



University of Venda

**THE IMPACT OF CURRICULUM CHANGE ON THE MARKET: THE CASE OF
SOUTH AFRICAN TEXTBOOK PUBLISHERS AND RETAILERS**

BY

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A DISSERTATION IS SUBMITTED IN FULFILMENT OF THE REQUIREMENTS OF
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DECLARATION

I, Maphangwa M.R. declare that this dissertation for the Masters of Commerce degree in Business Management, that is, MCOM (Masters of Commerce) at the University of Venda is hereby submitted by me; has not been submitted previously for a degree at this or any other university. I declare that this is my own work in design and execution, and that all reference material contained herein has been duly acknowledged.

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ABSTRACT

Textbooks in the school context have a crucial role to play in order to achieve educational objectives as well as in directing teaching approaches (Doll, 1996). Curriculum change creates a demand for new textbooks (Taylor & Richards, 2014). The market for publishing and retailing of textbooks has many unique features, including the demand and supply aspect which is influenced by public procurement, and the existence of profit-driven textbook publishers and retailers. The phenomenon of curriculum change represents another distinctive characteristic of the market, which acts as a disruptor to the economics with significant implications for roleplayers in the market. These effects may be positive or negative, as insufficient information exists on the impacts of this feature of the market, especially in the South African context.

In this study, textbooks publishers and retailers are the focus as it is their business obligation to supply textbooks to the Department of Education. The primary purpose of the study is to investigate the perceptions of selected textbook publishers and retailers on the impact of curriculum change on the performance of their businesses. The study identified proper communication and lack of intensive training as gaps that need to be addressed to ensure that textbook publishers and retailers succeed well in their businesses despite curriculum change.

An in-depth qualitative study was conducted using purposive sample of 30 key respondents, that is, ten respondents from textbook publishers, ten respondents from textbook retailers and another ten from the Department of Education. The study employed the hermeneutic approach to analyse the empirical qualitative data generated from the research study. The analysis of the study was focused on the challenges that textbook publishers and retailers face due to curriculum change as well as their strategic response to curriculum change. The study found that textbook publishers and retailers' perceptions on the impact of curriculum change on their business is both negative and positive and that the industry appreciates curriculum change as a stimulus of economic activity despite the challenges experienced. Recommendations for textbook publishers and retailers to cope with curriculum change are given.

Key words: Curriculum change, textbook retailers, textbook publishers.

ABBREVIATIONS

DBE:	Department of Basic Education
DOE:	Department of Education
LTSMs:	Learning and Teaching Support Materials
NCS:	National Curriculum Statement
CAPS:	Curriculum Assessment Policy Statement
FET:	Further Education and Training
PASA:	Publishers Association of South Africa

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CHAPTER 1: INTRODUCTION AND BACKGROUND OF THE STUDY

1.1 INTRODUCTION

This research examines the issue of curriculum change in the South African context, and the impact of this change on the market, specifically on textbook publishers and retailers. In recent years there has been a trend towards curriculum change (Phakisi: 2008; Curriculum News 2014a). The Department of Basic Education takes curriculum review and curriculum change very serious (Curriculum News Report, May 2010a). Curriculum change is an inherent aspect of the education sector, especially in the South African context as a developing country, and one which is seeking to overcome a historical legacy of unequal education and other undesirable outcomes from education. With curriculum change, textbooks have a crucial role in exemplifying how to teach (UMALUSI, 2009a; Ministerial Task Team Findings, 2010a). The issue of the impacts of curriculum change on South African textbook publishers and retailers is of interest from an economic perspective as it illuminates disruption to the market, and gives insight into actors' responses to change; therefore being of interest for private and public sector actors (Koch, 2006; Lungisa, 2015).

The dissertation begins in Chapter 1 with an outline of the research, describing the research background, problem statement, research questions, research methodology, significance of the study, study scope and limitations and ethical considerations.

1.2 RESEARCH BACKGROUND

Many studies have been carried out on curriculum development and its implementation which includes textbooks as learning and teaching support material (Hoadley & Jansen, 2012; Drake, 2007; Doll, 1996; DBE Action plan to 2014a). Curriculum is often loosely used to mean 'syllabus', or 'course of study' (Hoadley & Jansen, 2012; Doll, 1996). Change, on the other hand, involves a shift in position that may go either in a favourable or unfavourable direction. The term 'curriculum change' suggests curriculum improvement (Doll, 1996). In South Africa, the year 2009 brought significant change in schools' curricula, from the National Curriculum Statement to the

Curriculum Assessment Policy Statement, leading to the revision of content and therefore, textbooks, assessment and workbooks (Curriculum News Report, 2009a). These changes had significant implications for all education stakeholders, including changes to textbooks and other learning and teaching support materials; factors that affect the cost of textbooks and the economic analysis of textbook pricing and its impacts on textbook publishers and textbook retailers.

The market for publishing and retailing of textbooks has many unique features, including the demand and supply aspect which is influenced by a public entity in the education department (Koch, 2006). The phenomenon of curriculum change represents another distinctive characteristic of the market, which acts as a disruptor to the economics with significant implications for roleplayers in the market. These effects may be positive or negative, as insufficient information exists on the impacts of this feature of the market, especially in the South African context (Hawkins, 2008; Koch: 2006; Renni, 2001).

Although curriculum change is not a new phenomenon, it should be noted that textbooks are crucial in supporting the implementation of curriculum (Taylor, 2008; Phakisi, 2008; Curriculum News Report, 2009a). The review of curriculum in 2009 led to the change from the National Curriculum Statement (NCS) to Curriculum Assessment Policy Statement (CAPS). The review committee recommended an increase in the number of textbooks and improved usage of textbooks. However, the mandate of the curriculum review panel did not specify the support for curriculum implementation with special attention on textbooks, which is the expertise of textbook publishers and retailers (Task Team Report, 2009a; Taylor & Richards, 2014).

Against this background, this study investigates the impacts of curriculum change in South Africa on the textbook market from the year 1995 up to 2015, specifically focusing on the perceptions of selected textbook publishers and retailers.

1.3 PROBLEM STATEMENT

The commercial nature of textbook production and sales is not well understood by the Department of Education, textbook publishers and retailers as well as the South African Book Development Council (Van der Sandt, 2007). The review of curriculum change highlighted the crucial role that Learning and Teaching Materials with the inclusion of textbooks play in supporting and strengthening curriculum change implementation, hence; the price of textbooks was not a consideration (Curriculum News Report, 2010a). The Department of Education Ministerial Committee recommended own price guidelines without considering prices offered by textbook publishers and retailers consideration (PASA Draft National Policy, 2014; Curriculum News Report, 2010a). The impacts of curriculum change in South Africa on the textbook market is therefore, poorly understood in South Africa. The study therefore intends to reveal the perceptions of selected South African textbook publishers and textbook retailers on the impact of curriculum change on the performance of their businesses.

1.4 RESEARCH OBJECTIVES AND RESEARCH QUESTIONS

Research objectives

The main objective of this study is to investigate the impacts of curriculum change in South Africa on the textbook market. The following research objectives assists the researcher to evaluate the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses:

RO1: To determine the challenges that textbook publishers and retailers face due to curriculum change.

RO 2: To determine strategic responses of textbook publishers and retailers with regard to curriculum change.

Research questions

The following research questions were used in order to obtain the perception of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses.

RQ1: What are the challenges that textbook publishers and retailers face due to curriculum change?

RQ2: What strategic responses do textbook publishers and retailers take with regard to curriculum change?

1.5 RESEARCH METHODOLOGY

The research adopted a qualitative approach because the enquiry is concerned with the evaluation of the perceptions of South African textbook publishers and retailers on the impact of curriculum change on performance of their businesses. The qualitative research approach was suitable because the research investigated how respondents made sense out of their perceptions of experiences. The qualitative research design allowed the researcher to analyse respondents' perceptions, beliefs and attitudes (Lee, 1999; Dayton & Halloway, 2011). The study, while qualitative in nature, incorporated quantitative elements in design, in the form of using both open- and close-ended questions in the data collection instrument.

1.5.1 Sampling

To obtain reliable data, the researcher used purposive sampling in order to achieve the research objective. The purposive sample refers to a non probability sample that is selected based on the characteristics of the population and the objective of the study. It is also known as judgemental, selective or subjective sampling (Palys, 2008; Tustin, Ligthem, Martins & Van Wyk, 2005; Tongco, 2007; Lee; 1999; Babbie & Mouton, 2009). The researcher purposively sampled ten textbook publishers and retailers and ten DBE officers working in the curriculum section as the suitable research respondents. The researcher included the DBE curriculum officials in order to confirm the results obtained from textbook publishers and retailers. The sample size therefore,

equals to thirty. The target population from the qualitative research was determined by the qualitative paradigm, which does not estimate the sample size (Malterud, 2016). However, Lee (1999) suggested a minimum of thirty and a maximum of fifty while Creswell suggested only a minimum of twenty and a maximum of thirty. Based on the purposively sampling approach, the sample being described as the actual list of units from which the final sample was established by the research objectives, that is; to determine the challenges that textbook publishers and retailers face due to curriculum change and to determine strategic responses they take with regard to curriculum change.

1.5.2 Data collection and analysis

Data were collected by means of personal interviews that helped in fulfilling the research needs. The study uses both the primary and secondary data collection methods. Primary data was collected to use a factual or measurement approach to address a specific problem (Brynard & Hanekom, 2006). Secondary data, or “data which has been collected before” (Wiid & Diggins, 2013), was collected related to the study in order to inform the research study, that is; the perception of South African textbook publishers and retailers on the impact of curriculum change on the performance of their business.

Primary data was collected by means of questionnaires with structured research questions. This primary data was both quantitative and qualitative in nature. Personal interviews coupled with selected discussions were held in order to allow respondents to express their views on the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses. The principal aim of data analysis in this instance is to extract all relevant data in the mass of collected raw information (Tustin et al., 2005).

Interview responses were coded and grouped into themes. It was also categorised according to the study objectives. Codes were used for both closed- and open-ended questions. Data was captured using a digital voice recorder. Recorded data was transformed into paper-based format. The following thematic sub-sections were segmented based on the research objectives:

- Challenges that textbook publishers and retailers face due to curriculum change.
- Strategic response of textbook publishers and retailers with regard to curriculum change.

1.5.3 Reliability and validity

Reliability is linked to the transferability in qualitative research which describes the extent to which the findings of the research study are consistent and precise over time and to which the results give accurate presentation of the research study objectives (Wiid & Diggins, 2013). The researcher ensured reliability by linking themes and interpretations to the excerpts from the data collected. Validity determines whether the adopted conceptual constructs are able to measure what they are designed to measure (Wiid & Diggins, 2013). To this end, the researcher compared the responses given by the respondents with existing data detailed in Chapter 2.

1.6 SIGNIFICANCE OF THE STUDY

The research revealed the knowledge of the perception of textbook publishers and retailers on the impact of curriculum change on the performance of their businesses. The results of this study provided a clear understanding to researchers, and to private sector stakeholders to make informed decisions when investing in the textbook publishing and retailing industry. The market-based information developed by this research detailed the challenges and strategies which textbook publishers and retailers apply in response to curriculum change. The study also provided a foundation for further research on textbook publishing and retailing.

1.7 SCOPE AND LIMITATIONS OF THE STUDY

For the purpose of this study, the research focuses on selected South African textbook publishers and retailers affected by curriculum change from grade R to 12 of the National Curriculum Statement (NCS learners) and the revised NCS known as

Curriculum Assessment Policy Statement (CAPS). The research sample was further delimited to the Further Education and Training (FET) band of selected South African textbook publishers and retailers and Department of Education (DOE) curriculum planners and implementers in the Limpopo and Gauteng provinces. Limpopo textbook publishers and retailers as well as curriculum officials in the Department of Education in areas such as Thohoyandou, Sibasa, Makhado, Nzhelele, Giyani and Polokwane were visited for field study. In Gauteng, textbook publishers and retailers as well as curriculum officials in the Department of Education were also visited specifically in areas such as Benoni, Alberton and Pretoria (Hartfield).

1.8 ETHICAL CONSIDERATIONS

The respondents were given adequate information about the study prior to their participation. Confidentiality was not violated in all circumstances. The researcher requested permission to conduct the research study in writing from all specified stakeholders, being; curriculum officials in the DOEs well as textbook publishers and retailers (see Appendix A). The respondents were given Consent Forms for participating in the study and a Letter of Confirmation of Confidentiality of the information supplied (see Appendix B). The names of respondents did not appear in the report as a way of promoting anonymity and to avoid the likelihood of any views expressed in the report being linked to them. Respondents were given the freedom to pull out of the study at any point in time during the research process, even though none did so.

1.9 DEFINITION OF KEY CONCEPTS

Defining key concepts used in the study was critical to contextualise the meaning of the terms related to the study.

Curriculum change

In educational literature, curriculum change is referred to as educational engineering. The term suggests the existence of a technology for improvement (Doll, 1996; DBE Action Plan to 2014a, 2011).

Profitability

Profitability means making more money than you spend, or revenue less expenses. It is the state or condition of yielding a financial profit or gain, that is; what is left of the revenue the business generates after it pays all expenses directly related to the generation of the revenue, such as producing a product, and other expenses related to the conduct of the business activities. In simple terms, profitability can be defined as the revenue a company derives from its operations, less all explicit costs (Mark, Van Rooyen, Bosch & Reynders, 1998; Case; Fair, & Oster, 2014; GAAP, 2014).

Business costs

In business and accounting, cost is the monetary value that a company has spent in order to produce something. It is the amount of money that is spent to produce a good or a product. The amount that is recorded as an expense in bookkeeping records (Mark et al., 1998; Wingard, Von Well, Pretorius, Ferreira, Badenhorst & Van der Merwe, 2012).

1.10 OUTLINE OF THE RESEARCH

The study of the impact of curriculum change in South Africa on the textbook market focusing on the perceptions of selected textbook publishers and retailers on the performance of their businesses was organised structurally as follows:

Chapter 1: Introduction and background of the study: In this chapter, the researcher presents a general introduction and background information of the study. The research background and problem statement are presented. The research questions are presented, and a brief outline of the research methodology used to answer the research questions is provided. Additionally, the significance of the research, the research scope and limitations, and ethical considerations of the study are described.

Chapter 2: Literature review: The literature review focuses on the different aspects related to the research topic. The background of curriculum change in South Africa is reviewed, textbooks and other teaching and learning support materials, the core functions performed by textbook publishers and retailers, factors affecting the cost of textbooks , emerging e-books market, and managing curriculum change are discussed.

Chapter 3: Research methodology: This chapter outlines the research methodology utilised in carrying out the research. It considers the area of study, research design, population and sample size, questionnaire design; data collection methods and data analysis, and finally the reliability and validity of the research.

Chapter 4: Data analysis: In this chapter, the data collected is analysed and themes emerging from the data are presented. The chapter explains research findings on perceptions of the selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses.

Chapter 5: Conclusions and recommendations: This chapter provides an overview of the research, summarising the findings of the study thoroughly and presents recommendations based on the research findings which may open new avenues for further research.

1.11 CONCLUSION

This chapter has presented the outline of the research, describing the background to the research, the problem statement which the research seeks to address, the research questions which the research seeks to answer, and the research methodology which the research employs to answer the research questions. The chapter has also discussed the significance of the study, the scope and limitations of the study and the ethical considerations. The next chapter describes the literature related to the study area, namely the literature on curriculum change and the textbook publishing and retailing sector.

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

The purpose of the literature review is to develop an understanding of the nature and meaning of the problem that has been identified (Sekaran, 1992). This chapter investigates the existing literature to establish the current knowledge on curriculum change and its effects on textbook publishers and retailers. The issue of curriculum change presents an intersection of the education and private sectors. While changes to a curriculum are driven by theory and policy around learning strategies and education outcomes, there are very real, and often overlooked, impacts on the marketplace as such curriculum changes have profound implications for publishers and retailers of education products being seen from the perspective of a market place, curriculum change is a severe disruption to the market, and so presents a unique opportunity to investigate the effects of this disruption on stakeholders and to determine appropriate responses to these changes. The economic effects of such curriculum change on elements of the market, including disruption to product development and distribution, or retail, patterns of textbook publishers and retailers are assessed. The literature review therefore focuses on the following key areas:

- the educational theory around curriculum change in the unique context of South Africa, where educational content is influenced by unique historical factors and the associated policy imperatives driving change with special focus on curriculum change, and curriculum change review in South Africa, textbooks as part of teaching and learning support materials development in South Africa
- price factors in the textbook market,
- the core functions performed in textbook publishing and retailing businesses,
- Factors affecting the costs of textbooks
- Managing curriculum change, and
- emerging e-book market

2.2 CURRICULUM CHANGE

Curriculum change is defined as educational improvement or educational engineering (Doll, 1996; Phakisi, 2008). Changes to a curriculum are influenced by processes of evaluation of the content and desired outcomes of the curriculum, which results in reform that is interactive and requires the expenditure of time and effort. Curriculum change is a broad and continuous effort which seeks to address the effects of utilising educational content and processes to meet clearly defined goals. A good curriculum policy provides a clear guidance to textbook writers, teacher educators, teachers, government officials and parents as to what the education strategy's goals are (Task team final report: 2009b). Whenever change in curriculum occurs, the subject matter is re-organised (Smeed, Bourke, Nickerson, & Corsbie, 2015).

