

The Library and Information Services (LIS) Transformation Charter

Commissioned by the Department of Arts and Culture (DAC) and National Council for Library and Information Services (NCLIS)

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Contents

Preamble	ii
Preface	iv
Executive Summary.....	xi
Definitions, abbreviations and acronyms	xviii
Acknowledgements.....	xxvii
Chapter 1. Rationale for Transformation: an Overview of the Challenges and Opportunities	0
Chapter 2. Methodology: Reliability and Limitations	15
Chapter 3. Analysis of the LIS sub-sectors	21
3.1 School LIS	23
3.2 Public Libraries	29
3.3. Thusong Services Centres and IKS.....	39
3.4 University, Vocational and Technical Education and Training (TVET) College, and Research Councils ...	44
3.5 National Libraries	55
3.6 Special libraries	59
Chapter 4. Access to LIS and participation.....	63
Chapter 5. Human resource development: education, training and continuing professional development ...	72
Chapter 6. Monitoring and evaluation of LIS,.....	78
Appendix 1. Implementation Plan	86
Appendix 3. Questions for Library and Information Transformation Charter Public Consultations	4
References	6

Preamble

The Parties to the Charter,

- Recalling the principles proclaimed in the Constitution of the Republic of South Africa and the Bill of Rights which recognizes access to information as a human right;
- Realizing that the Government of the Republic of South Africa is committed to economic, cultural and social upliftment and well-being of all its people without discrimination;
- Recognizing that the White Paper on Arts, Culture and Heritage (1996) established a close connection between access to information and freedom of speech;
- Recalling that the Education Laws and Amendment Act No. 31 of 2007, lists the availability of the library as a minimal national norm and standard for school infrastructure;
- Noting that in the information age access to information is decisive and a source of wealth and power;
- Emphasizing the importance of the Library and Information Services Sector as an integral part of the knowledge economy, and sustainable development;
- Emphasizing, further, the importance of the sector in redressing historical inequalities, poverty eradication, social cohesion and growing the economy;
- Concerned that despite attempts by Government since the transition to democracy in 1994, the literacy level and the culture of reading still leave much to be desired by international standards;
- Drawing attention to the gap between wealthy and poor sections of South African society as an obstacle to the enjoyment of human rights and the achievement, by all, of the full meaning of freedom;
- Noting, also, that the rights and needs of poor and marginalized sections of South African society have been ignored over the years, in spite of the fact that in the Universal Declaration of Human Rights there is no room for a declaration of sectional rights;
- Emphasizing that special care is taken to point to poor and marginalized groups that often suffer from inadequate protection of their human rights – women, youth, children, and people living with disabilities;

- Mindful of the fact that the future of the sector lies in its human resources and in investing in people's capabilities;
- Mindful, further, that the LIS sector forms part of the bigger goals of government programmes including programmes such as New Growth Path, the National Development Plan, and Mzansi Golden Economy;
- Understanding that this will include adopting a national Library and Information Services policy, as well as providing the appropriate range of services that meet the criteria of availability, acceptability, accessibility, and quality;
- Understanding, also, that there may be no easy way to implementing the right of access to information;
- Emphasizing the vital importance of setting out implementation and monitoring mechanisms against a wide range of targets and specifying what government should do in terms of concrete action;
- Convinced that a comprehensive Charter to promote and develop the Library and Information Service Sector will make a significant contribution to the development of a just, prosperous and cohesive society;

Have agreed as follows:

Preface

In April 2008, the National Council for Library and Information Services (NCLIS), in consultation with the Department of Arts and Culture (DAC), brought together seven people to form the Library and Information Services Transformation Charter Technical Team. They were invited, not as representatives of organizations and institutions, but in their individual and personal capacities. Most of them are from the Library and Information Services (LIS) sector and have varied experience as academics, practitioners, policy development experts and public officials.

Their assignment was: to define the challenges facing the sector and to provide a clear framework of principles and mechanisms for effecting the changes needed for the sector to contribute to the elimination of illiteracy and inequality, and build an informed and reading nation.

The starting point was the recognition that, in the information age, access to information is crucial and is a source of wealth and power. Access to information makes better people, more efficient and effective workers, and more responsive and responsible citizens. We should think of the library as an institution, as a special place for everybody, as accompanying all South Africans throughout their lives. It should be systematically integrated into the economy and society as the preserver and transmitter of knowledge and information.

For the majority of people in developing countries the lack of information is the main impediment to their own development. This state of affairs is due not only to scarce material resources, but also to a lack of appreciation of the developmental role which the library and information sector plays. In our opinion there is no more important developmental policy than one oriented towards eradicating information illiteracy and building a modern, efficient, and equitable library and information system.

Both Government, together with its social partners, the private sector, civil society organizations, households and international aid agencies, should support this. It is in the national and global interest to make South Africa a more information literate nation. What is clear is that if Government does not create the right conditions for the development of the sector, no amount of support from its social partners will succeed in this endeavour.

The Charter's recommendations are based on the careful examination of all the evidence available to assess what is required to augment the sector's capacity to contribute in a sustainable way to the elimination of inequality and poverty. The Team consulted extensively with scholars, practitioners, users of services, civil society and political leaders both inside and outside the sector.

The Team has met individuals and groups from each of the nine provinces. They have received numerous formal submissions and have made a particular effort to engage with both policy implementers and policy beneficiaries. NCLIS is enormously grateful to all the individuals and groups for their contributions.

The first draft was presented to the Minister of Arts and Culture in July 2008, a few days before he opened the new building of the National Library in Pretoria. The second draft was presented to the National Summit early in December 2008 for public scrutiny and deliberation. In 2009, the sixth draft was presented in the form of argument and recommendations. In 2013 the Charter was revised and updated in alignment with new circumstances. However, the revised Charter has maintained the form of argument and recommendations. The argument is developed under the headings "Overview", "Challenges" and "Opportunities" and "Recommendations". This is the basis for action. The elements of the argument and recommendations are designed to serve as a comprehensive but succinct statement of findings. The analysis is mediated through the following categories: Policy and Legislation, Human Resources, Collaboration and Partnership, Funding, Innovation, Technology, and

Infrastructure. Integral parts of this Charter are the analysis and evidence that outline the substance and basis of our recommendations.

The Charter will be available in English on DAC's website. Suggestions for further reading and deliberation appear at the end of the Charter. The Charter speaks to diverse audiences: the LIS profession, decision-makers in Government who must drive forward the programme of transformation of the people as set out in the Bill of Rights and the NDP Vision 2030). The rich and the educated elite of our society who must take a strong lead for action in partnership with Government; international aid agencies, which must assist Government in its commitment for greater action on the Millennium Development Goals. It is addressed to all the citizens of South Africa. It is South African citizens who must demand action and whose voices will determine whether Government takes strong, prompt and sustained action.

The recommendations proposed constitute a coherent plan for LIS in South Africa. They should be implemented together as aspects of the same organic vision. 2014 is the year of our fifth democratic elections and just a year before the target year for the Millennium Development Goals to halve poverty and eradicate illiteracy by 2015. It is the year to take decisions that will demonstrate our resolve to turn the vision of an informed and reading nation into a reality.

There are difficulties to be contended with. The difficulties facing the effort to build an informed and reading nation are not contingent or mechanistic, nor are they questions of institutional engineering. They are of a deeper nature. Our starting point in addressing them relates back to some of the key factors in the challenges of our democracy reflected in the NDP Vision 2030.

In analyzing the causes of this condition and what can be done about it, it is necessary to say something, however briefly, about social trends in the last twenty years. Although they do not all point in the same direction, they cannot be said to have helped to make our democracy more vital or more present in people's lives. What is deeply worrying is that there are all too

few public spaces for and processes of education and training in information literacy. Consequently, there are all too few public spaces for and processes of informed discussion and participation in decision-making. Most citizens are either uninformed or 'privatized' in their habits, thoughts and daily practices.

While it is certainly true that access to education has been widened and that the Internet and many other instruments are democratizing access to information, the largest single cultural influence on families, especially the upper classes, remains the media. The oligarchic structure and conformist tendencies of national and global media have the effect of inhibiting the solid transmission of democratic and participative values. Thus, highly focused strategies for eradicating illiteracy and building an information literate citizenry are urgent. The best strategies combine step-by-step implementation and monitoring plans with an integrated body of knowledge across disciplinary boundaries. Using this framework to inform action plans on the ground and organizing the feedback of implementation would result in an integrated body of knowledge.

The right of access to information as a human right is now an established part of South African law. Yet looking at the terms in which this right is defined, one may be filled with a sense of hopelessness. What could it mean to guarantee the right of access to information? In which way is the right of access to information central to the development of human capabilities in the Information Society? Without a huge increase in the budgets of Arts and Culture, Basic Education, and Higher Education and Training, which is not in prospect, attempting to provide everyone with even a modestly defined right of access to information could drain resources from other vital sectors such as water, sanitation, housing, mining, and agriculture. Some critics may view such a provision as no more than fine words and sentiments. In recognition of the difficulty of resource constraints, the Charter adopts the notion of progressive realization rather than full immediate realization of the right. In Section 32(2) of the Constitution, this is clarified: "National legislation must be enacted to give effect to this right, and may provide for reasonable measures to alleviate the administrative and financial burden of the state." This offers a perspective on how the right of access to information can be approached in practice. The Charter, noting the difficulties of the task, acknowledges that the full enjoyment of the right of access to information is a long-term goal for millions of South Africans.

Given the problems outlined above, insisting on a right of access to information looks like a hard road to travel. Why attempt it, then? The national burden of poverty and persistent structural inequality is immense, but many political and moral arguments are available to support calls upon government and its social partners to ensure the right of access to information. South Africans already have political and moral duties of social cohesion and inclusion. Why, then, complicate matters by calling upon the right of access to information? Simply because the right of access to information can make a difference. The key point is that as a right it concerns the distribution of power and status. Those with access to information have an enforceable claim, and need not rely simply on the goodness of others. By contrast, the need for assistance is often taken as a sign of weakness and dependence while to be able to offer it is a sign of strength and superiority. (Wolf, 2012: 10 – 12)

The distinction between the right of access to information and assistance is important. Assistance is, in a sense, conservative: it conserves existing power structures, whereas to recognize another's right of access to information is to cede authority to them, at least within a particular sphere. The right of access to information argument is also more powerful in that while the assistance argument typically addresses only temporarily, urgent needs, the rights argument can also concern broader structures of freedom and opportunities. Although nothing is infallible, the point of establishing the right of access to information is to try to rebalance the power relationship, and to produce long-term, reliable structures that will remove the need for dependence in the future. That, at least, is the hope that underpins the Charter, and that is why the right of access to information is worth pressing for.

Ability to access information and its public diffusion are essential for well-being in our information society.. The point is not how many books we have in our libraries, just more options to find the one we really want in the net. Information in the Internet Age comes from people, people generating information and disseminating it over the net. This is where the revolution lies. It is the continuous collective capacity of society to generate its own information, to disseminate it, to

recombine it, to use it for its specific goals, that has transformed social practice through the transformation of the range of possibilities for the human mind. Making full use of the right of access to information is the decisive operation in modern society, and the source of wealth and power. (Castells, 2003)

In a broader historical perspective, the integrated LIS sector, an organic part of the South African Information Society, represents a qualitative change in the human experience. If we refer to our new, post-apartheid, post-colonial democratic tradition according to which social action at the most fundamental level can be understood as the changing pattern of relationships between people, the Charter paves the way for a new era. The apartheid and colonial model of relationship was characterized by the domination of political and economic power. The codes of social organization, which determined the governance of libraries and information services, directly expressed the struggle for survival under the political economy of state apparatuses, as history taught us by tracing the laws, policies, regulations, and codes of the LIS sector back to the roots of the struggle for freedom and justice. The second pattern of the relationship established at the origins of the Bill of Rights, and associated with anti-colonial struggles around the world and with the triumph of reason, saw the primacy of national unity and social cohesion, making South African society out of the process of shared labour, shared services, and shared risk by which South Africans found their liberation from oppressive forces and their submission to democratic law

Whenever the South African government adopts, like most governments, a new policy and embarks on a new national development plan, there are inevitably winners and losers, even if these distribution effects were unintended. In this broadest sense, virtually all government policies and national plans can be termed redistributive (Sefton in Morgan and Goodin). 2006). In this Charter, the focus is on the right of access to information, where the redistributive motive is most prominent. A significant part of the discourse on library and information services in South Africa is on efficiency, though efficiency can also have significant distributional effects. However, it is also important to recognize that redistribution from rich to poor is only one of several dimensions along which redistribution may occur and furthermore, that policies with redistributive effects may have objectives other than redistribution (Sefton in Morgan and Goodin). 2006). In understanding

empirical analysis of the redistributive effects of the right of access to information, it is important to realize that this will entail comparison with a counterfactual world where the right was not applied. It would also be instructive to assess the right of access to information by looking at its impact on overall inequality and poverty.

In the context of this Charter, the focus is on the notions of the right of access to information and equity that underline the Bill of Rights and how these notions reinforce each other, are reflected in the transformation of the LIS sector. The National Development Plan Vision 2030 gives a prominent role to redistributive policy. Unlike profit oriented regimes, the underlying assumption is that the outcomes of unfettered markets are unfair and that, therefore, the developmental state is much more prepared to regulate the economy to equitable outcomes. As indicated in the Preface and Executive Summary, greater equality may be good for economic growth. Greater information literacy can increase work effort, whereby individuals work smarter to achieve a higher level of service delivery. It could also be argued that more equal access to information, contributing to economic growth and job creation, can help to suppress conflict and disturbances. Each South African would feel better knowing we live in a society which protects the marginalized and moderates the extremes in social and economic power that accompany the operation of unregulated markets. Though hard to quantify, the efficiency gains that can accrue from the application of the right of access to information need to be set against the price of inequality (Stiglitz, 2013; Terreblanche, 2005).

Executive Summary

1. Key Thrusts of the Charter

The Charter identifies the next steps that the Department of Arts and Culture, the Department of Basic Education, and the Department of Higher Education and Training, the Department of Science and Technology, the LIS sector, the private sector and civil society should take towards widening access to library and information services in the most cost-effective manner. In preparing the Charter, the Technical Team considered the progress achieved in the last twenty years, took stock of the current position of the sector as well as the considerable challenges ahead. The strategies and mechanisms presented are aimed at putting library and information services on a stronger footing and to be more flexible and sustainable.

The Charter is also meant to form a basis for building an integrated LIS ecosystem so crucial in the pooling and mobilization of scarce resources and services. We argue in Chapter 1 that the ecosystem approach is transformative, offering a compelling view of a future LIS. The current financial crisis serves to remind us that we can no longer depend on past models for the future development and management of library and information services. The LIS sector will be faced with the parallel escalating challenges arising from the goals of the NDP Vision 2030 and the economy's rapid absorption into global information networks.

02

We will have to broaden the sharing of library and information services, strengthen their flexibility and improve access. Special attention must be given to improving the management of integrated library and information services, upgrade the provision of library and information science education at universities, as well as strengthening research and innovation capacity. This will enhance efficiency and accelerate institutional realignment within the sector.

We will also have to enhance the value-add of integrated library and information services through library and information literacy, and also strengthen Thusong Services (formerly, Multi-Purpose Resource) Centers. In this respect, the Charter emphasizes the creation of a strong human resource base to support the development and management of an integrated library and information services system to meet the demand for shared services, elimination of information illiteracy, and building a professional force that is adaptive and innovative. As integrated library and information services develop, the integrity of their institutional structures, leadership and management abilities, and the efforts to bridge the gap between different kinds of libraries and information institutions, will be tested.

The government and its social partners will have to continuously foster the spirit of cooperation and collaboration among various library types as we go about building a reading nation, inculcate the spirit of sharing, and broadening access to library and information services. To ensure sharing of services, the Department of Arts and Culture, the Department of Basic Education, the Department of Higher Education and Training, and the Department of Science and Technology should pool their resources to support the sharing of services. The ultimate effort, however, will have to be made by the librarians and information professionals themselves in developing the requisite skills and capabilities to take advantage of the opportunities available. They will have to work hard at meeting the challenge of establishing an innovative and sustainable sector. Only then can the LIS professionals be truly part of the national effort to forge a network of skills and capabilities.

2. Integration of Library and Information Services: Methodological Framework

a) In developing an integrated and information services sector, libraries and information services are approached from a macro perspective of a country and cover particularly the formal dimensions. These dimensions are considered to cover the legal framework, policy regime, and administrative arrangements. Thus, for the purpose of our investigation, we define libraries and information institutions as an integrated system covering both their institutional environment and institutional arrangements. This is in contrast to conventional approach where they are distinguished as separate segments. Since

libraries and information services institutions are the executive and implementation arms created for the translation and enforcement of legal and policy provisions, neither they nor the laws and policies can exist independently of each other.

b) Our approach to the integration of these institutions is based on the recognition that they cannot exist independently of each other. In our conceptual framework, the integrated conception of library and information services is essential to meet two analytical requirements. The first is to allow a different approach to institutional mandates, and the second is to distinguish library and information institutions from their general institutional environment. Our approach for the integration of these institutions involves an analytical distinction among the three institutional components: legislation, policy, and administration (Nkondo, 2012).

c) The library and information system, as defined by these three institutional components, has to be separated from its general institutional environment to understand how the system and its performance are influenced by a variety of factors exogenous to the strict confines of the library and information services sector. These exogenous factors include fiscal policies and national human resource development plans.

d) A relationship between library and information institutions based on integration through functional affiliation rather than the erection of structural and functional boundaries, is a challenge to our postmodern conception of integrated public services. Moving beyond the individual institutional identity, demands an expansive sense of library and information services which we identify as an ecosystem identity. This ecosystem identity integrates the basic elements of structure and function. It assumes a process of reconfiguration (Saleth et al, 2004:73 – 74).

e) The ecosystem identity refers to the recognition of affiliated functions that arise from the realization of the fact that these institutions came into being from a single overarching function. This reconfiguration can be achieved through the incorporation and collaboration of various institutional types to be understood and managed as a species.

Their functions are effectively those of a species.

Our exploration of integrated library and information services structures across the sector leads to an overarching conclusion: as an historical trend, dominant functions and processes in the Information Society are increasingly organized around integrated institutional arrangements (Castells, 1996:163 – 215). Integrated functions and processes constitute the new institutional morphology, and the diffusion of the logic of integrated services substantially modifies operations and outcomes in processes of production and the delivery of services. While the integrated form of social organization has existed in South Africa in the last twenty years, the new ecosystem paradigm provides a solid conceptual and practical basis for its pervasive expansion throughout the LIS sector and the entire social structure. Furthermore, it is argued that this ecosystem logic induces a social determination of a higher level than that of special and differentiated social interests expressed through the different institutional structures: the power of the flow of services takes precedence over the flow of institutional power. Presence or absence in the governance of each institutional structure and the dynamics of each institution vis-à-vis others are critical sources of domination and change in our society. (Castells, 1996:500).

A clearer understanding of the statements about the value of the ecosystem approach would require that we link up the main lines of analysis presented in Chapter 1 of the Charter (“Rationale for Transformation: An Overview of the Challenges and Opportunities.”) with the broader conceptual and strategic perspectives outlined in the Preamble and the Preface. It should, however, be kept in mind that it is impossible to address the full range of theoretical and practical questions until after examining (in the chapters on “the LIS subsectors and the chapter on “Implementation and monitoring”) fundamental issues such as institutional mandates, diverse needs and interests, institutional identity and path dependence, governance and human resource development, and the economic crisis. It is only after treating these matters, and observing their actual expression in the macro-processes reshaping the LIS sector and South African society twenty years into our democracy, that we propose some exploratory interventions to guide the new sector in the making. Nevertheless, enough information and ideas have been submitted, in the various Chapters of the Charter, to be able to reach some provisional conclusions

concerning the integrated structure of dominant functions and processes, a necessary starting point to understand the overall dynamics of the LIS sector.

Processes of institutional transformation summarized under the ideal type of the LIS ecosystem go beyond the sphere of governance and technical relationships of work: they deeply affect institutional culture and power. Institutional culture is abstracted from history, and becomes predominantly mediated by regulatory and communication frameworks that interact with user communities and by the user communities in a diversity of codes and values.

At a deeper level, the material foundations of the LIS sector and of South African society are being transformed, organized around the flow of services. Beyond the metaphorical value of these expressions and the ecosystem, supported by a number of analyses and illustrations, particularly in the chapters on "sub-sectors" and "access", a major hypothesis is put forward: dominant functions and processes in the LIS sector should be more comprehensively organized in integrated functional structures that link them up across the sector and with user communities in the multiple space of places historically segregated along racial lines and disconnected from each other.

