsdesk at the Cape Argus, and previously helped set up editorial systems at the trail-blazing Daily Voice tabloid in Cape Town. He has also edited his own community-based newspaper, in the Eastern Cape, currently serves on the board of Big Issue magazine, and serves on the boards of various industry bodies.*

<http://www.independentpublisher.org/article.php?ssID=15&aID=58>

Corporate press

Resistance Is Futile By Raymond Joseph

Amongst the villains who featured in the legendary *Star Trek* series were the Borg, a nation bent on total domination and subjugation. All-conquering races of aliens, the Borg's conquests were always prefaced by the ultimatum: "Resistance is futile. You will be assimilated." And opponents who refused assimilation were annihilated, regardless of cost.

In South Africa today, the terrestrial Borg of the publishing world are the big publishing conglomerates - Caxton, Johncom, Media24 and Independent Newspapers - who are going head to head in the rush to buy up existing community and grassroots titles, carve out new markets, and start new titles.

The shake-up has also seen a realignment of advertising sales houses serving the sector, and an apparent breakdown in the long standing "gentlemen's agreements" between the conglomerates around territorial spheres of interest.

As part of the realignment, and compounding the Borg effect, Caxton has withdrawn all its titles from the only specialist advertising sales house focusing on the community print sector, CAPRO - which turned over almost R75-million last year.

Caxton's titles are now represented in-house, at the National Advertising Bureau (NAB), and are being bolstered by a string of new start-up titles that often directly mirror CAPRO's remaining clients.

A preliminary scoping report by the Association of Independent Publishers (AIP), as part of a wider Media Diversity and Development Agency (MDDA) funded census of the sector, notes Caxton's expansionist plans in KZN, with the buyout of the Rising Sun Group (six titles) and the *North Coast Courier*.

Caxton's move into KZN appears to have prompted Media24 (through its local Witness Group) to purchase the *South Coast Fever* and Herald Group of newspapers. "This in turn appears to have sparked an unusual alliance between Caxton and the Independent group to jointly launch a new freesheet in Pietermaritzburg in direct opposition to Media24's local neighbourhood titles," the

report says. And just to make it even more interesting, Caxton also launched the first of 20 new *Get It* community magazines in KZN's Newcastle district.

The KZN turf war is mirrored in the Eastern Cape, where Johncom and Media24 are facing each down after the latter's incursion into the Bisho and Mthatha (previously Umata) areas. Johncom has responded by going on an aggressive buying spree, snapping up 10 of the province's oldest, most credible or most vibrant grassroots titles, including the *Wild Coast Herald*, based in Port St Johns, the *Talk of the Town*, based in Port Alfred and, most recently, the *Grahamstown Shoppa*.

They have also launched the *East Cape Agriculture Review*, with plans to open a similar title in the Western Cape, traditionally - in the English market - an Independent Newspapers stronghold.

There are many theories why this is suddenly happening, but the answer appears simply to lie in the exponential growth in revenues earned by the conglomerate media's so-called "community" newspapers.

They earned a whopping R605-million from advertising in 2004, up 51 percent from 2003 earnings.

And this figure is, in all likelihood, far higher as both AdEx and MIW classify neighbourhood and small town newspapers owned by the conglomerate media houses as "community" press. They do not measure ad spend in the majority of independent grassroots newspapers that operate in townships and rural regions.

Earlier this year, media research company AC Nielsen reported that the sector's performance outstripped the mainstream print media over the past five years, posting an impressive 112 percent increase in ad spend.

This realisation that there is mega money to be made in the sector - as well as a fear of being left behind by the boom - has set off a veritable feeding frenzy by the big players.

But now warnings are being sounded, amidst growing fears that the vibrant, diverse and divergent voices of small, independent publishers and grassroots titles will be homogenised or lost, as they lose the fight to survive. There are also real fears that the big players will move the production of their acquisitions in-house - and out of the communities they serve - to save costs.

The 'Borg' factor

Owning multiple titles in different communities will also mean that they can offer advertising packages across a range of titles that offer a wide reach, as well as generally capitalise on the other economies of scale, like reduced print and material buying costs.

There is increasing talk of a tipping point, a point of no return, being reached where the Borg will dominate and small independent voices will be stifled, not by harassment and legislation as was the case in another, now distant South Africa, but by the greed of big business.

Says Professor Anton Harber, Caxton chair of journalism at Wits University: "In the US and UK, the phase in which the local press was subsumed into national groups was a tipping point for media concentration and loss of diversity and local-ness. The danger is that there is likely to be increased homogenisation (as resources and editorial copy are shared across different papers) and less involvement in local issues and concerns, because these groups are usually run from a distant centre by people with little feeling for small communities."

At the same time, there is also some anger at the perceived cynicism of the big media houses who, along with government, donate millions of rands each year to the MDDA to help fund the growth and diversity of small independent media in South Africa.

"There is a perception at grassroots level that the conglomerates are cherry-picking the most viable independent publishers, at the same time that MDDA grants for brand new titles are fragmenting already marginal or fiercely traded rural media markets," says AIP president, Justin Arenstein. "The independent publishers are caught in between, and are often left with little choice except to sell out."

This is strenuously denied by Libby Lloyd, CEO of the MDDA, who says: "... the MDDA has supported new initiatives to do feasibility studies and business planning in areas where there are other titles, however only in such instances where such publications are wanting to appeal to currently neglected audiences (for example publications that are wanting to appeal to rural or township audiences and produce papers in languages other than English or Afrikaans)."

As for the sudden interest by the big players in "community" media,

Lloyd says: "The existing major media players which run local knock-and-drops are benefiting from this - rather than independently run papers. The growth in the involvement of major media houses in the sector appears to be as a result of national advertisers wanting to advertise local branches in local newspapers."

The only way to overcome this, says Lloyd, is for independents to organise and ensure advertisers are aware of their existence, as well as to market themselves, provide clear readership profiles of their papers and ensure that it is easy to place adverts with them. "No advertiser is going to contact hundreds of papers individually," she says.

Andrew Gill, Johncom's head of business development, says he is aware of the danger of titles losing their individuality and plans are in place to stop this happening.

"A central hub removes diversity of voice and the relevance of local community news. The real key to successful, sustainable newspapers is a diverse set of products and quirky and unique news."

His group strategy, he says, is to "take risks" and produce products that are relevant and have a long term sustainable outcome. But the real clue to why Johncom - and others - are taking such an interest in this sector is in Gill's comment that "national advertisers have a demand for reach. If you do not have the scale in terms of five to seven products, you will never go beyond the community you are serving."

In another time and another life as editor and as part owner of a feisty community newspaper in Jeffreys Bay, territory that SAAN (now Johncom) considered their own, I saw first hand how the Borg operates.

We found ourselves in a position where the (SAAN-owned) opposition was giving away advertising at prices that were crazy and unsustainable and would have destroyed us if we tried to match them.

Business became very tough and I moved on as our paper became less and less profitable, although my erstwhile partner held out for some time. But eventually he sold out to TML. Resistance was futile.

http://www.themedia.co.za/article.aspx?articleid=261412&area=/media_insightfeatures/

State media

Govt mag to reach remote areas

The government had launched a new bimonthly magazine, Vuk'uzenzele, to provide information on opportunities and services to South Africans with limited access to mainstream media.

Vuk'uzenzele, which translates loosely as "get up and do it for yourself", comes after three years of government discussions on the need to improve communication with South Africans, to highlight progress and problems and create awareness of existing socioeconomic opportunities and services.

The various editions of Vuk'uzenzele will be published in all official languages, as well as in Braille and online, and will be distributed free of charge in all nine provinces, reaching some of the country's deepest rural areas.

To support the magazine, the government's Batho Pele Getaway call centre (1020) is ready to help readers follow up on information they get from the magazine.

Minister in the Presidency Essop Pahad said at the launch at the end of September that Vuk'uzenzele was not government propaganda, but a tool to disseminate information to people who could not afford newspapers.

"The magazine will enable people in the rural communities to access information about what government can do for them," he said.

Pahad said he initially opposed the initiative - first suggested by Government Communication and Information System (GCIS) chief Joel Netshitenzhe three years ago - as he was "not sure a magazine that would be regarded as government propaganda would fly."

Pahad's second concern at the time was the cost. "Treasury officials

Tool for Rural Communications

scrutinised it closely, and the minister of finance agreed to make the budget available," he said. While Vuk'uzenzele is to carry advertising, GCIS will fully fund the publication, to the tune of around R20-million for the 2005/06 financial year.

At 32 pages, the first issue has articles highlighting progress made in providing clean water, the more than 220 000 jobs created by the Expanded Public Works Programme, and the relative success of poverty alleviation community projects. It also has advice on accessing small business finance, budgeting household income, and baby care.