Curriculum evaluation and change is a feature of both developing and developed countries (Taylor & Richards, 2014). In developing countries, the more dynamic nature of change and development generally in the society and economy can drive a greater rate of curriculum change to determine whether previous major curriculum changes have constituted real improvements. As the environment keeps on changing, this creates new needs in society. The curriculum also has to change continuously in order to address new needs (Bondi & Wiles, 1998; Taylor & Richards, 2014). In times of fast moving changes in subject matter, curriculum planners always consider the reasons for making changes in order to review curriculum thoroughly (Doll, 1996). The impact of context on curriculum entails goals; syllabus, core-content and time scheduling, teaching content, planning, implementation of instructional learning situation; instructional and learning objectives, teaching methods and teaching media (Task Team Report, 2009a; Gruba, 2014; Renni, 2001).

2.3 CURRICULUM CHANGE AND REVIEW IN SOUTH AFRICA

The study focuses on curriculum change and review in South Africa from the year 1995 up to 2015. Since 1994, the government issued several curriculum related reforms intended to democratise education and eliminate inequalities in the post-apartheid education. In 1995, the government conducted a national audit on teaching that

revealed many disparities and problems in South Africa which were caused by the Apartheid system (Booyesen & Du Plessis, 2015). The most significant policy shift in education is known as the shift to 'Outcome Based Education' which underpins the current iteration of the national Curriculum (Taylor & Francis, 1998).

In the year 2000, the Minister of Education established a Curriculum Review Committee which led to modification of the curriculum, also known as the National Curriculum Statement (NCS) (Taylor & Richards, 2014). In 2009, the Minister of Basic Education appointed a panel of experts to investigate the nature of challenges and problems in implementing the NCS as a way of addressing the challenges. The curriculum review panel was also expected to develop a set of recommendations designed to improve curriculum implementation. The understanding behind the curriculum change investigation and its report was that the conditions under which teachers work were considered as central to their ability to enact the curriculum. Challenges on the implementation of the NCS such as teachers' workload, confusion, and learner underperformance in international and local assessments were identified by the Task Team (Task Team Report, 2009a).

The Task Team identified a number of issues that constitute the necessary steps in implementation of a new curriculum, that can be taken as best practice for curriculum change in South Africa. The following three phases for improving curriculum implementation and the enhancement of teaching and learning in schools was recommended: Phase 1 entails streamlining the policy available to teachers, clarifying and specifying the content. Phase 2 entails creating tighter links between the curriculum, training and learning and teaching support materials (LTSMs). In this phase, the production of high quality textbooks clearly aligned to the curriculum are required. In Phase 3 implementation is strengthened and effects of streamlining and strengthening initiatives are allowed to take hold in schools. The motive was to culminate in wide-scale testing in 2014 (Task Team Report, 2009a; Curriculum News Report, 2012a).

In 2011, NCS was reviewed and amendments were made. The amendment was named the Curriculum and Assessment Policy Statement abbreviated as CAPS (Taylor & Richards, 2014).

2.4 TEXTBOOKS AND TEACHING SUPPORT MATERIALS DEVELOPMENT IN SOUTH AFRICA

LTSMs are the basis of a curriculum (Doll, 1996). The textbook is regarded as the chief learning tool in schools. The selection and development of appropriate LTSMs to enhance teaching and learning is an important part of curriculum interpretation and implementation (Taylor & Richards, 2014). Textbooks and other related materials express both the values of the education policies and those of their producers and publishers. Producers of textbooks are therefore a crucial component of the education system and shape and determine the curriculum and its outcomes (Curriculum News, 2012c). Textbooks and teaching support materials therefore represent the intersection of the education, creative and business sectors, as producers of educational materials are business persons driven by a profit motive who have scope to apply creative ideas to differentiate their products in the marketplace. In this sense, textbook and teaching support materials developers influence curriculum planning to a significant degree (Doll, 1996).

In South Africa's Curriculum 2005, the envisaged role of textbooks was adapted to encourage the idea that teachers should develop their own learning materials. They were encouraged to 'dip in and out' of textbooks to develop their own curriculum support materials (Task Team Review Report, 2009a; Booysen & Du Plessis, 2015). In 2009, the review committee recommended the increased and improved use of textbooks, and development of a national catalogue of learning and teaching support material with approved textbooks which have been aligned with CAPS. The review of the implementation of NCS highlighted the crucial role that LTSMs including textbooks play in supporting and strengthening curriculum implementation (Curriculum News, 2009a). The focus for the strategy for textbooks, and LTSMs generally, within the revised curriculum was on establishing guidelines for the DoE for the development of a national catalogue of LTSMs aligned to the CAPS, and recommended an optimal textbook size with price guidelines, allowing teacher voice, quality control and cost effectiveness.

The market for national curriculum-based textbooks and teaching support materials in South Africa comprises of a number of role players which create the demand, supply the product and consume the products (see Figure 2.1). According to Circular no. 29 of 2016, Kwazulu-natal Department of Education, the DBE negotiate prices for departmental purchases. The DBE creates the initial demand through development of the curriculum and requirement to supply schools with textbooks and teaching support materials. Textbook publishers supply the product to schools on behalf of the DBE, and to retailers to supply to consumers. The nature of the market therefore consists of a combination of public procurement of products (textbooks) through the education departments, and private supply to consumers.

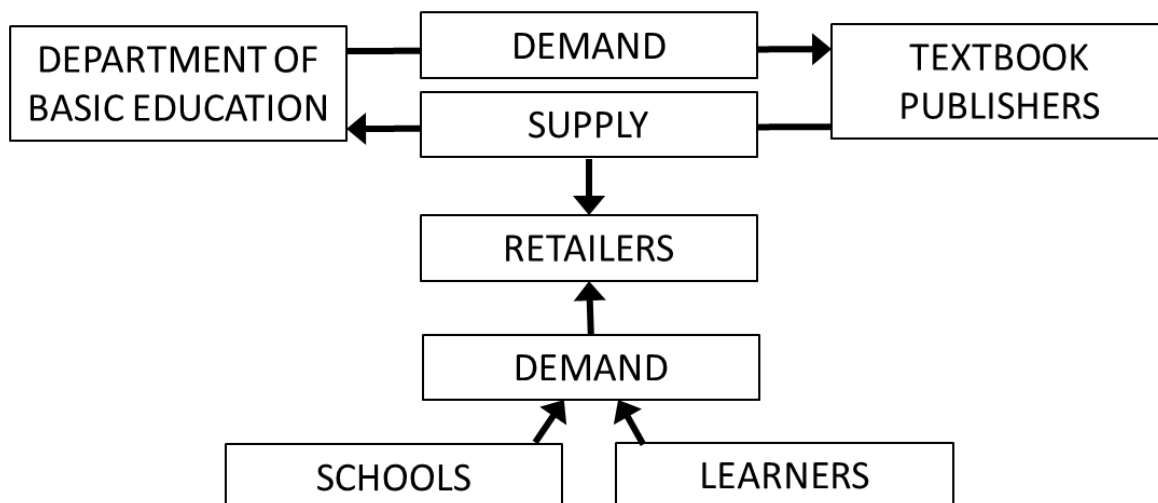


Figure 2.1: South African curriculum textbook publication and retail market

Source: Researcher's own contribution

2.5 PRICE FACTORS IN THE TEXTBOOK MARKET

Price exists whenever consumers are charged for a product. No matter how good the intentions of a private organisations and government, it is very difficult to prevent the price system from operating (Hill, 2013; Case et al., 2014). Efficiency in the pricing and procurement mechanisms of textbooks and LTSMs generally are emphasised as they capture 30 percent of textbook budgets (Task Team Review Report, 2009b).

It is standard economic assumption (though not necessarily a perfect one in the real world) that, other things being equal, a firm will attempt to maximise its profits. Given

that profit is defined as the difference in total revenue and total cost, a firm achieves a maximum profit by operating at the point where the difference between the two is at its greatest, and this profit principle applies to the sustainability of textbook publishers and retailers depend highly on costs and profit earned (Vigaro et al., 2005; Case, Ray, Fair, Sharon & Oster, 2014).

If a firm maximises profit, then it is generating the highest possible reward for entrepreneurship resources (Kruger, De Wit & Ramdas, 2006; Case et al., 2014). Business owners also attempt to manage their businesses so as to improve their well-being. The profit-maximisation rule applies both to firms that are able to sell their product at a constant price and to firms that find they must reduce the price of their product to increase sales (Kruger et al., 2005; Case et al., 2014; Mc Connel & Brue, 1980).

Even where there is a public-private relationship, for example in the case of textbook publishers and retailers for supply of products with a degree of guaranteed demand, price and profit considerations play an important role in operation of the system. Publishers produce textbooks which they typically distribute to wholesalers and retailers. Book stores purchase textbooks in an attempt to pay lower prices because this helps them to yield savings. This becomes possible if the same textbooks are utilised and if changes are made at the same point in time. The curriculum-based textbook market contains unique challenges as the body of knowledge upon which products are based changes rapidly, that is; curriculum change.

2.6 CORE FUNCTIONS PERFORMED IN TEXTBOOK PUBLISHING AND RETAILING BUSINESSES

There are various business functions performed in textbook publishing and retailing businesses as in any other businesses (Kruger et al., 2006; Mark, 1998). These include the financial function, the marketing and general management functions, represented in Figure 2.2 below.

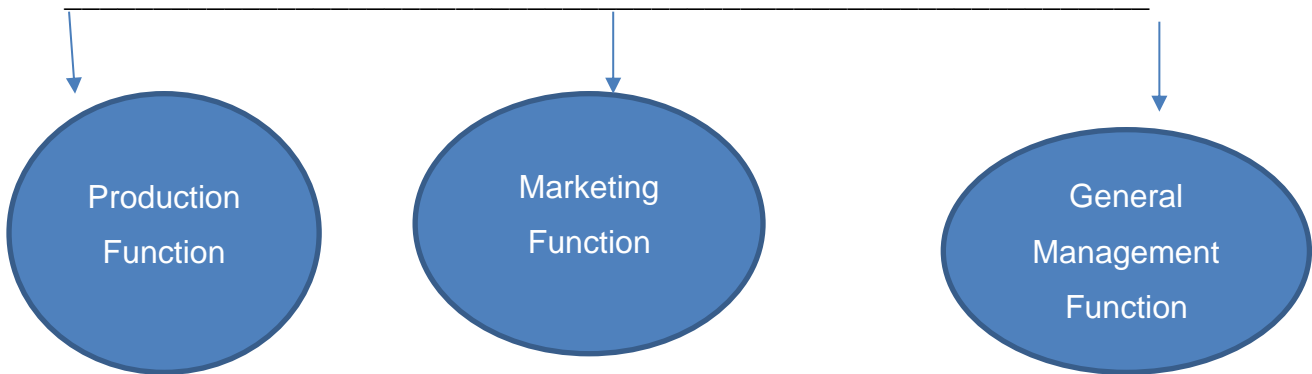


Figure 2.2: Core functions performed in textbook publishing and retailing

2.6.1 Financial functions

The financial function performed in the publishing and retailing of textbooks ensures that money is available for the purchase of raw materials, machinery and for payments of salaries, as well as to fulfil the general business obligations (Kruger et al., 2006). The financial function is primarily concerned with the acquisition and employment possibilities of capital (Mark, 1998). The publishing and/or retailing enterprise's objectives cannot be achieved unless management is well informed about the various cost components. It is therefore, important to take special considerations of the pricing and profitability of the business.

The finance decision when curriculum changes

When a textbook publisher or textbook retailer takes a decision to publish or sell new textbooks, financial management becomes an important aspect. The key objective of financial management is the creation of responsibility derived from the business owners whilst managing and mitigating the risks faced by the entity (Vigario, Benade, Combrink, De Gaaf, Esterhuysen, Jonker, Klopper, Ndlovu, Nobyati, Plant, Steyn & Steyn, 2013). Financial managers have to plan, monitor and control their finances. Financial managers of textbook publishing and retailing also look at investments that yields future cash flows. The sources and application of funds can therefore, not be

ignored Vigario et al., 2013). It is also the duty of the finance function to take the responsibility of obtaining funds with minimum cost and appropriate risks.

Whenever curriculum changes, the need for funds arise to textbook publishers and retailers in order to finance the project, that is publishing new textbooks and retailing. A project such as the development of new textbooks which applies in textbook publishing firms can be financed using debt (loan finance) or equity finance. Equity finance is provided by the owners of the business whereas debt finance is provided by lenders who do not run and cannot make decisions on how the business should run (Vigario et al., 2013, Wingard, Von Well, Pretorius, Ferreira, Badenhost & Van der Merwe, 2012). How the business finance the project will have an impact on the financial risk of the business, which will increase as debt finance increases or decreases as equity finance is used. In deciding how to finance the project, which in the study is the publishing of new textbooks and retailing, all the necessary calculations must be done at market values.

2.6.2 Marketing in curriculum change

Marketing is defined as the social activities that direct the flow of goods and services from producers to consumers in a way that effectively matches supply and demand. The main purpose of the marketing function is to sell the product or service of the organisation, which in the study refers textbooks (Kruger et al., 2006). It is the responsibility of the marketing function to take into consideration the costs associated with marketing of textbooks. Marketing costs include selling costs and distribution costs. These are costs incurred in order to promote sales, store the finished products and transport them to consumers (Mark et al., 1998). Examples of marketing costs are salaries of sales staff, commission of sales staff, advertising costs, free samples, entertainment expenses, travelling expenses, rent, telephone expenses, stationery and postage of sales staff, delivery costs as well as miscellaneous marketing costs (Kruger et al., 2006; & Kotler, 2003; Smit, Cronje, Brevis & Vrba, 2016).

Marketing entails the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchanges that satisfy individual and organisational objectives. The definition identifies the four

decision areas of marketing as product decision, pricing, distribution and marketing communication decisions (Mark, 1998 ; Kotler, 2003). The functions of marketing are illustrated below in Figure 2.3.

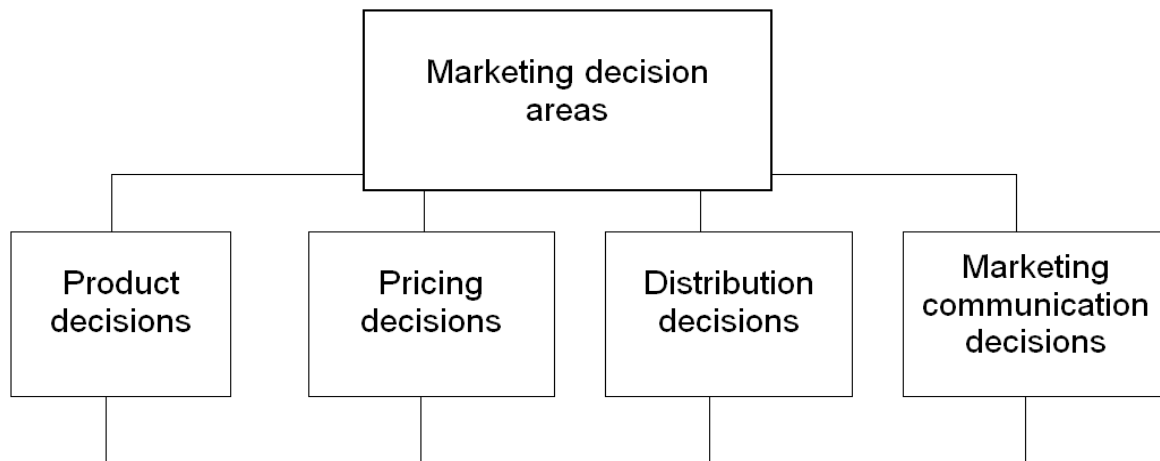


Figure 2.3: Areas of marketing decision areas

(Adapted from Kruger et al., 2006; Kotler, 2003; Cronje et al., 1994).