In an analytical vein, reflecting on the empirical findings in the nine provinces, the argument on the transformation of the LIS sector surfaces the key role in a modern democracy of information literacy and reading literacy, important functions of LIS:

- All other variables being constant, integration of library and information services would reduce inequitable access to LIS;
- Service delivery efficiency gains could be used for the promotion of information literacy;
- There should be an increased emphasis and funding for the promotion of reading which will lead to development of the individual with consequent benefits for community development

- Given these improvements in building individual and community capacity, newly induced demand could result in heightened deliberation and participation in decision-making processes;
- If information literacy strengthens decision-making processes, decline in violent protests and disturbances could occur;
- If protests and disturbances decline, all other factors being equal, it would boost public confidence in government and attract substantial direct investment to the benefit of the LIS sector strengthening its role in job creation and social cohesion

In an analytical vein, reflecting on the empirical findings in the nine provinces, the argument on the transformation of the LIS sector can be summarized in several key points:

- All other variables being constant, integration of library and information services would reduce inequitable access to LIS;
- Service delivery efficiency gains could be used for the promotion of information literacy;
- If information literacy improves, then, newly induced demand could result in heightened deliberation and participation in decision-making processes;
- If information literacy strengthens decision-making processes, decline in protests and disturbances could occur;
- If protests and disturbances decline, all other factors being equal, it would boost public confidence in government and attract substantial direct investment;
- If information literacy creates conditions for direct investments and technological innovation, that could lead to job-creation and social cohesion.

In sum, it seems that there is a systematic structural relationship between the integration of library and information services, the diffusion of information technologies, improved information literacy levels, citizenship, and the evolution of social cohesion and employment levels in the economy as a whole.

Information literacy and information technologies, within an integrated services system, could become the critical ingredients of economic growth and social development.

These impacts can be expressed in a vision of a transformed LIS vision which will have the following indicators:

- LIS are within reach of all South Africans. Access is free;
- More than 50% of South Africans are regular visitors and members. LIS are seen as places for everyone, catering for the marginalized such as people with disability, rural citizens, the jobless and the incarcerated;
- The various sub-sectors collaborate to ensure an integrated LIS which is free of barriers and achieves equity of provision for all citizens;
- LIS are guided by norms and standards, and institute regular monitoring and evaluation systems;
- There is an integrated funding model which ensures sustainable growth across all parts of the sector;
- LIS staff are committed professionals and are respected as such by their parent institutions, government bodies and user communities. They are appropriately qualified and remunerated. They are engaged in continuous professional education and development. They have codes of ethics and are held accountable.

The Charter's vision for LIS is attainable. In spite of challenges, its investigation found evidence of many innovative programmes and high levels of energy and commitment among LIS practitioners across the sector.

Definitions, abbreviations and acronyms

Abbreviations and Acronyms

ACE	Advanced Certificate in Education
ACRL	Association of College and Research Libraries
ASGISA	Accelerated and Shared Growth Initiative for South Africa
BIBSA	Bibliographic Standards of South Africa
CEPD	Continuing Education for Professional Development
CHELSA	Committee for Higher Education Librarians in South Africa
CICD	Centre for Information Career Development
DAC	Department of Arts and Culture
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
DoE	Department of Education
DPME	Department of Performance Monitoring and Evaluation
DPSA	Department of Public Service and Administration
DWCPD	Department of Women, Children & People with Disability
ELITS	Education Library Information and Technology Services
ETQA	Education and Training Quality Assurance
FET	Further Education and Training
FOSS	Free and Open Source Software

GCIS	Government Communication and Information System
GDP	Gross domestic product
GRAP	Generally Recognised Accounting Practice
HEQF	Higher Education Qualification Framework
HESA	Higher Education South Africa
HoD	Head of Department
HSRC	Human Sciences Research Council
ICT	Information and Communication Technologies
IFAP	Information for All Programme
IFLA	International Federation of Library Associations and Institutions
IKS	Indigenous Knowledge System
ISAP	Index to South African Periodicals
ISASA	Independent Schools Association of South Africa
ISO	International Standards Organisation
JIPSA	Joint Initiative for Priority Skills Acquisition
KZN	KwaZulu-Natal Province
LED	Local Economic Development
LIASA	Library and Information Association of South Africa
LIS	Library and Information Services
LISLIG	LIASA Special Libraries Interest Group
LTSM	Learning and Teaching Support Materials
MOOC	Massive Online Open Courses

MTEF	Medium-Term Expenditure Framework
NCLIS	National Council for Library and Information Services
NDP	National Development Plan
NEIMS	National Education Infrastructure Management System
NGO	Non-Governmental Organisation
NLPF	National Language Policy Framework
NLSA	National Library of South Africa
NPC	National Planning Commission
NQF	National Qualifications Framework
NRF	National Research Foundation
NRS	National Record System
OBE	Outcomes-based education
OSALL	Organisation of South African Law Libraries
PIRLS	Progress in International Reading Literacy Study
PRAESA	Project for Alternative Education in South Africa
RDA	Resource description and access
RDP	Reconstruction and Development Programme
SABINET	South African Bibliographic Network
SABS	South African Bureau of Standards
SANB	South African National Bibliography
SANLIC	South African Library and Information Consortium
SAOUG	Southern African Online User Group
SAQA	South African Qualifications Authority

SASSA	South African Social Security Agency
SGB	Standards Generating Body
SLIS	Special Libraries and Information Services
SLYSIG	School Library and Youth Services Interest Group
TVET	Technical and Vocational Education Training
UNESCO	United Nations Educational, Scientific and Cultural Organization
UWC	University of the Western Cape
WCED	Western Cape Education Department

Definitions

Access	In this document refers to the degree to which the facilities and services of libraries are accessible by as many people as possible. Accessibility can be viewed as the “ability to access” the functionality, and benefit, of libraries. This includes distance and transport, building design, assistive technology, relevant and usable content of resources, suitable format of resources, and the languages of the resources and spoken by the staff. Accessibility is also used to focus on people with disabilities and their right of access to library services.
Articulated system	A system of interconnected parts that work together
Basic literacy	The minimum ability to read and write
Borderless	Connects all publicly funded libraries to each other so that users may access information and material from any library anywhere in

libraries	the city, province or country, either in person or online
Digital curation	Digital curation is the curation, preservation, maintenance, and collection and archiving of digital assets. It is the process of establishing and developing long term repositories of digital assets for current and future reference by researchers, scientists, and historians, and scholars generally.
Digital divide	The gap between people with effective access to digital and information technology and those with very limited or no access at all. It includes the imbalances in physical access to technology as well as the imbalances in resources and skills needed to effectively participate as a digital citizen. In other words, it is the unequal access by some members of society to information and communications technology, and unequal acquisition of related skills.
Digital media	Electronic media that work on digital codes
Digital technology	An electrical data storage and transmission technology that processes information in binary strings of 1's and 0's. This is the foundation of computing and of high-end multimedia systems (HDTV, direct broadcast satellite, online video and so on).
Digitisation	The Canadian government defines digitisation as "The conversion of images, characters, or sounds to digital codes so that the information may be processed or stored by a computer system."
Ecosystem	A concept from biology, it comprises, in this context, all the LIS institutions operating in South Africa at this point in time, all the relationships between them, all the features of politics, economics, and culture that affect them, and the history of the country as well.

e-Learning	A term covering a wide set of applications and processes, such as Web-based learning, computer-based learning, virtual classroom, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet (LAN/WAN), audio and videotape, satellite broadcast, interactive TV, CD-ROM, and more. (www.usnews.com)
Functional literacy	A level of reading and writing sufficient for everyday life
Global knowledge economy	The new forms and increasing networking of economy and society that are developing from information and communication technologies and the development of new knowledge
Indigenous knowledge systems	Indigenous knowledge systems refers to the content or substance of knowledge resulting from intellectual activity in a traditional context and includes the know-how, skills, innovations, practices and learning that form part of(un)codified knowledge passed between generations.
Information literacy	The literacy needed to function in the information society. It refers to the ability to access, use and evaluate information from different sources, to enhance learning, solve problems and generate new knowledge.
Information society	"A people-centred, inclusive and development-oriented society, where everyone can create, access, utilize and share information and knowledge, enabling individuals, communities and peoples to achieve their full potential in promoting their sustainable development and improving their quality life, premised on the purposed and principles of the Charter of the United nations and respecting fully and upholding the Universal Declaration of Human Rights"(World Summit on Information Society.2003 Declaration of Principles.)

Knowledge management	A process of collecting, organising, storing, exploiting and disseminating information and data held in an organisation especially information known to individuals as well as the general store of known information.
Knowledge society	A term preferred by UNESCO Information Society since they argue that enhancing information flow does not guarantee the development that is offered by knowledge. There is a more "comprehensive holistic and comprehensive vision and a clearly developmental perspective. The main challenge of the knowledge society is to narrow the digital divide that accentuates disparities in development, excluding entire groups and countries from the benefits of information and knowledge; to guarantee the free flow of equitable access to data, information, best practices and knowledge"(Khan,2004).
Open access	The provision of free and easy access to information and knowledge. It removes the barriers in traditional scholarly publishing and licensing.
Public library	a library set up by government authorities, at local, provincial or national level, to serve a geographic area or community. The IFLA/UNESCO <i>Public Library Manifesto</i> (1995)states that in principle the public library shall be free of charge. It also suggests that public library services must be adapted to the different needs of rural and urban areas and that the public library network must be designed in relation to other kinds of libraries, including those in schools, colleges and universities.
School library	The generic term "school LIS" is preferred in this document. Other terms include "media centres", "learning resource centres", "school

library learning commons”, and “school information centres”. A modern school LIS provides access to and education in the use of a wide range of learning, information and reading resources – print, audiovisual, digital and online. Current definitions in South Africa are inclusive and pragmatic – thus allowing for different models of collection development and delivery. Similarly, the term “school librarian” is used generically to denote anyone who is in charge of the school library programmes. Most school librarians in South Africa are “teacher-librarians” as they are expected to do subject and classroom teaching.”

Service learning The US Department of The US Department of Education defines service learning as “An educational activity, program, or curriculum that seeks to promote students’ learning through experiences associated with volunteerism or community service.”

Shared services The concept of shared services refers to the centralising of certain activities such as provision of a union catalogue, cataloguing, standardising processes (norms and standards) and consolidating systems such as procurement to leverage economies of scale

Social model of disability This modelproposes that barriers and prejudice and exclusion by society(purposely or inadvertently) are the ultimate factors defining who is disabled and who is not in a particular society. It recognises that while some people have physical, intellectual, or psychological differences from a statistical mean, which may sometimes be impairments, these do not have to lead to disability unless society fails to accommodate and include them in the way it would those who are ‘normal’.

Virtual library and information Monash University defines virtual library and information services as “access to electronic information in a variety of remote locations through a local online catalogue or other gateway, such as the

services

internet”.

Wireless
technology

Wireless communication is the transfer of information over a distance without the use of electrical conductors or “wires”. The distances involved may be short (a few meters as in television remote control) or long (thousands or millions of kilometres for radio communications). It encompasses various types of fixed, mobile, and portable two way radios, cellular telephones, personal digital assistant (PDAs), and wireless networking.

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Chapter 1. Rationale for Transformation: an Overview of the Challenges and Opportunities

This introductory chapter provides an overview of the state of library and information services (LIS) in South Africa and the framing legislation. It comes from the views of respondents throughout the country as well as perusal of various documentary sources. The overview outlines the perceived hindrances in the fulfillment of the mission of South African LIS, which were identified in the course of the Charter Team's investigations, and also suggests the opportunities that might aid their transformation.

In common with international practice, the convention in South Africa is to divide library and information services (LIS) into sub-sectors, like academic, public and school. Much of the work of the Charter's Technical Team involved analysis of conditions within these separate sectors – as reported in Chapter 3. However, in analyzing the constraints and looking to the future, it became clear that the convention might hinder the fresh vision that is required for transforming South African LIS. Each sub-sector is defined by the user group it is designated to serve; and, as soon as the focus shifts from the conventional structural categorizations to the attributes and needs of their user groups (actual and potential), commonalities and inter-dependencies emerge.

The recognition of these connections explains the reliance on the ecological concept of *ecosystem* in this final draft of the LIS Transformation Charter, as explained later in this chapter. It provides a useful image for the strategic thinking that recognizes that the health of the whole comes from the health of its parts or sub-systems and the relationships among them. The ecosystem approach calls for an *integrated* LIS system in which institutions play their role in a coherent but differentiated whole.

Today's emerging technologies and social networks will, in any case, make the existing borders meaningless; as more South Africans gain access to the Internet via their mobile phones, for example, they are already serving to widen and indeed democratize access to information. The Mobile South Africa 2014 study (2013) showed that 89% of all Internet use in South Africa is via mobile devices.

Overview of South African LIS

In 2010, South Africa had 7 384 publicly funded libraries, made up of:

- 366 public libraries within the six metropolitan areas;
- 1 386 public libraries affiliated to the nine provincial library services;
- 210 Higher Education libraries;
- 5310 school libraries;
- 112 special and government departmental libraries;
- two national libraries (including the National Library for the Blind) (South African Yearbook 2011/2012, 2012).

By June 2013 the community library conditional grants had funded 414 new libraries and the upgrading of 244 libraries (South Africa. Department of Arts and Culture, 2013).

Given South Africa's developmental imperatives and the particular socio-economic challenges faced by youth, the low number of school libraries and public libraries is of concern. The survey of public libraries, commissioned by the Department of Arts and Culture in 2007, found that South Africa had three libraries per million people, comparing unfavourably with countries in the developed world but quite well with other African countries like Botswana or Kenya (South Africa. Department of Arts and Culture, 2008: 122). It found also that the libraries are unevenly distributed across the provinces. It is worth noting that the uneven distribution of libraries is a consequence of the historical imbalances of the past based on the racial and urban-rural divide of the apartheid regime. Library membership also compares unfavourably with countries in the developed world: for example, in the Western Cape, which has a relatively widespread network of libraries, only 22% of the population are registered members (Western Cape Government. Cultural Affairs and Sport, 2012: 1). (Of course, formal membership is not the only measure of use and value: for example, collections and information services are heavily used in-house by school learners and students).

There are two bodies that serve the interests of South African LIS across its various systems: the National Council for Library and Information Services (NCLIS) and the Library and Information Association of South Africa (LIASA). Both potentially have a crucial role in transformation. These important bodies give leadership and provide a

focus of concerted action for the development of LIS for all. LIASA's various sub-groups allow for specialized interests. And there are other independent professional associations like the Special Libraries and Information Services (SLIS), the Organisation of South African Law Libraries (OSALL), the Southern African Online User Group (SAOUG) and the South African National Research Information Consortium (SANRIC). Professional associations of authors, booksellers, publishers, vendors, and related industries share similar interests to those of librarians, and are natural partners in aspects such as the promotion of reading.

Legislative and governance framework

The Constitution and a body of legislation govern South African LIS and mandate their delivery. This body of legislation is accompanied by other government documents and laws that contain explicit and implicit references to LIS. Some of them are listed below, with indications of their specific bearing on the LIS Transformation Charter.

- The Constitution of the Republic of South Africa (Act No 108 of 1996). The Charter will align the LIS sector with the national strategic imperatives that are inspired by the Constitution. The right of access to information, which is enshrined in the Constitution and in its Bill of Rights, links to responsibilities of libraries for freedom of expression and freedom of access to information.
- Interpretations of Part A of Schedule 5 of the Constitution has resulted in confusion about the responsibility for delivering public library services, with unfortunate consequences. The Charter expects, however, that forthcoming public library legislation will correct this anomaly and establish certainty on the matter;
- The draft Revised White Paper on Arts, Culture and Heritage (Version 2 4 June 2013). The draft revision of the 1996 White Paper on Arts, Culture and Heritage represents a strategic repositioning of the role of the national Department of Arts and Culture (DAC) in the context of a developmental state. It affirms the role of arts and culture in social cohesion and “nourishing the soul of the nation”. But it makes a strong case as well for their pivotal role in economic empowerment and skills development – in keeping with the DAC’s Mzansi Golden Economy strategy. The literature section refers to the absence of an entrenched reading culture and to the DAC’s aim to promote, develop, and make accessible the rich and diverse traditions of all South African literatures in written and oral forms. The White Paper affirms the role of libraries in providing the nation with

access to its published legacy and promoting open access to information and a reading culture. However it acknowledges that uneven access and facilities hinder the delivery of information services and suggests that virtual and digitised services might address the backlogs. The draft Revised White Paper promises a Libraries Strategy, which will devise minimum norms and standards for community LIS, align services across the spheres of government and develop criteria for the allocation of public funds for LIS. It also, however, suggests that the NCLIS will be dissolved. As stated in the previous section, NCLIS plays a crucial role in integrating and speaking for the various LIS sub-systems so its possible dissolution is a threat to the whole LIS eco-system;

- The National Library of South Africa Act, No 2 of 1998. The aims of collecting, recording, preserving, and giving access to the national documentary heritage and the world's information resources resonate with the Charter's aims. The amalgamation of the South African Library in Cape Town and the State Library in Pretoria to form the National Library of South Africa supports the achievement of these objects;
- The South African Library for the Blind Act, No 91 of 1998. The focus of this Act is on blind and print-handicapped readers and on improving access to library and information services by South African people with disabilities;
- The United Nations Convention on the Rights of Persons with Disabilities and Optional Protocol. South Africa ratified the Convention and its Optional Protocol, which became an International Law on 3 May 2008. South Africa's commitment to modify or amend existing laws, regulations, customs, and practices that discriminate against persons with disabilities will add force to the Charter's transformation agenda;
- The Legal Deposit Act, No 54 of 1997, which requires publishers in the country to supply copies of each new publication to places of legal deposit, guarantees the preservation of the national documentary heritage, and its availability across the country. Suppliers of library and information resources are key LIS stakeholders and important participants in the preparation of the Charter;
- The Copyright Act, No 98 of 1978. This Act still requires amendment regarding copying and access to information. Copyright laws must be fair, and must balance the interests of commercial and non-commercial publishers with the public interest. . Special provisions in the Act for libraries, education, literacy training, inter-library lending, preservation, and exemptions and exceptions for

access by persons with sensory-disabilities would assist transformation of the LIS sector;

- The National Council for Library and Information Services Act, No 6 of 2001. The functions of the Council include the provision of information and advice to the Ministers of Arts and Culture and of Basic and Higher Education on the deficiencies of library and information resources in African languages, and on the promotion of basic and functional literacy, information literacy, and a culture of reading. Any move to subsume the Council under one of the other councils, as mooted in the draft Revised White Paper on Arts, Culture and Heritage (Version 2 4 June 2013), would not strengthen the South African LIS as a whole. As stated earlier, NCLIS has an important leadership, advocacy and integrating role across the various LIS sub-systems. However, it has been hampered by its lack of resources and clout. To address the lack of clout and influence, the NCLIS legislation should be amended to strengthen its strategic position as an agency of government, similar to the role of the National Heritage Council for the heritage sector..
- The Education Laws Amendment Act, No 31 of 2007 (that amends the South African Schools Act of 1996) lists the availability of a library as a minimum uniform norm and standard for school infrastructure. In September 2013 the Department of Basic Education gazetted for comment Regulations relating to Minimum Uniform Norms and Standards for Public School Infrastructure. The document lists a school library/media center as a core education area and specifies its minimum size. However its description of various models of library in Section 12 (2) is ambiguous and contradictory;
- The White Paper for Post-School Education and Training (Government Gazette 37229 16 January 2014), which covers universities, TVET colleges, and community colleges. The White Paper promotes an “integrated system” where the various institutions play their role in a “coherent but differentiated whole”. The community colleges are an innovation; they will absorb the existing public adult learning centres in order to serve the 3.2 million young South Africans between the ages 15 and 24 years who do not qualify for entrance to universities and TVET Colleges. The White Paper makes no mention of the vital role of LIS in the post-school education sector;
- The South African Public Library and Information Services Bill was gazetted in 2010. The preamble describes its purpose as:

To provide for essential national norms and standards in order to maintain consistency for the delivery of community library and information services; to provide for measures to redress the inequality of the provision of community library and information services and resources; to provide for community library and information services principles; to promote co-operative governance and coordination of responsibility for community library and information services (South Africa, 2010).

The legislation listed above has a strong and direct impact on the LIS Sector, but there are many other laws and policy documents are implicated in the delivery of LIS such as:

- The White Paper on Education and Training, 1995;
- The National Archives and Records Service Act, No 43 of 1996;
- National Educational Policy Act, No 27 of 1996;
- The White Paper on Education, 1997;
- The White Paper on Higher Education, 1997;
- The Higher Education Act, 1997;
- The White Paper on Transforming Public Service Delivery, 1997;
- The White Paper on an Integrated National Disability Strategy, 1997;
- The Local Government: Municipal Structures Act, No 177 of 1998;
- The National Heritage Council Act, No 11 of 1999;
- Public Finance Management Act, No 1 of 1999;
- The Local Government: Municipal Systems Act, No 32 of 2000;
- Provincial Library and Information Services Act, No 7 of 2001;
- The Promotion of Access to Information Act, No 2 of 2002;
- South Africa. Department of Higher Education and Training. 2012. Green Paper for Post-School Education and Training.