Of great importance, Pahad said, is that the magazine would also allow for interaction with readers.

"People must be able to have their voices heard - to engage us on their difficulties in accessing information and services, and we will respond," he said.

Vuk'uzenzele editor Rafiq Rohan, the former editor of the Independent on Saturday, also tackled notions that the magazine was government propaganda funded by taxpayers.

"There are people who need information that will change their lives, but are deprived of it because of distribution challenges in the mainstream media," he said.

"If the perception out there is that the magazine is meant to forward government propaganda at the taxpayer's cost, I want to dispel that. This magazine appears at a time when the demand for government services is at a peak."

The core function of the 32-page magazine is to meet people's need for information on socioeconomic opportunities - especially those who do not have access to such information. - *SouthAfrica.info reporter*

http://www.southafrica.info/public_services/citizens/services_gov/vukuzenzele-300905.htm

Municipal potential

A LIST THAT MAKES A POINT ABOUT SCALE & RESOURCES

This list of 284 municipal authorities shows the potential of the State media sector at local level to reach huge constituencies in far-flung areas, should they choose to enter the publishing field. So far, not many have publications that could be described as community print media, but the number is growing. Attempts to ascertain exactly how many municipalities have, or plan to have, newspapers, received responses from only a handful (12 of 283) who all said they had projects in hand. The contact details for the municipalities are in the database of our study.

Aganang Local Municipality	Koloti
Breede River/Winelands Local Municipality	Ashton
Cederberg Local Municipality	Clanwilliam
Modimolle Local Municipality	Modimolle
Ventersdorp Local Municipality	Ventersdorp
Waterberg District Municipality	Modimolle
Witzenberg Local Municipality	Ceres
Amahlati Local Municipality	Stutterheim
Sedibeng District Municipality	Vereeniging
Breede Valley Local Municipality	Worcester
Gert Sibande District Municipality	Secunda
Plettenberg Bay Local Municipality	Plettenberg Bay
Northern Free State District Municipality	Sasolburg
Bergrivier Local Municipality	Piketberg
Umsobomvu Local Municipality	Colesberg
Motheo District Municipality	Bloemfontein
Khai-Ma Local Municipality	Pofadder
Garden Route/Klein Karoo District Municipality	George
Bophirima District Municipality	Vryburg
Kwadukuza Local Municipality	Ballito
Cape Agulhas Local Municipality	Bredasdorp

Mbombela Local Municipality	Nelspruit	Matzikama Local Municipality	Vredendal
Xhariep District Municipality	Trompsburg	Masilonyana Local Municipality	Theunissen
Umkhanyakude District Municipality	Mkuze	Umuziwabantu Local Municipality	Harding
Inkwanca Local Municipality	MOLTENO	Siyanda District Municipality	Upington
Beaufort West Local Municipality	Beaufort West	Imbabazane Local Municipality	Escourt
Theewaterskloof Local Municipality	Caledon	Dihlabeng Local Municipality	Bethlehem
Albert Luthuli Local Municipality	Carolina	The Big Five False Bay Local Municipality	Hluhluwe
Endumeni Local Municipality	Dundee	Kannaland Local Municipality	Ladismith
Inxuba Yethemba Local Municipality	Cradock	Ingwe Local Municipality	Creighton
Central District Municipality	Mafikeng	Thaba Chweu Local Municipality	Lydenburg
Kouga Local Municipality	Jeffrey 's Bay	Mogale City Local Municipality	Krugersdorp
Mangaung Local Municipality	Bloemfontein	Ubuhlebezwe Local Municipality	Ixopo
Endondakusuka Local Municipality	Mandini	Nquthu Local Municipality	Nquthu
Msunduzi Local Municipality	Pietermaritzburg	Overstrand Local Municipality	Hermanus
Mtubatuba Local Municipality	Mtubatuba	Stellenbosch Local Municipality	Stellenbosch
Ulundi Local Municipality	Ulundi	Kagisano Local Municipality	Ganyesa
Naledi Local Municipality	Vryburg	Kgalagadi District Municipality	Kuruman
Mafikeng Local Municipality	Mmabatho	Kamiesberg Local Municipality	Garies
Midvaal Local Municipality	Meyerton	Kou-Kamma Local Municipality	Kareedouw
Setsoto Local Municipality	Ficksburg	Karoo Hoogland Local Municipality	Sutherland
Newcastle Local Municipality	Newcastle	Gamagara Local Municipality	Kathu
Middelburg Local Municipality	Middelburg	Rustenburg Local Municipality	Rustenburg
Lekwa-Teemane Local Municipality	Christiana	Tambo District Municipality	Umtata
Mossel Bay Local Municipality	Mossel Bay	Khara Hais Local Municipality	Upington
Kgatelopele Local Municipality	Danielskuil	Ugu District Municipality	Port Shepstone
Central Karoo District Municipality	Beaufort West	Kheis Local Municipality	Groblershoop
Emnambithi-Ladysmith Local Municipality	Ladysmith	Klerksdorp Local Municipality	Klerksdorp
Tswaing Local Municipality	Delareyville	Knysna Local Municipality	Knysna
Siyancuma Local Municipality	Douglas	Kgetleng Rivier Local Municipality	Koster
Saldanha Bay Local Municipality	Vredenburg	Moqhaka Local Municipality	Kroonstad
Edumbe Local Municipality	Paulpietersburg	Ga-Segonyana Local Municipality	Kuruman
Dikgatlong Local Municipality	Barkley West	Kwa Sani Local Municipality	Himeville
Lephalale Local Municipality	Lephalale	Laingsburg Local Municipality	Laingsburg
Kungwini Local Municipality	Bronkhorstspuit	Langeberg Local Municipality	Riversdal
Drakenstein Local Municipality	Paarl	Mooi Mpofana Local Municipality	Mooi River
Emalahleni Local Municipality	Lady Frere	Emfuleni Local Municipality	Vanderbijlpark
Engcobo Local Municipality	Engcobo	Ehlanzeni District Municipality	Nelspruit
Mskualigwa Local Municipality	Ermelo	Phumelela Local Municipality	Vrede
Zeerust Local Municipality	Zeerust	Letsement Local Municipality	Koffiefontein
Fetakgomo Local Municipality	Apel	Senqu Local Municipality	Lady Grey
Mafube Local Municipality	Frankfurt	Tswelopele Local Municipality	Bulfontein
Frances Baard District Municipality	Kimberley	Ntambanana Local Municipality	Richards Bay
Amatole District Municipality	East London	Lekwa Local Municipality	Standerton
Gariep Local Municipality	Burgersdorp	Madibeng Local Municipality	Brits
Govan Mbeki Local Municipality	Secunda	Dannhauser Local Municipality	Dannhauser
Greater Groblersdal Local Municipality	Groblersdal	Nkangala District Municipality	Middelburg
Makana Local Municipality	Grahamstown	Nkomazi Local Municipality	Malelane
Ndlambe Local Municipality	Port Alfred	Maletswai Local Municipality	Aliwal North
Great Kei Local Municipality	Komga	Capricorn District Municipality	Polokwane
Nelson Mandela Metropolitan Municipality	Port Elizabeth	Matatiele Local Municipality	Matatiele
Umgungundlovu District Municipality	Pietermaritzburg	Mogalakwena Local Municipality	Mokopane
Hantam Local Municipality	Calvinia	Mantsopa Local Municipality	Ladybrand
Lesedi Local Municipality	Heidelberg	Ekurhuleni Metropolitan Municipality	Germiston