2.6.2.1. Product decisions when curriculum changes

It is the responsibility of the marketing manager to make decisions regarding the product such as its design and packaging (Smit et al., 2016). Product decisions entails how firms adjust their product lines to changing conditions, which in the study is the change in curriculum. Firms often change their product mix breadth by either adding or deleting categories (Grewal & Levy, 2010).

- Increasing breadth or depth

Firms often add new categories to capture new or evolving markets, increase sales, and to compete in new avenues. Increasing depth normally occurs when a firm wishes to address changing consumer preferences or preempt competitors while boosting sales. The longer the product exists in the marketplace, the more likely it is that the market will become saturated. For this reason, new product introductions becomes important for firms. New product does not necessarily mean that the product has never existed before. Completely new products represent fewer than ten percent of all new product introductions each year. Without new products or services, the value of

the firm ultimately decline. In industries such as arts, books and software, most sales comes from new products (Grewal & Levy, 2010).

- Decrease breadth or depth

It is advisable to delete the entire product lines to address changing market condition or meet internal strategic priorities (Grewal & Levy, 2010).

2.6.2.2. Price decisions

Price is the overall sacrifice a consumer is willing to make to acquire a specific product or service. Price also provides information about the quality or value of products and services. A price set too low may signal low quality, poor performance, or negative attributes about the product or service. Consumers usually rank price as one of the most important factors in their purchasing decisions. Marketers view pricing decisions as a strategic opportunity to create value rather than as an effort afterthought to the rest of the marketing mix, that is; product, price, distribution and promotion. Successful pricing strategies such as are customers, company objectives, costs, channel members and competition are built around the five critical components of pricing which known as the five Cs of pricing. (Grewal & Levy, 2010; Acutt, 2010, Kotler, 2013; Mc Carthy, 2013).

C1 - Company objectives

The pricing of a company's product or service should support and allow the firm to reach its overall goals. The company objectives usually reflect how the company intends to grow. The objectives may include profit orientation, sales orientation, competitor orientation or customer orientation. A firm may however, embrace two or more non competing objectives. Below follows the short description of the company objectives.

- Profit orientation

Firms usually implement target profit pricing, maximizing profit and target return pricing.

- Sales orientation

Firms usually set prices believing that increasing sales will help the firm more than will increasing profits. They may be more concerned about their overall market share. They believe that market share better reflects their success relative to the market conditions than do sales alone.

- Competitor orientation

Firms strategise according to the premise that they should measure themselves primarily against their competition. Some firms focus on competitive parity. They set prices that are similar to those of their major competitors.

- Customer orientation

A customer orientation explicitly invokes the concept of value. The price is set with an attempt to increase value by focusing on customer's satisfaction, that is; setting prices to match consumer's expectations.

C2 - Customers

Customers want value. The higher the price, the greater the status associated with the product and the greater the exclusivity because fewer people will afford to purchase the product.

C 3 – Costs

Firms must understand their cost structures in order to determine the degree to which their products or services will be profitable at different prices. Cost-based pricing method determine the final price to charge by starting with the cost. Prices are usually set on the basis of estimates of average costs. Two primary categories of costs are considered, that is; variable costs and fixed costs.

Variable costs consists of primarily labour and materials that vary with production volume. Fixed costs remain essentially at the same level, regardless of any changes in the volume of production. Examples of fixed costs include items such as rent,

utilities, insurance, administrative salaries and the depreciation of the physical plant and equipment.

C4 - Competition

Competition has a profound impact on pricing strategies. With competitor based pricing, firms know that consumers compare the prices of their products and they set prices the way they want consumers to interpret their own prices relative to the competitors offerings (Case et al., 2014; Grewal & Levy, 2010).

C5 – Channel members

Channel members must carefully communicate their pricing goals and select partners that agree with them in order to avoid conflict. Channel members, that is; manufacturers, wholesalers, and retailers which in the study will be textbook publishers and textbook retailers can have different perspective when it comes to pricing strategies. A textbook publisher that is focusing on increasing the image and reputation of its brand but working with a textbook retailer that is primarily concerned with increasing its sales may be used as a suitable example. The textbook publisher may desire to keep prices higher to convey better image, whereas the textbook retailer wants to lower prices and will accept lower profits to move the product, regardless of consumers' impression of the brand (Kotler, 2013; MC Carthy, 2013).

2.6.2.3. Distribution of textbook decisions

Distribution decisions entails delivering value proposition, which in the study refers to textbooks. The distribution decision represents all the activities of the supply chain management necessary to get the product to the right customer when that customer wants it. Supply chain management is the set of approaches and techniques that firms employ to efficiently and intergrate their suppliers, manufacturers, warehouses, stores, and other firms and other firms involved in the transaction, such as transportation companies, into a seamless value chain in which merchandise is produced and distributed in the right quantities, to the right locations, and at the right time, while

minimizing systemwide costs and satisfying the service levels required by customers. It is important for businesses to know that convenience is the key to success and consider where their target market expect to find their products. The level of difficulty a manufacturer or a publisher in case of textbook publishing has in getting retailers to purchase its products is determined by the degree to which the channel is vertically intergrated. Without a strong and efficient supply chain system, merchandise or textbooks in case of textbook publishing will not be available when customers want it. Customers will be disappointed, and sales and profits will suffer (Grewal & Levy, 2010). The supply chain management affects marketing. Manufacturers, retailers or distribution specialists operate as distribution centres. They accept the responsibility for the receipt, storage and redistribution of goods to company stores or customers. A decision has to be made whether to use a direct or indirect marketing channel or supply chain.

- Direct supply chain

In direct supply chain, the end user of products purchase the products directly from the manufacturer or textbook publisher, that is schools buy textbooks directly from textbook publishers. The supply chain / channel can be shown as follows:

Textbook publisher (manufacturer) – schools and individual school learners

- Indirect supply chain

With the indirect supply chain, textbook publishers (manufacturer) to retailers who sell them to schools. The supply chain/ channel can be shown as follows:

Textbook publisher -- Textbook retailer -- schools and individual school learners

2.6.2.4. Marketing communication decisions

For any communication campaign to succeed, the firm must deliver the right message to the right audience through the right media (Grewal & Levy: 2010). It is important to note that marketing costs in textbook publishing and retailing are costs incurred in order to promote textbook sales, store the finished textbooks and transporting them to consumers, that is Department of Education offices and to schools (Mark et al., 1998 ; Acutt, 2010). Representatives for visiting customers in order to get orders must also

be employed because they keep customers abreast of new products that are coming onto the market (Kruger *et al.*, 2006; Kotler, 2013). Both the textbook publisher as the manufacturer and the retailer know that good promotion can mean the difference between flat sales and a growing consumer base. A coordinated effort between the manufacturer and retailer helps guarantee that the consumer receives a cohesive message (Grewal & Levy, 2010).

The intergrated marketing communication decisions that represents promotion must be made. This encompasses advertising, personal selling , sales promotion and public relations known as the 4Ps of marketing (Grewal & Levy, 2010; Goi, 2009; Kotler 2013).

- Advertising

Advertising refers to the paid form of communication, the placement of announcements and persuasive messages in time or space purchased in any of the mass media by a business, government agency and individuals who seek to inform or persuademembers of a particular target market or audience about their products, services, organisations, or ideas(Grewal & Levy, 2010; Wiid & Diggines, 2013).

- Personal selling and direct marketing

Pesonal selling is a two way flow of communication between a buyer and a seller that is designed to influence the buyer's purchase decision. Personal selling can take the form of various settings such as face-to-face advertising, video teleconferencing, on the telephone or over the internet (Wiid & Diggines, 2013). Sales personnel or sales representative primarily function to persude customers to buy (order getting), order taking and sales support, others fill a combination of roles. Personal selling costs are usually quite high compared to other forms of promotion (Goi, 2009; Kotler 2013).

Direct marketing refers to marketing that communicates directly with the target customers to generate a response or transaction. Direct marketing include telephone, mail, programme- length television commercials (informecials, catalogues, and internet based initiatives such as e-mail and m-commerce (Kotler 2013).

- Sales promotion

Sales promotion are special incentives or excitement – building programmes that encourage the purchase of a product or service, such as coupons, rebates, contests, free samples, that is sample copies of textbooks in case of educational materials, and point of purchase displays. Most marketers typically design these incentives for use in conjunction with other advertising or personal selling programmes (Kotler, 2013; MC Carthy, 2013).

- Public relations

Public relations function is the organisational function that manages the firm's communications and relationships to achieve a variety of objectives, including building and maintaining a positive image, handling or heading off unfavourable stories or events, and maintaining positive relationships with the media. Event sponsorship is regarded as one of the most effective public relations tool (Kotler, 2013; MC Carthy, 2013).

2.6.3 General Management

Management is the process which deals with the use of scarce resources as well as certain tasks such as planning, organising, leading or coordinating and controlling to attain certain objectives. People and processes are utilised in order to meet specific needs of the market and also to reach the objectives of the business (Mark et al., 1998). The general manager focuses on the entire organisation and provides direction to the entire organisation (Smit et al., 2016). It is therefore important for a manager to plan, organise, lead and control all the activities of the business. Cronje et al., emphasize the fact that general management function must be able to ensure that strategic decisions are made with special consideration to the following:

- Changes in the Market;
- The development of knowledge and skills;
- The development of new products and services;
- The maintenance of cooperation between employees; and

- The consideration of ways in which the enterprise can strive towards attaining its vision, mission and objectives and be able to survive in Markets that are becoming ever more competitive.

The four basic tasks to be performed by the general management functions can be described as follows:

2.6.1 Planning

Planning occurs in all organizations and at all levels of the organization. At the top of the hierarchy one finds the strategic plan followed by the tactical and then the operational plans at the lower levels of the planning hierarchy (Smit et al., 2016). Planning encompasses defining goals, establishing strategies for attaining the set goals, and developing a comprehensive hierarchy of plans and coordination of activities for the success of the business (Smit & Cronje, 2004, Smit et al, 2016). Planning requires coordination of all the functional areas of the business. There should be forecasting of demand, aligning the business's competing demands from supply chain to the final consumer, while linking strategic planning with operations overall planning horizons (Heizer & Render,2014).

Strategic planning deals with the following:

- An environment that is constantly changing
- An organisation that needs to be flexible to adapt to changes , and
- Strategies to align the organisation with the changing environment

It is important for the manager to develop a tool which will help to ensure that the organisation survive in the changing environment. One such a tool is strategic planning. Strategic planning refers to the process of proactively aligning the organisation's resources as the internal environment with threats and opportunities caused by changes in the external environment (Smit et al., 2016). The focus of strategic planning is the changing future and not the present or the past. When formulating strategies in response to curriculum change, textbook publishing and retailing businesses need to asks themselves questions such as the following:

- What does curriculum change in the future hold for us?

- Is it viable to continue with textbook publishing and retailing with curriculum change in future?

Will the business It may assist them to come up with an answer that is different from their current reality.

As part of planning process, the financial management must allocate financial resources to different departments in the organisation in order to enable them to achieve certain goals. This must be done by means of a budget. A budget refers to a formal plan, expressed in financial terms, that indicates how resources are to be allocated to different activities or departments of an organisation. Various types of financial budgets which focus on cash flow may be drawn. This include cash-flow budget, capital budget and Balance budget. Operational budgets which focus on revenue are also essential. This covers the contract budget, sales budget, income budget and expenditure budget (Vigaro et al., Doll, 1996; Curriculum News Report, 2010 c; Curriculum News Report, 2012c).

2.6.2 Organising

Organizing refers to the process of creating a structure for the organization that will enable its people to work effectively towards its vision, mission, and goals. The process of organizing consists of assigning the tasks necessary to achieve the organisation's goals to the relevant units or department and providing the necessary coordination to ensure that the units work synergistically (Smit & Cronje, 2004; Smit et al., 2016).

Smit et al., (2016) explained the following reasons for organizing:

- Allocation of responsibilities – managers have a duty to allocate responsibilities. It should be clear as to who is responsible for which tasks
- Accountability – This enables responsible employees to account for their outcomes, positive or negative.
- Establishing clear channels of communication – Organising ensures that communication is effective and that all information required by managers and employees at all levels of the organization effectively reaches them through the correct channels so that they can perform their jobs effectively.
- Resource development – Organisation helps managers to deploy resources

- The principle of synergy enhances the effectiveness and quality of the work performed. Cooperation of departments is desired to ensure that planned volumes are delivered.
- Division of work - Workload can be divided into activities to be performed by individuals or groups.
- Departmentalisation – Related tasks and activities of employees can be grouped meaningfully in specialised sections so that experts in various fields can deal with their specialised tasks
- Coordination – The organisation structure is responsible for creating a mechanism to coordinate the activities in the entire organization.

2.6.3 Leadership

Leadership involves taking the lead to bridge the gap between formulating plans and reaching goals. It is the process of directing the behavior of others towards the accomplishment of the organization's goals (Smit & Cronje: 2004; Smit et al., 2016). This involve influencing people , giving orders, motivating people, managing conflict, and communicating with subordinates. An organisation requires someone to set certain activities in motion and keep them going in order to reach its goals. That is leadership (Smit et al., 2016).

An overview of the components of leadership follows below.

- Authority

Authority refers to the right of a leader to give orders and demand action from subordinates. It includes the right to take action to compel the performance of duties and to punish default or negligence. In the formal organisation structures such as textbook publishing and retailing businesses, the owners or shareholders in case of companies possess the final authority.

- Power

Power is the ability of a leader to influence the behaviour of other without necessarily using authority

- Influence

This is the ability to apply authority and power in such a way that followers take action.

- Delegation

The leader pass his or her authority on to a subordinate to do something on his or her behalf. Responsibility and authority are delegated down the chain of command from a person at a higher level in the organisation to a person at a lower level.

- Responsibility

Leaders bear the responsibility for performing a task according to orders and it is their duty to account for their actions

- Accountability

Accountability is the evaluation of how well individuals meet their responsibility. Managers are accountable for everything that happens in their departments or sections.

2.6.4 Control

Control is an important task performed by management in the organization which in the study is the management of textbook publishing and retailing business. Control is necessary in order to determine whether the plan was successful or not. If not, it becomes vital in order to plan steps that can be taken to prevent and rectify errors. The motive behind control is to determine steps that can be taken to prevent and rectify errors in order to ensure that the organisation remains within acceptable limits. The process informs the management if activities are proceeding according to plan (Smit & Cronje, 2004; Smit et al., 2016).

The importance of control

Smit et al., (2016) explained the following importance of control :

- Control is necessary to ensure that all activities at all levels of the organization are in accordance with the organisation's mission and goals
- Control is applied to ensure that the organisation's resources are deployed in such a way that it achieves its goal.
- Tight control results in better quality.
- There is a greater need of timeous control in large and complex organisation in order to avoid mistakes which may cost millions of rands.

- A successful free- market economy also give rise to more active competition. This nessecitates stricter cost and quality control.
- Control can hep minimize costs and limit the accumulation of errors.
- Conrol facilitates delegation and teamwork.

Areas of control

It is necessary to control the organisation’s activities at strategic points, that is; human, financial, physical, and information resources as the key areas of control (Smit et al., 2016). Table 2. 1 below gives the illustration of areas of control defined by most organization. The key areas of control are also applicable to textbook publishing and retail businesses.

Key areas of control	Examples of aspects or costs which to be controlled
Human resources (Meeting standards for recruitment, selection and controlling human resource)	Training and development costs and costs involved in terminating contracts. This
Financial resources	Cash flow or debtor control
Physical resources (Tangible assets such as buildings, office equipment and furniture, vehicles, manufacturing machinery and equipment such as printers, photocopiers, binding machine in case of textbook publishing industries, and other things)	Cost of equipments and machinery, maintenance costs and other consumables
Information resources (Timely and accurate information regarding issues such as market forecasting , adequate environmental scanning and accurate operational and financial terms)	Research and marketing costs

Table 2. 1: Key areas of control

2.7 MANAGING CURRICULUM CHANGE

Whenever change in curriculum occurs, the subject matter needs to be reorganised. The reorganisation of curriculum is done around its key ideas; around material of instruction such as textbooks, as in learning activity packages; around ways of working, or around people, as when biography is used in teaching. Planners develop broad fields or fusion approach (Task team final report, 2009a). In times of fast moving changes in subject matter placement, the reasons for making changes is considered thoroughly (Doll, 1996). It therefore, becomes important for business managers in textbook publishing and retailing to manage curriculum change. They must therefore, be able to respond to the internal need for change either through reactive change or planned change. Due to the fact that change is often unexpected, managers may respond to it in a reactive way. In this instance, the process is usually hurried and poorly planned and executed in anticipation of future events and changes (Smit et al., 2016).