Challenges

Twenty years into democracy, the heritage of apartheid is still evident in South African LIS, as evidenced, for example: in the lack of LIS for poor black children; the inadequate provision of LIS for people living in the former apartheid "homelands"; the continuing neglect of indigenous literatures, languages and of indigenous knowledge systems; the uneven quality of LIS across post-school education institutions; and the uneven access to ICTs. The redress of the prevailing inequities is at the heart of the Charter.

Each of the LIS sub-sectors has its own governance structures. And each is perceived to have its own niche user community; indeed, standard definitions rely on these conventions. Concern over the fragmentation of the sector is evident. It seems that the standing of the whole LIS sector is weakened, for example, by its fragmentation across different levels and departments of government. And the delivery of services in its various sub-systems is negatively affected by the divisions. Thus, the needs of school learners and youth for LIS will continue to be neglected if the entire sector does not recognize the impact of the neglect on society and accept responsibility to alleviate it.

The hurdles in the way of the fulfillment of the social mission of South African LIS are categorized in this section into four inter-related and inter-dependent groups: a general lack of appreciation of the social and economic role of LIS, which might well be the fundamental issue underlying all the others; unresolved questions over policy and governance; human resources and training issues; and uneven and unequal access to LIS.

Lack of appreciation of the value of LIS in educational and developmental imperatives

- The role of the library and its staff as an agent of development and social cohesion has not been sufficiently recognized or achieved. The role of LIS in Government development programmes, such as Apgisa, Jipsa, Mzansi Golden Economy, and the National Development Plan (NDP), has been neglected;
- Many South Africans are unaware of the services and benefits that libraries offer;
- The role of libraries in literacy and information literacy education is not sufficiently recognized. The lack of functional and information literacy is a major impediment in the work force and affects productivity;
- LIS are not in a financial position to prioritize the redress and equity that should inform developments and service delivery;
- LIS have largely neglected the mainstreaming of indigenous knowledge and the collecting and disseminating of it in book, audio and video formats;
- The role of LIS in nurturing democratic values by providing access to diverse views, encouraging critical thinking, and teaching information literacy is neglected by LIS themselves and by society at large.

Policy and governance issues

- Libraries have been seriously under-funded, both by government and their parent organizations;
- There is as yet no funding framework or model;
- There is a perceived overlapping of library mandates across government tiers and departments. There is a lack of clarity over the allocation of roles, responsibilities and mandates. This applies in all spheres of government but especially at local government level;
- In rural areas, traditional leaders are not being sufficiently involved in the kind of LIS decision-making and promotion which would enhance community involvement and LIS use;
- Norms and standards - for service delivery, infrastructure, management, staffing, provisioning, ICTs and public access -have been lacking;
- The lack of coherent policies and strategies results in many cases in the perpetuation of the inequalities of the past;
- Cumbersome and ineffective procedures hamper the procurement and acquisition of library and information resources and this leads to waste. The value of knowledgeable publishers and booksellers as stakeholders in the social mission of libraries has been underestimated;
- As stated earlier, the proposal to reduce the number of statutory councils and to cluster them into a different configuration will have the undesirable effect of disbanding NCLIS. This would be a retrograde step since NCLIS fosters cooperation among the three national departments, the Department of Arts and Culture (DAC), the Department of Basic Education (DBE) and the Department of Higher Education and Training (DHET) all of which have an important stake in policy development of LIS in South Africa.

Human resources and education and training challenges

- The low status of the library profession and doubts among its practitioners about their professional identity are hampering the social and economic role of libraries;
- Too few library professionals are being developed to meet present and future needs. The workforce is aging, with serious implications for the future. Attracting young people into the library profession is a challenge;
- Although the recent conditional grants have funded 1575 new staff members , there is concern that these temporary contract appointments are not

sustainable;

- There is unequal grading of positions and ranks and salaries across the public service, the provinces, and local governments;
- In the absence of national policy on school librarian posts, the training of school librarians in higher education institutions is under threat;
- There is as yet no national statement of LIS skills – a document that would be of great value in ensuring relevance and appropriateness of educational offerings;
- LIS curricula do not always meet the needs of the contemporary profession and its constituencies;
- The lack of an accrediting agency means that employing organizations find it difficult to assess the various qualifications when they recruit new staff.

Uneven access to LIS and ICTs: physical, intellectual and social

- There is unequal spatial access to LIS - with regard to urban/rural, suburb/township/informal settlements, as well as the different provinces and local governments. The unevenness of access applies not only to public and school libraries but also to university libraries;
- The spatial distribution of libraries mostly places them out of reach of the poor;
- The inadequate services for certain other specific groupings of South Africans must be highlighted, such as:
 - the millions of school learners (and their teachers) in the thousands of schools without functional LIS;
 - students and staff at the 300 campuses of our 50 Further Education and Training (FET) colleges, renamed in the White Paper on Post-Secondary Education released in January 2014 as Technical and Vocational Education and Training Colleges (TVET);
 - people with disabilities. Not only are library buildings inaccessible to people with disabilities but LIS do not provide accessible formats for visually impaired and learning disabled users. The recent conditional grants have perhaps begun to alleviate this situation (South Africa. Department of Arts and Culture, 2011);
 - the 156,000 inmates of South Africa's prisons whose reading and information needs are inadequately provided for;
- Many people lack the reading and information skills which would enable them to benefit optimally from library services. This includes students at tertiary level

and employees in the workplace;

- The shortage, and in many cases lack of, suitable resources in the languages of potential library users also limits their access to information and the services of the library;
- The unavailability of staff to serve people in their own languages and other modes of communication further limits access;
- Many libraries are in old buildings and in buildings which have not been designed as libraries. The creation of physical infrastructure to provide access to the facilities is a challenge;
- While internationally ICTs are transforming the role of LIS, many LIS in South Africa lack the ICTs necessary in today's global information or knowledge economy. Many staff lack the capacity to use the technology, both to facilitate the work of the library and to provide access to electronic information for users.

Opportunities

The last few years have brought exciting developments and opportunities, which, if exploited, will address the above problems:

- The recent conditional grants from national government are already making a difference in the provision of new infrastructure, ICTs and staff;
- The National Development Plan 2030 (National Planning Commission, 2012) offers the LIS sector an opportunity to promote its developmental and educational roles. Government has circulated the Plan to libraries, asking them to make it accessible to their communities. But the real and potential contribution of LIS themselves to the Plan needs to be concretized by the LIS sector;
- The South African Public Library and Information Services Bill, gazetted in 2010, promises to meet the calls for norms and standards - for infrastructure, funding, staffing, provisioning- and for clarity on governmental mandates;
- The above legislation will improve the standing and status of the LIS profession;
- Although they fall short of setting policy, the National Guidelines for School Library and Information Services, published by the Department of Basic Education (DBE) in 2012, could be a first step towards a healthy school library system. They put forward strong arguments for the contribution of libraries to quality teaching and learning. The DBE's briefing to Parliament 20 August 2013

on its plan of action for school LIS offers some hope that it is beginning to address the huge backlogs. However the necessary funding from Treasury is not yet assured. Moreover, the lengthy timeframes given in the plan and the vagueness over mechanisms to monitor progress give rise to concern;

- The recent advocacy for school libraries, coming from recognition of the role of libraries in building a more equal education system by NGOs and civil society groups like Equal Education, offers opportunities for the LIS sector. The relationships built with Equal Education can be extended to other civil society groups whose missions coincide with LIS concerns. Many NGOs whose interests are congruent with those of LIS (e.g. freedom of access to information, social justice and youth issues) would welcome participation by librarians who could offer support, and in turn, benefit from the association;
- The on-going high level consultations between the Department of Basic Education and the Department of Arts and Culture are evidence of the increased awareness of the interdependence of the various LIS sub-sectors. It is good news that, in recognition of the shared responsibilities to support school learners, the Department of Arts and Culture is providing additional funding for educational resources in public libraries;
- The availability of reliable methodologies for monitoring and evaluation and impact assessment should encourage more libraries to undertake systematic measurement. This is not only in line with good governance and transparency, but will provide evidence about the value of particular services which can be used to raise the profile of the library and its value to society;
- Emerging technologies offer opportunities for LIS to extend their services outside their walls, to break down the divisions within the sector, and to play a dynamic role in the broader information ecosystem.

An ecosystems approach to the challenges and opportunities

The above opportunities point the way to the transformation of the LIS sector so that it might fulfill its potential role in building an inclusive society. However, the fragmentation of South African LIS, in many ways the heritage of apartheid planning, might well get in the way of the opportunities. The Charter's vision is for a sector that sees beyond the existing barriers to find innovative ways to fulfill its social mission. As Lankes (2011) points out in his landmark book *The New Atlas of Librarianship*, "The mission of librarians is to improve society through facilitating knowledge creation in

their communities". We agree that knowledge creation is the fundamental mission of all kinds of library and information services.

A useful way of thinking about the LIS landscape is to think of it in terms of a system, which is not a term usually applied to the assembly of libraries in South Africa where the term 'sector' is preferred. Underwood points out that systems thinking accommodates multiple but related views (1996: 19) allowing levels of abstraction (e.g. the idea of a network) and other views which focus on the concrete. The idea of the system can also be a goal towards which we can plan and work, recognizing the fragmentation that exists, while espousing the ideal of a whole in which component parts interact with one another in a purposeful coordinated way. In Checkland's terms the use of soft systems thinking (as opposed to hard systems thinking for disciplines such as engineering) allows analysis of a situation, identification of a desired situation, and a consideration of optional routes to the desired outcome (2000: S14-S15). We are proposing a further refinement to the concept, viz. ecosystem, a term that captures diversity and complexity, and the idea of interaction between the system (or organism in ecological terms) and its environment. An ecosystem is one in which the sub-systems are inter-linked and interdependent, where there is continuous co-evolution, where change is systemic and where complementarity encourages niches for different roles and functions (Nardi and O'Day, 1999). It is also characterized by interactions of "actors and organizations linked by flows of resources and information" (Mars, Bronstein and Lusch, 2012: 277).

Two key aspects underpin the analytical basis of the ecosystem perspective. The ecosystem perspective enables us to view the structure, functions, and operations of library and information institutions as an ecosystem that evolves within an environment defined by physical, cultural, social, economic, and political conditions to produce certain outcomes. In addition, the ecosystem perspective enables us to trace the central role that the subjective perceptions of individuals play in the process of institutional change or realignment, and enables us to understand better the change process within an integrated analytical framework.

The features that characterize healthy library and information institutions – interlinkages and malleable or adaptive flexibility – are similar in principle to those of an ecosystem. This similarity justifies the use of the ecosystem perspective in an

analysis of institutional arrangements and environment, and enables us to analyse and present most of the institutional features as a cluster of related ideas. Using this approach, we are able to consider institutional structures, regulations, and operations at various levels as an interconnected ecosystem that evolves with the institutional environment as characterized by political, social, economic, cultural, environmental, and physical factors.

The ecosystem perspective enables us to do at least three things: first, assess patterns of change in the linkages between institutions; second, evaluate the nested and embedded nature of these institutions within physical, political, social, economic, and cultural systems; and third, treat both institutional segments – that is, institutional structure and institutional environment – together as part of a system and relate the system to its social, economic, and political settings. The approach allows a different and more nuanced analysis from one that focuses primarily on institutional efficiency (Saleth et al, 2004).

The ecological approach encourages us to think of South African LIS in such a way that where the flows of resources diminish, for example to school libraries, we will recognize that because of our interdependence, the weakness of one component has the potential to weaken other components. It discourages thinking about borders and so is more hospitable to the aims of eliminating barriers and achieving integration in a sector where the uneven and unequal provision of the past is reflected in disparities and fragmentation, two attributes often cited as hampering the sector reaching its potential. As the “stability of the system is dependent on keystone actors” (Mars, Bronstein and Lusch, 2012: 277), it is necessary to identify potential risks to them because their loss or harm to them can jeopardize the enterprise. Mars, Bronstein and Lusch conclude with a sober warning about organizational ecosystems:

Organizational ecosystems are expected to develop over time, through foresight and purposeful planning, in ways that contribute to the betterment of those organizations and society as a whole. Those organizational ecosystems that do not evolve in a manner that promotes the greater good are put in jeopardy of being eliminated or becoming obsolete (2012: 279).

One of the merits of the ecosystem metaphor is that it draws attention to accelerated change, and how the dynamics of turbulence and threats can be understood and risks minimized. The new approach focuses on the users and the importance of attending to

their own and also to societal needs. It should encourage a shift towards thinking about services, rather than functions tied rigidly to typology, e.g. library services for children regardless of setting, so that public libraries might consider ways of delivering services to schools without school libraries. The paradigm also should direct our attention to other actors in related fields; importantly for us, other memory institutions.

The chosen analytical framework generated a number of lines of inquiry which uncovered the following:

- An examination of the structure of LIS focusing on each sub-sector recognizing that the system is composed of a number of elements;
- The scope of the investigation in each sub-sector included a study of interactions among all players, and a study of external forces impacting the sub-sector;
- The centrality of the user required a study of the most important needs of the diverse user populations;
- Cross cutting issues were identified and examined:
 - Literacies: reading literacy and information literacy;
 - Education as a common objective in many library types;
 - Identification of niche areas: e.g. community empowerment, research and development, cultural heritage;
 - ICTs as a tool for networking, and improving information and resource flows; including mobile technologies, social media;
- Identification of barriers to access: physical, intellectual, social, cultural;
- Human resource development: the demands for new kinds of professional service and competencies;
- Measurement and evaluation of services and programmes.

Because those organizational ecosystems that “do not evolve over time for the greater good of society” tend to be eliminated or rendered obsolete (Mars, Bronstein and Lusch, 2012: 275), the analysis was accompanied by the proposal of solutions to problems uncovered in the interests of growing a robust system appropriate for a developmental state. Thus the framework was both an analytical tool, and a means of charting a route to development and transformation.

Our exploration of integrated library and information services structures across the sector leads to an overarching conclusion: as an historical trend, dominant functions

and processes in the Information Society are increasingly organized around integrated institutional arrangements (Castells, 1996:163 – 215). Integrated functions and processes constitute the new institutional morphology, and the diffusion of the logic of integrated services substantially modifies operations and outcomes in processes of production and the delivery of services. While the integrated form of social organization has existed in South Africa in the last twenty years, the new ecosystem paradigm provides a solid conceptual and practical basis for its pervasive expansion throughout the LIS sector and the entire social structure. Furthermore, it is argued that this ecosystem logic induces a social determination of a higher level than that of special and differentiated social interests expressed through the different institutional structures: the power of the flow of services takes precedence over the flow of institutional power. Presence or absence in the governance of each institutional structure and the dynamics of each institution vis-à-vis others are critical sources of domination and change in our society. (Castells, 1996:500).

The benefits of the ecosystem approach to South African LIS will be illustrated in the analysis of the various subsystems in Chapter 3

Chapter 2. Methodology: Reliability and Limitations

In the preparation and writing of this Charter, the technical team observed the protocols and patterns of investigation of other sector-specific charters produced by the government. However, the special character and requirements of the LIS sector guided the adoption of appropriate methods of data collection.

This Charter was developed in two phases over a five year period. The first phase commenced in 2008 with public consultative workshops in every province in which a wide range of stakeholders participated. The first phase produced the 6th draft of the Charter by July 2009 and has served as a base document for the second phase which was commissioned in 2013 and which has produced the current 7th draft of the Charter.

The mechanisms for assuring quality, and for achieving validity and reliability, nonetheless, do comply with the standard criteria established in social science research. The National Council for Library and Services Council (NCLIS) commissioned the Charter in collaboration with the DAC, and the NLSA gave the project a high public profile and supplied the political and material support needed to conduct such an extensive project successfully.

In both phases of the Charter development, a technical team, consisting of a chairperson and six members, was assembled on the basis of expertise in the LIS sector, and experience of the government's charter initiative. There was a special effort to ensure that the team possessed all the competencies required to produce a successful outcome. In the first phase the Technical Team comprised the following members: Prof Muxe Nkondo (chairperson), Professors Joe Teffo, Mary Nassimbeni, Yonah Seleti, Archie Dick, Genevieve Hart and Mrs Anna Brown. In the second phase that commenced in June 2013 Professor Archie Dick who was the then Chairperson of NCLIS was replaced by Ms Segametsi Molawa due to the perceived conflict of interest. In both phases, the Technical Team was assisted by a project coordinator who was responsible for the smooth running of the project.

Members of the Technical Team were paired in their research and writing assignments, and they communicated with each other and other team members electronically and at

discussion meetings. These meetings were used also to review progress and strategies in the development of the Charter. A reference team of experienced LIS practitioners met regularly with the technical team to monitor progress and to discuss draft reports. Minutes were taken at these meetings and distributed to the technical and reference team members.

A participatory policy analysis approach guided the collection of qualitative and quantitative data. In this approach, public consultations feature strongly as a widely acknowledged way of probing the nuances and inner dynamics of human and social processes. Public consultation meetings were arranged in the nine provinces of the country with a view to bringing together all the LIS stakeholders at a centrally-located venue.

Although attendance varied, the discussions generated valuable data on the basis of a standard list of questions on pertinent LIS matters (see Appendix 2). Participants were invited to respond to these questions in their own languages, and immediate translation facilitated in-depth discussions. The technical team provided translators to deal with regional variations in language use. This arrangement encouraged wider participation and enriched the quality of data elicited at the public consultation meetings.

The meetings were video-taped and recorded for subsequent content analysis. These materials constitute a rich body of primary evidence, and may be useful for future consultation by LIS and other scholars. Technical Team members also made and shared notes directly after each meeting. This allowed immediate discussion of the issues raised at the public meetings and the opportunity to address difficulties that could be avoided at subsequent meetings.

There was a concerted effort to collect and analyse materials with a direct bearing on the LIS Charter themes. These were sourced from the Internet, government offices, individuals, and libraries. They included recent relevant reports such as the KPMG report on public libraries (South Africa. Department of Arts and Culture, 2008), research studies, surveys, White Papers and other government documents. Trend analysis of the data provided a reasonable degree of validity and consistency, especially given the nature of the project and its strict time-frame.

A first draft of the Charter was submitted to the Minister of Arts and Culture, and to NCLIS, and was circulated publicly for comment. The LIASA 2008 Annual Conference provided an opportunity to test the progress of the charter with some of the key LIS stakeholders. Focus group interviews and in-depth discussions with reference individuals who attended the conference produced valuable additions, and identified weaknesses and gaps in the first draft. There were follow-up sessions with individuals after the conference and technical team members received written submissions that strengthened and improved sections of the charter.

In line with the idea of deliberative democracy, a second draft was publicly circulated for discussion at a National Summit with a view to further improvement. The comments from participants at the National Summit were incorporated into a third draft, which provided another opportunity for publicly circulating and improving the charter before official adoption, final editing, and production. The product from this process was branded as the 6th draft of the Charter.

After the publication of the 6th Draft, the technical team sought opportunities to lobby policy makers and the political leadership for their endorsement of the Charter. At the end of 2009 a meeting was held with the then Minister of Education and senior members of the Department to focus specifically on the chapter dealing with school libraries. The Minister acknowledged the huge backlogs. In 2010 NCLIS and members of the Technical Team led by Professor Nkondo briefed both the Parliamentary Portfolio Committee on Arts and Culture and the Parliamentary Portfolio Committee on Education on the Charter. In February 2011, the Department of Arts and Culture together with Professor Nkondo and the Technical Team presented the Charter to National Council of Provinces (NCOP) Committee on Education and Recreation. The discussions in these oversight committees of Parliament and the NCOP were robust and highlighted the importance of consulting communities and parents (Parliamentary Monitoring Group, 2011).

A high level meeting between the Ministers of Arts and Culture, Mr Paul Mashatile and Basic Education, Ms Angie Motshekga was held with the Technical Team in early 2010 for the endorsement and implementation of Charter. At this meeting a new paradigm of collaboration among all information and knowledge sectors was identified as a

strategy to deal with the problems in the school library sector. The Charter team was then mandated to consider collaborative strategies across all sectors and to produce a 7th draft.