Moshaweng Local Municipality	Mithibistad	Greater Taung Local Municipality	Reivilo	Nkonkobe Local Municipality	Fort Beaufort
Greater Letaba Local Municipality	Duiwelskloof	City of Tshwane Metropolitan Municipality	Pretoria	Intsika Yethu Local Municipality	Cofimvaba
Umvoti Local Municipality	Greytown	City of Johannesburg Metropolitan Municipality	Johannesburg	Ukwahlamba District Municipality	Barkley East
Umngeni Local Municipality	Howick	Greater Tzaneen Local Municipality	Tzaneen	King Sabata Dalindyebo Local Municipality	Umtata
Mthonjaneni Local Municipality	Melmoth	Zululand District Municipality	Ulundi	Umzimkulu Local Municipality	Umzimkulu
Ethekwini Metropolitan Municipality	Durban	Richmond Local Municipality	Richmond	Western District Municipality	
Metsweding District Municipality	Bronkhorstspuit	Hibiscus Coast Local Municipality	Port Shepstone	Baviaans Local Municipality	Willowmore
Greater Marble Hall Local Municipality	Marblehall	Uthungulu District Municipality	Richards Bay	Mmquma Local Municipality	Butterworth
Randfontein Local Municipality	Randfontein	Southern District Municipality	Klerksdorp	Ngqushwa Local Municipality	Peddie
Mier Local Municipality	Mier	Seme Local Municipality	Volksrust	Nxumba Local Municipality	Adelaide
Mookgophong Local Municipality	Naboomspruit	Highlands Local Municipality	Belfast	Sakhisizwe Local Municipality	Elliot
Mkhambathini Local Municipality	Camperdown	Blue Crane Route Local Municipality	Somerset East	Ntabankulu Local Municipality	Tabankulu
Boland District Municipality	Worcester	Nama Khoi Local Municipality	Springbok	Mhlontlo Local Municipality	Qurban
Boland District Municipality		Sunday's River Valley Local Municipality	Kirkwood	Alfred Nzo District Municipality	Mount Ayliff
Sisonke District Municipality	Ixopo	Chris Hanu District Municipality	Queenstown	Umzimvubu Local Municipality	Mount Ayliff
Izingolweni Local Municipality	Ezingolweni	Swellendam Local Municipality	Private Bag X11,	Kopanong Local Municipality	Trompsburg
Mohokare Local Municipality	Zastron	Swellendam		Metsimaholo Local Municipality	Sasolburg
Lejweleputswa District Municipality	Welkom	Qaukeni Local Municipality	Flagsstaff	Nokeng Tsa Taemane Local Municipality	Rayton
Moretele Local Municipality	Temba	Thembisile Local Municipality	eMpumalanga	Merafong City Local Municipality	Carletonville
Dr JS Moroka Local Municipality	Siyabuswa	Thembelihle Local Municipality	Hopetown	Nkandla Local Municipality	Richards Bay
Moses Kotane Local Municipality	Madikwe	Potchefstroom Local Municipality	Potchefstroom	King Shaka District Municipality	Durban
Vulamehlo Local Municipality	Scottburgh	Tokologo Local Municipality	Boshof	Umtshezi Local Municipality	Escourt
Musina Local Municipality	Musina	Abaqulusi Local Municipality	Vryheid	Ndwedwe Local Municipality	Ndwedwe
Mbonambi Local Municipality	Richards Bay	Camdeboo Local Municipality	Graaff-Reinet	Bohlabela District Municipality	Thulamahashe
Makhado Local Municipality	Louis Trichardt	Ubuntu Local Municipality	Victoria West	Bushbuckridge Local Municipality	Mkhuhlu
Greater Kokstad Local Municipality	Kokstad	Elundini Local Municipality	Maclear	Greater Giyani Local Municipality	Giyani
Mbizana Local Municipality	Bizana	Umdoni Local Municipality	Scottburgh	Vhembe District Municipality	Thohoyandou
Kai Garib Local Municipality	Kakamas	Umjindi Local Municipality	Barberton	Mutale Local Municipality	Mutale
Ngwathe Local Municipality	Parys	Umzumbe Local Municipality	Port Shepstone	Blouberg Local Municipality	Bochum
Nala Local Municipality	Bothaville	St Johns Local Municipality	Port St Johns	Molemole Local Municipality	Dendron
Naledi Local Municipality	Dewetsdorp	Uthukela District Municipality	Ladysmith	Lepelle-Nkumpi Local Municipality	Chuenespoort
Namakwa District Municipality	Springbok	Indaka Local Municipality	Ladysmith	Thabazimbi Local Municipality	Thabazimbi
Umlalazi Local Municipality	Eshowe	Utrecht Local Municipality	Utrecht	Bela-Bela Local Municipality	Bela-Bela
Jozini Local Municipality	Richards Bay	Hlabisa/Impala Local Municipality	Mtubatuba	Sekhukhune District Municipality	Groblersdal
Nongoma Local Municipality	Nongoma	Swartland Local Municipality	Malmesbury	Maruleng Local Municipality	Hoedspruit
Nyandeni Local Municipality	Libode	Thabo Mofutsanyane District Municipality	Witsieshoek	Mopani District Municipality	Giyani
Prince Albert Local Municipality	Prince Albert	Maphumulo Local Municipality	Maphumulo	Thulamela Local Municipality	Thohoyandou
Ba-Phalaborwa Local Municipality	Phalaborwa	Amajuba District Municipality	Newcastle	Makhudutamaga Local Municipality	Jane Furse
Polokwane Local Municipality	Polokwane	City of Cape Town Metropolitan Municipality	Cape Town	Greater Tubatse Local Municipality	Burgersfort
Maluti-a-Phofung Local Municipality	Witsieshoek	Magareng Local Municipality	Warrenton	Delmas Local Municipality	Delmas
Uphongolo Local Municipality	Pongola	Umshwati Local Municipality	Wartburg	Dipaleseng Local Municipality	Balfour
Richtersveld Local Municipality	Port Nolloth	Overberg District Municipality	Bredasdorp	Phokwane Local Municipality	Hartswater
George Local Municipality	George	Matjhabeng Local Municipality	Welkom	Karoo District Municipality	De Aar
Oudtshoorn Local Municipality	Oudtshoorn	West Coast District Municipality	Morreesburg	Kareeberg Local Municipality	Camarvon
Mkhondo Local Municipality	Piet Retief	Westonaria Local Municipality	Westonaria	Tsantsabane Local Municipality	Postmasburg
Siyathemba Local Municipality	Prieska	West Rand District Municipality	Randfontein	Sol Plaatjie Local Municipality	Kimberley
Lukanji Local Municipality	Queenstown	Emalaheni Local Municipality	Witbank	Enthanjeni Local Municipality	De Aar
Bojanala Platinum District Municipality	Rustenburg	Okhahlamba Local Municipality	Bergville	Renosterberg Local Municipality	Petrusville
Umzinyathi District Municipality	Dundee	Impendle Local Municipality	Impendle	Setla-Kgobi Local Municipality	Stella
Msinga Local Municipality	Tugela Ferry	Maquassi Hills Local Municipality	Wolmaransstad	Schweizer-Reneke Local Municipality	Schweizer-Reneke
Umhlabuyalingana Local Municipality	Mbazwana	Ikwezi Local Municipality	Jansenville	Molopo Local Municipality	Vryburg
Umlhathuze Local Municipality	Richards Bay	Richards Bay	Idutywa	Lichtenburg Local Municipality	Lichtenburg
Nketoana Local Municipality	Reitz	Buffalo City Local Municipality	East London		

Printing

PIFSA empowerment participants

COMPANY	NAME	REGION			
			APT Print & Paper Solutions CC	Mr Gavin Webster	Central
Aries Carton & Screenprint Pty Ltd	Mr Kai Neckel	Cape	Associated Industries Pty Ltd	Mr Yani Joannides	Central
Bates Screen Printing & Litho Pty Ltd	Mr Michael Shiel	Cape	Beswick Machinery Pty Ltd	Mr Gavin Beswick	Central
Clarion Printed Products Pty Ltd	Mr Steve Loughton	Cape	Bindpro Pty Ltd	Mr Theuns Botha	Central
Die Nooitgedacht Pers CC	Mrs Margo Ronne	Cape	Camera Press	Mr Kevin Hellyer	Central
Duikerprint Pty Ltd	Mr VSD Ludwig	Cape	Classic Paper Supplies Pty Ltd	Mr Craig Cloete	Central
Formeset Printers Cape Pty Ltd	Mr SO Razzak	Cape	Clyde Printers CC	Mr Charles Skinner	Central
Graphicraft Pty Ltd	Mr Klaus W Borgelt	Cape	Die Cut Pty Ltd	Mr David Clarke	Central
Hostmann-Steinberg SA Pty Ltd	Ms Razania Asaro	Cape	Gartone Press Jhb CC	Mr Garth N Harrup	Central
Logo Print	Mr Frank Giese	Cape	Goldfields Press Pty Ltd	Mr Mike Bath	Central
Paarl Gravure	Mr Bob Constandse	Cape	Hameric CC	Mr JD Head	Central
Pegasus Litho Pty Ltd	Mr John R Thornton	Cape	JA Kairuz Litho Printers CC	Mr Joseph Arthur Kairuz	Central
Premium Ideas Pty Ltd	Ms Maria Brodrick	Cape	Kanitone Repro CC	Mr Anthony Jarvis	Central
RC Engravers	Mr Antron Hendricks	Cape	Lithotech Pty Ltd	Mr N Birch	Central
Syrelines Process Pty Ltd	Mr Derek Murison	Cape	Long Run Label CC	Mr Lee J Barnard/Mr Terry A	Central
The Paper Shop CC	Mr Tony Wilson	Cape	L'orac Tims Printing	Mr Marius TR Smith	Central
USS Graphics International Pty Ltd	Mr D O'Connell	Cape	M Lass Pty Ltd	Mr William Arthur Storbeck	Central
Van Riebeeck Press Pty Ltd	Mr Walter Retter	Cape	Magicprint Pty Ltd	Mr Joao Figueira	Central
A & R Printchem Co. Pty Ltd	Mr Günther Werner Dölz	Central	Manne & McCann Pty Ltd	Mr BH Niselow	Central