The selection and development of appropriate learning and teaching support materials to enhance teaching and learning is an important part of curriculum interpretation and implementation (Taylor & Richards, 2014). The recommendation was that ten textbooks per grade per subject should be approved, and that a textbook course should be approved across a phase (Task Team Review Committee Report, 2009a). It is important to note that the development of textbook is the sole responsibility of textbook publishers and retailers. The efficiency in the pricing and procurement mechanisms of textbooks and learning and teaching support materials were emphasized as they capture 30% of textbook budgets. South African managers including textbook publishing and retail managers are therefore, operating in one of the most difficult management environments where there are variables which influence the way in which they have to manage their organisations (Smit et al., 2016). During 2010 – 2014, textbooks in South Africa were in mid-range, with regional countries such as Namibia and Botswana being more expensive than South Africa, Kenya and Zambia being cheaper than South Africa (Task Team Review Committee Report, 2009a).

The report showed the following textbook comparisons as indicated in table 2.2 below:

Country comparisons

	Country population	School enrolments	Average number of books approved per grade per subject at primary and secondary schooling
Kenya	39.80m	8.20m	6
Zambia	12.94m	3.28m	5
Botswana	1.95m	0.47m	3 to 5
Namibia	2.7m	0.57m	4 to 5
South Africa	49.30m	12.1m	16 (More in some subjects in GET)

Table 2.2: Textbooks country comparison

Source extract: Adapted from the Report of the Task Team for the Review of the Implementation of the National Curriculum Statement (2009)

As a way of managing curriculum change, the curriculum review committee compared various countries's population and school enrolments with South Africa. A recommendation based on the textbook country comparison was that the acquisition and distribution of textbooks should be allocated to provinces (Task Team Review Report, 2009a). For achieving cost effectiveness the following suggestions for learner textbooks were made:

- Grade 1 to 3: between R30 and R 50
- Grade 4 to 6: between R40 and R 60
- Grade 7 to 9: between R50 and R 80
- Grade 10-12: Between R 80 and R 150

The above price recommendation compelled textbook publishers and retailers to take note of textbook costs very seriously. A great deal of interaction took place between heads of operating units and top management in textbook publishing industries (PASA Draft National Policy, 2014).

2.8 FACTORS AFFECTING THE COST OF TEXTBOOKS IN SOUTH AFRICA

The educational textbook market is affected by various factors that influence the cost of products. These include skills shortages, implementation of new technology, off-shoring of printing, uncertainty, barriers to entry, price insensitivity, corruption, as well

as government contracting practices. The following general and sector-specific factors are identified that affect the cost of educational textbooks in South Africa:

- Skills shortages

Across the value chain (with the exception of distributors), there are concerns about the availability of qualified staff for the industry. Competition for skilled staff may be increasing overheads (Van der Sandt, 2007).

- Implementation of new technology

The potential of print on demand has not been fully investigated by the industry, and book distribution can be made more efficient by the wider adoption of technologies, which would also provide small publishers and independent book retailers with easier access to larger book retailers and the lists of large publishers (Van der Sandt, 2007).

- Off-shoring of printing

As a result of lower capital and labour costs, printing in the far east is about 30 to 40 percent cheaper than in South Africa, and anecdotal evidence suggests that an increasing amount of South African textbook printing is being outsourced to the east (Van der Sandt, 2007).

- Uncertainty

Publishers often receive requests to submit new textbooks for approval within unrealistic timeframes. This increases origination costs, as pressure is put on publishers' time resources, and authors need special incentives to work under extreme conditions (Van der Sandt, 2007; Barnes, 2009; Key, Dietman & Wiedmann et al., 2010). Without advance warning of orders from publishers, printers cannot source the cheapest available paper (Van der Sandt, 2007).

- Barriers to entry

High marketing costs for educational books act as a barrier to entry to new or small publishers who are typically less able to afford the large expenditures required. The large amount of free sample books distributed to schools seems to be the greatest single driver of marketing costs (Van der Sandt, 2007).

- Price insensitivity

Prices of textbooks cannot be ignored. Educational departments currently do not use price as a criterion for judging textbooks submitted for approval (Van der Sandt, 2007). The annual price increases of textbooks are not mentioned in the DBE National Draft policy (PASA Draft National Policy, 2014).

- Corruption

There are widespread and consistent allegations of corruption in the educational market. In addition to the direct cost of bribes, lost sales and so forth, corruption reduces the ability of publishers to forecast sales and thus further increases uncertainty in the educational market (Van der Sandt, 2007; PASA Draft National Policy, 2014).

- Government contracting practices

Concerns exist about the level of discretion given to certain private sector entities to purchase books on behalf of educational authorities as this removes government oversight on public spending. The government contracts often do not adequately address potential conflicts of interests on the part of the service provider (Van der Sandt, 2007; PASA Draft National Policy, 2014).

2.9 EMERGING E-BOOK MARKET

An 'e-book' refers to the contents of a book made available in electronic form (Hawkins, 2000). E-books represent the fastest growing segment in the US publishing industry even though publishers are still unsure about its future and its impacts, considering the print version is still greatly preferred in colleges (Koch, 2006; Marques, 2012; Vassilow & Rouley, 2000). Most educators, active today, grew up in a time before computers were commonly used and have limited experience of the use of technology in the classroom. The potential impact of e-textbooks depends on the interactive content, usefulness and ease of navigation as well as the format of e-textbooks. This will require motivation and dedicated efforts to understand the potential benefits of the willingness to change and adapt to teaching style and curriculum (Susan & Tanguma, 2012).

Local e-commerce services have become more established in South Africa that sells both physical and e-books online. However, the Department of Basic Education retention policy deals only with printed materials, that is; textbooks (PASA Draft National Policy, 2014). Many elementary schools provide computer labs and laptops for students. Many colleges are starting to ensure that e-book textbooks become available for use by students.

In developed countries, learners taking learning courses have their own computers whereas in developing countries such as South Africa, the computer and internet penetration is low. For this reason, learners would have to rely on communal facilities such as their schools, libraries or internet cafes (Dean, 1989). While there would be significant upfront costs for schools were they to provide computer labs and laptops, there can also be significant savings in future because e-book textbooks will become less expensive, as many publishers believe they will. Textbook publishers believe keeping textbooks up-to date will become a simpler endeavour for schools and even more environmentally friendly with no paper required in future (EBooks, 2013). However, textbook publishers and retailers have concerns about the lack of clear policy around digital copyright (PASA Draft National Policy, 2014).

2.10 CONCLUSION

The summarised literature review serves to indicate the importance of understanding the impacts of curriculum change in South Africa on the textbook market focusing on the perceptions of selected textbook publishers and retailers. Curriculum change is not something that publishing businesses can take lightly as it has significant impacts on the business model and operations. The textbook market, in conjunction with its links to the curriculum and education sector, have many unique characteristics and unique challenges, many of which are poorly understood from a business perspective. There is a clear indication that curriculum change will always occur, which implies that this set of unique challenges will continue to apply to the textbook publishing and retailing industry. Considering this reality of constant disruption to this particular market, it therefore becomes important to understand the perceptions of textbook publishers and retailers on curriculum change, in order to identify challenges they experience and also to know how they adapt to change in order to sustain their businesses. The study will

assist the researcher to draw conclusions deduced from the responses obtained from the research questions.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 INTRODUCTION

This chapter presents the methods that formed part of the research design of this study. This chapter reflects all the various methodologies that made the data collected relevant to answer the research questions and to make empirically justified recommendations. The chapter details the following aspects of the research methodology: research design, research population and sample size, research design, data collection methods, data analysis, and ethical considerations.

3.2 RESEARCH DESIGN

The research design of the impact of curriculum change on the market, which is; a case of Soth African textbook publishers and retailers, emphasises qualitative data, which is appropriate for this research as the research seeks to investigate a complex phenomenon which is composed of the attitudes, beliefs and motivations of textbook publishers and retailers. This research approach is often expressed as personal value judgements from which a purposive sample was drawn. (Tustin et al., 2005; Cresswell, 1998; Malterud, 2016; Palys, 2008). The research method uses in-depth interviews using a combination of open- ended and closed-ended questions.

3.3 RESEARCH POPULATION AND SAMPLE

The research population includes all the people or establishments whose opinions, behaviour preferences and attitudes will yield information for answering the research questions (Tustin et al., 2005). The main purpose of sampling in the study was to obtain views, opinions and perceptions of textbook publishers and retailers in South Africa ,specifically in the Limpopo and Gauteng province as the two targeted provices within easy reach of the researcher. Another reason for tareting the two provinces was that the institutions visited for the research study were referrals from the institutions approached by the researcher, that is; Kalahari Publishers and Book sellers. In

In addition, the researcher resides in the Limpopo province which implied convenient travel. The national DBE offices with the learning and teaching support materials (LTSMs) section was also the interest of the study because the researcher wanted to confirm the responses some of the responses obtained from textbook publishers and retailers.

Table 3.1 below shows the areas of study included in the research sample.

Table 3.1: Area of study

Gauteng Province	Limpopo Province
Benoni and Aberton in Johannesburg. Hartfield in Pretoria and Pretoria City Centre	Thohoyandou, Giyani, Polokwane, Makhado – Biaba and Makhado, formerly known as Louis Trichardt (LTT)

The population of this study was textbook publishers and retailers as well as the DBE officials in the Limpopo and Gauteng provinces. The total sample size drawn from the population is 30 respondents, consisting of 10 textbook publishers, 10 textbook retailers and 10 DBE officials. The respondents in the business sector consist of business owners\managers, sales and marketing managers. In the DBE, the respondents in the DBE sector consist of LTSM (book unit) officers and administrators.

The total study population and resultant sample size is shown below in Figure 2.1.

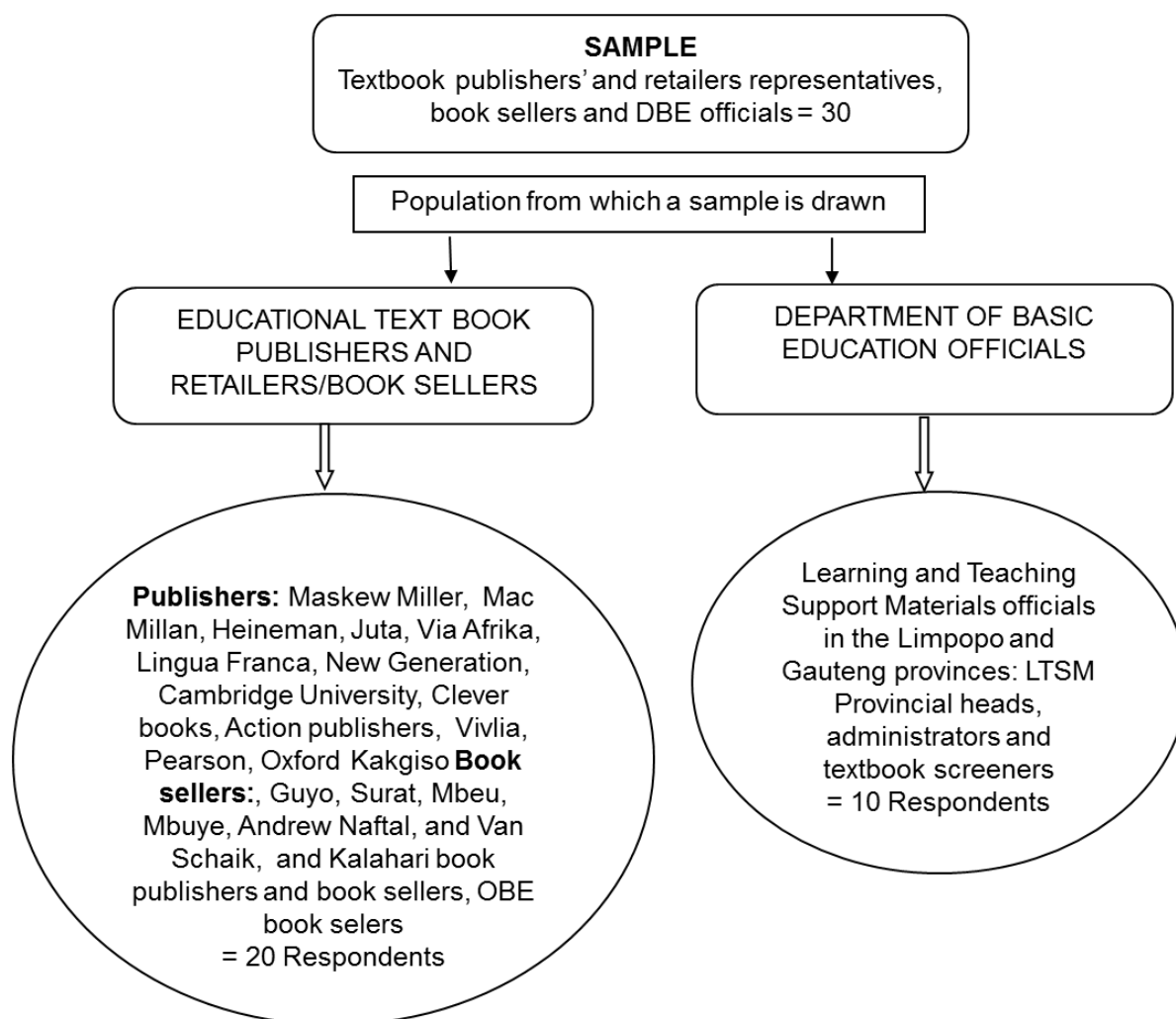


Figure 3.1: Research population and sample

Source: Researcher's own contribution

3.4 RESEARCH INSTRUMENT

Two questionnaire instruments were constructed. The questionnaires were designed for the two groups of respondents, namely; 'textbook publishers and retailers' as well as the targeted 'DBE officials'. The selected interviewees were interviewed personally using a structured questionnaire consisting of twenty-five questions, both close- and open-ended, which assisted in obtaining the perceptions of research respondents in accordance with the research questions that the research investigates. In each questionnaire, respondents were requested to provide demographic details such as

the name of their business, position in the business, province, period in the industry or department, gender, as well as detailed questions relevant to investigate the perceptions of selected textbook publishers and retailers on the impact of curriculum change on the performance of their businesses.

The structure of the questionnaires, of close- and open-ended questions, allowed the respondents to indicate their responses by a tick to 'No' and 'Yes' responses. In choosing responses, they were required to give motivation to their given responses. The open-ended questions also allowed the respondents to explain or give reasons why they chose a particular answer. Open-ended responses are regarded as "free responses" because they call for responses from the respondents (Tustin et al., 2005).

The questionnaire required respondents to provide the level of agreement for answering the given questions using a five point Likert scale approach. Five codes were used, that is; 1= "Strongly agree", 2= "Agree", 3 = "Not sure", 4 = "Disagree" and 5 = "Strongly disagree". The respondents indicated their degree or the level of agreement to which they see curriculum change affecting the performance in their businesses. The scale consists of a series of statements that express either a favourable or unfavourable attitude towards the concept under study (Tustin et al., 2005).

In addition to the structured written questionnaire, a structured interview was applied to the textbook publishers and retailers where in-depth responses were recorded, in order to derive further insight into the research questions.

From the responses given, the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the textbook market could be measured.

Pre-testing of the questionnaire

According to Wiid & Diggins (2013), it is necessary to test and refine the draft questionnaire. The draft questionnaires were tested on a small sample of the DBE officials and textbook publishers and retailers. The pilot study was conducted in order to ensure that the research questionnaire measures what it was intended to. This helped the researcher to refine the questionnaire and plan for proper data collection..

The research questionnaire was adapted following pre-testing in order to correct certain minor points and to give clarity which assisted the researcher to understand the accuracy of language used.

3.5. DATA COLLECTION

Primary data was collected using the research instrument in order to address the research questions. The primary data collection process is defined as “fieldwork” (Tustin et al., 2005). Primary data was collected using structured questionnaires and a voice recorder which assisted in fulfilling the research needs. This helped the researcher in making the data readily available for data capturing. Through primary data collection, the respondents (textbook publishers and retailers) were asked questions related to their perceptions of textbook publishers and retailers on the impact of curriculum change on the performance of their businesses. DBE officials were asked questions which required them to indicate their considerations for textbook publishers and retailers when planning and implementing a change in curriculum.