In addition to the mandate given by the two Ministers on reworking the Charter, the second phase of the development of the Charter was prompted by the fact that five years had elapsed since the completion and submission of 6th draft to NCLIS and the Charter had not yet been adopted for implementation and certainly needed updating before it could be presented for endorsement. In the process of updating the Charter the technical team has reviewed the charter, held brainstorming workshops on a range of issues especially on the philosophy of collaboration and shared services¹ⁱ under the concept of the library ecosystem. The Technical Team interrogated the implications of the eco-system approach on the library landscape in the country. It was appreciated that to fully understand the impact of the eco-system approach would require undertaking an audit of the LIS landscape. The Technical Team's interaction with NCLIS on the philosophy of collaboration and shared services associated with the eco-system produced a debate on the value of collaboration, cooperation and integration in the South African landscape. The philosophy of collaboration and shared services that overlay the Charter is thus a product of in-depth research and robust exchanges between the technical members, NCLIS and the reference group.

Members of the Technical Team scanned the policy documents released since 2009, conducted questionnaires on specific issues, interviews with sector leaders at conferences such as the SABINET 14th annual conference, one on one interviews in specific sectors such as the FET colleges, the Government Communication and Information Services (GCIS), focus discussion groups and the use of Internet resources. Analysis and writing up was done through the pairing of colleagues and through intermittent meetings to harmonize the team's thinking. Attention was paid to ethical issues pertaining to the methodology undertaken and reliability of the data used in the drafting of the 7th draft of the Charter. Before finalizing the 7th draft for

¹The concept of shared services applied in the Charter refers to the centralizing of certain activities such as provision of a union catalogue, cataloguing, standardizing processes (norms and standards) and consolidating systems such as procurement to leverage economies of scale.

submission to NCLIS in January 2014, the Technical Team met members of the Reference Group for their inputs which were incorporated into the draft for formal submission; email comments from members unable to attend were received and incorporated.

Limitations

The Charter is limited by the factors that affect all national consultative projects, and only some are identified here. The representativity of the data in respect of province, LIS stakeholders, urban and rural areas, literate and illiterate persons, and so forth, was uneven and can be questioned. It was particularly difficult to reach such user groups as learners and students; although where they attended provincial consultations their concerns were articulated clearly and emphatically. There was a concerted effort to improve representativity through follow-up meetings and consultations throughout the duration of the project.

Another limitation has been the terms of reference of the project. The NCLIS, in collaboration with DAC and the NLSA, commissioned the Library Transformation Charter in order to align the LIS sector with the spirit and values enshrined in the Constitution of the Republic of South Africa and its Bill of Rights, and to address national imperatives. This presented such challenges as the different interpretations of national imperatives by LIS stakeholders, the timeframe for completion of the project, and the format of the final product to be delivered. In order to overcome these limitations, an extension was granted to the technical team to consolidate the vast amount of data, and to deliver a research-based product.

The Charter's conceptual separation of libraries from archives and museums, in spite of managerial connections in government departments, highlights another limitation of the Charter. More importantly, the South African public's need for information, for example on family history, local history, government information, identity, and so forth, implicates libraries, archives, and museums collectively as memory institutions. In practice, the libraries that are located in archives still face difficulties in their efforts to serve the general public, thereby preventing increased collaboration.

Another limitation is that the Charter is primarily an aspirational and inspirational document and offers only some strategic guidance on implementation. For this reason

it does not address all of the issues raised by LIS stakeholders and with the level of detail that they may expect. It may therefore not meet all their expectations. The NCLIS should consider conducting workshops after the release of the Charter to indicate which LIS matters will be given closer attention. A constant refrain in many discussions, for example, was the need to produce minimum uniform norms and standards for the entire LIS sector.

Finally, it may have been unreasonable during the collection of data to expect practising librarians in the brief time allotted for interaction to connect the traditional aims and objectives of libraries with national imperatives such as poverty eradication, social cohesion, and economic development. One way of dealing with this after the Charter is released may be to ensure that a library's own transformation plan of action be clearly linked to specific national imperatives.

Recommendation

Since the time allocated for the production of the 7th draft did not allow for its presentation to and discussion with the whole sector, it is recommended that NCLIS and DAC provide an opportunity for a national symposium. This event should encourage wide discussion of the Charter's findings, and an examination of policy options that will meet the goals of transformation of the sector.

Chapter 3. Analysis of the LIS sub-sectors

Introduction

The focus in this chapter is the various sub-systems that comprise the South African LIS ecosystem. Despite the promotion of the unifying and integrating image of ecosystem in the previous chapter, it is deemed useful to examine each sub-system separately as the reality is that each has its own history and its own niche user communities. Each section provides an overview of the sub-system and outlines its specific challenges. Recent innovations and trends are identified in an effort to identify opportunities and make recommendations that it is believed will lead to sustainable transformation both of the specific sector and the broader LIS system.

The chapter confirms the huge gaps in service across South African LIS – within the sub-systems and across them. The reading and information needs of large numbers of South Africans are not being met. Large numbers do not have access to LIS or must put up with inferior services. The weaknesses in one sub-system must affect the whole LIS system – as evidenced by the comments from public and university librarians on the impact of the lack of LIS and information literacy education in schools.

The power of the ecosystem approach is that, while allowing for specializations, it provides a uniting vision which will be required if South African LIS are to fulfill their potential role in building the learning society and competitive knowledge economy envisaged in the National Development Plan. Some of the significant threads that emerge across the chapter's sections are:

- The developmental role of all kinds of LIS. In alleviating information poverty they play a vital role in building social cohesion and social justice;
- The need to prioritise services to youth. The latest 2011 census reveals the median age across all main population groups to be 25 years (Statistics South Africa, 2012: 21). South African children and youth are at disproportionate risk for a number of reasons: poverty, poor schooling, effects of HIV/AIDS on the stability of families, and abuse;
- The role of LIS in harnessing the potential of emerging technologies to provide more open access to information for people inside and outside their walls;

- The crucial educational role of LIS, both formal and informal. Their specific responsibility might be literacy and information literacy education, but they play a crucial role in all learning programmes at all levels;
- The important role of LIS in creating knowledge and supporting innovative research in a developing society like South Africa. As stated in Chapter 1, knowledge creation is indeed the mission of all kinds of LIS;
- The urgent need to find ways to overcome the barriers among the information and knowledge institutions within the different systems in order to meet the common information and reading needs of their user communities. One example is the potential merging of Thusong Services Centres, public libraries and IKS resource centres in underserved rural areas;
- The continuing importance of the library “as place” – demonstrated across all the sectors. The library provides a meeting place for the diverse members of its community.

3.1 School LIS

Good school LIS are essential to the transformation of the South African education system, which aims to provide quality schools for *all* South African learners. Apartheid's Bantu education calculatedly under-resourced the schools designated for black learners. If school libraries are deemed to be important for quality learning, then the principles of redress and equity enshrined in the South African Constitution and educational legislation mean that ways must be found to provide them. The daunting backlogs in provision mean that innovative models of service and delivery will be required. It is unrealistic to expect all 25,000 schools to be provided overnight with its own facility. Any new models will, however, have to convince those who believe that only a centralised library in every school will fulfill the criteria of redress and equity.

Overview

The rationale for school libraries in South Africa has four arguments:

- The curriculum cannot be delivered without access to well-managed collections of learning resources;
- South Africa's aspirations to compete in the global knowledge economy depend on producing information literate school leavers. Information literacy education is accepted internationally as the specific mission of school libraries;
- School libraries develop the reading literacy crucial for academic achievement and participation in a democracy. Teachers might teach children *how to* read but everyday access to attractive books in their home languages leads children to *enjoy* reading. The more they enjoy reading, the more they will read – and the better they will read. Internationally, reading ability has been shown to be a critical factor in academic performance and in keeping learners in the school system;
- The library builds social cohesion. A library that is open all day, after school hours, benefits the whole school community. It provides a safe space for serious leisure - for personal, social and cultural development. It is a place for exploring oneself and the wider world.

Planning for South African school LIS must take into account the consensus in the professional and research literature that effective school libraries depend on the following interdependent factors:

- Adequate infrastructure - including ICTs with Internet connectivity;
- A proportion of the school budget allocated to the LIS collection;
- A librarian to manage the LIS collection and to ensure that the LIS is a dynamic learning resource;
- A team approach. The relationships among principal, teachers and library staff are crucial;
- Consensus on the kind of learning that is valued;
- Integration of information literacy education in the learning programme across all learning areas.

As South Africa builds its school LIS systems in the next few years, the connections between the staff in the school and other role-players in the wider world of information and knowledge, like public librarians, will be crucial.

Challenges

The National Education Infrastructure Management System (NEIMS) report, published by the Department of Education (DBE) in 2011, makes the fundamental challenge clear: across the country only seven percent of schools have a functional library. Library provision reflects the socio-economics of the provinces and the communities served by schools; and it retains the inequities of apartheid education. The vast majority of South African school libraries and school librarians exist within schools serving middle class communities, who are able to levy fees and raise funds for "extra" resources and teachers "extra" to the learner/teacher ratios set by the Department of Basic Education.

Given the resource demands of the curriculum and the "pro-poor" school funding policies evident in the National Norms and Standards for School Funding, it has to be asked why so few schools have LIS. Answers lie in the following challenges:

- Norms and standards for school LIS do not exist so there has been no pressure on school systems to develop them. The Department of Basic Education's National Guidelines for School Libraries, published in 2012, are to be welcomed; but, as mere guidelines, they have had little impact;

- The DBE's Regulations Relating to Norms and Standards for Public School Infrastructure (South Africa. Department of Basic Education, 2013b) includes a library as a core education area which must have "a minimum, adequate and suitable school library collection". But the regulations make no further statement on what a library should contain – or how it should be staffed; There are no official government posts for school librarians. When faced with national educator/learner ratio imperatives, schools cannot make room for a librarian. The vast majority of the existing school librarians are employed in governing body contract posts;
- The resources of the existing provincial education department school LIS support services are overstretched. Their budgets cannot meet the needs of all schools in their provinces. Their LIS advisors are often responsible for more than 300 schools;
- Schools lack the space for LIS. Many schools have converted their libraries into classroom teaching space. The most common library model is a cramped books storeroom;
- Schools lack reading and learning resources. Hardly any schools conform to the IFLA/UNESCO standard of 10 library items per learner (2002);
- Teacher-librarians lack status inside a school. They are often expected to run the library in a few 'free' periods a week;
- Education and training programmes for school librarianship are limited. The lack of school librarian posts means that no career path exists;
- The cohort of South African school librarians is aging;
- Divisions and inadequate communication between different sectors hinder the development of school libraries and learners' information literacy.

Probably the fundamental factor underlying all the above challenges is a lack of appreciation among teachers, principals and, indeed, policy-makers of the educational role of libraries. Libraries are seen as collections of books rather than as dynamic multimedia learning centres; and there is little awareness of their crucial role in education for the 21st century.

Opportunities

Since the 6th draft of the LIS Charter, there have been some positive shifts that the LIS profession should exploit:

- Despite their flaws, the DBE's Norms and Standards for Schools Infrastructure (South Africa. Department of Basic Education, 2013b) accept a library/media centre as a core area in every South African school;
- The DBE's briefing to Parliament on school LIS 20 August 2013 began with an admission that it had neglected LIS (South Africa. Department of Basic Education, 2013a). It then went on to outline its plans to remedy the situation – beginning with a plan for centralised and classroom libraries over the next three years for secondary and primary schools respectively. It has asked Treasury for R700 million to fund the first phase – and will bid for further funding for the following 10 years. The plan, however, includes only the seven weakest provinces;
- The power of today's ICTs in modern multimedia and online LIS must be exploited. Dependable and generous access to the Internet will redress gaps in collections, connect the classroom and library, and connect the school to the broader information universe;
- The growing appreciation of the role of public libraries in serving the reading and information needs of school learners is to be welcomed – given the gaps in school LIS provision. In announcing an additional R1.1 billion rand for libraries in his budget speech 16 May 2013 the Minister of Arts and Culture highlighted the need to strengthen his department's partnerships with the Department of Basic Education and the Department of Higher Education and Institutions of higher learning "to ensure that we do become a reading nation and subsequently improve our literacy levels" (South Africa. Department of Arts and Culture, 2013). It appears that a proportion of the extra funds is to be assigned expressly to the work of public libraries with schools;
- The DBE and DAC have identified collaborative strategies in their document Strategic Guidelines for Collaboration between Community Libraries and Schools (South Africa. Department of Basic Education and Department of Arts and Culture, 2013). Acknowledging the critical shortage of school LIS and the contribution of public libraries to formal school education, the document describes a number of possible avenues for joint activity. These include networking and resource sharing, collaborative collection building, and shared literacy and information literacy programmes.

Recommendations

The above documents from the Departments of Arts and Culture and Basic Education hold many excellent suggestions and plans that must be supported. It will be up to the LIS profession and civic society to hold the departments to account and make them a reality. For example:

- A national school library policy that provides norms and standards for the establishing, provisioning and staffing of libraries is the first step to redress the situation. It will act as an impetus for provincial education departments to recognise the need for libraries and will provide authority for the work of the school library support services. It will also persuade schools' governing bodies to develop their own library and information policies;
- The national school LIS unit within the Department of Basic Education should be re-established to drive the policy processes and guide the implementation nationwide. The unit needs to be highly placed in the departmental hierarchies and staffed by qualified school librarians and education specialists;
- Different conditions call for different models of service. Examples that might offer at least temporary solutions to the prevailing problems of lack of space include:
 - classroom collections in primary schools, replenished frequently from the stocks of education centres or public libraries
 - clustering schools around one facility in order to share resources and space
 - container or modular LIS.

These models should not be regarded as ideal or permanent solutions and schools should be encouraged to progress to different models as their circumstances change;

- In some communities, education and public library authorities might together establish dual use school community libraries, available to the school in the school day and open to the community after school hours and in school holidays. In establishing such a model, role-players should take cognisance of the international benchmarks for successful dual-use LIS and of the IFLA/UNESCO proviso that "the unique aims of the school library must be acknowledged and maintained" (2002). Memoranda of understanding and policy are crucial to clarify the roles and responsibilities of the governance structures and to ensure that the partnerships are fair;
- Every school learner must have access to a living up-to-date collection of

reading, learning and information resources which caters for all ages, abilities and backgrounds. Whatever the delivery model, a minimum of five items per learner will be required. The initial establishing and provisioning of the LIS should be the responsibility of the provincial school library support services or an agreed upon alternative agent, in consultation with school management. Thereafter, school LIS programmes should be sustained by annual allocations from schools' budgets. It is recommended that 10% of schools' learning and teaching support materials (LTSM) budgets be assigned to the LIS programme;

- Once national policy endorses school librarian posts, it is likely that school librarian education programmes will expand. In partnership with provincial education departments, universities' education faculties and library schools should be encouraged to set up school librarianship programmes. UNISA should re-establish its school and children's librarianship programmes;
- Teacher education programmes in colleges and universities should include courses in school librarianship and in children's and youth literature. Moreover information literacy education should be embedded in all teacher education;
- Both formal and informal education programmes should harness the knowledge and expertise of the existing cohort of excellent school librarians. Mentoring programmes should be established;
- Finally, the urgent social, health and educational challenges facing South Africa's children and youth necessitate more active collaboration among sectors. Provincial education departments, public library authorities, professional associations, schools and universities need to share the responsibility of providing access to effective LIS programmes that will help young people to make sense of their lives.

3.2 Public Libraries

3.2 Public libraries

The public library is an essential component of a modern democracy, an enduring agency uniquely tasked with providing opportunities for education, culture, literacy and information provision to reach all citizens free of charge. In this section we give an overview of the current situation of public libraries before outlining the challenges they face. Recent innovations and trends are identified in an effort to map future directions, concluding with priorities likely to ensure sustainable transformation, and recommendations.

Overview

The principles set out in IFLA/UNESCO Public Library Manifesto (1994) represent an authoritative statement about the functions of the contemporary public library:

The public library, the local gateway to knowledge, provides a basic condition for lifelong learning, independent decision-making and cultural development of the individual and social groups. This Manifesto proclaims UNESCO's belief in the public library as a living force for education, culture and information, and as an essential agent for the fostering of peace and spiritual welfare through the minds of men and women" (IFLA/Unesco Public Library Manifesto, 1994).

The first South African public library was established 195 years ago when the government proclaimed the South African Public Library on 20 March 1818. This library is now the Cape Town campus of the National Library of South Africa (Satgoor, 2013). In 2010 there were 1752 public libraries located in the six metropolitan areas, and affiliated to provincial library services (South African Yearbook 2011/2012, 2012).

Public library services are the exclusive competence of provinces, in terms of Part A of Schedule 5 of the South African Constitution. Prior to the new Constitution, this function was shared between provinces and local authorities, with local authorities providing and maintaining buildings and staff and provinces providing the professional and technical services. In the current dispensation this arrangement largely continues in spite of the fact that "municipalities have no comparable competence" (Basdeo and Sibanda, 2013). There has been no sustained and systematic legislative or executive assignment of the function to municipalities by provinces, accompanied by the

inevitable funding obligation for the provinces, with the result that many municipalities continue to administer and fund the function. Experts in public administration who have studied the issue of the so-called unfunded mandate in South Africa conclude that municipalities continue, in the main, to exercise the function which is not legally theirs because it is “socially and unacceptable for municipalities to close their libraries knowing that the provincial government may not take over or provide adequate compensation for this function” (Basdeo and Sibanda, 2013).

The tardiness in making arrangements to address the situation is perhaps accounted for by the fact that for a number of years the LIS sector explored possibilities of shifting the function for Schedule A to Schedule B of the Constitution, i.e. to municipalities, on the grounds that they have traditionally been the service providers on account of their proximity to their communities. A few provinces have shown the way in addressing the anomaly through formal memoranda of agreement, either by assigning the function to the relevant local authorities deemed to have the capacity, or by taking over the function where they do not. Where agreements are not in place, libraries can be at risk in those situations where municipalities have to cut services and target libraries since they are not legally obliged to provide such services.

Challenges

The challenges facing public libraries stem in many respects from the legacy of apartheid and a period of funding neglect in the first decade of democracy. They relate to infrastructural deficits, human resource demands and operational difficulties.

The location of many public libraries has been influenced by former apartheid spatial planning with the result that many areas, such as former townships, informal settlements and rural areas are under-served, or not served. There are a number of municipalities where there are no libraries at all, a situation affecting more than 2 million people. Linked to the inequities flowing from geographical location is the historically uneven resourcing between established libraries in the suburbs, and those in townships and rural areas. Opening hours limited to the typical working day also militate against social inclusion. The average opening hours in South Africa are 40 hours per week – not hospitable to working people who travel long distances to and from work. Opening hours are driven by staffing provision which is insufficient in many areas.

There are also many examples where inadequately or inappropriately trained people are appointed to positions for which they are not equipped. Disparity in salaries for equivalent positions in metro and provincial library services must be addressed in order to stabilise staffing and obviate the disruption caused by job hopping.

Unduly complicated administrative procedures also hamper efficient operations, highlighting the reality that library materials such as books cannot be treated in the same way as, for example, furniture or computer hardware. Many public librarians have complained that supply chain management procedures laid down by government structures create delays and introduce unnecessary obstacles to the acquisition of books, and other library materials. The Treasury's injunction that library books now qualify as assets and so are liable to capitalisation has led to strenuous protests from libraries about the cost and disruption of the injunction; with no exceptions having been granted thus far. This is known as GRAP (Generally Recognised Accounting Practice) 103 Standards.

One problem that continues to trouble the LIS sector is the fact that at least fifteen public libraries have been destroyed in arson attacks during protest actions since 2009 (Van Onselen, 2013). A recently reported case was that of the Welgeleë Library in Olifantshoek which was destroyed with its collections and equipment on 24 June 2012. The library served a community of 15,000 residents, as well as two crèches, two primary schools and one high school (Haasbroek, 2012). Jansen, commenting on the burning in quick succession of five libraries in 2011, suggests that these episodes of "calculated attacks on books" are associated with a "the loss of respect for what is represented in the book" (Jansen, 2011). There has been as yet no systematic study of this phenomenon, which would provide insights to help prevent the attacks.

Opportunities

There are solid grounds for confidence in South African public libraries. In recent years, they have been boosted significantly through generous material support, and policy and legislative refinements open the way to a more agile public library service geared to maximise gains and extend its reach to all communities. The government's commitment to revitalising public libraries through the conditional grants offers them a way of redressing past imbalances and charting a path to the realisation of library

services consistent with a developmental state. The conditional grants have made significant differences in all the provinces, resulting in the building of new libraries, refurbishment of others, hiring of extra staff and provision of material. Additional funds released by Treasury for 2013/2014 will assist financially vulnerable municipalities to provide library services, a provincial competence.