Master Print	Mr B S Bailey	Central	Wepener Drukkery Edms Bpk	Mr G Coetzee	FreeState
Minuteman Press Hyde Park	Mr Jeremy Dannheisser Owner	Central	Cheque Printing Pty Ltd	Mr Peter Austin	KZN
Monty Print CC	Mr P Monticelli	Central	City Printing Works Pty Ltd	Mr Mark Backhouse	KZN
National Office Products & Stationery Ass o	Ms Gioia Macintosh	Central	Impress Web	Mr Ziyed Agjee	KZN
Northern Printers CC	Mr P Spolander	Central	Kendall & Strachan Pty Ltd	Mr Mike Coldbeck	KZN
Pepic & Kraus Print CC	Mr Alex Kraus	Central	Pala Printers CC	Mr V J Soni	KZN
Printcol Pty Ltd	Mr Johann Jungbauer	Central	Print Connection CC	Mr Wally Stephen Blom	KZN
Printout Business Solutions Pty Ltd	Mr Steve Cullerton	Central	Prontaprint	Mr Eddie P Portmann	KZN
Quarto Press Pty Ltd	Mr E Higgs	Central	R A Burns & Co Pty Ltd	Mr Robert Burns	KZN
Rand Envelope Pty Ltd	Mr Rolf Randall	Central	Rapid Run CC	Mr James W H White	KZN
Rodgers & Associates Quality Printers Pty L	Mr Andre van Beek	Central	Zululand Times 1959 Pty Ltd	Mr Pat McLaverty	KZN
Ronnie Cox Graphic Supplier CC	Mr Paul M Cox/Mr Michael T	Central	Blitz Printers Pty Ltd	Unknown	Northern
Rosside Press Pty Ltd	Mrs Barbara Martyn	Central	Brits Drukkery Edms Bpk	Mr Japie Steenkamp	Northern
Rubber Stamp & Engraving Co. Pty Ltd	Mr Philip Kuhn	Central	CTP Limited	Mr Louis Kruger	Northern
Screenline (1971) Pty Ltd	Mr Neil de Greef	Central	Fulloutput 1138 CC	Mr BC Greyling	Northern
Shesha Media Pty Ltd	Mrs Denise Wegener	Central	G T O Z Print Investments Pty Ltd	Mr Dean Viljoen	Northern
Stups Printing CC	Mr H Stobaus	Central	Mijoy Print	Mr Mike & Joy Gornall	Northern
Team Data SA Pty Ltd	Mr G J Rossouw	Central	Multiprint Pty Ltd	Mr Vernon Vergne	Northern
The Bureau Digital Media Pty Ltd	Mr Günter Grumptmann	Central	Polokwane Printers Pty Ltd	Mr Ben de Jager	Northern
Top Cut Packaging CC	Mrs Margaret E Adams	Central	S Durrant and Viljoen Pty Ltd	Mr Brett Durrant	Northern
Ultra Litho Pty Ltd	Mr Colin Finck	Central	Seriti Printers	Mr Allen Swart & A Goeman	Northern
Universal Screen Print Pty Ltd	Mr JP van Zweeden	Central	V & R Drukkery Edms Bpk	Mnr Ludick P Venter	Northern
Free State Business Products CC	Mr Norman Adams	PIFSA			

Distribution

Street-wise investigations

Brainstorming with vendors to find solutions

In our search for good ideas about distribution (to beat market dominance by companies that monopolise the channels), we plunged deeply into local and international streetwise know-how. We spoke to vendors on the streets in Johannesburg and Durban. We also tapped into the websites of www.streetnet.org (an international alliance of street sellers) and www.homenet.org (homebased workers).

The message was consistent: those who draw their livelihoods from outside the “legal” area of public trading are in need of organisation, and could use any help they can get from the press. In Durban, we found that street traders have been helped by the relaxation of certain urban regulations. Where they work, on pavements and corners, they have been assured of less harassment and more security. But this may not last – and those we spoke to agreed they needed a voice.

Grassroots papers could be that voice. Mutually supportive relationships can be built around the need of street sellers to be heard, and the need of publishers to get their papers out to the people. There are possibly only two ways of developing homegrown distribution channels in communities: 1) find existing channels that no-one is yet using for grassroots papers distribution, or two 2) create channels that were not there before. The second choice is often the one that publishers feel forced to make when they are shut out of distribution systems by bigger players.

But tapping into pre-existing community channels is a good strategy. A significant percentage of the population is engaged in informal employment. This means that channels exist. Street-sellers are regulars – there every day – and they know the passing crowd; this is how they get

their living. Publishers can forge alliances with those who are already operating distribution systems for other kinds of products. All it takes is to give coverage to street issues (without necessarily becoming “street papers”). For its part, the MDDA may be able to facilitate relationship building in several ways. Customers are likely to be attracted by brightly decorated street stalls. Eye-catching poster frames and newspaper stands would do the trick; so would colourful bibs to be worn by the food hawkers. Merchandising like this needs creative thought – it is quite possible that soft drink manufacturers would pay for the stands and bibs. All the MDDA might need to do is get the system working by helping publishers and microenterprises to come together.

Every local authority has its own rules about merchandising, and one of the things that the MDDA or business advisors may have to do is get permission for banners and postering. Applications to use space in designated areas must usually be made to the city's property manager, and this alone can discourage innovative distribution. It may cost money, and there is the ever-present fear of attracting too much official attention.

Of course, distribution is not just a newspaper function. All manufacturing and sales requires channels of distribution, and business advisors are clear about the importance of innovation to beat the competition. Retailers are constantly on the lookout for new ways to bring in customers, hold onto existing ones, cut costs, and improve merchandising at the point of sale.

The innovative ideas suggested here – working together with street vendors to promote the newspaper while promoting their cause too – came out of an informal brainstorm with vendors on the streets of Durban. It was they who suggested that if the newspaper would report their problems, they would be only too happy to carry it in their stalls, put up banners too, and promote it to all and sundry.

Street vendors came up with innovative ideas for grassroots distribution, as part of a bargain to help their own cause.

Circulation

AN ABC FOR EMERGENT PUBLISHERS

Questions put to Charles Beilis of the Audit Bureau of Circulation, Jan 26, 2006

1. What is the Audit Bureau prepared to offer?

Referring to the PMSA Director, Natasha Volans' letter to Libby Lloyd of the MDDA dated Nov 18.

Clearly we need some form of accreditation that will allow publishers to raise advertising, while at the same time give advertisers some comfort that their money is not going down the drain.

There would need to be some form of accountability in the form of a certificate to give the publisher the wherewithal to get advertising, while at the same time providing comfort to the advertiser.

2. Have you drawn up a clear set of procedures as yet?

We have no clear set of procedures yet. These would need to be negotiated and mutually agreed to. We have our own system that is suited to the needs and pockets of our members.

The accountability that we offer would be ABC endorsed but different to what other publishers use. We would want to include them; and to see how best to bridge the gap (between them and out members); and we would want to see them as free-stand businesses.

3. What would be the objectives of the procedures?

(To demonstrate credibility as a publisher.) We would need to design a set of criteria (that enable us to work with them).

And we would need to know who their representatives are. Would it

be the AIP or individual members? I have devised a set of **eight criteria** that would be a useful starting point. These are open to discussion and amendment. Each would need to:

- Show that the publication is **listed by the AIP**: This is substance to help the publisher; Show that it is **registered with the ABC**: This might be done by asking each to be registered with us; **Pay a fee**;
- Submit a copy** of the publication;
- Give a **brief description** of the publication;
- Provide a **publishing calendar**;
- State the **selling price** (if for sale);
- Show the **areas of distribution**;
- Demonstrate the **method of distribution**;
- Produce a **printers invoice**: This is the most critical aspect.

3. How would procedures be devised? (Do we need to set up a working group?)

Once we know who their representatives are we can set up a working group and work through the issues to reach an agreement on the process to be adopted.

We need to get agreement on a **Code of Conduct**. The big question is how best to handle such a system of verification on the ground.

4. How will they be implemented and how would such audits be conducted?

- o We would use our own people to check information. Our own **internal**

audit team would in particular check the printers' invoice and the average print run.

- o We would issue a **certificate** for a publication that is listed and registered (and in production) over a specific period. It would have the ABC logo on top and could have the AIP logo as well.
- o A **second certificate** might be designed for a 'start-up publication'. It would need to be registered with the ABC and AIP. Other requirements would be a description of the publication; and (details of) the initial print-run over the first three months of production. It could then switch to the 1st level certificate.