The data collection took place between February and March 2016. The researcher introduced the perceived study subject before the actual interview process. The respondents were provided with the structured questionnaires which were required to be completed manually by the research respondents. The questionnaires were completed in the presence of the researcher within a given period and returned to the researcher.

Voice recording using a digital voice recorder was also used during the interviews. Interviews were done for the purpose of collecting data specifically, to get the views on the perceptions of selected South African textbook publishers on the impact of curriculum change on the performance of their businesses. In voice recorded interviews, each interviewee took an average of 30 minutes. All the voice recording interviews were transcribed. The respondents were requested to participate in the interview and to grant the researcher permission to record the interview session. The tape-recorder granted the researcher more opportunity to recall the information gathered during the interview process (Babbie & Mouton, 2009). This was done purposefully in order to ensure that all the related matters are included and clarified.

According to De Vos, et al., (2005), follow-up questions are imperative and much valuable information can be gathered, especially when the respondent generalises and hesitates to be open with the answer. Follow-up questions aim at expanding responses that are further explained from a research respondent. This assisted the researcher to obtain in-depth information about the perceptions of respondents.

The collected data was coded and translated. This was interpreted into information which became useful to draw conclusions of the research study. The research processes were carried out effectively. The information or data collected through voice recording were utilised together with the data contained in the research questionnaires to compile the research and for making recommendations for improvement by the DBE and South African textbook publishers and retailers.

3.6 DATA ANALYSIS

The qualitative data assisted the researcher to compare and measure the results from the respondents when interpreting the attitudes, beliefs and motivations within a subject, that is; the impact of curriculum change on the market, which is ; a case of South African textbook publishers and retailers. Qualitative data analysis is a process of examining and interpreting data (Lee & Lings, 2008; Lancaster, 2005). The research data was transformed into information which was used to develop concepts and explanations.

The researcher organised primary data collected into codes according to respondents' responses, logically, as stated in the questionnaire. The coded data was again written under each thematic heading as guided by each question. The researcher discussed the views and perspectives of the respondents with regard to the perceptions of selected South African textbook publishers on the impact of curriculum change on the performance of their businesses using the hermeneutic approach to data analysis. Hermeneutic interpretation requires that the interpreter impose meaning based on the perspectives from a pre-existing paradigm (Rennie, 1999; Lee, 1999). This was done because hermeneutic interpretation is a theory and practice of the interpretation of the meaning of texts The analysis of data was also done using the literature reviewed in Chapter 2, thereby validating the descriptive data collected.

3.7 RELIABILITY AND VALIDITY

3.7.1 Reliability

Reliability is a universal concept in the evaluation of both qualitative and quantitative research (Lee, 1999). Reliability is a test of the accuracy of measurement and whether an instrument can be interpreted consistently across different situations (Babbie & Mouton, 2009). The researcher built a relationship with a local textbook publisher with a textbook retail store in order to obtain referrals. This gave the researcher the credibility of securing the correct research respondents to give accurate research results. A pilot study was conducted in order to ensure that the research questionnaire measures what it was intended to. This helped the researcher to refine the questionnaire and data collection plans. Finally, the researcher recorded the interpretations made during the field work. Verbal comments of the interviewees were not ignored. This helped to improve the accuracy and dependability of the responses.

3.7.2 Validity

Validity concerns the credibility of the findings as compared to the reality of perceptions or viewpoints articulated by the research respondents (Lee, 1999). The researcher achieved validity of the research through a number of measure are customers, company objectives, costs, channel members and competition book publishers and retailers and confirm its validity by collecting the data also from the DBE. Different areas in the two provinces of South Africa, that is; Limpopo and Gauteng were selected for conducting the research study. Comparable results from both regions serve to strengthen the validity of the responses overall. The purpose of the research study was clearly explained to the research respondents. The interview processes took place (completing of questionnaires and voice recording) in the presence of the researcher.

3.8 ETHICAL CONSIDERATIONS

The values and standards of proper ethical conduct cannot be disregarded in this research (Tustin et al., 2005). All ethical considerations associated with conducting research of this kind were adhered to. Permission was sought from all the selected

participants who participated in the study. The research participants were interviewed only when they had given consent to do so. A digital voice- recorder was only used to record respondents who were willing to be recorded. The integrity of the research was maintained by not falsifying any collected data. Finally, confidentiality of respondents' identities was observed and the names of respondents did not appear in the research report.

3.9 CONCLUSION

This chapter described in detail the methods and procedures that were used in collecting the data in order to meet the research objectives. The study followed a qualitative research design approach wherein, attitudes, beliefs and opinions of selected South African textbook publishers and retailers were studied. The DBE officials confirmed most of the responses related to the way they involve textbook publishers and retailers when planning and during the implementation of curriculum change. The chapter described the research design, research population and sample, the development of the research instrument, the process of data collection and data analysis. Finally, the reliability and validity of the research, and ethical considerations, were discussed. The following chapter presents the results of the data analysis performed according to the research methodology described in this chapter.

CHAPTER 4: DATA ANALYSIS

4.1 INTRODUCTION

This chapter presents and analyses the primary data collected as explained in Chapter 3. Furthermore, this chapter presents an analysis of collected data as it pertains to the study and the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the textbook market. The views and opinions of the Department of Basic Education (DBE) officials as an important stakeholder of curriculum change was taken into consideration when analysing data. It is important to note that responses presented here incorporate data taken both from the written questionnaire and voice recorded interviews, as similar questions were posed to respondents in order to address the following research research questions:

- What are the challenges that textbook publishers and retailers face due to curriculum change?
- What strategic responses do textbooks publishers and retailers take with regard to curriculum change?

4.2 RESPONDENTS' DEMOGRAPHIC CHARACTERISTICS

4.2.1 Respondent profiles

The respondents who participated in the interview process from the DBE, comprised of ten respondents from the curriculum section in the Learning and Teaching Support Materials (LTSMs) in the DBE, three officials from the provincial office in Polokwane and seven officials from the DBE national office in Pretoria. From the textbook publishing and retailing industry, ten respondents were textbook publishers and ten were textbook retailers. The findings reveal that the fifty percent of respondents in the textbook publishing and retailing industry were business owners, followed by sales managers with a total of forty-five percent and the sales persons with five percent. It is the researcher's view that the respondents' positions' are equivalent to their levels of responsibility in the business. The respondents profile can be accurately presented below in table 4.1

Province percentage	Area visited	Respondents percentages		
		Textbook publishers	Textbook retailers	DBE officials
Limpopo province	Giyani	10%	0%	0%
	Sibasa	20%	10%	0%
	Polokwane	10%	10%	30%
	Thohoyandou	10%	10%	0%
	Sibasa	10%	10%	0%
	Nzhelele	10%	10%	0%
	Makhado	10%	10%	0%
Gauteng province	Alberon	10%	20%	0%
	Benoni	10%	10%	0%
	Hartfield	10%	10%	70%

Table 4.1: Respondents profile

The respondents were assigned codes in order to protect their anonymity and to assist with presentation of the research findings. The respondents' codes were assigned in accordance with their industry positions. Accordingly, Respondents 1 – 10 are textbook publishers, respondents 11 – 20 are textbook retailers, and respondents 21 – 30 are DBE officials. Table 4.2 below indicates the respondent codes.

Table 4.2: Respondent codes

Respondent code	Industry
Respondent 1 – Respondent 10	Textbook publishers
Respondent 11 – Respondent 20	Textbook retailers
Respondent 21 – Respondent 30	DBE officials

4.2.2 Province and business area

The following business locations were targeted: Polokwane, Giyani, Thohoyandou, Sibasa, Nzhelele (Biaba), and Louis Trichardt (Makhado) in the Limpopo province, and Benoni, Alberton, and Pretoria in the Gauteng province as presented below in Table 4.2. Table 4.2 shows that from the two provinces, Limpopo had the majority of respondents (66.7 percent) and Gauteng had fewer respondents (33.3 percent).

Table 4.3: Province and business area of research respondents

Limpopo province: 66.7%	Gauteng province: 33.3%
Polokwane, Giyani, Thohoyandou, Sibasa, Nzhelele (Biaba), and Louis Trichardt (Makhado)	Johannes burg: Benoni and Aberton Pretoria: Hartfield

4.2.3 Gender

The findings showed that the majority of respondents (90 percent) were males while fewer respondents (10 percent) were females.

4.3 ANALYSIS OF REULTS

Collected data was analysed in order to determine the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the market. Data analysis was guided by the research questions.

The data analysis was presented according to grouping of responses within identified themes . Themes emerged from data analysis and from the research questions.

4.1 Challenges that textbook publishers and retailers face due to curriculum change

4.1.1 Costs of new material development are high

Respondent 1 to Respondent 20 responded to the question. Fifty-five percent of the respondents confirmed that costs are affected negatively by curriculum change in their businesses.

The common view of textbook publishers was that they are affected negatively because of the costs of developing new textbooks. Respondent 1 explained that:

Losses incurred were for books that were developed and submitted to the DBE but were not approved. We were unable to sell those books and we had to write off the development cost.

The following typical costs were reported:

- Typesetting
- Design and layout costs
- Editing costs
- Printing costs
- Salaries
- Copy writing
- Marketing costs
- Royalties

Respondent 8 said:

...if the book is not selected we incur losses as we have to pay for the transport costs, materials and the authors for the work done, I don't know the exact amount for the loss.

Respondent 9 shared the same view:

Six to ten copies must be submitted to the DBE for review. We pay hundreds of thousands for digital printing. We incur huge marketing costs trying to sell the

books especially in remote areas which normally do not buy the books because they are poor.

Costs associated with publishing found in the study matches with factors affecting the cost of textbooks in South Africa explained in Chapter 2. Costs of developing new materials have a negative impact on the performance of textbook publishers and retailers because higher costs reduces profitability.

This is an indication that curriculum change requires textbook publishers to have adequate funds in order to adjust to change because of the many costs associated with the publishing of textbooks. The results revealing the impact on textbook publishing and retailing costs of curriculum change is presented in Figure 4.1 below.

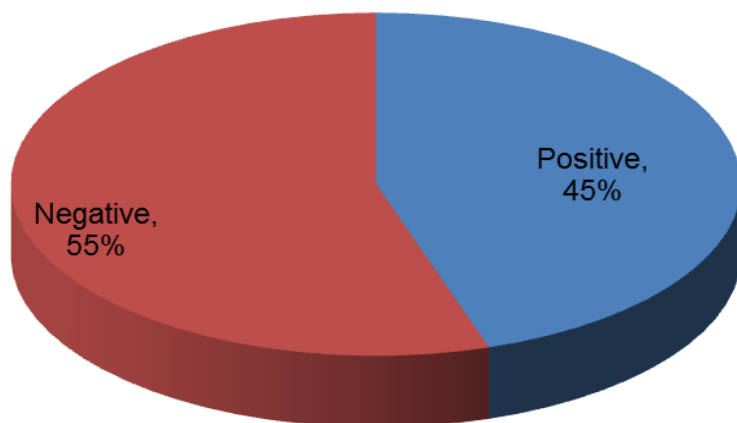


Figure 4.1: Impact on costs due to curriculum change

In the light of the above, it can be concluded that losses do occur as a result of curriculum change. There are irrecoverable losses which textbook publishers and retailers cannot avoid.

4.1.2 High competition

Textbook publishers and retailers were required to list their competitors. Table 4.4 below shows competitors in textbook publishing and retailing industries as extracted from the responses given by respondents in the study.

Table 4.4: List of competitors

Textbook publishers	Textbook retailers
<ul style="list-style-type: none"> • Macmillan • Maskew Miller Longman • Kalahari • Mangalani • Via Afrika • Van Schaik • Cambridge University Study and Master • Pearson • Lingua Franca publishers. 	<ul style="list-style-type: none"> • Mbuye book shop • OBE book retailers and suppliers • Mbeu book sellers • Kalahari book sellers • Andrew’s book sellers • Nev publishers and booksellers • Van Schaick book sellers • Guyo book shop • SURAT book sellers • Mangalani book sellers.

The findings above confirms that competition in the textbook publishing and retailing industry is high.

4.1.3 Uncertainty due to textbook selection processes

The study found that there is no guarantee of success when curriculum changes due to textbook selection process and textbook ordering considerations by the DBE. It was also found that the selection of textbooks is the sole responsibility of the National DBE through the screening of textbooks. However, the individual provinces are given the procurement mandate. The screening process enables the DBE to develop a national textbook catalogue with recommended or approved textbooks. The catalogue is issued to schools for teachers to select textbooks of their individual choice.

The research study found that the selection of textbook by DBE create uncertainties to textbook publishers and retailers. They are not always sure that they will contracted for supply of textbooks when curriculum changes occur. It was also found that individual schools select textbooks, and therefore textbook publishers. The findings were in agreement with the DBE explanation that textbook procurement is a provincial

competency and that the Department of Education (DOE) works with provinces to coordinate changes (Curriculum Report, 2009).

The study also found that the National education structures do not select textbooks. The responses given indicated that subject specialists screen textbooks focusing on content relevancy in terms of Curriculum Assessment Policy Statement (CAPS) policy and prices of textbooks. After the screening process, a national textbook catalogue with approved textbooks is compiled.

Respondent 21 to Respondent 30 indicated that the selection of textbooks is crucial whenever a new curriculum is introduced.

Confirming this, Respondent 22 said:

The selection of textbooks is the only way the DBE can assure the quality of textbooks.

The common criteria given that are considered when ordering textbooks are conformity with prescribed content and prices of textbooks. It can thus be concluded that the DBE sees the screening process as something very important and uses the curriculum section officials for screening textbooks, with the content and price given as two important criteria for selecting textbooks.

The respondents at national level indicated that national office does not order textbooks because it is the mandate of individual provinces, and as such there was no system to be stated. The respondents at provincial level indicated that they take orders from various districts and order the books from various textbook publishers as per needs.

From the responses given by the DBE officials on questions related to the criteria for selecting textbook publishers, the ordering of textbooks, as well as the delivery of textbooks to schools; the research study identified the following selection and textbook procurement procedure:

1. The call for submission of LTSM by the National Department of Education.
2. Subject specialists screen textbooks focusing on content relevancy in terms of CAPS policy.
3. A national textbook catalogue with approved textbooks is compiled and sent to schools.
4. Schools select textbooks and indicate their needs through districts.
5. Districts submit school needs to the provincial office.
6. The provincial office orders textbooks from publishers and keeps the orders in stores/ central warehouse for delivery. The price of textbooks is an important consideration when ordering textbooks in the Limpopo province. Individual school choices are not considered.
7. Contract procurement: the provincial office procures textbooks to individual schools through a tendering agency, as per order.

In the light of the above findings, it can be concluded that there is no guarantee of success because there are important considerations when ordering textbooks. The response are in agreement with the DBE Report of the Task Team (2009a) which explained the necessity of screening and cataloguing of textbooks which centralised by the Department of Education. One of the recommendations of the Task Team was that a mechanism and guidelines need to be developed so that the DOE is able to manage textbook pricing effectively while offering teachers a range of high quality textbooks to suit their contexts and needs. It becomes very clear that the quality textbooks and textbook pricing are important consideration when ordering textbooks.

4,1.4. The period of curriculum change is unknown to textbook publishers and retailers and therefore, the frequency of textbook publication is unknown.

The question of frequency of textbook publication was applicable to textbook publishing businesses only. Retailers were not included due to the fact that they do not publish textbooks or educational materials. All ten textbook publishers indicated that they do not have a specific period regarding the frequency of textbook publication. They indicated that they only publish textbooks when there is a change in curriculum and only when it has been announced by the Education Minister.

Respondent 7 indicated that the development cost of textbooks would be too high if curriculum changes can take place on yearly basis, and publishers would not be able to recover the initial investment cost which they normally cover over a medium term period.

Respondent 3 said:

Textbooks are only published once when they are approved, and then reprinted when new stock is needed. Once the textbook appear in the market, we do revisions, but these are only to change any factual errors and we cannot make extensive changes.

Respondent 6 who shared the same sentiment expressed the view:

How often we publish depends on the programme of the Department of Basic Education, why because the department has its own schedule of calling for new textbooks. We have to wait for the Department of Basic Education's call for the submission of books. We also wait for the process of screening.

The above findings confirm that there is no stated period for curriculum change and this is a serious challenge to textbook publishers and retailers. Continuous curriculum change can also result in a detrimental effect to the success of textbook publishers and retailers. The above findings therefore, are in agreement with the uncertainty factors highlighted in Chapter 2 (PASA Draft National Policy, 2014).