The Carnegie Corporation's Next Generation Public Librarians, administered by LIASA, aims to deliver a hundred public librarians with a postgraduate diploma through a generous scholarship programme between the years 2012 to 2014. Neither project on its own, or in tandem, will deliver the services required, but they offer an important platform to lay necessary foundations for transformation.

There have been a number of developments in policy documents and conceptualisation that have offered useful lines of inquiry and guidance for the planning and evaluation of services. The South African Public Library and Information Services Bill of 2010 which provides "for essential national norms and standards" and "the determination of national policy and principles" for community LIS is an important document sketching the principles that should underpin the services (South Africa, 2010: 5,10). The proposed Gauteng Public Library and Information Services Bill, drafted in 2012, amplifies the governance arrangements and relationships so critical for the effective delivery of a good service (Meyer, 2013).

After a hiatus of nearly a decade the NLSA has published the Directory of Public Libraries in South Africa, an essential tool for those wishing to understand the public library landscape, and for planning, monitoring and evaluation which requires the collection of sound and basic statistics (National Library of South Africa, 2012).

Current planning in a couple of provinces has started to incorporate the thinking that public libraries should purposefully seek opportunities to formalise their involvement in the provision of services to school children. This has resulted in a number of initiatives where joint-use libraries have been located on, or near, a school property. This kind of planning has surfaced an extra layer of problems manifested in differing practices with respect to opening hours (e.g. closure of the school during school holidays) and reluctance by potential education partners to collaborate in the absence of directives from their authorities.

The drafting of guidelines by the DBE and DAC on collaboration between schools and public libraries is a welcome step in suggesting mechanisms and procedures that will facilitate collaboration (South Africa. Department of Basic Education and Department of Arts and Culture, 2013). One library in a growing township has reported success in its targeted efforts to focus on early childhood development (ECD) where it has well attended programmes with children and their care-givers. Since ECD is very loosely organised and regulated by education authorities, bureaucratic problems are not as prominent as they are in the formal education sector, such as in the primary and secondary schools.

Recommendations

The recommendations offer a view of the public library as an accountable institutional the heart of the community, run by well qualified staff, with the skills to create partnerships in order to leverage greater capacity to advance the goals of a modern service equipped with the technologies needed by citizens for their individual development, and for building healthy communities.

There should be a national strategic plan informing growth, expansion and consolidation of public library services, taking into account the diversity of needs of different communities. All public libraries should be community centres, sensitive to local needs and able to meet information needs through quality services informed by input of the local community services based on the foundational principles of freedom of information and access for all.

The public libraries should fulfill their important contemporary function of offering a public space where activities of various types are offered and taken up in pursuit of:

- Promotion of reading and writing, with a focus on family literacy programmes;
- Education and learning: formal and informal;
- Community and other useful information provision, e.g. consumer health, employment opportunities;
- Participatory democracy and active citizenship;
- Fostering creativity and cultural expression;
- Support of businesses;
- Social cohesion and the fostering of appreciation of cultural diversity;

- Information literacy to allow citizens to participate in the knowledge society.

These activities rest on the idea of the library as a public place, providing a meeting place where people can learn, interact, share ideas and stories, and create and innovate. The importance of the concepts of public culture and public space, to be defended and used to promote community building by the public library, is described by Zukin, as:

socially constructed... produced by the many social encounters that make up daily life in the streets, shops and parks—the space in which we experience public life in cities. The right to be in these spaces, to use them in certain ways, to invest them with a sense of ourselves and our communities—to claim them as ours and to be claimed in turn by them — make up a constantly changing public culture. Yet public space is inherently democratic. The question of who can occupy public space, and so define an image of the city, is open-ended (1995: 10–11).

This might require re-ordering of resources, and administrative adjustments, for example, in extension of opening hours. This will, in turn result in pressure on staffing which will need to be expanded to meet other demands derived from the principle of access. For example, the provision of services to those whose movement is restricted, either through infirmity, ill health or incarceration. People in these circumstances need access to materials for rehabilitation, for therapy, and also in order to participate in education. Outreach services will overcome difficulties that some communities experience in making visits to the library. This will have the added benefit of building community ties and integrating the library in the community.

Partnerships

The library should be fully integrated into each local authority's integrated development plan. This will require of the librarian the ability to understand how to communicate with local authority managers and politicians and to advocate for the library and so ensure that it plays its role in the economic and social life of the community.

Every public library should take steps to ensure that cooperative agreements are in place between local authorities and provincial library services so that service levels are guaranteed, and that there is clear definition and equitable and sustainable allocation of roles, responsibilities and duties. Libraries should enlist the support of the community by establishing or strengthening Friends of the Library Committees which

are an effective means of extending the capacity of the library and also providing a valuable bridge to the community.

Partnerships with other community agencies will extend the reach of public libraries. For example, linkages should be established with Thusong Centres which have been established by government to offer integrated electronic information services to communities particularly in rural areas.

Partnerships with schools and educational authorities will ensure that no child is without library and information services, so crucial in the educational, social, and cognitive development of all children. Considering the demographic reality of the country and the desirability of establishing children's literacy at an early stage, special attention should be given to work with children, at various stages of their development. The sphere of early childhood development (ECD) offers opportunities for productive interventions with service providers, for example by making available suitable reading material, games, toys and other facilities to the numerous local projects involved with ECD. Best practice is being developed through the pioneering efforts of those libraries already embarked on this important niche area of growth.

Librarians working with school children will need the knowledge and skills to match the curriculum requirements with the materials and programmes offered to learners. There are opportunities, also, to partner with NGOs such as PRAESA that has launched a national long term movement for reading enjoyment reading for enjoyment, Nal'ibali, an opportunity taken up by at least one Provincial LIS.

The library at the centre of the community

Since the library is important as a meeting place and community hub, its design and furnishing is very important. In order to reduce capital costs, the Department of Arts and Culture has recommended that provinces explore the feasibility of adopting a standardized library design from a portfolio of new library buildings, incorporating adaptations for local conditions (South Africa. Department of Arts and Culture, 2012).

This proposal would cut down on design and building costs. An interim portable and transportable solution for dispersed communities, far from urban or peri-urban hubs, is

offered through the use of mobile bus services, container libraries, and wheelie wagons which are convenient and affordable service points in previously unserved areas.

The current use of wheelie wagons in schools in the rural Western Cape serves the needs of school children and the community, thus acting as an affordable joint use option.

The extension of services should be accompanied by programmes to facilitate and promote use, thus optimising return on investment, e.g. information literacy programmes that are particularly important for people who have not been exposed to information and library resources.

Provision of computers and ICTs

All public libraries should have sufficient computer capacity for the management and delivery of services, and use by clients. There should be sufficient computers with Internet connections in each service point both for the use by the public and also for use by staff. An ICT project for community libraries is being implemented by the National Library of South Africa (NLSA), in which they are being provided with connectivity (Ledwaba and Tsebe, 2012). Figures supplied by the NLSA in 2013 show that 1054 public libraries have Internet access, while 465 remain without. This increase in coverage is partly due to the NLSA's project which reports a 400% increase in membership of a rural public library which was connected through this project.

A large public library in KwaZulu Natal reports on a project to offer indigenous knowledge collected through community participation on a digital platform thus involving the community as creators of knowledge who can share their stories with many people (Greyling and Zulu, 2010).

The global study on public access to ICTs in eight countries including South Africa concluded that "public access will remain a critically important service" even in the future when higher connectivity has been achieved (Sey, Coward, Bar, Sciadas, Rothschild & Koepke 2013: 26). The research showed that in almost all countries surveyed – Bangladesh, Botswana, Brazil, Chile, Ghana, Lithuania, the Philippines and South Africa – "libraries are largely untapped sites for public access"; the exception being Chile (2013: 32). The report also highlighted the importance of "info mediation" (2013: 34) in creating an environment that facilitates the effective use of ICT – a

reference to the role of information literacy education which every public service librarian should embrace.

Many public libraries in the developed world report success in strengthening relationship with their communities through social media, providing direct channels of communication whereby clients can learn of new developments, and make inputs such as suggestions for materials.

Investing in Human Capabilities

Pre-service education and training should incorporate these aspects of the changing role of the public library into the curriculum, and continuing education should be made available to all staff on a regular basis to keep up with technology, and changes in the environment.

There is a national effort initiated in 2013, with stakeholder participation by employer organisations, to streamline and harmonise formal qualifications, taking into account the needs of employers with respect to skills sets and knowledge required for different level posts.

Staff vacancies need to be filled with suitably qualified staff as shortages have a deleterious effect on service, and erode the confidence of the community. The hiring of professionally trained staff has the concomitant obligation that their professional judgement should be respected, and that bureaucratic obstacles to the effective performance of their tasks should be eliminated. In particular there should be continued lobbying against the inappropriate imposition of GRAP 103 Standards which will have deleterious effects on staff time which should be more productively used.

In order to counter the shortage of qualified librarians, the provincial and the independent library services should create a fund to finance bursaries for suitable candidates to study for a professional qualification. Depending on the shortfall, each authority should ring-fence an amount over a period of five years to provide bursaries for the study of library and information science to supplement those already available. In addition, each library authority should develop a continuing education plan in order to facilitate the systematic updating of skills of staff.

Monitoring and evaluation of public library services

In order to ensure that the objectives of the service are met, which will vary according to context and community need, it is essential that activities and use are monitored and evaluated on a regular basis. The framework for the establishment of norms and standards is presented in the South African Public Library and Information Services Bill which requires the Minister of Arts and Culture to establish national norms and standards for public libraries, and also set indicators to be used in measurement (South Africa, 2010).

Every provincial library service and metropolitan library should produce an annual report covering the agreed categories for reporting. All local authorities should incorporate a section in their annual reports on the public libraries in their jurisdiction. The benchmarks should include input variables, process variables and output variables. The collection and publication of these data will allow libraries to monitor their performance and progress over time, compare them with comparable libraries, and plan for improvements. The data should include not only statistics about staffing, materials, facilities, and circulation, but also outcomes and measures of user satisfaction.

The public library can and should find a comfortable fit between its programmes and the vision outlined in the NDP that summarises the characteristics of South African citizens in 2030:

“We love reading.
All our citizens read, write, converse and value ideas and thought.
We are fascinated by scientific invention and its use in the enhancement
of our lives.
We love the joy of speaking many of our languages.
We know our history and that of other people.
We have clear values” (National Planning Commission, 2012: 14).

3.3. Thusong Services Centres and IKS

The Thusong Services Centres (formerly known as Multi-Purpose Community Centres) are included in the charter because of the value they might add in mitigating the lack of access to information in South Africa and their potential role as resource centres for the collection, documentation and dissemination of indigenous knowledge (IK).

Overview

At the inception of the Thusong Service Centres, the Government Communication and Information Services (GCIS) set a vision of “providing every South African Citizen with better access to information and services within their place of residence and in each local municipality by 2014 to improve the quality of life”. The main objective of the Thusong Services Centres is to address the historical imbalances in access to relevant and empowering government information. Today the 178 Thusong Services Centres constitute one-stop centres where local, provincial and national government and other service providers offer services and information about government programmes to local communities.

The historical challenges in accessing government information and other relevant services which the Thusong Services Centres were established to address include:

- Travelling long distances to access empowering services;
- Language barriers;
- Low levels of literacy;
- Lack of relevance of existing information provision to the needs of communities;
- Exclusion of the visually impaired and other differently-abled people.

This section also promotes the role of the Thusong Centres as hosts of indigenous knowledge systems (IKS) resource centres. Historically, IK has not been part of the knowledge architecture of the knowledge institutions in the country. Until 2004 when the South African Cabinet adopted the IKS Policy, there was no policy framework to promote the development and management of IK. The consequence of this colonial and apartheid legacy is that IK was not even included in the classifications of knowledge that would provide the metadata to assist with its documentation. The IKS Policy of 2004 outlined a number of policy interventions to redress the marginalisation of IK in

the knowledge architecture of the country. One of the interventions mentioned in the policy is the establishment of IKS resource centres to work with other players in the knowledge and information infrastructure, such as the Thusong service centres, libraries and museums, in the recording, documentation, storage and dissemination of IK to knowledge institutions for its uptake and use in academic research and innovation and for general use by local and indigenous communities.

Challenges

The Thusong Services Centres do not have as yet the coverage in all 283 municipalities that was hoped for by 2014. There are 178 across South Africa and they are unevenly distributed, as shown in the following table.

Province	Number of "operational" Thusong service centres
E Cape	11
F State	10
Gauteng	46
KZN	22
Limpopo	23
Mpumalanga	22
N Cape	5
N West	17
W Cape	32

The ideal Thusong Service Centre is based on a six block service model that lays emphasis on the basic information needs in communities:

1. Government social and administrative services;
2. Offices (Phone, fax, scan, postal services, desktop publishing, etc.);
3. Education and skills development;
4. Local Economic Development (LED) services;
5. Business services and community opportunities;
6. Information and communication activities.

Components 3 and 6 are interconnected and suggest an overlap with the work of public LIS. However it seems that these two components do not play a prominent role at existing Thusong Service Centres and only a minority house public LIS.

The following table shows that only 41 of the 178 Thusong Centres house public LIS and only another 37 might have space for a library.

Province	Number of "operational" Thusong service centres	Thusong service centres with libraries	Thusong service centres with potential/ space to host a "physical" library
E Cape	11	3	5
F State	10	None	2
Gauteng	46	14	None
KZN	22	10	None
Limpopo	23	3	20
Mpumalanga	22	7	6
N Cape	5	2	None
N West	17	1	4
W Cape	32	1	None

There are questions over the operational sustainability of the Thusong Services Centres and over the take-up of their services by communities. The lack of intergovernmental co-ordination around the establishment and operations of Thusong Services Centres is perhaps the most pressing challenge. Neither the Department of Basic Education nor the Department of Arts and Culture is strategically involved in the conceptualisation and establishment of the Thusong Services Centre initiative. This is regardless of the fact that this initiative is earmarked for community development.

Opportunities

One of the strengths of the Thusong Service Centres is the number of stakeholders and subsequent wide range of services that the centres offer as a collective to the communities. The stakeholders include:

- Department of Home Affairs;
- South African Social Security Agency (SASSA);
- Department of Social Development;
- GCIS;
- Department of Health;
- Telecentres;
- Post offices;

- Agricultural Extension Offices;
- Municipal services;
- Community development workers;
- South African Police Service;
- NGOs and community based organisations;
- Public libraries.

As they are, the Thusong Centres might be seen as uni-directional points for accessing information provided by these stakeholders. However, as mentioned above, they might also serve as dynamic public libraries and IKS documentation centres.

The combination of the orientations of Thusong Centres and of public LIS would enable the transformation of rural LIS into community hubs of access to health information, e-governance, ICT skilling, and economic empowerment. Moreover, taking on the role of IKS resource centres would transform Thusong Service Centres from consumers of information to producers of information and to vibrant knowledge centres.

The Department of Science and Technology (DST) recently launched the National Recordal System (NRS) as a cyber-infrastructure for the collection, documentation, storage and dissemination of IK for use in the National System of Innovation.

The NRS is made up of recorders at community level and documentation centres currently located in universities, science centres and traditional authorities. There is a national office to manage and administer the system.

The work has required the creation of networks of stakeholders, including knowledge holders and practitioners, and a forum of technical and specialized users, such as companies and the Intellectual Property Commission of the Department of Trade and Industry and the Department of Environmental Affairs. The NRS is based on a distributed system and can easily overlay the model of the Thusong Services Centres.

The DST policy of establishing the IKS documentation centres aims at leveraging existing government infrastructure such as the science centres, public libraries and museums and the Thusong Service Centres. The combination of the original purposes and the location of IKS documentation centres within the Thusong Services Centres will

contribute to a sustainable and mutually beneficial model for information services in rural and poor communities rich in IK.

Recommendations

It is apparent that existing challenges can be addressed by:

- Implementing strategies which will address the lack of integrated service delivery. The DBE and DAC can be involved in the establishment of the next generation of Thusong Service Centres. Other departments need to support the business plan developed by the GCIS whose strategy to address access and mass participation by the needy communities includes the establishment of Thusong Service Centres at each of the 283 municipalities in South Africa;
- Prioritizing well-equipped LIS as critical components of the Thusong Service Centres. This should be done in order to address problems faced by learners and community members without access to such critical empowering facilities and infrastructure;
- Improving the limited ICT infrastructure and Internet connectivity;
- Ensuring that digital and open access to information be encouraged through the telecentres that form an integral part of Thusong Service Centres. The conception of "open access" will embrace the training of local communities in digital and information literacies. The ICTs thus will fulfill their potential as vital educational tools;
- Enabling Thusong Service Centres and their LIS to become IKS resource centres. They should lead the documentation of IK in their communities and should employ young people in the process of its recording, documentation and dissemination;
- Establishing satellite and mobile Thusong Service Centres to enlarge the footprint of the existing centres. The proposed mobile services should include state of the art ICT facilities;
- Addressing the lack of adequate space in many of the centres to promote a healthy environment and acceptable amenities for users of Thusong Service Centres - including people with disabilities;
- Identifying and prioritising solutions to the threats to the operational sustainability of Thusong Services Centres;
- Appointing qualified professionals to work at the libraries and IKS resource centres

3.4 University, Vocational and Technical Education and Training (TVET) College, and Research Councils

In this section we give an overview of the current situation of libraries in the post-school sector (university and FET colleges), and address also the situation of libraries attached to the various research councils. For each type, we outline their challenges, and identify trends and innovations that we believe point the way to future scenarios that will reflect national and global imperatives. Universities and FET colleges have a vital role in offering diverse learning opportunities for South African school-leavers, who face disproportionate socio-economic challenges. Research and innovation by universities and science councils are key to improving the nation's quality of life and enhancing its global competitiveness.

There are disparities between university and FET college libraries: with the former being better resourced, organized and networked, and the latter of varying quality and at different stages of development. Within the university library sector, there are also disparities, exacerbated by the high cost of electronic databases. While some of the research council LIS are clearly ground-breaking centres of information and knowledge management, others lack status within their institutions. All face challenges in terms of capacity to meet increasing demands for costly resources and specialised research services.

UNIVERSITY LIS

Each of the 23 universities has a library or academic information service whose purpose is to support teaching, learning and research in its institution. The LIS services are aligned with the mission and goals of their institutions, and all are affected by trends in higher education such as transformation and redress imperatives, rapid increases in student numbers, students who are ill-prepared for the demands of higher education, increasing uptake of and demand for ICTs in teaching and learning, the drive towards quality assurance, pressure for increased community engagement, changing pedagogic practices, and concern about the employability of their graduates.

Challenges

University LIS, following global trends and national demands, face the following challenges:

- Redress of inequities in provision and resources among institutions impacting on

the quality of the educational experience of the student. Projects that addressed historically disadvantaged university libraries served more to highlight the scale and depth of these inequalities than to remedy them because the benefits of books, ICT equipment and training could not be sustained in a resource-poor environment. Institutional mergers did little to equalize resources among university libraries. While physical structure, facilities to accommodate ICT equipment and services, and budgets remain inadequate, the inequalities will remain in place;

- Balancing of the demands of institutional autonomy and participation in the implementation of sector-wide transformation initiatives. The holdings of university libraries are a national asset and should ideally be made available to all;
- Optimal exploitation of digital technology;
- Demands for evidence-based value to the institution;
- Contribution to employability of graduates;
- Ensuring that staff have the capacity to meet demands of excellent service;
- Designing conducive learning and social spaces that meet the needs of 21st century students and researchers. The ease of access to electronic resources from remote locations does not diminish the value that innovative design of physical space affords collaboration in learning and knowledge production.

Opportunities

International associations like the Association of College and Research Libraries have identified the trends affecting academic LIS (2012 top ten trends in academic libraries, 2012). Global trends in higher education and the research environment and rapid advances in digital technologies indicate new roles and opportunities for university LIS such as:

- Research data management;
- Digital preservation. Many academic libraries in South Africa have already embarked on digitisation projects – creating open digital repositories of dissertations, their institutions' research outputs and special collections of archived materials;
- Shifts in higher education. Libraries must adapt to shifts in the higher education sector, such as new policy directives, new pedagogical approaches and more flexible modes of delivery, such as blended learning which uses a combination of

online delivery, and face-to-face teaching, and MOOCs which can deliver online education to vast numbers of dispersed students;

- Developments in ICTs. Social media, mobile devices, and open publishing offer new methods of communication and engagement with LIS users;
- Changes in scholarly communication. The above developments in ICTs are allowing researchers to share their work in online discussion groups, virtual communities of practice and open-access institutional research repositories. New publishing models are being developed, growing out of dissatisfaction with conventional methods, which are expensive, and limited in reach. Many South African universities have signed the Berlin Declaration on Open Access to signal their commitment to the goals of the Declaration which promotes the use of free knowledge sharing and exchange. At least one university library has offered its own technological and skills capacity to host South African journals on its platform thus enabling the journals to become open access;
- New staff capacities. University libraries need to train and re-skill staff capable of meeting the challenges of the evolving environment. New job descriptions are being devised (e.g. data librarian) and staffing structures reconfigured to operate in new growth areas.