5. What could such a system cost?

This would be a nominal amount perhaps R200-R300 a year. We are not aiming to make money. It must cover the basic costs. We would be making a contribution to the process.

6. Who would be classified as emergent?

I think the classification into 'emergent publisher' is a job for the MDDA and the AIP. (They need to develop criteria for the classification).

7. What form would the supervisory body take?

(With a system in place there would be no need for supervision.)

Our task would be a checking one, to conduct an evaluation that is ongoing.

I don't think it is our job to tell people how to run a business. This might be the task of the MDDA or the AIP. Certainly we could offer advice but we need to be asked what sort of advice we could offer.

A starting point might be the use of the Code of Conduct used by the ABC (as amended in November). It could require a slightly different version with amendments that both parties agree to.

8. Who would gain access to the figures?

(The bodies concerned would have jurisdiction over their registers.)

9. How soon could such a system come into operation?

Just as soon as agreement can be reached between the parties: the MDDA, AIP and the ABC Board (that includes the advertisers).

10. Where to from here?

We need to know who the representatives are and to meet them to discuss the issues and to reach agreement. This is not too onerous. Once settled this can be taken to the ABC's next board meeting.

Further issues:

- o MDDA and AIP could propose a bridging certificate for publishers not-yet-in-print. This might take the form of a point system that verifies the level of booked advertising by ascribing points to it. Such a method would need to be negotiated with the two major advertising bodies, the Association of Commercial Advertisers and the Advertising and Media Forum. Both have representatives on the ABC board.
- o I think it important that we suggest the development of a biography for each publication that is updated annually. This could contain all the important information that the AIP, MDDA, ABC might want. The bait might be that could also contain market research items and if cleverly designed, be used as a marketing tool by the publication concerned.

Design of an audit system for circulation

Impeccable audited figures are a must if the negative mindset of the advertising industry towards grassroots publishing is going to change. An Independent Circulation Audit of the Grassroots (ICAG) could be set up and run separately from the ABC system. The best way to set up such a system would be to call for tenders from auditing companies. Again, a principle of black empowerment should apply when choosing the tenderer.

Audits should be carried out at least every year but preferably quarterly as the system gets going. Three complementary sets of activities are needed to effect an audit system for this sector. Publishers themselves need to produce detailed, verifiable, reports based on the documentation they collect in the course of the year. The independent auditors would vet all the data and pay field visits in order to draw up audit reports. Training will be necessary to get publishers aligned with the system and ensure that little of the auditors' time is wasted when they arrive to do check-ups.

The technical training and advice on what kinds of data are needed and how to put it all together will help grassroots publishers in several ways. It will focus attention on financials, distribution data capture, and follow-ups to find out why there are failures in some areas. It will also facilitate improved payment procedures and record keeping. And research at distribution points should improve relationships with shopkeepers and stall owners by impressing them on them the need to treat the publications as valuable products, not throwaways.

A Code of Conduct would ensure voluntary compliance with requirements.

PUBLISHERS' STATEMENTS

A great deal of information is already in the hands of experienced publishers and just needs to be standardised and checked. For those not yet collecting the information needed, training will be necessary. Publishers would be responsible for assembling their own statements to be handed to the auditors, based on:

Print orders & frequency of publication

Distribution of copies and returns

Subscriptions and bulk sales

Circulation areas reports

Invoices and sales vouchers

AUDIT REPORTS

An audit manager would be responsible for timely and accurate completion of print audits within a geographic region through application of the MDDA's circulation audit rules and policies. The job would entail managing field audit staff. They would carry out on-site verification of publisher's financial, distribution and circulation data.

TRAINING

The design, testing and implementation of of classroom, mentoring and distance training is a necessary component of the system. User documentation should be placed on iPop and printed in the form of a handy manual. As rules evolve, new training materials and initiatives will evolve too.

Management

Management consultants and auditors

Business expertise to make it all happen

For the business and market development strategies outlined in this Report, the MDDA is going to need management consultancy and auditing help (eg for the circulation audit system to be set up). The table identifies key associations to approach for professional and practical advice on business analysis, tax matters, and systems.

Two in particular should be approached:

Institute of Management Consultants of South Africa

The institute maintains a comprehensive database designed to offer a choice of consultants that can be selected by a variety of skills, industry experience and geographical location. The Institute facilitates networking with fellow professionals and can put the MDDA in touch with the right firms. As it is a signatory to the Financial Sector Charter on Black Empowerment, IMCSA can probably assist with empowerment advice for the grassroots supplier networks.

Institute of Directors - South Africa

The IoDSA specifically represents directors, professionals and business leaders in their individual capacities. It aims to bring about aims to bring about lifelong learning by business leaders and it has various educational programmes. It was that IoD that set up the King Committee on Corporate Governance, so the institute would be a useful ally in mobilizing support for protocols in the publishing industry.

Managing the management consultant

MDDA staff should take a look at a useful book on how to manage the management consultants*. Written under the auspices of the Management Consultancies Association (MCA) of the United Kingdom by the director of the MCA think-tank, the book describes in detail what companies need to look for when hiring consultants, what they can expect and under which conditions they can achieve the results they expect.

* Czerniawska, Fiona - The intelligent client: managing your management consultant. 2003. Hodder & Stoughton, UK. ISBN 0 340 850 531.

TYPE	LEVEL	ABBREV	NAME	WEBSITE
Business	MACRO	IMCSA	Institute of Management Consultants of SA	www.imcsa.org.za
Business	MACRO	IIASA	Institute of Internal Auditors of SA	www.iiasa.org.za
Business	MACRO	IODSA	Institute of Director - South Africa	www.iodsa.co.za
Business	MACRO	SAICA	South African Institute of Chartered Accountants	https://www.saica.co.za/
Development	MACRO	SAIGA	Southern African Institute of Government Auditors	www.saiga.co.za

The Common Body of Knowledge approach

We did not phrase it this way in the Report itself, but grassroots publishers are themselves a “community of interest”. which involves common values, shared knowledge, and a mission to reflect local social reality. Publishers also make up a “community of practice” that develops techniques to do the job in hand. Many such communities of interest and practice are represented by institutes which do research and publish documentation.

The IMCSA is a case in point, as its website shows. It offers its members access to an international management journal, and draws their attention to news and views affecting consultants.

An intriguing aspect of management consulting is that it rests on a Common Body of Knowledge (CBK). This is not a set of systems or templates like the proposed newspaper in a box. It avoids detailed descriptions of content (or tools, techniques and functional skills). Instead, it sets out “statements of competence” on the profession of management consulting itself and the business of consultancy; it explains the nature of the functional knowledge required (eg competence with figures); the structure, processes and environments of the organisations served; how to add value for clients and how to interact with colleagues.

It may be worth exploring the CBK approach to community publishing, as it would avoid the trap of attempting to specify every procedure in detail. While detailed templates are certainly necessary, especially for early S-Curve phase publishers, the more advanced operations demand original solutions.

By specifying competencies rather than procedures, a CBK drawn up for the publishing industry would provide a foundation for the assessment of funding applicants. As was pointed out in the Report, survivalist

enterprises come into being when people who lack competence simply try to take advantage of funding. In addition – and what is most important for entrepreneurship – the qualities of drive, leadership and personal discipline required for heading a publishing enterprise need to be highlighted and assessed.

Consensus rests on common values and tools

An example of how competencies may be described and clearly set out is found at the Usability Body of Knowledge website: <http://www.usabilitybok.org/glossary>, compiled by the Usability Professionals' Association. They explain that “Defining such a guide is an important step in our development ... because it represents a broad consensus regarding the ... range of knowledge, skills, and methods that should be mastered by practitioners in the field.”

Broad consensus is what grassroots community publishers in South Africa need to achieve.

- If it comes into being, the proposed National Forum for Community Publishers should run a members' publication and seek funding for from the MDDA.
- The proposed iPop website would be a related step towards building a common identity.
- Most of all, GAPS would cement relationships among publishers and deliver benefits giving the grassroots publishing community a sense that it is a recognised force in the economy.

Networks

Finding support for a grassroots network

The priority we have placed on networking means that every effort should be made to connect with support organisations and possible sponsors. International donors will be interested in endorsing and maybe underwriting a grassroots press network: this is true community development and it has moral and material resources behind it in the capitals of the world.

Any motivation for management tools would have to be coupled with proposals to broaden journalism skills, as the promotion of democracy is a priority in ICTs development.

A Networking StratPlan is needed, and this is going to take research. It would have to comprise:

- Needs analysis – a review of who in the grassroots has what, and assessment of what would be needed to get everyone connected on a fast and functional system.
- Networking architecture – a basic schematic plan for the physical shape and information-processing functions of the system, along with a costing and management plan.
- Information strategy – a motivation for, and explanation of, the purpose of the networking system, seen in the South African context and related to developmental ends. This would include a training and empowerment plan to grow skills and bring new operators into the media industry.