4.1.5 Other important challenges

The question was directed to textbook publishers and retailers. They were required to list challenges they face as a result of curriculum change. Eighty percent of them confirmed that they had challenges in their businesses due to curriculum change. The following list of challenges were gathered:

- Understanding the new curriculum is difficult.
- Lower sales of existing stock (old textbooks) and/ or losses as a result of obsolete stock.

- Increased expenses.
- Lack of resources for production.
- Inability to dispose of the old stock of textbooks.
- Adapting to writing new textbooks (developing the new material approved by the DBE.
- Finding appropriate authors.
- Teacher trainings are costly
- High marketing costs.
- Corruption due to government contracting practice.

Respondent 2 who has been in the industry for 18 years, the owner and the managing director of the textbook publishing industry admitted that there are challenges due to curriculum change by stating:

...change always comes with a lot of casualties. We have been hit hard by the change in the curriculum because new textbooks have to be developed. We do not have resources to develop these new curriculum textbooks. The DBE asks for books at once for different grades. It is difficult for us as we are small publishers. Big publishers have readily available material and staff, such that they easily modify the existing textbooks to suit the new demands by the Department of Education as compared to small publishers who have to start from scratch.

Respondent 6 who had been in the industry for 30 years explained:

A change in curriculum is the catalyst to the death of the majority of small publishing industries. The DBE is planning to approve one textbook per grade. This means that the majority of publishers whose books are not approved will not be able to supply textbooks. The publishing industry is based on curriculum change, hence; no sales will be made by publishers.

In addition, the period required by the DBE for submission of new textbooks following a curriculum change is considered, in many but not all instances, to be too short. An

example was found from 2009 for a call for submission of LTSM where textbook publishers were required to register their materials from 2009 August up to November 2010 to be used in 2011. This means that a call for submission of LTSM to be used in 2011 was given a period of 13 months for development and publication. Depending on the subject in some cases the period was even less than 13 months. This confirmed the finding that a call for submission of textbooks takes place at short notice.

In the light of the above, it can be concluded that there are several challenges that textbook publishers and retailers experience due to curriculum change.

4.1.5 No state subsidy for publishing or retailing new textbooks (No incentives for publishing textbooks)

The respondents were required to indicate if the government provides subsidies to textbook publishers and retailers of educational materials when the new curriculum is introduced. All the respondents responded that the government does not provide subsidies. The textbook publishers stated that they do not get any financial assistance from schools, but use own capital to finance publishing and marketing costs.

DBE respondents were also required to indicate if they consider textbook publishers and retailers financially whenever curriculum changes. The researcher wanted to confirm the responses obtained from textbook publishers and retailers. The majority of the DBE respondents, that is; eighty percent indicated that they do not consider financial constraints of textbook publishers and textbook retailers when planning curriculum change.

In the light of the above, it can be concluded that textbook publishers and retailers do not get any financial assistance from the government either when they are required to publish new products due to curriculum change. This simply means that the DBE does not consider the financial implication of new curriculum to textbook publishers and retailers.

4.1.6 DBE procurement procedure restricts textbook publishers and retailers to supply textbooks to schools.

The respondents were required to indicate if they supply textbooks to schools upon the request by a school. Textbook publishers and retailers stated that they do not supply textbooks to public schools. Textbook retailers indicated that they do supply textbooks only to independent schools and upon request by such schools.

The majority of respondents, that is; seventy percent indicated that textbook publishers do not supply textbooks to schools. Respondent 3 expressed the view:

... it is the duty of the Basic Department of Education to provide textbooks to all public schools because of free education policy in South Africa.

In the light of the above, it can be concluded that it is the duty of the Department of Education (DOE) to ensure that schools receive textbooks. This is in agreement with DOE procurement method as explained by the Task Team Report (2009b). This shows the discord between the government imperative to develop local entrepreneurs in the delivery of LTSM. This is also in agreement with decentralised procurement explained in Chapter 2.

4.2 Strategic responses that textbook publishers and retailers take with regard to curriculum change

4.2.1 Attending trainings on new curriculum conducted by the DBE enabled textbook publishers to know and comply with the expectations on new curriculum.

The respondents were required to indicate if they had been trained to publish the relevant content in the context of curriculum change. They were also expected to list the institution from which they received training in the case where they had been trained. Fifty percent of textbook publishing and retailing respondents indicated that they were trained.

Respondent 2 said:

The DBE gives us guidance of what their needs are or what textbook should cover in line with the curriculum needs. We do not develop textbooks at random, the DBE calls for the submission of new textbooks.

Fifty percent of the remaining respondents who indicated they were not trained stated that attended briefing sessions on new curriculum which, according to them, were not trainings.

The research findings confirmed that hundred percent of the respondents were trained on the new curriculum and therefore, have adequate knowledge of the DBE which enable them to get their textbooks approved. The study confirmed that compliance with new curriculum expectations made it possible for publishers to have their textbooks approved.

Figure 4.5 below shows the respondents responses on training; that is; an indication as to whether they were trained on CAPS as a new curriculum before it could be implemented.

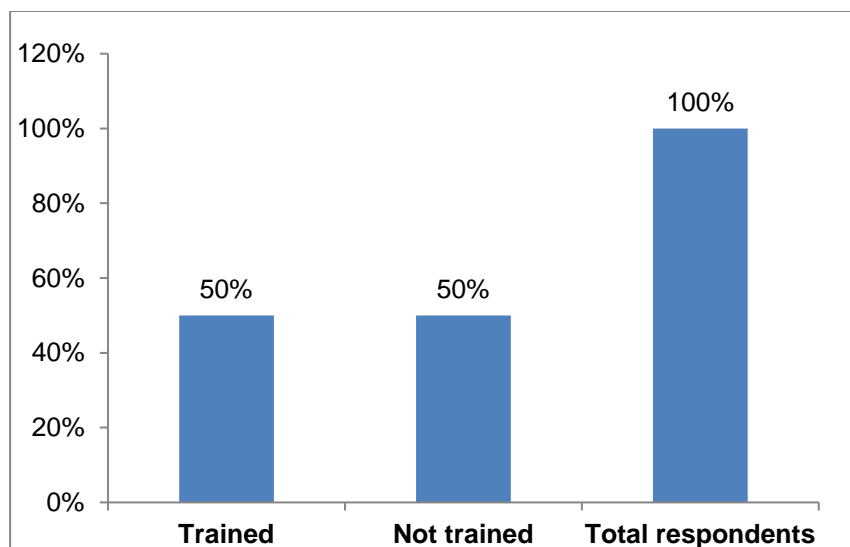


Figure 4.2: Training of textbook publishers and retailers on CAPS

The above findings gives a confirmation that textbook publishers are trained when curriculum changes. It also confirms that the DBE do call textbook publishers for training sessions which other respondents refer to, as briefings. This is a clear

evidence that textbook publishers are given curriculum change expectations and requirements for new textbooks before a new curriculum can be implemented.

4.2.2 Publishing other projects and curriculum related educational materials

Respondents were required to indicate how their business strengths fit well with the threats posed by curriculum change. A total of hundred percent respondents indicated that they provide various publishing projects.

R8 said:

I do not rely on publishing textbooks only. I also publish other books such as novels and poetry. Publishing other projects such as printing and binding keep my business forward.

R12 concurred with R8 when he said:

We are moving away from textbooks and concerntrate on study guides because our textbooks were not approved. We are focusing on stationery, educational equipments such as photocopier machines, computers, data projectors and other things.

The research findings above confirms that textbook publishers and retailers have strategies to keep their business successful when curriculum change affect them negatively.

4.2.3 The use of direct and indirect distribution of textbooks

Respondents were required to explain how they market their textbooks.

Sixty percent of the respondents indicated that they use both direct and indirect distribution of textbooks. Most textbook publishers stated that they have their own retail stores. They pblish and sell textbooks directly to the DBE if contracted to do so and also sell through their own retail store and also sell to other textbook retailers.

The findings confirmed that textbook publishers and retailers operate as distribution centres for textbooks.

4.2.4 Sales promotion

The study revealed that all respondents promote their sales through flyers, supplying free sample copies of textbooks.

R13 responded:

We prefer personal selling. We move around schools with flyers and free sample copies of approved textbooks as a way of marketing our textbooks.

The study confirmed that textbook publishers and retailers are in line with the marketing decisions outlined in chapter 2.

4.2.5 Publishing pre-paid orders and publishing smaller quantities of textbooks whenever curriculum change is announced

The research findings indicated that textbook publishers publish reluctantly the moment, curriculum change is announced. The majority of respondents, that is; ninety percent stated that whenever curriculum change is announced, they focus on publishing textbooks only on demand.

4.2.6 Proper finance decisions

The majority of respondents indicated that they rely on both equity and borrowed funds in order to cope with challenges posed by curriculum change. However, they indicated that finance decision depend on the financial position and the level of business growth.

4.2.7 No focus on e-textbook publishing

The question on the emergence of e- book publishing was directed to publishers. Thirty percent of them indicated that they do publish e-books. Seventy percent of the them

stated that e-books was not a good option because they are not marketable due to technology which the society does not possess or cannot afford. They also stated that the DBE was currently focusing on the printed material. There was a high degree of disagreement among textbook publishers on the benefits of publishing e-textbooks.

From those who reported that e-textbooks are a good option,

Respondent 3 expressed the view that:

Yes, e-Books are good alternative for paper books provided teachers know how to use them effectively. They can definitely enhance the learning experience, as e-books can be an additional asset and interactive enhancement that would not appear in a normal textbook. This is only an improvement though, if the book is not simply a book behind glass, in other words, a pdf on a reading device.

Contrary to the above respondent, Respondent 9 indicated that e-books are not a good option and do not intend to use it in future and explained:

No, because of security reasons. We are concentrating on print. We focus on remote rural areas with no access to internet and e-books.

Respondent 4 shared the same view:

Not yet, but we are moving towards publishing e-books because it is a requirement. However, it is not a good option to publish e-textbook because most people cannot afford and lower sales will be recorded.

The above clearly shows that the majority of textbook publishers interviewed have negative perceptions of e-textbooks. It also confirms that the schools in the two provinces (Limpopo and Gauteng) were not using an e-textbook-capable system. The findings are in agreement with the challenges of e-textbooks described in Chapter 2.

From the DBE perspective, the economic condition of the country is the main reason stated for not using e-textbooks. Twenty percent of respondents who indicated their

perception that the DBE intends to use the system in future as the country is moving to a paperless society failed to identify any school which was using the system.

From the above findings, it is evident that the DBE is currently not focusing on the system of e-textbooks. It can also be concluded that the introduction of e-textbooks is still a challenge in the two provinces (Limpopo and Gauteng).

4.3 Other important findings

4.3.1. Textbook publishers and retailers motivation

Respondents were required to explain what keeps them going, what motivates them to continue with business when curriculum changes. It was found that the following factors influence textbook publishers to publish textbooks:

- The call for submission of textbooks by the DBE.
- Passion.
- Opportunity.
- Competition.
- Profit.

Respondent 3, a textbook publisher, expressed the following view of the motivation to publish textbooks, which incorporates all of the noted motivations:

I like what I do. Let me tell you how I was working. I was a teacher and had an obligation and passion. I had always been competing with so many schools with good learner performance. What I would normally do at that time was not to rely on other people's materials such as study guides. I would develop my own resources using the policy documents and internet sources. My learners would always be on top with end of year results. Then when I saw a call for a submission by the DBE, I saw an opportunity. I wrote textbooks being attached to a certain publisher. My books were approved and from the reports, sales were satisfactory. After five years as a writer, I decided to open a publishing business. I am passionate about publishing. My job communicates with me.

Respondent 4 shared the following motivating factor:

Besides making money, we want to make contributions to the South African education.

The findings above are in agreement with Nieman & Niewenhuizen's (2009) explanation that entrepreneurs see opportunities in the market, gather resources and create, and grow the business venture to meet needs and receive rewards in the form of profit. The factors given are a testimony to the qualities of entrepreneurs as outlined by Nieman & Niewenhuizen (2009). It is therefore the researcher's view that factors listed by the respondents can be attributed to the motive behind the textbook publishing business; which is primarily making profit.

4.3.2 Proper consultations by the DBE whenever curriculum changes occur

The respondents (textbook publishers and textbook retailers) were required to indicate the level of agreement on the statement that the government and the DBE had communicated with them before the implementation of new curriculum. The question also addresses item 10 of the voice recording interviews.

Respondents 9 said:

The state does consult with publishers when they call for submission of textbooks and give guidance where possible.

Respondent shared the same perspective:

Consultation do exist, but the DBE must at least give publishers two years like in other countries instead of the current six months.

The call for submissions takes place after the structuring and designing of the new curriculum (Report of the Task Team, 2009; Curriculum News Report, 2012c). It can therefore, be concluded that the only factor which textbook publishers and retailers are not comfortable with, is the period which the DBE gives textbooks publishers to prepare themselves for curriculum change.

4.3.3 Readiness for curriculum change

To the question; ‘were you informed about curriculum change and for how long?’ the respondents stated the period given for curriculum change readiness as well as any two methods of communication which were used. Eighty-five percent of the respondents gave a ‘Yes’ answer to show that they were informed about curriculum change before it could be implemented.

The study findings on the question ‘*were you informed about curriculum change?*’, are presented below in Figure 4.3.

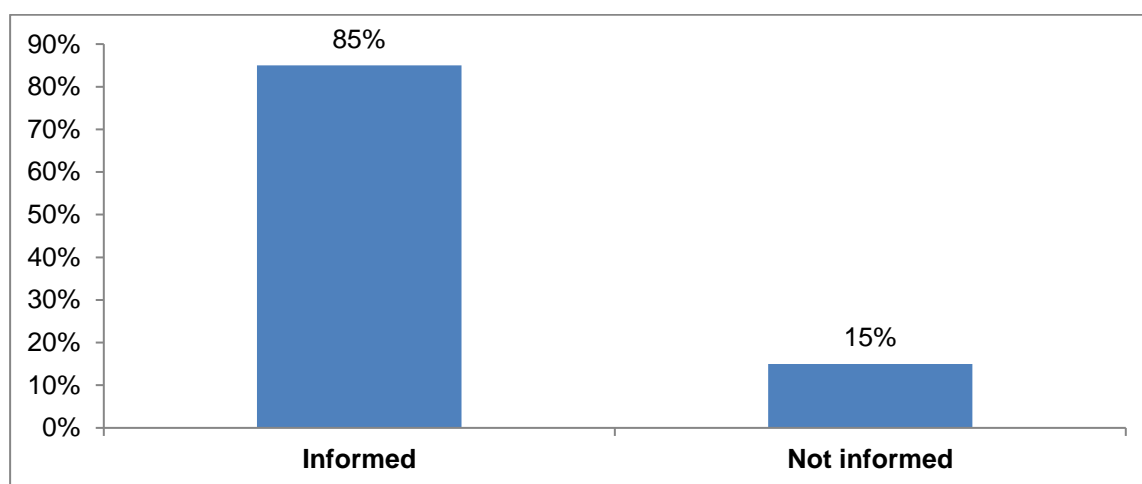


Figure 4.3: Textbook publishers and retailers informed about curriculum change

The period given for readiness ranges from three months to three years (3 years, one year, 7 months, 6 months, and 3 months). Respondent 8 explained:

Six months, this is a tight schedule as you have to start the book from sketch. This is very difficult as we have to look for new materials. Everything has to be perfect before we submit the book for review.

Eighty percent of the respondents who were textbook retailers, stated that there was no time given for preparations before implementation of a curriculum change. Respondents from textbook publishers reported a range of notice periods, including 6 months, 1 year, 18 months to 3 years as the period given for readiness before the

implementation of CAPS. This resulted in a total of 12 out of 20 (sixty percent) respondents from textbook publishers and retailers who indicated that they were given time for preparations before curriculum change.

A respondent noted:

Approximately 18 months to three years should be given to textbook publishers for publishing preparations whenever a curriculum change is anticipated.

Respondent 5 shared the same sentiment by explaining:

The submission time for textbooks must be assessed. When curriculum changes, we were given a period of three months for submission. We are suggesting to the Department of Education to give us a period of 18 months because for one to come up with good quality textbook materials, it requires 18 months.

The above gives an indication that textbook publishers and retailers do not know the exact period given to prepare themselves for curriculum change because they could not give similar responses. This in agreement with uncertainties explained in Chapter 2. The above findings give a clear indication that textbook publishers and retailers were informed about curriculum change from RNCS to CAPS, before CAPS could be implemented as a way to prepare for readiness. However, textbook publishers and retailers seem to be unsatisfied by the period given for readiness. They also seem not to be sure of the readiness period given, because their responses on this aspect were not similar.