Some of these themes have coalesced in the last few years in South Africa around the idea of research librarianship. The objective of research librarianship is to provide services designed to assist the university improve and enhance research productivity. A research librarian needs knowledge and understanding of the research landscape, the research process, the researcher and his/her needs in particular disciplines, scholarly publishing, and research data management. The research librarian will be able to intervene at various points of the research cycle to assist the researcher with specific needs – for example in-depth profiles of the literature in the particular domain, applications for NRF ratings, advice about the choice of journals for publications, assistance in the individual research assessment process. Tenopir, Birch and Allard, (2012: 7) argue that research data management encapsulates these activities as:

services that a library offers to researchers in relation to managing data and can include informational services (e.g., consulting with faculty, staff, or students on data management plans or metadata standards; providing reference support for finding and citing data sets; or providing web guides and finding aids for data or data sets), as well as technical services (e.g., providing technical support for data repositories, preparing data sets for a

repository, de-accessioning or deselecting data sets from a repository, or creating metadata for data sets).

Shore, Executive Director of ACRL, pointed out to delegates at a conference on performance measurement in 2013 the danger of the library not embracing these trends:

There was a time when the research library had a monopoly on research—if you wanted to do research you had to use the library, literally, physically. We lost that monopoly over the last 20 years but our historical-legacy thinking and practice have not come to terms with this loss. In fitting our measures to our goals, we need to realize this fundamental truth if we want to have a fighting chance and not focus on the library solely, but the world of information in which we now live (quoted in Groves, 2013).

The global theme of the importance of collaboration is even more compelling in South Africa, where levels of inequity in library resourcing and provision are very marked. An important paper by Gibson and Dixon (2011: 341) goes as far as proposing the development of a metric to measure the library's civic engagement manifested, for example, in outreach and public service "to a wider community as part of its organizational mission to improve the quality of life in that community".

Most South African universities incorporate the goal of social responsiveness in their mission statements. While it might be impractical for university libraries to open their doors to all citizens, there are other avenues where they can express their unity and solidarity with all library types by identifying and working in areas to address the inequalities. For example, university libraries are familiar with the problem of the under-prepared student, receiving his or her education in a school with scanty resources and teachers often ill-equipped to incorporate resources in their teaching. In pursuit of the goal of social responsiveness, the university library is well placed to offer information literacy training to school teachers, a more efficient means of skills transfer than trying to reach thousands of learners.

Another area of collaboration could be joint projects of digitisation between university libraries, with their specialised skills and resources, public libraries and IKS resource centres, which often hold material of particular community importance.

TVET COLLEGE LIS

Overview

Before 1994 Further Education and Training (FET) Colleges resorted under the national departments of education for the different races, with the differences of resourcing that are implied. Colleges for whites had libraries, many others did not. After 1994 the colleges were placed within the provincial departments of education and treated as schools. They were restructured to form 50 non-racial, multi-campus institutions. After the division of the Department of Education into the Department of Basic Education and the Department of Higher Education and Training (DHET), the FET colleges were placed with DHET and the Further Education and Training Colleges Act, 2006 was promulgated. During this whole period the libraries at FET colleges were largely neglected. The Act makes no mention of libraries.

It has become clear that the colleges have not been fulfilling their mandate to prepare students for the labour market, and they are at present receiving substantial attention from the DHET. To this end the Further Education and Training Colleges Amendment Act, 2013 was promulgated. The Act provides the following definition: "college" means (a) a public college that is established or declared as (i) a technical and vocational education and training college; or (ii) a community education and training college; or (iii) a private college that is established, declared or registered under this act, excluding (a) a school offering further education and training programmes under the South African Schools Act; or (b) a college under the authority of a government department other than the Department of Education (Act 1 of 2013 p. 3).

The White Paper on Post School Education and Training (South Africa. Department of Higher Education and Training, 2013) which has extensively restructured this sector with the intention of achieving greater articulation has renamed these colleges as Technical and Vocational Education and Training (TVET) colleges. In his budget the Minister allocated R2.2 billion in assistance to students at colleges and R2.5 billion for building institutional capacity including infrastructure, management, teaching and support services (South Africa. Department of Higher Education and Training, 2013a).

Challenges

- The role of libraries in vocational education and training is not recognised. The White Paper for Post-School Education and Training (South Africa 2014) the Further Education and Training Colleges Acts, and the 2013 budget speech make no mention of libraries;
- There are wide variations in the provision of libraries and the functionality of those libraries that do exist. Few colleges have libraries. Of the colleges that do have libraries, not all their campuses have libraries. Some colleges and campuses have so-called open learning centres, which only provide access to the Internet;
- Colleges are provided with posts in accordance with their enrolment. These posts do not include library posts;
- Where colleges do have libraries and librarians, the librarians are often sidelined, not given opportunities for training, and poorly paid;
- Colleges do not have dedicated library budgets;
- Even in colleges that do have libraries, equipment and systems are often outdated, e.g. manual library management systems and outdated security systems;
- The resources in the libraries are often outdated and/or not relevant to the needs of the students at the colleges;
- Libraries have limited Internet access with inadequate and outdated ICT resources.

Opportunities

The increased emphasis on the role of TVET colleges and the concomitant increase in budget provide an opportunity for improving their LIS. This includes all aspects i.e. staff, infrastructure, equipment and resources. The open learning centres could be expanded to form libraries. University libraries should consider coming to an agreement with TVET colleges in the vicinity in order to provide a service to their students.

RESEARCH COUNCIL LIS

Overview

The focus in this section is on the LIS of South Africa's 17 public research institutes and councils, some of which have statutory status. Their relationships are complex and in a state of flux – as in the on-going merger of the Human Sciences Research Council

(HSRC) and the Africa Institute of South Africa. Higher education accounts for 86% of South Africa's research (National Planning Commission, 2012: 327); but the contribution of the science councils is significant, with, for example, 35% of government spending on science and technology being channeled to them in 2009/2010 (South Africa. Department of Science and Technology, 2011: 33).

South Africa's aspirations to move from a resource-based to a knowledge-based economy depend on building its research capacity. The National Development Plan 2030 (National Planning Commission, 2012: 326) sees technological innovation and the production of new knowledge as crucial to growth and development. Human development is the focus of research in the social sciences, which, as the HSRC points out on its web pages, addresses such critical national issues as democratisation, social justice, governance, service delivery, and crime. The mission statements of the research councils reveal understanding of the role of research in alleviating poverty and improving the nation's quality of life.

The role of LIS in the research programmes of their organisations is crucial. They provide dynamic information services in organising tailored research collections and providing access to information on demand; and some have moved beyond the library precincts into larger roles as knowledge managers. Thus, they manage the institution's records and research repositories – and are responsible for the knowledge-sharing systems. However, it cannot be assumed that all the research LIS have the capacity to take on these new responsibilities. There is some comment on the need for benchmarks of service – perhaps explaining the reported initiative by the Medical Research Council to appoint a consultant to investigate the varying conditions and levels of service within the sector.

The recent Agreement of Collaboration of the South African National Research Information Consortium (SANRIC) comes from growing pressures of “universally diminishing budgets” (South African National Research Information Consortium, 2012). The Consortium hopes to act as a forum to negotiate affordable access to research information. But the goals spelled out in its founding document show awareness of wider issues. They include, for example, the aims to:

- Disseminate South African information and data to enable African and international scientific research;

- Facilitate the development and upgrading of competency levels of librarians working within the sector;
- Serve as a collective national source of expertise for the effective curation of research data;
- Promote the use of new technologies

Challenges

These goals perhaps reflect the two chief challenges that were reported: sustaining excellent services with limited budgets and recruiting staff capable of offering the cutting-edge services the research LIS take pride in. Both might be linked to perceptions that the parent institutions tend to underestimate the value of their LIS. There was comment that the status of LIS is rather low and that they need to market themselves more aggressively so that they have more influence.

Other challenges reported are:

- The academic LIS model of subscriptions to packages of databases does not suit the more focused interests of the research LIS;
- The research LIS have on the whole small staff numbers, yet they are expected to take on more demanding roles;
- Librarian education is too theoretical and does not equip graduates with the technical skills required in the research LIS environment;
- It is difficult to recruit people with the subject knowledge needed to work with researchers;
- Although high level skills and knowledge are demanded, salaries are comparatively low.

Opportunities

It is clear that the research council LIS are making an important contribution to the South African LIS profession and to the research community. Many offer trail-blazing services. There is evident satisfaction in the close relationships they are able to build with research teams and pride in the excellence of their professional staff.

- The revival of SANRIC with its bargaining powers surely offers an opportunity to overcome some of the procurement challenges. The opportunities for collaboration it offers are in keeping with the statements in the National

Development Plan that “the National System of Innovation is about networks and partnerships” (National Planning Commission, 2012: 327).

- The goals of SANRIC reveal a desire to take on stronger leadership which will enhance the visibility of research LIS. Internationally, the recognition of the strengths of librarians in organizing information has led to new roles in data curation and in institutional and disciplinary repositories. The South African research LIS might take the lead in this area.
- The growing realization across all sectors of the contribution of research and innovation to national development imperatives offers opportunities for the research LIS to assert their value and improve their situation. There is widespread concern over the decrease in South Africa’s R&D expenditure to 0.87% of GDP in 2009/10 after a large drop in business research spending (Wild, 2013). The links of R&D spending to economic growth and job creation explain the desire of the Department of Science and Technology to recapitalise the science councils (South Africa. Department of Science and Technology, 2011: 30). It is hoped that the research LIS will be included in these plans.

Conclusion

This analysis has shown that there are great disparities among the three categories examined in this section. Libraries in TVET Colleges are the least well developed, reflecting the status of TVET in the post-secondary education ambit with respect to resource provision, level of investment and level of maturity. Among university libraries the state of the individual library reflects the growth, stability and maturity of the parent organization. Academic and research LIS are struggling with the high costs of electronic databases in spite of cooperative and consortial efforts to negotiate favourable terms from vendors. This has led to calls to government to intervene on their behalf to tackle the issue. Government has not yet drafted an open access policy as have the USA and many countries in the European Union which oblige researchers funded by public money to publish their research in open access journals or in open access repositories, very often hosted in the university or research library. It has been seen that these policies have the effect of reaching audiences who would otherwise not have access, thus increasing readership, use and impact.

Recommendations

All libraries in the higher and further education and training sector should strive to offer excellent services to promote their organisation's mission and in keeping with national goals with respect to education, research, innovation, and human resource and economic development. They should recognise their role in an articulated system that will cooperatively meet the needs of the nation, acknowledging that their major source of funding is from the public purse.

In order to meet the challenges it is recommended that the sector:

- Target inherited inequalities, and devise innovative funding strategies to redress them, as well as challenging the Department of Higher Education and Training to seek ways in which international organisations can assist;
- Engage the relevant departments of government via the South African National Library and Information Consortium (SANLIC) to negotiate national site licenses for electronic products;
- Explore the possibility that SANLIC may extend its services to other sectors that wish to venture into this environment (e.g. schools and public libraries) thereby securing affordable access to the electronic products needed;
- Harness the potential of digital technologies for the more efficient sharing of knowledge and the stimulation of innovation, through digital data curation and management, for example, in the creation of institutional digital repositories of the intellectual products of their institutions;
- Create an institutional information literacy policy in universities and colleges leading to an action plan which recognises their responsibility for ensuring that all graduates enter the workplace with the requisite information literacy skills. This is urgent as the first baseline study of employers' expectations of graduates conducted by HESA in 2007 reported that employers found that graduates do not have the ability to find and use information;
-
- Act as a partner in the provision of information to the nation's citizens, finding ways of meeting information needs of citizens which cannot be met through the stock of the public and school library sector. Build on the collaborative frameworks in place in order to optimise use of resources for the development of the nation;
- The establishment of three new South African universities offers exciting opportunities for South African LIS. They could act as pilot sites and role models for innovative services that break down the conventional barriers that separate

academic LIS from their surrounding communities. They thus offer a chance for innovative design and planning to advance the idea of LIS ecosystem which could generate useful data and insights to inform productive partnerships and collaboration for the older established university LIS

- The TVET sector must be prioritized by ensuring the following:
 - DHET should intervene to establish TVET college libraries;
 - Library posts with suitable remuneration should be created for TVET college libraries;
 - The potential role of libraries in TVET colleges should be investigated and evidenced;
 - Norms and standards need to be established for TVET college libraries, including staffing and budgets;
- The community colleges and their public adult learning centres, an innovation in the post-secondary sector, as mentioned in Chapter1, will need good LIS;
- University libraries and TVET colleges should investigate methods of cooperating
- The recapitalisation of Research Councils should include ring-fenced provision for improved resourcing of their libraries.

3.5 National Libraries

There are two national libraries in South Africa, both governed by their own, separate Act of Parliament. They are the National Library of South Africa (NLSA) and the South African Library for the Blind (SALB).

NATIONAL LIBRARY OF SOUTH AFRICA

Overview

The National Library of South Africa (NLSA) exists as a result of the amalgamation of the South African Library and the State Library through the NLSA Act 92 of 1998. The NLSA is one of the Agencies of the Department of Arts and Culture and its affairs are controlled by the Board of the National Library South Africa. The NLSA is the custodian and provider of the nation's published documentary resources. It is mandated to collect, preserve, and make available the published national documentary heritage of South Africa.

The National Library comprises two campuses: one in Pretoria and the other in Cape Town. The National Library's Pretoria Campus, a state of the art facility funded by the Department of Arts and Culture was opened to the public on 1 August 2008. The Centre for the Book in Cape Town, an outreach unit of the NLSA, promotes the culture of reading and writing in the country.

In view of the overwhelming need for study facilities for students in South Africa due to noisy, overcrowded living conditions, the National Library building in Pretoria has been provided with extensive study space. The usage of the NLSA continues to grow with over 2000 visitors each day.

The objectives of the National Library are to contribute to socio-economic, cultural, educational, scientific and innovative development by collecting, recording, preserving and making available the national documentary heritage, and promoting an awareness and appreciation thereof, by fostering information literacy, and by facilitating access to the world's information resources.

The functions of the National Library are to:

- Build up a complete collection of published documents emanating from and relating to South Africa;
- Expand, record, manage and maintain all collections of published and unpublished documents with emphasis on documents emanating from or relating to Southern Africa;
- Promote optimal management of collections of published documents held in South African libraries;
- Render a national bibliographic service and act as the national bibliographic agency;
- Promote optimal access to published documents, nationally and internationally;
- Provide reference and information services, nationally and internationally;
- Act as the national preservation library and provide conservation services;
- Promote awareness and appreciation of libraries and the national published documentary heritage;
- Promote information awareness and information literacy.

Challenges

- Inadequate funding for the NLSA to function effectively as the national library and implement dynamic development within the sector;
- The distance of the NLSA from ordinary South Africans in various provinces;
- Uneven compliance with the legal deposit processes;
- The uneven availability of library materials in all official languages;
- The lack of clarity on the NLSA leadership role within the LIS profession;
- The lack of clarity on the relationship between the NLSA and other memory institutions, i.e. archives and museums;
- Uncompetitive salaries for NLSA staff, resulting in loss of expertise;
- The retirement of many experienced NLSA staff who take with them a wealth of knowledge and expertise and skills, especially in cataloguing, bookbinding and book restoration;
- Lack of resources to comply with GRAP (Generally Recognised Accounting Practice) 103 Standards;
- The need to update the NLSA legislation which is not in line with developments within LIS.

Opportunities

The NLSA is expected to play a leading role in the South African LIS sector. It participates in national and international forums, including LIASA and its interest groups, IFLA and its sections, and national standards generating bodies. The NLSA hosts the head-office of LIASA as well as CHELSA on its Pretoria campus. The NLSA also partners with other national libraries in Africa and internationally. It serves on various committees nationally and internationally in order to promote cooperation and collaboration in library and information issues.

The NLSA assists the Department of Arts and Culture with some of its Community Libraries' Conditional Grant special projects, namely, Reprint of African Classics, indigenous language bibliographies, the rolling out of Internet connectivity for libraries, RDA training, and the LIS Transformation Charter. The NLSA is also an Ex-officio member of NCLIS. The Centre for the Book donates books to communities, schools and prisons to inculcate a culture of reading. Book-clubs are also established in schools and prisons to promote reading and writing.

Recommendations

- The NLSA should be adequately funded in order to fulfill its mandate. At present the NLSA is lagging behind other national libraries of the world;
- The collections of the NLSA should be digitized;
- The NLSA should participate with organisations such as SANLIC in arranging more affordable licenses for electronic resources for South African libraries;
- The NLSA should enhance its visibility across South African communities;
- The salaries of staff should be improved in order to attract, recruit and retain the highly skilled staff required;
- The legislation dealing with NLSA should be updated.

SOUTH AFRICAN LIBRARY OF THE BLIND

Overview

The South African Library of the Blind (SALB) serves the reading and information needs of visually and print impaired persons throughout South Africa and increasingly Sub-Saharan Africa. Audio and braille books are circulated to its widespread and extensive membership via postal delivery.

Challenges

- There is limited access to LIS for the blind and print-handicapped;
- There are perceptions of a lack of involvement of SALB's constituency in decision-making, hence the motto of people living with disabilities: "Nothing about us without us";
- The conversion from the existing analogue system of SALB to digital is incomplete and only partially funded. The digitisation process is essential if the library is to continue to exchange books with other major libraries for the blind in the world;
- Outdated copyright law hampers the conversion of resources into formats suitable for the blind and print-handicapped.

Opportunities

- The Marrakesh Treaty to Facilitate Access to Published Works by Visually Impaired Persons and Persons with Print Disabilities (2013), which was championed by the South African government, and the development of a national policy on intellectual property provide an opportunity to negotiate exceptions to the copyright law to make provision for converting resources for use by the blind. The Marrakesh Treaty is returned to in Chapter 4;
- The widespread conversion of analogue collections to digital;
- The possibilities of delivering audio resources electronically.

Recommendations

- Networks must be built across all sectors to improve LIS access for the blind and print-handicapped;
- The SALB should expand its services through organised structures e.g. public and school libraries and Thusong Centres;
- South African LIS must work together to overcome the restrictions coming from the Copyright Act so that SALB's products and services can be expanded;
- Infrastructure to convert analogue collections to digital should be expanded.
- More provinces should participate in SALB's successful initiative to decentralise its services in the three provinces of Eastern Cape, Mpumalanga and KZN. It is recommended that more provinces take advantage of this successful innovation of the establishment of mini-libraries, which has resulted in extending the reach of SALB through partnerships with provincial LIS and public libraries

3.6 Special libraries

Overview

South African special libraries have a long and proud history within the South African LIS profession. However, globalization, developments in ICTs, organizational transformation, and economic pressures have brought many challenges. Owing to the volatility of the business environment special libraries are in constant flux.

Special libraries belong to the category of all libraries not falling within public, school, academic and national library systems. Special libraries advance the goals of their parent organizations, and focus on the specific information needs of their users. They provide access to specialized information resources physically or virtually. Special libraries are in the following sectors:

- Private business/Corporations;
- Public organizations like hospitals and museums;
- The research and science councils that were covered in an earlier section;
- Government departments and entities;
- Non-Governmental organizations (NGOs).

Their singular character can be seen in some examples that include special and rare book collections and libraries with a special focus and clientele such as the Presidential Library in the Office of the President of South Africa, the Correctional Services Library which has a rehabilitative function, and the Constitutional Court of South Africa's library.

Special libraries are often small and managed by one librarian. The professional work of special librarians can include both the traditional library and information services and the delivery of information and knowledge management services. Their diverse and miscellaneous nature means that there is no single association that represents all special libraries. Special LIS associations include LIASA's Special Libraries Interest Group (LiSLIG), the Special Libraries and Information Services (SLIS), the Organisation of South African Law Libraries (OSALL) and the Southern African Online User Group (SAOUG). Special library associations and consortia encourage better library administration, information handling, techniques, and practices, and foster good relationships with content suppliers. Although it is clear that different special library

associations are necessary for operational reasons, there is also the need for special libraries to be connected in some way with the national association, LIASA.

Challenges

Perhaps the fundamental challenge is a lack of recognition of the value of LIS in their parent organizations. Muller (2008) identifies this as an international trend. In South Africa several corporate libraries have been closed, downsized or outsourced owing to lack of financial or managerial support. It seems that their librarians have not communicated to the corporate sector an understanding of the value of special libraries. Special librarians' high levels of knowledge of the sources and literature of specific disciplines, of their current topics of interest, and of the tools for exploiting and adding value to their content are often not widely known or appreciated in the organizations where they work.