Numerous organisations can be approached for their help, both to compile the plans and costings, and to seek donors. There are far too many organisations to spotlight just a few, but good starting points are:

Developing an ICTs strategy

International Development Research Centre (IDRC – Canada) – www.idrc.ca

This is a research organisation and not a direct funder for equipment and software. However, because it researches needs and is well connected, the IDRC can be an invaluable partner. The IDRC's Partnership and Business Development Division focuses on working hand in hand with research partners; undertaking joint funding and activities with other donor and research institutions; and fostering collaborative research in the South.

United Nations Commission on Science and Technology for Development (CSTD) - www.unctad.org/cstd

Bridging the technology gap between and within nations is the mission of CSTD. This encompasses ICTs (information and communication technologies). It is worth reading a recent report of the panel of the CSTD, published in November 2006 in Paris, on Bangladesh. This deals with the development of a "people-centred, development-orientated and inclusive information society with a view to enhancing digital opportunities for all people". It appears at http://www.unctad.org/sections/dite_dir/docs/dite_pccb_stdev0026_en.pdf. Part of the CSTD strategy involves connecting Africa. Connect Africa is a project undertaken by UNCTAD in partnership with the Observatoire Technologique (Technology Institute) of the Centre des Technologies de l'Information (Information Technologies Centre) of the State of Geneva in Switzerland.

Shuttleworth Venture Capital – www.hbd.co.za

On the enterprise level, local help is at hand. Taking its name from "Here be Dragons", this venture capital company could prove to be a good partner and advisor for the MDDA. Focused on fairly early stage ventures, the HBD Fund2 has millions for new ventures. Well defined criteria mean that only companies which have been trading for six months and have the potential for successful profitmaking within three to five years will be eligible. This corresponds to our potential sustainables on the S-Curve.

Market Research

Media Marketing Services: Zoutpansberger

In an attempt to satisfy the need for basic information on Capro member publication readers, their perceptions and their handling/reading habits, Media Marketing Services (MMS), under the direction of John Annandale, (former Marketing Services and Advertisement Director of Reader's Digest) is in the process of undertaking a series of small reader surveys. This survey for Zoutpansberger is one of the first in the series.

Survey Basics

Survey Period: Insertion Date: 28 July 2006 - Closing Date: 11 August 2006

Final Sample Size: 119

Incomplete Questionnaires Removed: 0

Duplicate Questionnaires Removed: 0

Step-by-Step Procedure

In consultation with Capro, MMS prepared a uniform 2-page A4 self-completion questionnaire as the basis for a survey of a broad cross-section of Capro titles. Prepared in English and Afrikaans for Zoutpansberger, the questionnaires were supplied to the publisher in pdf format. Response incentives were offered to encourage participation. Incentives / gifts / prizes were arranged by the publisher.

Given the option of printing the questionnaire "on page" or as a loose insert, the publisher opted to print and insert loose questionnaires. Insertion Date: 28 July 2006 – Closing Date: 11 August 2006.

MMS managed the collation and scrutiny of returned questionnaires, capture and processing of data, preparation of report(s), graphs in printed and digital format.

Respondent names and addresses were monitored to ensure that respondents only featured once in the survey. There were no duplicates to be discarded nor were there significantly incomplete questionnaires requiring rejection. Questionnaires were sequentially numbered and captured with a 1 in 5 audit to monitor and assure capture accuracy.

Standard checks included ensuring that respondents didn't select more than one option when a single response was required. Where more than one response to a single option was received, for example, where the respondent indicated "male" and "female" instead of one or the other, the respondent's name was checked for an indication of gender. If no logical answer was found, a "no-answer" was recorded. Equally if a respondent under 16 years of age claimed to have a degree or tertiary qualification, or claimed to be divorced, this would default to a "no-answer". Or if they claimed to personally own a motor car, this would default to "no vehicle".

Out of 22 questions and sub-questions, there exists the possibility of 32 "no-answers". Any questionnaire with more than 10 "no-answers" was automatically excluded from the survey. No such questionnaires were found for Zoutpansberger.

Once captured, a random prize draw was conducted at Capro to identify the winners. Four participants were excluded from the draw as they had more than 6 unanswered questions or sub-questions. Publishers were advised of the prize winners' details.

The publisher was called on to report any "Acts of God" or special events occurring during the course of the survey which may have had some bearing on response. No significant events were noted.

Results have been presented graphically for each question and include the base upon which each percentage is calculated as well as the number of informants involved. The tables are repeated 3 times (Total Sample, Male Sample, Female Sample)

Special Notes:

1. Since response was random and uncontrolled, the degree of statistical reliability is limited to “what is received”, and possible bias or skew of samples and/or sub-samples may exist. These could be statistically addressed in a much more costly study but since the purpose of this study has been “affordable illumination”, this report reflects only “what was received”.

2. No weightings have been applied to the data and samples have not, and should not be grossed up to presume a readership total.

3. Dissemination of survey data will be the sole right of Capro members and their representatives. Neither raw data nor documented reports will be provided to any other party in any form other than that in which the data is released to the industry by Capro.

4. If so required, MMS will provide reasonable access to how the work was carried out, and the necessary information whereby the quality of the work and validity of the findings can be adequately assessed.

5. In line with data privacy requirements, informants were given the publisher’s assurance that their personal information would not be used directly or indirectly for the compilation of lists, registers or data banks for any other purpose.

6. In the event of Capro or Capro members publishing material from this survey, or publishing interpretations or claims made as a result of the survey findings, MMS reserves the right to provide bona fide enquirers with techniques and methods used, and size and nature of sample, should

these not be included in the data released by Capro.

7. Whilst not absolving MMS from the responsibility of supporting the survey findings, misinterpretation can occur when results are conveyed and MMS will accept no responsibility for interpretations other than those contained in the prepared reports. Users must ensure that misinterpretation, or the quotation of results out of context does not occur, and that as far as is practicable the source of any published data is clearly quoted. Should incorrect or misleading data be published or disseminated, MMS reserves the right to publish or disseminate the correct findings.

Survey Contractor: John Annandale

Media Marketing Services

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Cell: +27 72 454 0501

annandale@sentechsa.com

Market Research

An enormous amount of very useful information about the SA reading public can be culled from Internet sources that are readily accessible. Most organisations these days use online databases as their tools of preference. On these pages we highlight some of the leading online data sites used in this Report. They are shown more or less in our order of priority. Media users need some understanding of how to read and analyse the data to make the best use of it, so training in this area is strongly recommended. Several of the organisations show here do run workshops.

SA Advertising Research Foundation - www.saarf.co.za

This invaluable source of much free data provides readership/audience figures on major newspapers, magazines, radio, and television stations. The site carries presentations and explanations of the AMPS, Lifestyle Measures (LSMs), and lists various publications. Grassroots newspapers are not covered, and it would be almost impossible to duplicate the AMPS work independently, which is why we have recommended smaller-scale reader surveys.

Eighty-20 - www.eighty-20.co.za

Eighty-20's website is useful because it offers quick free unlimited access to topics such as AMPS (Lite), township property market, and the SA population Census 2001. There are also searchable databases including SA Economic Variables - CPI, sourced from Stats SA and updated regularly. Eighty-20 sends out a "fact-a-day" email to free subscribers, drawing attention to useful new research and insights.

Bizcommunity - www.bizcommunity.com

A vast and steadily growing collaborative SA website with information about all types of media and marketing activities in SA. Contributors may send in press releases, which do get used and are read widely by the marketing fraternity.

Where to find info

GCIS databases - www.gcis.gov.za/docs/directories/index.html

Various contact directories including media (with some community press), government structures, miscellaneous business and other organisations, and international representation in the country.

PRODDER - <http://sangonet.org.za/>

The Programme for Development Research at the Southern African Non-Governmental Organisation Network (SANGONeT) is the twch which collects and disseminates information about organisations in the field. It allows for the listing of NGOs with online entries.

Human Sciences Research Council - www.hsrc.ac.za

The Research Outputs Database lists books, articles and special reports, while the news/articles usually spotlight key new information. A Call Centre is operated by the HSRC links to the national statistical system. A (rare) systematic research effort gathers information about both gender and race.

Development Bank of Southern Africa - www.dbsa.org

This leading finance institution has a knowledge portal with local government and a rural forum which shares topical information about rural development. The Rural Monitor tracks media coverage of rural issues during the month prior to its release.

Nexus database system - <http://stardata.nrf.ac.za/index.html>

Operated by the National Research Foundation, the Nexus system contains databases mainly related to the humanities and social sciences, providing information on current and completed research projects, research organisations, professional associations, bios of researchers, periodical submission requirements, forthcoming conferences.