Sixty percent of the textbook publisher and retailer respondents agreed that the DBE consulted with on the implementation of a curriculum change (Table 4.5). The question, which required the respondents to indicate how long in advance the textbook publishers and retailers were informed about the change of curriculum from RNCS to CAPS, was not clearly answered.

Respondent 6 said:

The DBE send information to PASA (South African Publishers Association) who inform publishers about curriculum change.

Table 4.5: Communication before implementation

Description	Percent
Agree and Strongly agree	60 %
Disagree and Strongly disagree	40 %

The above is a clear indication that the DBE uses the association of publishers (PASA) to communicate with textbook publishers whenever the change in curriculum occurs. This gives a confirmation that the DBE agrees on the implementation of a curriculum change with textbook publishers and textbook retailers who are affiliates of PASA.

There was no definite answer with regard to the period which a curriculum lasts before a new one can be introduced. The respondents indicated that the change in curriculum depends on the Minister of education. However, the majority of the respondents (80 percent) reported a period of five years. The general response given by the DBE officials with regard to the period given for the preparation of curriculum change before it could be implemented was also not definite.

Respondent 25 said:

Normally, members of the parliament change after a period of five years. That is where mostly you find that a new minister comes with a new curriculum.

The minority (20 percent) of the respondents made the point that there is no specific period because curriculum change is introduced in phases. From the above, it can be concluded that curriculum changes after every five years due to the fact that it is the same period that the Ministerial positions last in Parliament.

4.3.4 Continuous demand for textbooks by the DBE

The DBE respondents were required to indicate if they order textbooks for a particular year only. Fifty percent of the respondents gave a 'No' answer, indicating that they do not order textbooks for a particular year only. However, fifty percent of the respondents stated that they do order textbooks for the particular year of implementation. They also stated that the DBE does not stop to order textbook in the proceeding years of a new curriculum in order to address any shortfall, depending on the number of learners at school.

Respondent 23 said:

When curriculum changes, schools select the book and submit their needs through the districts. As the province we order the books as per school needs. We can thus say it is true, we order textbooks for the particular year only. But because we lose books every year and the number of learners does not stay constant, we are compelled to order books every year as top ups even though the quantities will be smaller than those ordered in the implementation period.

The DBE stated six months as the period that lapses between the ordering and the delivery of textbooks to the DBE provincial textbook stores.

In the light of the above, it can be concluded that the DBE orders textbooks for schools from publishers every year, volumes which vary depending on the number of learners available in schools.

4.3.5 Increased profitability in the short-run

There seemed to be a general consensus on increased profitability due to curriculum change. Seventy-five percent of the respondents confirmed that profitability in their businesses were affected positively by curriculum change.

Respondent 9 illustrates the view by highlighting that:

Curriculum change has an impact on sales in the implementation year as every learner needs to get a new textbook. The quantities sold in the first year are therefore higher than in subsequent years when only top-ups books are bought. Curriculum change does not however, improve textbook sales over a long period.

Respondent 8 expressed the view that:

High demand of new curriculum textbooks brings more profit to the business.

Respondent 9 who shared the same sentiment expressed the following view:

Because there are new entrants of books in the catalogue, it improves the sales of textbooks from the schools in the implementation year as compared to the other years when there are no curriculum changes. The sales are very high during the implementation phase comparative to other years when the implementation phase has passed.

Eighty-five percent of textbook publishers and retailers see the benefits of curriculum change.

Respondent 11 explained:

We do gain from curriculum change because when the curriculum changes, we know we have new business since there are new textbooks which schools must buy from us. We buy the books from publishers and supply them to schools.

The views of the respondents on the impact of curriculum change on business profitability can be summarised as conferring the advantages of Increase in sales and increase in sales revenue.

The results of respondents' perceptions on the impact of curriculum change on profitability are illustrated below in Figure 4.2.

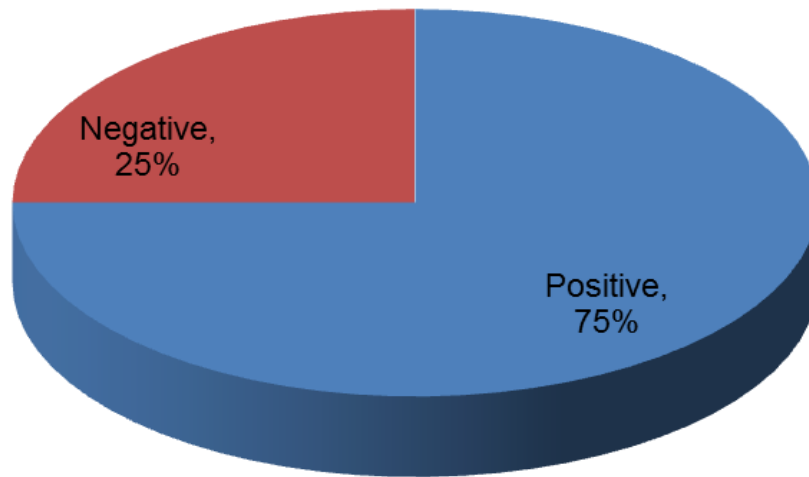


Figure 4.4: Impact of curriculum change on profitability

From the data findings as presented in Figure 4.2, the general impact on profitability of curriculum change is higher. However, in the light of the above analysis, it can be concluded that curriculum change results in higher sales in the short-run, that is; during the implementation phase. In subsequent years as stated by most of the respondents, the sale of textbooks drop. This implies that the textbook publishing and retailing business is in fact dependent on these curriculum changes to reinvigorate production and sales. Paradoxically, the curriculum changes also tend to increase costs, due to the in-built redundancy effects on existing stock, however, increases in profits from curriculum change seem to outweigh any potential cost increases. The proviso is that, while publishers who can successfully navigate this peculiar characteristic of the textbook market reap the benefits, those that cannot, for instance by not successfully producing competitive new products, suffer directly because of this feature of the market.

4.3.6 Negative perception of textbook publishers and retailers on new curriculum

The majority of respondents indicated that the impact of curriculum change on the performance of the textbook publishing and retail business is both negative and

positive. The respondents indicated that the impact becomes negative for publishers whose books are not approved whilst positive for those whose textbooks are approved.

One of the textbook publishers shared the view that the impact is both negative and positive by saying:

It is both positive and negative because as the curriculum changes, we have to submit our books to the Education Department and we pay submission fees for this. We have to do this for our textbooks to be considered, to be recommended and used by the government. If our books are selected we become ensured of high sales revenue whereas if the books are not recommended, sales revenue become very low because of low demand.

As a way of explaining positive impact, Respondent 4 pointed out:

...the impact is positive, a new curriculum present opportunities for publishers to develop new books hence making it possible for publishers to sell their books.

The majority of those who said the impact is positive claimed they experienced receiving a good approval rating from the DBE from developing new material for the new curriculum.

Explaining the negative impact, Respondent 3 expressed the following view:

The business is affected negatively because the curriculum changed while we had stock of the previous curriculum textbooks which were rendered redundant. There was nothing we could do with the National Revised National Curriculum and the apartheid textbooks. The loss was huge and it imparted casualties to publishers. The curriculum has been changed three times from the apartheid, that is; Curriculum 2005, RNCS, and now its CAPS within a short period of time.

This response illustrates the disruptive effects on the textbook publishing market from changes to the curriculum. The economic impact of curriculum change here has the

effect of, in one stroke, making existing stock redundant, with knock on effects on profitability.

Respondent 8 mentioned retrenchment as one of the consequences of curriculum change in his publishing business.

The above comments confirmed that curriculum change has both negative and positive impacts on the performance of textbook publishing and retailing industry. The impact can be positive on the condition that the revised product (textbooks) are recommended and therefore competitive in the marketplace. In this sense, curriculum change provides a stimulus to the business by generating profits from new products. Comparatively, the consequences can be negative when the new product is not competitive, and for the effects this has on existing, and now redundant, stock of this feature of the market.

4.5 CONCLUSION

The chapter presented and discussed the primary data collected from the respondents in the form of questionnaires combining demographic data with thematic questions, and close- and open-ended responses, as well as data from voice recorded interviews. The data analysed is derived from a sample of respondents from Limpopo and Gauteng Provinces made up of selected South African textbook publishers and retailers as well as DBE officials, particularly officials working with LTSMs. The data was carefully considered in order to develop themes, which contribute towards answering the research questions. The demographic profile of the respondents who participated in the study, findings and analysis according to themes were presented. The next chapter draws conclusions from the data analysed and research findings, and makes recommendations based on these conclusions.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

This chapter summarises the research findings and provides relevant conclusions and recommendations on the impact of curriculum change on the market, specifically the South African textbook publishers and retailers. Conclusions are drawn from the research findings, with particular reference to the research questions and the following objectives of the study.

- To identify challenges that textbook publishers and retailers face when curriculum changes
- To determine how textbook publishers and retailers respond with regard to curriculum change

The research was conducted as a qualitative study because the impact of curriculum change on the market was studied. A qualitative method best suited the investigation of the study given the ability to generate in-depth data in order to answer the research questions. Structured questionnaires were used for data collection. The study targeted selected textbook publishers and retailers in South Africa, as well as education officials, specifically in Limpopo and Gauteng provinces.

5.2 SUMMARY OF RESEARCH FINDINGS

The research results are informed by the research questions which are addressed through the literature review and the collected empirical data. The following findings were identified from the data analysis:

5.2.1 Key challenges

- The call for submission of LTSM takes place at short notice

It is important to note that textbooks are critical to the success of education in the country. Textbook publishers perceive that the DBE provides them an unreasonably short time for the development of textbooks. They all agreed to the fact that the period

for a submission of LTSM is very short. From the research findings, it was also found that there is no specific time given to textbook publishers for proper preparation of curriculum change. As a result of time constraints, the quality of textbooks is compromised.

- A recommendation on textbook prices was made by the DBE with no financial consideration on textbook publishers and retailers.

The research study found that Limpopo Department of Education prefers lower priced textbooks. The selection process also revealed that the price of textbooks is an important consideration in the Limpopo province and that the province selected the cheapest books from publishers. The DBE claims that the selection criteria of textbooks by schools had no impact on quality because the selection is done from the national catalogue with approved textbooks.

- Procurement of textbook shortfall takes place on a yearly basis

From the questions related to the supply of textbooks on yearly basis, it has been found that there is always a procurement of textbooks to address the shortfall early in every academic year; because accurate numbers of learner enrolment cannot be finalised because learners migrate between schools and districts.

- There is no stated frequency for curriculum change in South Africa

The study showed that the rate of curriculum change in South Africa is influenced by the politics. The perceptions of textbook publishers and retailers is that curriculum change occurs each time the Ministerial positions in Parliament change.

- Contract procurement benefits large publishers and marginalise small publishers

The Department of Education obliges contractors bidding on public work to employ a specific percentage of certified DBE subcontractors and material supplies (textbooks). Textbook publishers and retailers' perception is that curriculum change and the system

applied are biased against the majority of small textbook publishing and retail businesses.

- Curriculum change adds to the costs of textbook publication and retailing

The research findings conclude that costs associated with curriculum change such as the design and layout costs, auditing costs, printing cost, salaries, copy writing, marketing costs and royalties increase as a result of curriculum change. The prices of textbooks in South Africa are in the mid-range as compared to other countries; the prices of textbooks are adjusted to match new costs, for example, a reprint may have cheaper paper. The study also found that the unit costs of new textbooks are highest in the first year or two after publishing because of the costs associated with textbook development. The research concludes that prices are important because bids are often evaluated by price, for instance in Limpopo province, and in practice the quality of paper and binding are considered less important.

- No subsidies or incentives for textbook publishing or textbook retailing

The study found that the government does not give textbook publishers and retailers' incentives or subsidies, either for publishing or selling. Respondents from the textbook industry and from the DBE gave similar responses on this issue.

- The use of e-textbooks is not popular in South African schools

The use of e-textbooks is still a challenge in South Africa. The study found that not all Curriculum Assessment Policy Statement (CAPS) textbooks are available in digital format. From the research findings, the perception of textbook publishers and textbook retailers is that e-textbooks are not a good option. They regard e-textbooks as more attractive in theory than in practice. They do believe that using e-textbooks theoretically provides solutions to students who are unable to get to class and is also convenient because it makes school administration easier. In cases where schools have to wait for printed books to arrive, if the Department of Education is using the e-textbook system, books will be available instantly. However, they do not prefer e-textbook publishing because their perception is that the government is not doing anything to

encourage their use in public schools; hence the adoption of e-publication will not benefit them.

Other findings

- Curriculum change is a stimulus for the market

The study found that all the research respondents appreciated curriculum change even though a high frequency of yearly curriculum change is not desired. Curriculum change incurs costs in the form of development costs and stock redundancy, yet reinvigorates sales. This gives evidence that all stakeholders related to curriculum development and dissemination see the necessity of curriculum change regardless of costs incurred and challenges which they encounter due to curriculum change.

- The provinces select and procure textbooks in schools

The national Department of Education has the responsibility to compile a catalogue of LTSMs, but every province is in control of their own budget to employ different ordering of textbooks, warehousing, delivery and payment methods. The findings reveal that both Gauteng and Limpopo Departments of Education procure textbooks centrally for all public schools.

5.2.2 Strategic responses

- Attend trainings on curriculum change offered by DBE

The study found that textbook publishers attend trainings on curriculum change which are conducted by DBE. Trainings on curriculum changes empower textbooks publishers and retailers with the desired knowledge on new curriculum.

- Publishing other projects and curriculum related educational materials

The research study found that the majority of textbook publishers and retailers provide various publishing projects as a way of keeping their businesses succeed even in case they are not contracted to supply DBE with textbooks..

- Proper marketing decisions

The research study found that textbook publishers and retailers have proper marketing decisions, that is; using direct and indirect distribution of textbooks as well as sales promotion

- Publishing pre-paid orders and publishing smaller quantities of textbooks whenever curriculum change is announced.

The research found that textbook publishers becomes reluctant to publish more textbook when curriculum change is announced. They switch to publishing on demand.

5.3 RECOMMENDATIONS

The research offers the following recommendations to South African textbook publishers, textbook retailers and the DBE based on the research findings.

- The period for curriculum change must be made explicit

The period for curriculum change must be known to all curriculum stakeholders including textbook publishers and retailers. Textbook publishers indicated that they were given too short a period to develop textbooks following curriculum change. It can be argued that the quality of textbooks is negatively impacted due to time constraints. Knowing the period for curriculum change will enable publishers and retailers to adjust to change with adequate time to plan and prepare, hence resulting in production of higher quality LTSMs. Improving quality textbooks as a result of longer notice periods of curriculum change will lead to the twin outcomes of improved education and success of textbook publication businesses. It is also recommended that textbook publishers affiliate to the Publishers Association of South Africa (PASA) so as to be up to date with curriculum change matters.

- The curriculum should stay in place for a period of thirteen years and be revised every two years

It takes 13 years for a learner to start grade R until completion of grade 12. A period of 13 years of a set curriculum will therefore allow a learner to start schooling and complete high school without changing curriculum.

- Retain the principle of teacher choice of textbook

From the research findings it was found that the Limpopo province orders the cheapest books from the catalogue and not necessarily the highest quality textbooks. Like in other provinces, it is advisable to retain the principle of teacher choice of textbooks. In keeping with democratic principles, teacher choices from a wide range of textbooks will allow teachers to choose the most appropriate textbook which matches the teaching context. This will also allow textbook publishers to compete more fairly in the industry.

- Incentives or subsidies for textbook publishing and selling should be given in order to promote quality textbooks

The study found that subsidies or incentives are not applicable to textbook publishing and retailing businesses. It should be noted that both textbook publishers and retailers do business in order to gain profit. Curriculum change results in rising costs of resources to develop textbooks. Textbook retailers purchase textbooks in an attempt to pay lower prices. This can yield savings but requires that the same textbooks be utilised, which is not guaranteed because of the rate of curriculum change. Textbook publishing and retailing subsidies or incentives will keep the industry alive and promote quality production of textbooks.

- Textbook publishers should adhere to DBE expectations to maximise their prospects of being procured

Textbook publishers must consider the relevant and current information contained within the DBE curriculum policy when writing textbooks in order to improve the quality

of textbooks and other educational materials. Textbook publishers should conduct intensive research on the content they intend to publish to ensure conformity with DBE and CAPS policies and to meet the expectations of end users (schools). Considering the importance of price when ordering textbooks, textbook publishers should ensure that prices of textbooks are reasonable and affordable.