The sector-specific challenges of special libraries and special librarians overlap with those of other LIS professionals but differ in the following ways:

- Organisational complexity can result in special librarians having to report to different line managers. This leads to isolation of special librarians from each other and needless duplication of tasks;
- In cases where special librarians attempt to expand access to their resources by the general public their efforts might be limited by internal policies, geographical and financial factors;
- Differentiation in the subject focus of special libraries often requires membership of professional associations outside of the LIS sector, and makes professional development more time-consuming and expensive;
- There are often wide discrepancies in post rankings and remuneration for special librarians. Librarian posts are often ranked with those of clerks and staff without tertiary qualifications. Hence some special libraries fill their librarian posts with candidates without appropriate qualifications.

Opportunities

The opportunities all relate to the special library sector's capacity for innovation. A significant aspect of the information ecosystem today is the predominance of innovation as a driver of change:

- Special librarians can leverage the capabilities of electronic communications channels and social networks to communicate their usefulness. Their abilities to leverage social networks with competitive e-products will be a key to the survival and revival of special LIS in the knowledge economy with its shifts from a product and service economy to an experience-based economy;
- Today most businesses consider themselves as learning organizations in which information and knowledge sharing is an integral part of the business. Businesses have come to rely on information hubs. Special libraries can assume this role as hubs of knowledge sharing and development -building information networks across all staff in the organization. Special librarians need to be at the forefront of information provision through the application of their skills and especially their synthesizing skills. This will transform the special library into a learning centre, physical and virtual;
- In a rapidly changing environment with the Internet providing open access to all, it is imperative that special libraries transform their services and find innovative ways to deliver information in their clients' preferred formats. The emergence of so-called Generation Y offers opportunities for dynamic specialized information services. Generation Y clients demand access to multiple sources of information and expect the information to be customized to their purposes;
- The exponential growth in the demand for authoritative global information among corporations implies a pivotal role for special libraries. Special libraries are expected to service emerging global systems of international trade, sea transport, global news services, air transport and many more.

Recommendations

- Managerial structures should consolidate all special library functions in an organisation into as few units as possible to improve efficient service delivery, and a more collegial working environment;
- The senior management of parent organizations should be informed of the public value of the information resources of their special libraries, and should empower special librarians to expand public access where this is possible;
- Special libraries should encourage their staff to participate in LIASA and other specialized interest groups relevant to their organizational mandate for skills development and benchmarking;

- There should be better coordination between the special library organizations, LIASA, and LIS teaching departments so that workshops and seminars can spread skills development opportunities as widely and cost-effectively as possible;
- There should be training opportunities for special librarians to remain abreast of the latest technologies in order to allow confident collaboration and communication with their international colleagues;
- Special librarians appointed at management levels should have qualifications both in LIS and in the discipline or specialisation of the organisation served by the library, although the disparate market values of the two qualifications may lead to problems in retaining them;
- Special librarians should learn to demonstrate the value of their libraries and of their own competencies using strategies that quantify their economic impact on the organisation in clear and simple terms;
- Special librarians should address the issues of posts and market-related salaries and other work-related challenges by preparing minimum uniform norms and standards for this sub-sector;
- Special libraries need to develop organizational repositories and maximize open access to the digital content;
- Finally, special libraries need access to the latest information technology such as affordable and sufficient broadband. Failure to provide new technologies could result in libraries being left behind. The LIS sector should leverage cloud computing and facilities like the Centre for High Performing Computing at the CSIR for information storage and retrieval. In order to be a learning organization, to provide an experience-based service and build information networks, librarians in special collections will need to be innovative and upgrade their professional skills to an unprecedented level.

Chapter 4. Access to LIS and participation

This chapter considers measures to increase access to and participation in LIS in South Africa, uncovering barriers, highlighting the unique contribution to the development of literacies by the library, and exploring possibilities for exploitation of ICTs to extend the reach of libraries. In addition to their educational and cultural roles, libraries contribute to economic development through a reading and functionally literate workforce. Factors explored are physical access, access for people with disabilities, intellectual and cultural access, the role played by illiteracy and the lack of a reading culture in restricting access, and the role of ICTs in relation to access.

Overview

The consultative meetings agreed that libraries need to adopt bold policies and innovative practices to reach all people. They noted that, in spite of great efforts, the distribution of LIS still favours urban populations and previously advantaged groups. It seems that LIS are often regarded as places for the literate elite and that social and cultural gulfs still exist. The built environment in many instances does not incorporate the spaces and facilities required by a modern service or facilities for people with disabilities. Although ICTs and Internet connectivity are regarded as essential for the efficient functioning of LIS; a significant number lack these basic facilities; while libraries that are connected do not always have sufficient capacity to meet demand. The lack of suitable materials in the indigenous languages is a barrier to use, although efforts by the NLSA and NGOs such as Biblione are increasing the numbers of titles available in all languages.

A significant barrier to access to information and participation in LIS is the lack of a culture of reading in South Africa. This is due to poor reading skills, lack of motivation to read and unawareness of the importance of reading. Although reading occurs of course both inside and outside of libraries, as institutions of reading, libraries play a leading role in building a nation of life-long readers. They supply not only books, but other reading materials such as newspapers, magazines, reports, and pamphlets – in print and digital format. They offer reading clubs and programmes to encourage the social aspect of reading, an important stimulus to the cultivation of reading as an important lifelong activity.

Challenges

The challenges to access and participation arise from structural factors emerging from historical legacy, and also from a re-orientation to a 21st century service approach that privileges and prioritizes access as an important human right.

Physical access

- Physical distance from LIS based on a legacy of spatial apartheid planning severely limits use. The conditional grants are making inroads in rectifying this situation by building libraries in rural areas and townships;
- The reduction of hours experienced by the public library sector as a consequence of insufficient funding and resultant staff shortages has had deleterious effects on people's ability to use the library;
- There is no systematic drive or plan to accommodate the reading and information needs of people in correctional facilities, a cause for concern given the low levels of literacy of many inmates, a factor that will severely limit their life chances once they have been released. The NLSA's initiative in providing reading materials through its Centre for the Book should be encouraged and expanded.

Access for people with disabilities

- Research estimates that between five percent and 12% of South Africans live with moderate to severe disabilities of various kinds. People with disabilities are often excluded from the mainstream of society and experience difficulty in accessing fundamental human rights;
- Disabled people's organizations across the world have therefore repositioned disability as a human rights issue and adopted the so-called social model. The social model recognizes that it is society itself that should accommodate people with disability rather than the other way round. This model is not at present applied in South African LIS;
- The South African copyright law and other legislation put barriers in the way of changing publications into formats that are accessible to disabled people.

Intellectual and cultural access

- Perceptions exist that LIS can offer little of value and relevance on account of

fears that LIS are the exclusive domain of the literate and educated elite. People who have had no prior experience or negative experiences of LIS have low expectations and people are reluctant to approach LIS for fear of the complexity of their organization and of the information universe;

- Lack of information literacy. In a knowledge society, such as the one South Africa is striving towards, it is essential that all citizens not only have access to information, but also the skills to use it effectively. Information literacy education is the means whereby these skills can be acquired;
- In 1994, a multilingual language policy was adopted giving official recognition to eleven languages whose recognition was guaranteed by the South African Constitution of 1996. In 2003, the South African Cabinet approved the National Language Policy Framework (NLPF) which aims to:
 - “promote the equitable use of the 11 official languages;
 - facilitate equitable access to government services, knowledge and information;
 - ensure redress for the previously marginalized official indigenous languages;
 - encourage the learning of other official indigenous languages in order to promote national unity, and linguistic and cultural diversity; and
 - promote good language management for efficient public service administration to meet client expectations and needs” (South Africa. Department of Arts and Culture, 2003: 13).
- The present outdated copyright laws do not make adequate provision for the needs of libraries, thus hampering the ability of libraries to provide access to information and resources. The particular defects to be corrected are those related to digital resources and exceptions for those wishing to make and distribute materials for the visually impaired.

Reading culture and literacy

- There is consensus that reading and literacy levels are unacceptably low. A strong commitment to implementing the School Library Guidelines and Minimum Norms and Standards for School Infrastructure will contribute significantly to the establishment of a reading culture in schools. The Progress in International Reading Literacy Study (2006) showed that learners in countries that performed better than South African learners had access to high-quality classroom and

central school libraries;

- There is a high level of adult illiteracy and a low level of functional literacy. According to the 2011 Census, 18.1% of South African could be regarded as functionally illiterate. Individuals over the age of 60 years, and women over 40 years are most likely to be functionally illiterate (Statistics South Africa 2012).
- The majority of South Africans are infrequent readers and the usual reading materials are newspapers and magazines. A quarter of the population never read in their leisure time, with people in rural areas and older people featuring strongly in this group. The National Survey into the Reading and Book Reading Behaviour of Adult South Africans (South Africa. Department of Arts and Culture. 2007) revealed that half of South African households have no books. There is also little articulation between homes, schools, and communities as sites of reading;

ICTs

- The uneven diffusion of ICTs, essential for socio-economic development, impacts on all spheres of individual and collective life. In this global digital age, those who are unable to access ICTs are increasingly disadvantaged as the world's dependence on them grows in all spheres of human activity.
- The burden on public agencies to provide access to the masses in South Africa is great as only 8.5 million people (or 17.4% of the population) are connected. This compares with the percentage in Africa of 15.6% and the rest of the world of 37.7% (Africa Internet Usage and Population Statistics 2012). Many South African public and school libraries are disadvantaged by slow provision of these technologies, which seriously hampers their ability to deliver quality services, and also to play a role in eliminating the digital divide.

Opportunities

Physical access

- The conditional grants for public libraries provide the opportunity to establish libraries where they are lacking, to improve access for disabled people to existing libraries and to conceptualise libraries that are in line with the culture of the majority of potential users;

- A small number of school/community libraries, which increase access for learners and the broader community, have been established. The expansion of this model provides opportunities for improved access in spite of the challenges inherent in the differing authority structures of schools and community libraries;
- The provision of books and literacy programmes to correctional facilities and awaiting-trial prisoners could make a contribution to their rehabilitation.

Access for people with disabilities

- In South Africa, The Constitution and its Bill of Rights, the Promotion of Equality and Prevention of Unfair Discrimination Act, of 2000, the South African Library for the Blind Act of 1998, and the White Paper on an Integrated National Disability Strategy of 1997 are the main pieces of legislation that impact on the lives of people with disabilities. Moreover, South Africa has ratified the United Nations Convention on the Rights of Persons with Disabilities and its Optional Protocol. These official documents generally emphasize the right of access to information of people with disabilities. The Copyright Act, The Legal Deposit Act, and other laws, however, make no special provision for people with disabilities, and thus restrict access to information. South Africa was at the forefront in negotiating the Marrakesh Treaty to Facilitate Access to Published Works for Persons who are Blind, Visually Impaired, or Otherwise Print Disabled which was approved on 27 June 2013. The Marrakesh Treaty and the fact that a national policy on intellectual property is being developed provides an opportunity for librarians to lobby for limitations and exceptions to the copyright law;
 - The Checklist of the IFLA Standing Committee of Libraries Serving Disadvantaged Persons is a useful tool for all types of libraries. It aims to improve access to buildings, services, material, and programmes (Irvall and Nielson 2005);
 - The special technology needs of people with disability are increasingly being met by advances in hardware and software. The take-up of these technologies is however sensitive to national needs, such as the indigenous language project of the South African Library for the Blind. Although South Africa compares favourably with the rest of the continent, there are still special challenges such as the low braille literacy rate that should be addressed.

Reading culture

- There are several state and private literacy organizations, as well as public-private partnerships, that promote reading and that involve libraries in these partnerships. Such partnerships can be expanded and utilized more effectively;
- The Department of Basic Education and several provincial departments of education have undertaken a variety of projects to improve literacy and promote reading. These initiatives have to be sustained, strengthened and expanded;
- The NDP calls for a library and a librarian in every community. It also calls for well-equipped libraries in no-fee schools. It includes the improvement of learner literacy as a priority. The DAC and DBE should implement these goals;
- Librarians, educators, and policy makers should develop an understanding of the popular uses of literacy, and of other reading formations linked to religious institutions, bookshops, book clubs, and trade unions. A mistaken assumption about reading patterns in South Africa, for example, is that there is little serious reading in African languages. And yet within the religious domain many believers read deeply and passionately in African languages, adopting a style of intensive reading that has largely disappeared in a world of often superficial reading. In order to understand how a reading culture works, this diversity of reading practices should be uncovered, to supplement the empirical work already produced. These practices provide the basis for the further development of the reading culture.

ICTs

- Libraries are being reshaped by the rapid spread of ICTs enabling them to create information hubs even in deep rural areas and to provide opportunities for previously marginalised communities to benefit from access to the new technologies. Bertot et al (2008) point out that in the UK and USA, the public library is the only public point of access for Internet and computing services.

Recommendations

Physical access

- Although there are no internationally accepted standards that relate to distance of public libraries from their communities, guidelines indicate that they should be conveniently located where people gather, such as shopping centres, and they should be in a safe environment. In South Africa it is generally agreed that a public library should serve a radius of 3.2 km effectively, and where there is no

transport within a radius of 1.5 km. Beyond these distances and under these conditions use diminishes;

- Opening hours must be arranged in such a way that people are able to use LIS during their free time;
- The design of the library building and arrangement of space should be in keeping with cultural needs and environmental conditions which will encourage people to enter the library and feel at home there;
- There is a need to develop an attitude of service which recognizes and is responsive to the diversity of cultures and languages in different communities of users;
- Account needs also to be taken of people unable to visit the library on account of incapacity, e.g. the aged, and those in hospital. This calls for outreach services to those unable to visit the library. The rights of those in prison must be guaranteed and affirmed by giving them access to library and information services. Correctional services should establish functional libraries meeting the diverse needs of the inmates. These could serve as depots for public and educational libraries.

Access for people with disabilities

Once the government has signed and ratified the Marrakech Treaty, its provisions should be reflected in South African copyright legislation which should make provision for:

- The reproduction, distribution and making available of published works in accessible formats through limitations and exceptions to the rights of copyright rights holders;
- Cross-border exchange of material;
- Assurances to authors and publishers that the system will not expose their published works to misuse or distribution to anyone other than the intended beneficiaries.

Intellectual and cultural access

- In order for the public library to deliver on its mandate of providing services to all members of the community, it needs to reach those who feel excluded by designing and marketing targeted programmes that will clearly promote social inclusion;

- The LIS collection must contain materials, media and artefacts that meet the needs of the particular community being served, taking into account cultural and linguistic diversity and educational levels. Participants at the consultative workshops stressed the importance of sound collection development principles that are closely articulated with community needs and interests.
- Books in mother tongue must be provided in order to promote the Language Policy and foster reading and in so doing both promote linguistic and cultural diversity and affirm language rights in a multilingual society. LIS must guard against “the slide towards a unilingual public policy delivery” which Alexander found distressingly evident in many spheres (2007);
- The public library should exercise its role in development by joining the struggle against poverty through engagement with adult education, and literacy programmes. Community libraries play an important role in offering literacy education in English to assist clients to improve their English language skills which in turn can enhance their employment opportunities;
- The Information for All Programme (IFAP) of UNESCO has concluded that “there is a need to embed information literacy in the curriculum at primary, secondary and tertiary levels, as well as in the training for information professionals, including education and health care workers”. It is the task of librarians to ensure that information literacy programmes are designed and delivered to all groups at their libraries who require the skills which are so essential a part of a modern democracy and necessary for social inclusion;
- Librarians should be encouraged to acquire conversational skills in the most used African language in their area so that clients are immediately made to feel welcome and the experience is an enjoyable one;

Reading Culture and Literacy

- In a focus on family, reach out to parents and children to improve reading activities of all family members in homes Reach out to teachers and learners to improve voluntary and curriculum reading activities in classrooms, and encourage teaching methods that involve reading;
- Increase involvement in those community reading activities which occur outside of libraries and which may be linked to literacy organisations, trade unions, and churches;
- Promote the reading and writing of books in mother tongue languages, and

purchase these materials through special catalogues. Librarians can lead the development and promotion of children's and youth literature in all South African languages;

- Provide opportunities for children's librarians to acquire storytelling and other reading promotion skills;
- Promote and encourage reading among library staff by having reading clubs and competition in the library itself, following the lead of a metropolitan library which has instituted innovative programmes with these goals. Librarians should get involved in reading circles, book clubs, and journal clubs so that they may provide reader guidance with confidence.

ICTs

- The sector should aim to overcome the fragmentation of services by poor connectivity and aim at the ideal of the "borderless library", connected into an integrated system. Provision of access to the Internet should be integrated and coordinated with other government initiatives such as the Thusong Centres project;
- Consideration should be given to the role of ICTs in the collection and preservation of indigenous knowledge;
- A study by the HSRC (Tabela et al, 2007), Mapping ICT Access in South Africa, concluded that it is logical to locate ICT services in public libraries because of their wide distribution, their educational orientation and their growing provision of remote access to their digital resources. The study recommends that the Universal Service Agency of South Africa consider working in partnership with public libraries to expand and exploit increased ICT and computer provision to increase the population's access to information;
- Development and acquisition of ICTs in LIS should conform to government strategy on Free and Open Source Software (FOSS). Librarians must keep abreast of open access initiatives in order to broaden their clients' access to scholarly and educational information, e.g. the Department of Science and Technology's investment in scholarly publication which flowed from one of the recommendations of the report on scholarly publishing by the Academy of Science in South Africa;
- Forums should be established or existing ones strengthened in order to share information/expertise among librarians across the sector.

Chapter 5. Human resource development: education, training and continuing professional development

Overview

As argued in Chapter 3, South African LIS are potential drivers of the knowledge economy through their role as depositories, intermediaries and distributors of information and knowledge. Libraries and librarians, by virtue of their spaces, collections, facilities and skills, need to be located centrally within the national initiatives for developing an information and knowledge society. With almost 1400 public libraries in place, the opportunity exists for libraries and librarians to become critical partners for social cohesion, and community education and development.

There are four forces that will shape the future of the LIS profession in South Africa: the Constitutional imperative to redress the inequalities of the past, globalization, ICTs, and changes in LIS users. The process of globalization is largely driven by ICTs which are bringing about the most radical and revolutionary innovations that the sector has seen for more than a century. ICTs have played a key role in LIS management and expansion of access to information for more than 30 years. Digital technologies are becoming the primary mode of delivery across the public and commercial sectors and are playing a significant role in knowledge transfer among cultural institutions and in widening public access to information and knowledge. Previous chapters have highlighted the changing needs and demands of 21st century information users and library clients. Librarians have to add value by providing experience-based and customized services if they are to compete with emerging technologies.

It is clear that 21st century librarianship requires a professional who embraces the potential of technology, creatively finds appropriate ways to implement it, and who has more diverse – even ‘unconventional’ – skills than ever before. The 21st century librarian is a professional who understands so-called Generation C customers, who are digital natives, increasingly mobile, and constantly “connected”. The 21st century librarian is able to adapt existing services and create new ones to meet his or her community’s needs, and change the public perception of “library”. The future of

librarians as information providers will not be located in dazzling buildings, but in the world of cyberspace that resides in the hand-held devices of most library customers. The new generation of LIS customers will need information literacy skills far beyond any previous generation, while living in local communities that are becoming more focused on global issues.

The training of librarians for the 21st century is a daunting challenge which must be faced for South Africa to become competitive as a nation. Librarians and information professionals are central to a buoyant knowledge economy. LIS staff has a double agenda: to teach the information competencies needed to redress the inequalities of the past and to build the competencies for a rapidly globalizing world. According to the World Bank, in the new environment, the emphasis is on "learning to learn; learning to transform information into new knowledge; and learning to translate new knowledge into applications" (*Lifelong Learning in the Global Knowledge Economy*, 2002:29). In this new paradigm, cooperative education is central.

Ocholla and Shongwe's analysis of the LIS job market in South Africa (2013) reveals the set of skills, knowledge and abilities that LIS students should have to be relevant in serving the 21st century clients. The 2009-2012 longitudinal survey shows that:

- South Africa is already experiencing diverse information based job opportunities, challenging the LIS schools to explore and exploit new dimensions, directions and ideas;
- LIS jobs in the emerging market are on the rise, a trend that is believed to be ongoing but cannot be easily quantified with accuracy as the data are not yet available;
- In South Africa, the public sector (academic institutions; national, provincial and local government departments, parastatals and foreign embassies) was the main advertisers of LIS jobs, over the private and NGO sectors;
- A diverse range of qualifications is needed at various levels. However, some senior positions in LIS do not require a LIS qualification;
- Salaries are critical in the retention of professionals in any sector. National government has been found to be paying higher salaries than other sectors. DAC (2012) has identified a number of challenges associated with librarians' salaries and prospects for promotion, for example: the job evaluation of librarians has not yet been concluded by the Department of Public Service and Administration;

and the disparities in salary and service conditions between the different spheres of government leads to instability.