Where to find info

South African Data Archive - www.nrf.ac.za/sada/

SADA) serves as a broker between a range of data providers (e.g. statistical agencies, government departments, opinion and market research companies and academic institutions) and the research community. Most valuably, for grassroots publishers, it contains general household surveys and labour surveys.

Council on Higher Education - www.che.ac.za

The CHE is an independent statutory body advising the Minister of Education. It maintains a resource centre with an online search. Among other things, it monitors ICTs (telecoms and computer networking).

Southern African Association for Institutional Research - www.saair.org.za

We have included this here because it could be a good starting point for the MDDA to begin its search for institutional partners. The SAAIR specialises in identifying clusters of activities, finding out who is doing what and what the standards of best practice are. They have a bent towards education and could be helpful in the mentoring/training area.

Commission on Gender Equality - <http://www.cge.org.za>

The Commission on Gender Equality is one of the six State Institutions Supporting Constitutional Democracy called for in the 1996 Constitution. The website lists publications and survey findings, along with links.

Community Agency for Social Enquiry - www.case.org.za

An applied research NGO, working in the socio-economic, political and developmental fields in South Africa. Website not functional when last tried.

Who does research

We relied on these sources and others which throw light on South Africa's current market research findings and trends. In particular, new research into household incomes and the segmentation of the lower LSMs proved helpful in framing our proposals about how to pitch advertising sales.

SAMRA - www.samra.co.za

SAMRA, the Southern African Marketing Research Association, runs workshops and an annual conference on new trends and techniques. The website makes convention papers available, giving rare access to cutting edge South African insights into consumer markets.

SA Statistics Online - <http://www.statssa.gov.za>

Stats online is a treasure trove of information, if you know how to search for it and extract what you are looking for. The site is moderately helpful by offering news and collated data (such as the income and expenditure survey 2005-2006 which throws much light on community households).

AC Nielsen - www.nielsenmedia.com/nc/portal/site/Public/

One of the best known and respected research companies, internationally and locally. Information (not free) is available for all key media by country, by region, or on a global basis through the Nielsen AdEx International service. The group also undertakes customised research into new markets, using innovative methods.

Markinor - www.markinor.co.za/resource-press.html

Established in 1972, Markinor has more than two decades of experience studying local and international markets. It is known for its poll surveys and its website has resources designed for journalists.

BMI-Technology - www.bmi-t.co.za

BMIT is a knowledge-based business in the computer area and it delivers strategic market intelligence through research publications. When last visited the site was inoperative.

Market Research

PRINT ADVERTISING, TOP BRANDS, AND TOP ADVERTISERS

Marketingweb, 27 February 2006

Total advertising spend (excluding self promotion) on Media was R17.1 billion in 2005. This is up from R8.1 billion in 2001, showing a good 110% growth, according to figures from Nielsen Media Research AIS/AdEx. In a review of South African advertising spend from 2001 to 2005, AIS/AdEx director, Janet Proudfoot said print got a large chunk – 39.7% — of this money, followed closely by television, with 36.9%. In 2005, R6.8-billion was spent on print, and R6.3 billion on television. Radio got the third biggest slice of the pie, with R2.36 billion – or 13.8%. Next came outdoor (R788,190), cinema (R591,182), direct mail (R121,465) and in last place, online (R140,722). Proudfoot was speaking at the release of the latest Audit Bureau of Circulation figures on Thursday.

Who was advertising?

In print media, 29,3% of the media spend came from retail (R1,9 billion). The second biggest spender was business to business at 16% or R1.09 billion. Banking contributed the third largest share, at 10.8% or R733,862.

The top 10 advertisers in print for 2005 were Pick 'n Pay, Shoprite Checkers, MTN, Spar, Vodacom, Standard Bank, Mass Stores, national Government, Cell C and Multichoice Africa. In total, they spent R1.126 billion.

In TV media, retail was also the biggest spender, at 23.8% or R1.5 billion. Second was health and beauty at 14% or R887,031. And third was business to business at 12.1% or R769,195.

The top five advertisers between 2001 and 2005 were Unilever SA, Shoprite Checkers, Pick 'n Pay, MTN and Vodacom.

Last year, cellphone operators spent significantly more on media (R925,569) than the three big banks, FNB, Standard and Absa (R666,889).

Top 10 Advertisers on Print 2003 to 2005

Advertiser	2003	2004	2005
PICK N PAY	173,693,984	188,596,152	207,798,360
SHOPRITE CHECKERS	128,735,643	185,629,192	215,150,440
MOBILE TELEPHONE NETWORK	67,253,934	100,136,497	146,206,002
SPAR SOUTH AFRICA	77,479,172	85,191,522	87,459,350
VODACOM COMMUNICATION	53,103,102	82,110,513	102,883,754
STANDARD BANK	67,377,972	64,837,791	92,523,019
MASS STORES PTY LTD	54,044,495	76,597,504	75,279,252
GOVERNMENT NATIONAL	72,219,198	63,161,713	65,823,001
CELL C	55,044,967	72,749,268	69,911,845
MULTICHOICE AFRICA	43,825,686	53,249,740	63,040,526
TOTAL	792,778,153	972,259,892	1,126,075,549

Total adspend in 2005

Top 15 Brands by ad spend: 2001 to 2005

Brands	2001	2002	2003	2004	2005
PICK N PAY SUPERMARKET	102,830,887	122,198,604	141,417,017	165,640,535	205,121,936
MTN CORPORATE	45,235,210	108,791,943	89,673,845	196,747,639	249,107,121
CELL C	55,282,073	146,093,487	105,849,028	93,390,372	146,576,747
VODACOM COMMUNICATION	52,318,095	64,163,178	90,058,249	104,567,212	209,026,422
SPAR SOUTH AFRICA	61,783,907	82,086,300	112,996,455	113,477,420	114,330,020
KENTUCKY FRIED CHICKEN	25,471,347	50,839,126	70,502,962	123,347,387	167,927,137
EDGARS DEPT STORE	57,278,332	61,544,549	67,675,464	85,148,852	107,684,196
SHOPRITE CHECKERS	108,987,377	73,358,303	54,845,375	67,396,765	50,471,402
GAME DEPARTMENT STORE	32,607,884	59,461,835	73,421,422	91,133,033	74,393,942
LOVE LIFE HIV CHECKERS	43,419,519	86,175,204	74,689,963	44,382,625	81,857,704
HYPER	27,164,324	64,948,115	63,116,654	89,868,327	81,722,923
NATIONAL LOTTERY	42,526,477	55,409,327	80,926,602	67,262,674	75,057,317
CLICKS DEPT STORE	50,699,866	53,913,126	68,144,782	70,144,953	73,382,692
COCA COLA	67,373,506	42,822,942	64,563,414	69,959,278	60,331,204
SHOPRITE SUPERMARKET	11,799,575	51,968,781	59,574,258	71,272,494	92,324,964
TOTAL	343,533,655	432,547,490	408,679,629	506,995,531	601,482,948

Top 15 advertisers by ad spend: 2001 to 2005

ADVERTISER	2001	2002	2003	2004	2005
UNILEVER SA	214,373,135	286,849,346	379,617,586	411,726,062	437,515,454
SHOPRITE CHECKERS	166,166,916	223,431,240	234,807,367	312,279,412	335,557,871
PICK N PAY	145,283,506	175,855,472	224,793,138	256,955,803	291,437,784
MOBILE TELEPHONE NETWORK	88,836,338	139,359,909	175,389,752	290,486,099	373,329,758
VODACOM COMMUNICATION	125,499,265	144,961,178	170,309,735	256,241,523	349,448,644
SAB MILLER	164,205,020	189,719,996	139,668,411	214,042,304	259,021,964
COCA COLA SOUTH AFRICA	127,431,141	148,748,363	152,171,593	193,902,800	222,258,892
TIGER BRANDS SA	90,188,706	140,234,295	169,166,483	213,449,233	205,513,603
STANDARD BANK	99,618,339	117,311,473	147,148,270	194,054,384	216,153,956
CELL C	55,282,073	157,456,941	175,347,446	171,038,826	202,790,363
JD GROUP	109,633,688	115,794,114	129,086,507	191,295,370	209,931,085
GOVERNMENT NATIONAL	74,111,527	135,840,925	181,891,955	152,996,316	186,619,270
EDCON	119,136,232	115,292,940	140,963,527	160,953,013	188,454,918
FIRST RAND BANK LTD	80,599,844	90,353,038	123,389,724	161,416,419	238,872,224
ABSA	77,153,873	101,333,981	125,586,393	156,524,602	211,863,025
TOTAL	1,737,519,603	2,282,543,211	2,669,337,887	3,337,362,166	3,928,768,811

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Advertising

Blue chip companies are top dogs

Spearheading advertising to the brown-chips

Blue chip advertisers are those with prominent marquee brands like SA Breweries, Pick n Pay, Siemens, Absa, and so on – those among the top names in their fields. Blue chip advertisers are represented by blue chip advertising agencies like those listed here. Spearheading advertising success with blue chip brands is not going to be easy.