- Textbook publishers and retail training is necessary whenever curriculum changes

The DBE must conduct intensive research in order to determine the needs so as to provide proper training whenever curriculum changes. This will assist in ensuring that textbook publishers are trained on aspects such as policy requirement and expectations, and the development and distribution of textbooks to publishers.

- Provision of e-learning training facilities

The study found that textbook publishers are still unsure about the future of e-learning because the DBE has no clear policy around digital content, as most educators grew up in a time before computers were commonly used and have never experienced the use of technology in the classroom. It is therefore important for the DBE to train teachers on e-learning because its impact will depend on the interactive content, usefulness and ease of navigation. The Department of Education should promote e-learning because it provides an enhanced learning experience which includes digital note taking and highlighting. The use of e-textbooks will assist learners with learning disabilities because it allows words to be made larger, to change colours, to talk and to transfer information into other formats. The provision of e-learning facilities such as wi-fi, tablets and proper classrooms will make e-learning a success.

It can be concluded that textbook publishers and retailers have the potential to adjust to curriculum change and succeed in their businesses regardless of challenges experienced due to curriculum change.

- Further research required to better understand the effects of, and appropriate responses to, curriculum change

It is recommended that future research could use a different methodology such as atlas.ti and focus on extending the study across many textbook publishers and retailers in other provinces.

5.4 CONCLUSION

In conclusion, the study has investigated the challenges that textbook publishers and retailers face due to curriculum change as well as their strategic response to curriculum change. The study identified proper communication and lack of intensive training as gaps that need to be addressed to ensure that textbook publishers and retailers succeed well in their businesses despite curriculum change. The study found that textbook publishers and retailers' perceptions on the impact of curriculum change on their business is both negative and positive and that the industry relies on curriculum change as a disruptor to the market which stimulates economic activity and profit-making despite the challenges experienced. Recommendations for textbook publishers and retailers to cope with curriculum change are given.

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APPENDICES

APPENDIX A: REQUEST TO CONDUCT INTERVIEWS

P. O BOX 2563

Thohoyandou

0950

25 January 2016

The Manager

Textbook Publishing Enterprise/ Textbook Retailer/ Textbook Unit/ Curriculum Head

Dear Sir/ Madam

REQUEST TO CONDUCT INTERVIEWS

I, Maphangwa Mmboniseni Rejoyce, the Masters of Commerce student at University of Venda, Student no: 9805404, ID NO: 720821 0894 087 hereby request for your participation in a research project which concerns the perceptions of selected South African textbook publishers on the impact of curriculum change on the performance of their businesses.

The interviews are for the research project which will be submitted to the University of Venda in fulfillment of the Masters of Commerce degree in the School of Management Sciences.

I wish to ensure the management that the interviews will not disrupt the smooth running of your business. Confidentiality will be maintained.

Your consideration will be highly appreciated.

Yours faithfully

Maphangwa M.R (Mrs)

APPENDIX B: RESEARCH QUESTIONNAIRE

INTERVIEW GUIDE FOR THE STRUCTURED INTERVIEW

This research project is about the impact of curriculum change on the market: The case of South African textbook publishers and retailers.

The research questionnaire supplied will not be used to incriminate your business in any way. Kindly supply the correct information.

Your input will be highly appreciated and all information supplied will be treated as “strictly confidential”. The questionnaire will be used for academic purpose only.

Instructions

This questionnaire consists of 5 pages with 26 questions. Please answer all questions by putting a tick (✓) in the space provided. Give motivation and \ or reasons for your answers when required to do so in short explanations. There is no wrong or right answer. Questionnaires’ will be completed in the presence of the researcher and handed over to the researcher.

Confidentiality

The research/investigation is strictly for academic purpose. All the information supplied will be kept confidential. The respondent may withdraw participation from the interview process in case the researcher becomes unethical.

Your cooperation will be highly appreciated.

Yours faithfully

Maphangwa M.R (Mrs)

APPENDIX C: CONSENT FORM

I consent to participate to the research study: The impact of curriculum change on the market: The case of South African textbook publishers and retailers

Name of Business\ Institution:

Province:

District:

Dear Madam

I,, manager / employee\ sales person of the above stated institution declares my availability and willingness to participate on the research project, that is, the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses.

I hope you will find this in order

Yours in Service

.....

Signature

Contact No.

APPENDIX D: TEXTBOOK PUBLISHERS AND RETAILERS QUESTIONNAIRE

Topic: The impact of curriculum change on the market: The case of South African textbook publishers and retailers

This questionnaire consists of five pages and should be completed by selected South African textbook publishing and textbook retail businesses. This will assist the researcher to evaluate the perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses.

1. Complete the following:

1.1. Period in the industry:

.....

1.2. Business site or location:

.....

1.3. Province

.....

Indicate your answer by a tick (√) or a cross (x) on the appropriate column

1.4. Gender

Female	
Male	

1.5. What is your position in the business?

General Manager\ Owner of the business	
Sales Manager	
Employee\ sales person	
Sales Representative	

2. For each of the following statements regarding curriculum change, indicate your answer by making a tick (√) or a cross (X) on the appropriate block.

2.1. Do you appreciate the newly introduced\invented curriculum change?

Yes	No

Motivate your answer

.....

.....

2.2. Do you have any challenge(s) due to curriculum change?

Yes	No

If yes, state any two challenges you experienced

.....

.....

2.3. Does curriculum change affect costs positively in your business?

Yes	No

Motivate your answer

.....

.....

2.4. Does curriculum change affect profitability positively in your business?

Yes	No

Motivate your answer

.....

.....

2.5. Do you publish educational materials on yearly basis?

Yes	No

Give any two reasons for your answer

.....

.....

2.6. Were you trained to publish the relevant content?

Yes	No
-----	----

--	--

If yes, state the institution which trained you. Indicate also any criteria for attending textbook publishing and/or textbook retailing training workshops

.....

.....

2.7. Does the Department of Basic Education offer incentives to best textbook publishers and/or textbook retailers?

Yes	No

2.8. Were you involved in the planning stage and preparations for curriculum change?

Yes	No

If yes, in which way?

.....

.....

2.9. Were you informed about curriculum change before the new curriculum (CAPS) was implemented?

Yes	No

If yes, explain any two methods of communication which were used. State also the period you were given for curriculum change readiness.

.....

.....

.....

2.10. Are you currently publishing your textbooks by means of EBooks method?

Yes	No

If yes, what are the websites which your clients may use to buy or download your textbooks? List any two of them

.....

.....

In case your answer is no, do you intend to use the system in future?

Yes	No

2.11. Who are your competitors? List any two

.....

2.12. Do you get assistance from the government when you publish and when you supply educational books to schools?

Yes	No

If yes, indicate the amount or percentage of subsidy allowance

.....

In case you do not get assistance, how are you coping with textbook publishing and marketing costs and/ or losses?

.....

3. To what extent do you agree or disagree with each of the following statements due to curriculum change? Indicate your answer by making a tick (√) or a cross (X) in the appropriate block. Use the following descriptors when giving answers.

Code	1	2	3	4	5
Meaning	Strongly agree	Agree	Not sure	Disagree	Strongly disagree

3.1. The government and the Department Basic Education (DBE) had taken a communicated decision in planning and implementing curriculum change to textbook publishers and textbook retailers

Code	1	2	3	4	5
Meaning	Strongly agree	Agree	Not sure	Disagree	Strongly disagree

Give any two reasons for your answer

.....

3.2. The DBE agree on the move for the implementation of a curriculum change with textbook publishers and textbook retailers

Code	1	2	3	4	5
Meaning	Strongly agree	Agree	Not sure	Disagree	Strongly disagree

Motivate your answer

.....

4. Briefly answer the following questions:

4.1. How does your business's strength fit well with the threats posed by curriculum change?

.....

4.2. How did you obtain benefits from curriculum change?

.....

4.3. What are the costs which you normally incur when you produce a new addition of the same textbooks after curriculum change? List any three.

.....

4.4. For how long (how much time) did you prepare for the change in curriculum before its implementation?

.....

4.5. What are your suggestions to the curriculum planners/ curriculum heads?

.....

Thank you.

APPENDIX E: DBE QUESTIONNAIRE

Topic: The impact of curriculum change on the market: The case of South African textbook publishers and retailers

This questionnaire consists of four pages and is done for the purpose of collecting data, specifically to get the views of the Basic Department of Education (DBE) on matters affecting the selected South African textbook publishers due to curriculum change. The information \data collected will be utilized to compile the research project for the above stated topic and for making recommendations for improvement by the DBE and/ or South African Textbook publishers where necessary.

1. Complete the following:

1.1. Respondent name (optional):

.....

1.2. Section

.....

1.3. Province

.....

1.4. Period/ Number of years working in the Department

.....

1.5. Gender

Female	
Male	

1.6. What is your position in the department?

.....

2. Answer the following statements related by making a tick (√) or a cross (X) in the appropriate block. Motivate your answer where necessary.

.

2.1. Do you appreciate the newly introduced\invented curriculum change?

Yes	
No	

Motivate your answer

.....
.....

2.2. Do you consider financial constraints of textbook publishers and textbook retailers when planning for a change in curriculum?

Yes	
No	

2.3. Do you get complaints regarding curriculum change from textbook publishers and retailers?

Yes	
No	

2.4. Do you involve textbook publishers in the planning stage and preparations for curriculum change?

Yes	
No	

2.5. Does the Basic Department of Basic Education offer incentives to best textbook publishers and retailers?

Yes	
No	

2.6. Does the government provide subsidies to textbook publishers and retailers of educational materials when the new curriculum is introduced?

Yes	
No	

2.7. Do you order textbooks for a particular year only?

Yes	
No	

If no, how long does it take the DBE to order textbooks from the textbook publishers or retailers?

.....

2.8. Does the Department of Basic Education train textbook publishers before they can publish educational textbooks whenever the curriculum changes?

Yes	
No	

2.9. Is the DBE currently assisting schools to make use of EBook textbooks?

Yes	
No	

(a) If yes, name any five schools which are using the system?

.....

.....

(b) If no, explain your reasons and indicate if you intend to introduce the system in future.

.....

2.10. Is the selection of textbook crucial when a new curriculum is introduced?

Yes	
No	

2.11. Do textbook publishers and /or retailers supply textbooks to schools upon the request by a school?

Yes	
No	

2.12. Did you experience challenges related to textbook publishers and retailers which have been caused by curriculum change?

Yes	
No	

In case you have, List any two. Describe any two strategies you have put in place for addressing the challenges

.....
.....

3. Choose the relevant answer from the possible alternatives given in brackets

3.1. The Department of Basic Education uses (tendering system/ volunteering/ bid system) when ordering textbooks.

3.2. (Price/ author/ content) is not considered when ordering textbook

3.3. (Certificates/ supply contracts/ prizes) are given to best educational textbook publishers on regular basis.

3.4. The DBE order books from the publishers with the (top quality material textbooks, lowest price textbooks, prescribed content textbooks)

4. Briefly answer the following questions:

4.1. For how long does a curriculum last before a new one can be introduced?

.....

4.2. For how long (how much time) did you prepare for a change in curriculum before it could be implemented?

.....

4.3. What are the systems\criteria for selecting publishers? Describe any two ways

.....

.....

4.4. What are the possible recommendations to textbook publishers and retailers in order to improve the quality of educational materials? State any two.

.....

.....

Thank you.

APPENDIX F: IN-DEPTH INTERVIEW QUESTIONNAIRE

Topic: The perceptions of selected South African textbook publishers and retailers on the impact of curriculum change on the performance of their businesses

Institution (Optional): Area/ Location:Position in the business:

Instruction

“I would like to hear your opinion on the questions related to the impact of curriculum change on the performance of your business. Note that your responses will be recorded in order to ensure that all the relevant facts are gathered. The information collected will be used for academic purpose and will remain confidential”.

Answer the following questions briefly:

1. Tell me, how long have you been in the textbook publishing/ textbook retailing industry?
2. What are the challenges posed/caused by curriculum change?
3. What are the benefits posed/caused by curriculum change?
4. Would you recommend a year to year/ continuous change of curriculum if you could be given the authority?
5. Do you think curriculum change has posed negative or positive impact on your business? Can you briefly explain how?
6. Do you think curriculum change has improved to textbook sales?
7. With regard to publication of textbooks, how often do you publish your textbooks?
8. What influences you to publish textbooks?
9. Does the state offer you any incentives?
10. Does the state involve you when planning a change in curriculum? If yes, can you explain how they involve you?
11. How long were you informed about the change of curriculum as it changes from NCS to CAPS?
12. Did you incur any losses due to curriculum change? In case your answer is yes, can you estimate your loss?
13. Have you ever published e-books? If yes, is it a better option or not?

14. Does the state subsidize your business? If yes, does it help you to attain a good standing in your turnover? If no, what measures do you intend to apply to cater for costs associated with publishing and marketing?
15. Do you have anything to add, comment or recommend?

Thank you Mr/ Mrsfor your views.

APPENDIX G: WORKPLAN AND RESEARCH BUDGET

ACTIVITY	TIME
Drafting the research proposal	March - April 2013
Submission to the supervisor for approval and \or corrections	April 2013
Corrections and re-submissions	April - May 2013
Completion of research proposal and the submission of a copy to the supervisor	May - December 2013
Completing literature review	July - September 2014
Presentation of the research proposal to the research committee	May - June 2014
Corrections and re-submissions	July 2014
Presentation of the research proposal to the Higher Degree Committee	August 2014
Corrections and resubmissions	September- November 2014/ March 2015
Drafting Research methodology, research questionnaire	April 2014
Librarian fees for checking data and corrections	April 2015
Data Processing and Analysis/ Research proposal	May 2015
Conducting the actual research/ Field work.	May – June 2015
Typing a report \ Conclusions and recommendations	July 2015
Editing the final draft of the Dissertation by Language practitioners	April 2016
Submission of the Dissertation to the supervisor for corrections and binding	May 2016
Submission to the external examiner and waiting for approval. Critical evaluation of the report	May - June 2016
Corrections, final binding and final submission to the examination	July - August 2016

APPENDIX H: PROPOSED BUDGET FOR THE RESEARCH

ACTIVITY	DETAILS	MOTIVATION	ESTIMATED COST
Stationery	Papers for printing	Data preparation and collection	R 500,00
	Pens		R 50,00
	Files (2 X R50)		R 100,00
	Stapler X 1		R 100,00
	Staples X 1 Box		R 40,00
	Printer	Printing the investigation and other related materials	R 4000,00
	Cartridge		R 945,00
	Photocopying	Copies of work done and data collection instruments	R 500,00
	Binding	Spiral and Final Binding copies of thesis	R 2050,00
Project equipment	Voice recorder and respondents token		R 4000,00
	Note book		R 20,00
	Memory stick		R 150,00
	Laptop		R 6 600,00
Airtime	Communicating with supervisors and interview respondents		R 500,00
Data bundles	R300,00 per month X 12 months	Internet access	R 3 600,00
Travelling costs / Fuel	Trips to conduct interviews and feedback		R 11 795,60
Details of trips for interviews			
Thohoyandou to Tndou, shopping complex (2 return trips X 6 km)			=R 39.60
Thohoyandou to Musiana (return trips X 300 km X R3.30)			=R 990, 00

Add Toll fees		=R 88,00
Thohoyandou to Makhado (return trips X 150 Km X R3, 30)		=R 495,00
Thohoyandou to Polokwane (2 return trips X 375 Km X R3, 30)		=R 2 475,00
Add Toll fees		=R 168,00
Thohoyandou to Pretoria (return trip X 1000 Km X R3, 30)		=R 3 300,00
Add Toll fees		=R 349,00
Thohoyandou to Johannesburg (return trip X 1100 Km X R3,30)		=R3630,00
Add Toll fees		=R 349,00
Accommodation fees during interviews:		R 4 800,00
1.Polokwane - R800,00 X two days = R 1600,00		
2.Pretoria - R800,00 X two days = R 1600,00		
3.Johannesburg- R800,00 X two = R 1600,00		
Proof reading and editing	Proof reading and editing research proposal draft (120 pages X R 30,00)	R 3 600,00
Coding	Statistical analysis Data analysis	R 4 000,00
Moderator	Editing reference list	R 900,00
Research assistants	Data collection (10 days X R50, 00 X 1 assistant) = R 500,00 Typing (R10 X 120 Pages) = R 1200,00	R 1 700,00
TOTAL		R 49 950,60