Some of our key informants in the top ten advertising agencies said it probably was not even worth trying at this stage. However, publishers do not have to go after the top dogs. With the right pitch – good data, a forceful presentation, a rates sheet, a website and a track record in community publishing – it is possible to reap rewards from an advertising sales campaign aimed at “brown-chips”. These are secondary companies that are not regarded as blue-chip but do operate in communities and may not be getting enough exposure.

Advertising experts advise grassroots publishers to avoid companies that use major agencies and go directly to marketing managers in firms. Publishers should also follow up with satisfied advertisers for repeat business, selling discounted contracts over several issues. This strategy would cover special retail offers in a local area, and some company image building in communities. Special advertising supplements linked to holidays like National Youth Day (16 June) can generate major display advertising.

Supermarket chains that sell fast moving consumer goods (FMCGs) will not be interested in advertising with low-circulation newspapers because the margins are too slim. But local and regional retailers, cash-and-carry stores and family chains, may well be – especially if coupons for discounts are printed in the publication, so bringing customers into the shops.

As we said in the Report, if all members of the grassroots pull together to establish sector credibility, and if the MDDA helps out by producing a prospectus, media buyers can steadily be won over. In Chapter 5 of the Report we drew attention to the types of products most likely to sell to middling and lower LSMs.

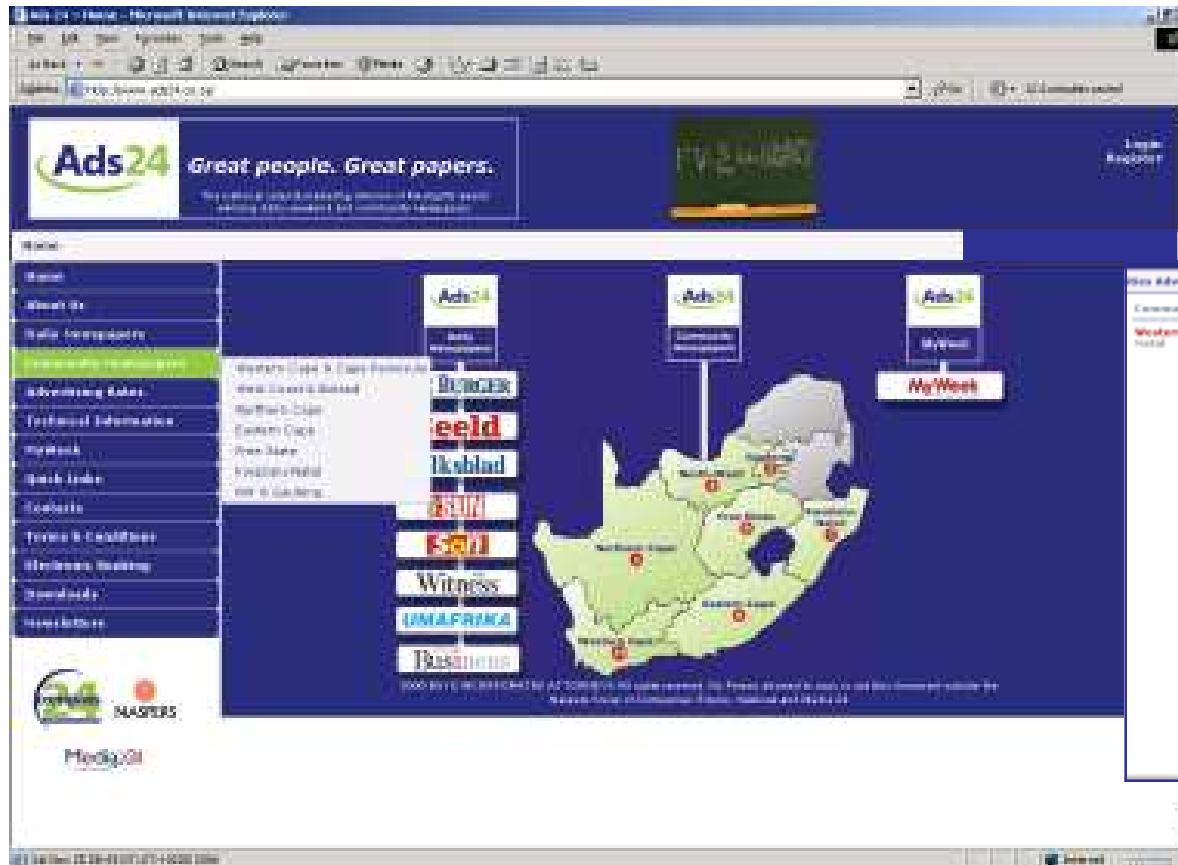
Rank	Agency	Income Rm'	5 Biggest accounts in 2005
1	FCB SA (Johannesburg)	101,0	Toyota, Vodacom, First National Bank, Uthingo, Telkom Business
2	Ogilvy Johannesburg	100,0	KFC, MultiChoice/M-Net/SuperSport, SABMiller, Sun International, Eskom
3	TBWA\Hunt\Lascais Johannesburg	98,0	Standard Bank, MTN, Sasol, Tiger Brands, Jameson Worldwide
4	Ogilvy Cape	93,0	Old Mutual, British American Tobacco, VW / Audi, BP / Castrol, Sun International / SABMiller
5	Net#work BBDO	89,0	Cell C, GM SA, Nedbank, SABC, Simba
6	JWT Group Johannesburg	88,0	ABSA, Ford, Unilever, Kellogg's, Reckitt & Benckiser
7	AdMakers	75,4	Urban Ocean Group Southern Africa, Kharafi Group Kuwait, GM SA, EDC Seychelles
8	Young & Rubicam Brands (Jhb)	65,0	Pick 'n Pay, MTN, Caltex, SABC, Ford
9	Young & Rubicam Hedley Bryne	64,0	Pick 'n Pay
10	Saatchi & Saatchi SA	65,0	Guinness, Engen, Postbank, Procter & Gamble, Peugeot

SOURCE: <http://www.epnetwork.co.za/advertising-agency.asp>

Advertising

Fast, functional and interactive pages

One does not have to look far for visible evidence of how to promote community publications professionally. The sample web pages below, taken from Media24's community newspapers ADS24 website, are quick and easy to navigate and understand. The pages impart the detailed data that advertising agencies need to make decisions. The rates sheet at right is only a short extract, referring to one paper in the stable of many papers.



Effective website presence

Grassroots publishers often allege that they are discriminated against when attempting to raise advertising. It is true that ad agencies regard the grassroots in a generally poor light and some are certainly prejudiced, no matter how strong the presentation given to them. But it is equally true that successful publishing depends on having good systems. These days, no publication can afford to be without a website because the majority of media buyers will go to the Internet in search of information. And when they get there, there must be full information showing samples of the newspaper or magazine, describing target markets and mapping the footprint (distribution areas).

Activating a web presence for grassroots publishers is a sector priority. The webs should be more than just "brochureware" but alive and interactive. The iPop web operation could make up any number of standalone sites and link to them, equipping them with ecommerce facilities to take orders and receive payments.

Advertising Rates

Western Cape & Cape Province

PUBLICATION	Pub Day	Print Order	SURCH SURCH	1 COLUMN	2 COLUMN	FULL COLUMN
Tyger						
Table	Wednesday	27,982	R 21.88	R 34.58	R 47.25	R 60.55
Tafelberg	Wednesday	18,761	R 19.28	R 31.78	R 44.48	R 60.78
Goodwood	Wednesday	23,613	R 21.88	R 34.58	R 47.25	R 60.55
Tafelberg	Wednesday	28,876	R 19.28	R 31.78	R 44.48	R 60.78
Phantom	Wednesday	22,849	R 16.48	R 28.38	R 41.98	R 58.28
Penon	Wednesday	18,283	R 19.28	R 31.78	R 44.48	R 60.78
Brackenford	Wednesday	14,884	R 16.48	R 28.38	R 41.98	R 58.28
Krugersdorp	Wednesday	16,718	R 17.28	R 30.28	R 43.98	R 59.28
Kalverster	Wednesday	18,126	R 19.28	R 31.78	R 44.48	R 60.78
Wynburg	Wednesday	20,988	R 24.48	R 37.98	R 51.98	R 68.15
Table Mountain	Wednesday	27,982	R 22.78	R 36.48	R 50.48	R 66.48
Table Mountain	Wednesday	20,883	R 28.28	R 42.78	R 58.48	R 76.78
2008 Rate - Tygerberg W11		28,652	R 17.88	R 30.58	R 43.28	R 58.58
2008 Rate - Tygerberg - W12						

Blank at end of book