Notwithstanding the daunting challenges facing human capital development in the 21st century that were alluded to above, it is probably true that the skills of critical thinking, problem solving, information literacy, and global awareness have been important to human progress throughout history. However, the training needs of the new generation of LIS workers will necessitate changes in curriculum, training, and assessment. The LIS sector in the 21st century South Africa will have to combine digital and traditional LIS elements. The digital services will include the following:

- Analyzing and processing different kinds of information resources;
- Activating and finding potential value hidden in any information;
- Providing added-value information products and services at the right time and place;
- Finding the right users for information and providing personalized and customized services.

ICTs have changed the LIS landscape. The new environment requires the provision of sophisticated services that need high level technical and people skills. The competencies required in the provision of nuanced services, both virtual and real, include the following:

- Project management;
- Financial management;
- Monitoring and evaluating services;
- Assessing the needs of stakeholders;
- Critical awareness of technologies and ability to compare technologies;
- Promoting and marketing innovations – and LIS;
- Ability to communicate and interact with clients;
- Political and social awareness.

The fundamental attribute underlying these sets of skills is an appreciation of the national priorities of reducing poverty, increasing employment and improving education. Moreover, education, training and continuing professional development should aim at producing librarians as “habitual askers of questions and seekers of knowledge, critical thinkers and informed decision makers” (Hinchliffe, 2001: 95).

Challenges

A unanimous call rang through the consultation processes for the transformation of the education and training of LIS professionals. The call highlighted the following issues:

- Demands for a service that is well integrated into the private and public life of the nation, offering clear value to individuals, groups, commerce, industry, the economy, education, and government;
- The need for library personnel to locate their practice within the development agenda, the knowledge economy and the young democracy;
- Given the changes confronting LIS, the urgent need for education in leadership; and mentoring of a new cohort of leaders in LIS as the present leaders approach retirement;
- The need to design curricula aligned with the objectives and values of emerging professionals, which will attract to the profession young people who can identify with its dynamism and role in a modern developmental state;
- The challenges of attracting people to librarianship when LIS salaries are not market related;
- Challenges in comparing and evaluating qualifications and their designations:
 - The ambiguities in the revised HEQF Sub-Framework – with, for example, the wording of the Postgraduate Diploma implying that only people with working experience of LIS may enroll for a Postgraduate Diploma in LIS, thus hindering entry to the profession by young graduates;
 - Questions over the status of the three-year Bachelor's degrees – given the reality that employers insist on the four-year professional degree or postgraduate diploma
 - The lack of articulation of qualifications, one unresolved problem is the position of staff with the three-year National Diploma in LIS who, with the phasing out of the BTech LIS degree, now have no clear route to a professional qualification.

Opportunities

The commitment of various relevant stakeholders in making a difference in the LIS sector includes the following:

- The LIS sector has been given an opportunity by the Department of Arts and Culture to participate and contribute to the revision of the draft White Paper on

Arts, Culture and Heritage (1996), to ensure that the LIS sector issues are receiving the government's attention and contribute to national priorities. The latest draft covers only minimal issues and trends in the LIS sector;

- In July 2013 LIS educators and practitioners started a dialogue to find common ground on critical areas of the curriculum, and types of qualifications;
- The process of registering LIASA as a professional body is underway. This will empower LIASA to promote the discipline more effectively, determine standards for professional education and training protect the interests of the public and regulate entrance into the profession.
- Ongoing development of relevant skills for practitioners through the Education, Training and Development Practices Sector Education and Training Authority (ETDP-SETA)

Recommendations

- A national strategy for libraries would build a unifying mission to the LIS profession. The strategy would give direction regarding the development of an informed citizenry through the reducing of illiteracy, developing a reading culture, fostering lifelong learning, and positioning South Africa as a knowledge economy. This strategy should be supported by sustainable budgets;
- Library personnel need to locate their practice within the development agenda.
- Norms and standards for the human resources in the LIS sector are required. The South African Public Library and Information Services Bill addresses only those for public libraries. Guidelines are required for:
 - staff composition;
 - remuneration;
 - applicable academic qualifications;
 - staff development and continuing education;
 - staff conduct and ethics;
- The formal registration of LIASA as a professional body is a priority to empower it to recognise suitable education and training providers and to be involved in the certification of learning programmes;
- To counter the dropping numbers in LIS education, current bursaries and scholarships for public libraries should be extended across the sector. The private sector should be invited to provide bursaries for training at various levels, and extending their social responsibilities in the LIS sector.

- LIS schools should collaborate and decide on areas of specialization. However a core curriculum should not be neglected, including history and philosophy of libraries, their socio-political context, and the contemporary issues impacting on them
- Leadership education and development should be prioritized – guided by the experience of the Centre for African Library Leadership (CALL) and the Centre for Information Career Development (CiCD). Programmes for mentoring and coaching leaders should be established across the sector.

Chapter 6. Monitoring and evaluation of LIS,

Overview

This chapter does two things, based on a macro and then a micro view. From the perspective of the whole system, it argues for a framework for implementation of the Transformation Charter, suggesting indicators and milestones of progress (The Implementation Plan is presented in Appendix 1). Underpinning the development of the framework for implementation is the principle that LIS of all types should have a programme of monitoring and evaluation (M&E) in the interests of good governance, accountability and the opportunity for the collection of evidence on their impact and value. Another benefit is that M&E helps in the development of a persuasive evidence-based marketing and advocacy plan.

The LIS Transformation Charter champions interventions that will redress the apartheid legacy of inequalities through the transformation of the LIS sector with the aim of making a significant contribution to the development of a just, prosperous, cohesive society, and a critical citizenry marked by a widespread culture of reading. This implementation plan outlines measures which, when implemented, should lead to the adoption of relevant policies, a LIS sector governance model, adoption of an ecosystem approach, appropriate institutional arrangements, an efficient and reliable workforce, and a sustainable LIS sector which is recognised as a strategic resource in the country's quest for a just, prosperous and cohesive society.

The LIS Transformation Charter is not a policy document; it is a broad policy guideline that is meant to inform and guide policy frameworks. It is important that it is understood that the Charter is not enforceable by law. The implementation measures outlined in the framework are derived from the analysis of public comment, questionnaires, indabas, focus groups and interviews with specialists.

The LIS Transformation Charter is guided by the Constitutional imperative that requires the rights of communities to be promoted and protected through equal distribution of resources and equitable rendering of services to all communities in South Africa. It is also driven by the principle that access to information and LIS services is a human

right which every citizen must enjoy. The implementation of the recommendations in this Charter to level the playing field for all citizens is a constitutional and human rights issue in South Africa.

Chapter 15 of the NDP indicates that, for a mobilised, active and responsible citizenry to flourish, knowledge of and support for a common set of values should form a pillar of the country's development. Values such as Ubuntu, Batho Pele, multiculturalism, cultural identity, redress, authenticity and accountability should undergird the provision of expanded services in the LIS sector.

One of the key imperatives for the immediate implementation of the recommendations of the Charter is that change is inevitable and ubiquitous. It is axiomatic to indicate that today the state of a nation's research, information infrastructure and education is a leading indicator of its future economic and human development. For South Africa to be competitive, it is important that it keeps up with the global trends in the provision of modern LIS that exploit all the benefits of ICTs. The LIS sector's capacity to contribute to the nation's ability to convert knowledge into innovations and wealth will determine its value to the nation. Knowledge intensive institutions such as LIS have a crucial role to play in shaping the knowledge projects of post-colonial societies. The implementation of the recommendations from the Charter will thus be essential in the re-imagining of a South African citizenry of a global knowledge-intensive society.

The adoption and implementation of a library ecosystem approach will provide a strategic and managerial toolkit for the provision of harmonized, coordinated and equitable LIS. An ecosystem is one in which the sub-systems are inter-linked and interdependent, where there is continuous co-evolution, where change is systemic and where complementarily encourages niches for different roles and functions (Nardi and O'Day, 1999). The implementation of an ecosystem approach will discourage thinking about borders and will be more hospitable to the aims of eliminating barriers and achieving integration in a sector where the uneven and unequal provision of services that are rooted in the past are still reflected in disparities and fragmentation, two attributes often cited as hampering the sector reaching its potential. The ecosystem approach obviates the debate as to whether we should aim for an integration of services (shared services) or promote the collaboration of institutions as it provides a framework with which to recast the debate. An ecosystem approach provides a way of looking at collaboration, cooperation and integration of services as a continuum. At the

governance level of policy and regulatory level, it may swing more to integration while at the institutional arrangements level collaboration may be a better framework.

Given that the interventions in this implementation plan are undergirded by human rights and Constitutional imperatives, their implementation should be treated as a matter of urgency. The choice of instruments to be used in the implementation of the Charter is influenced by the fact that, since the advent of democracy in 1994, the government has been introducing, gradually, structures of a developmental state. In the choice of policy instruments, it is reasonable to expect government to prefer the use of mixed instruments, combining mandatory and non – mandatory instruments, to correct policy gaps or failures. The use of mixed instruments is highly recommended because it leads to greater mutual understanding of those involved in the designing, financing and executing of policy. It also makes use of formal and informal relationships constituting policy networks. It is critical that the implementers of the Charter should seek special strategies to empower the people in the implementation of the proposed interventions and should try to achieve a balance between planning (almost always top-down) and process (which requires robust participation by the people).

Monitoring and evaluation

An implementation plan will need to be monitored and evaluated for the purpose of improving policy or programme performance, accountability, decision-making and increasing knowledge about what works and does not work in regards to the Charter as a public intervention. This Charter envisages monitoring and evaluation as a process carried out throughout the intervention lifecycle, including prior to the development of an intervention (diagnostic evaluation), to confirm the design (design evaluation), to assess progress and how the implementation can be improved (implementation evaluation), to assess impact (impact evaluation) and to see the relationship between costs and benefits (economic evaluation).

To ensure that the objectives of the Transformation Charter are met, it will be critical that NCLIS institutionalizes regular monitoring and evaluation processes and procedures. In 2010 the Government instituted the Department of Performance Monitoring and Evaluation (DPME) in the Presidency to “ensure continuous improvement in service delivery through performance and monitoring” (Department of Performance and Monitoring). Its document Guide to the Outcomes Approach (2010)

sets out a useful framework for all libraries instituting an evaluation programme, pointing out the important link between initial planning which should be based on a theory of change and an articulation of the ultimate results a particular intervention aims to achieve. Its logic model sets out in accessible language the links in the process, and defines clearly the relationship between the concepts/stages comprising the systematic approach

The National Evaluation Policy Framework of November 2011 has institutionalized evaluation in government requiring departments and entities to ensure that there is an evaluation budget in all programmes and a rolling plan over three years. Government has called on departments, to ensure that there are specific people within the organization trusted with the evaluation role with the required skills, and to ensure that the results of evaluations are used to inform planning and budget decisions and in decision making processes at management level. The institutionalization of evaluation in many government programme and interventions such as this Charter will align with the government plans.

The recommendations in the Charter should be viewed as high level transformation indicators which can be monitored and evaluated. The Transformation Charter performance indicators focus on the inputs, processes and outputs. New requirements of reporting by public entities should include reporting backs on the transformation charter indicators at regular intervals. However, some of the performance indicators require the setting up of norms and standards as part of the baseline required to regularize and harmonize the sector and to provide the rules of engagement for all. The next section outlines the landscape in this regard.

Norms and Standards: Value and Impact

This section presents an argument that measurement of value of the LIS sector to the society should be the ultimate purpose of monitoring and evaluation processes. Currently, the value of the LIS sector to the emergent South African knowledge society is largely unmeasured and thus not appreciated. One of the contributing factors to this situation is the absence of norms and standards for libraries which the sector has called for in multiple submissions and comments during the public participation process. Without norms and standards it will be impossible to set performance indicators that can measure the value of libraries and information service. The reason that governments issue norms and standards is to provide guidance to an industry or sector

in conducting its work so that consumers or beneficiaries may be assured of a level of service and type of service that they can expect (South Africa. Department of Arts and Culture, 2008). Currently there are no national minimum norms and standards for any type of library.

At the international level the importance of standardization is recognized and two international standards are central (Horvik, 2013). The ISO standard 2789 on international library statistics defines the basic concepts involved in statistical observation, counting and measurement, and the ISO standard 11620 on library indicators recommends indicators that could be used to compare libraries, library systems, regions and countries. The country's challenge is how to move from no norms and standards to setting norms and standards that speak to the imperatives of a nation in transition such as South Africa. The current efforts to develop standards are fragmented and left to the state as a key driver. It is here that civil society, the private and public sectors should put their efforts together to provide a governance model to transform the LIS sector.

Public libraries

Public libraries will soon have an important tool to help them plan libraries, and also measure progress as the South African Public Library and Information Services Bill, soon to be sent to Parliament, intends to "provide for essential national minimum norms and standards for the rendering of community library and information services" (South Africa, 2010). The Bill requires the national Minister of Arts and Culture to determine the norms and standards for the whole country, after consultation with relevant stakeholders. The Bill indicates broad principles on which public libraries must be based, and categories for which norms and standards would be required, e.g. size of library, buildings, library materials, accessibility, ICTs, staffing and management. Those tasked with drafting the norms and standards will, no doubt, take into account the vastly differing circumstances in the country arising out of geography, culture, language, population density, demographics, nature of community, and other factors that will impact on the essential features desirable for a particular area. It will be important, too, to set realistic timelines for the application of the norms and standards which set minimum limits. The Bill stresses the importance of monitoring and evaluation. This is important not only for compliance, but also for equity considerations, and also to demonstrate value for money to funders and customers.

School libraries

In 2012 the Department of Basic Education issued the document National Guidelines for School Library and Information Services which are not binding, disappointing many involved in school libraries who have long been asking for norms and standards. More recently, on 29 November 2013, DBE issued the Regulations Relating to Norms and Standards for Public School Infrastructure. The document contains references to school libraries, noting that each school shall have a library as a core education area which must have "a minimum, adequate and suitable school library collection". The document lists a number of library models, without defining or explaining their meaning: "mobile facility, cluster facility, classroom facility, centralized facility or a school community facility". This is an inadequate and unhelpful formulation as, contrary to convention, there are no precise definitions of terms, an essential feature of a standard. The categories of library indicated implicitly refer to definitions in the Guidelines. There are no timelines, and no indication of who and how the libraries will perform their functions; although these provisions lie outside of infrastructure considerations. The research reflected in the section on school libraries shows and this essential point has been taken up by the NGO Equal Education in its struggles with DBE reflected in its slogan "One school, one library, one librarian" - that a librarian is essential in a school library.

University libraries and FET College libraries

There is no set of minimum norms and standards for university libraries. It is appropriate for the university and FET libraries to formulate their own norms and standards which are likely to follow conventions such as those established by the Association of College and Research Libraries (ACRL) which approved a useful set of standards in 2011. ACRL proposes nine principles and associated performance indicators that can be applied in all academic libraries, with the proviso that each library will take into account its distinctive situation, user population and institutional dynamics. CHELSA is to be commended for undertaking the revision of a set of standards for university libraries. Recent thinking has addressed the idea that collaboration and civic engagement are important goals that merit attention to devising new metrics (e.g. Gibson and Dixon, 2011).

Measuring value

Higher education libraries have started to articulate positions and methodologies to meet the increasing demand for the academic library to articulate its values with those of the parent institution in order to demonstrate its congruency with institutional goals and objectives (Association of College and Research Libraries, 2013) and to give quantifiable evidence of the value it adds to the academic enterprise. The literature has shown that evidence of library value is most often sought in areas such as improved academic performance among students and their graduation in minimum time as a result of contact with the library; evidence of being taught and learning new skills and proficiencies in the library; the saving of students' and researchers' time and effort; and the library's role in increasing the institutional research output of theses, journal articles and other research products. Although libraries traditionally keep many counts and records, such as inputs (e.g. expenditure; stock; staff); outputs (e.g. circulation, downloads, interlibrary loans); and size (e.g. physical & digital collections, space), evidence demonstrating library value is more difficult to obtain and has to be specifically investigated even when supported by library data (De Jager, 2013).

Appendix 1.The Implementation Plan

The implementation plan has been rearranged thematically and strategically to allow for prioritising of the recommendations according to the following categories:

- Policy;
- Legislation;
- Governance- Regulatory;
- Institutional arrangements;
- Human Resources/capital;
- Infrastructure;
- Funding;

Appendix 1.Implementation Plan

Short Term = 1-3 years

Medium Term = 3-5 years

Long Term = 5 years and longer

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
POLICY						
1. A national school libraries policy	Lack of school library policy	DBE to develop policy on school libraries	National School Libraries policy in place	A National School Libraries Policy approved by Minister of Basic Education	DBE with provincial education departments	Short term
2. Free access to library and information services	Access to LIS facilities is not always free and this is a major constraint	Policy development to ensure free access	Develop & implement national policy framework on free access to LIS	National Policy Framework document and implementation	NCLIS, relevant government departments	Medium term
3. Develop LIS Transformation Implementation Plan	Lack of LIS transformation plan	Align the Plan with national imperatives	Mobilise & network with all government institutions.	Transformation Implementation Plan completed	NCLIS LIASA	Medium-term
4. Clarity in governance of public library sector	Confusion with respect to library function of Schedule 5 (a).	Legislative or executive function to be assigned by Provinces for viable and sustainable library function	Workshops for provinces and municipalities to explain options	All Provinces have workable formal agreements with municipalities either by legislative or executive assignment.	Provincial LIS, DAC, municipalities	Medium term
5.Borderless or seamless services	Public libraries, school & university LIS operate in silos	Develop a framework for consulting & sharing	Establish provincial platforms or consultative	Dynamic forums working to share to share	Relevant national and provincial	Medium term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
		resources, expertise & services where feasible	forums established for libraries across the sector for sharing resources, expertise & services across institutions	resources, expertise and services (where feasible) across the LIS sub-systems	departments and LIS organizations	
6. Relationship with museums and archives	Little interaction libraries, museums and archives, all memory institutions	Examine ways of collaboration	Establish a forum of members representing libraries, museums and archives	Systematic collaboration mechanisms instituted	DAC, Provincial institutions	Long
LEGISLATION AND REGULATORY						
7. Empower DAC to intervene to ensure that provinces ring-fence LIS funds from Treasury.	Some provinces have used the conditional grants to replace their LIS budgets	Improve DAC's Draft White Paper of June 2013 to give national DAC the power to intervene where provinces do not ring-fence LIS funds	Representations to DAC on Draft White Paper	Improved legislation enacted	NCLIS, DAC, Provincial Arts & Culture departments	Short
8. NCLIS is an executive body, an agency of government with the power to take executive decisions, with a dedicated budget and well resourced secretariat	NCLIS is advisory, without executive power	Amend NCLIS legislation	NCLIS and DAC workshop	Legislation enacted to strengthen NCLIS	NCLIS and DAC	Short
9. Norms and	Lack of norms and	Norms and	Norms and	Norms and	NCLIS to be	Medium

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
standards	standards for whole sector	standards developed	standards workshopped with all LIS	standards agreed & published.	champions of the setting up norms & standards.	
10. NLSA should ensure compliance with the Legal Deposit Act	Publishers and government departments do not on a regular basis deposit their publications.	The availability at NLSA of all the materials published in South Africa as a national resource	Strengthen the capacity of the NLSA to enforce the law	Dedicated role to ensure compliance	DAC, NCLIS and NLSA Board	Short
11. Amendment of the outdated Copyright Act	The current Copyright Act limits access to and expansion of products and services	Align the South African Copyright Act with the Marrakesh Treaty and the Beijing Treaty on performance rights	Attention should be paid to the exceptions and limitations	Amendment of the Copyright Act of South Africa	DTI, DAC, DWCPD	Short
12. Develop monitoring & evaluation models for transformed sector	Sector has no m & e models	No statutory obligations for transformation	Develop a transformation barometer for tracking change	Transformation barometer agreed & implemented	NCLIS	Medium
GOVERNANCE						
13. National School LIS Unit in DBE	National Schools Unit was disestablished	Provision of resources	DBE to establish Unit	National Schools Unit in place - school libraries action plan formulated & functioning in consultation with provincial education departments	DBE	Short
14. Establish Friends	Need to grow	Community	Workshop for	Friends of the	All	Long term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
of the Library networks	community support for libraries	involvement public library issues	public libraries to share knowledge from LIS with functional Friends of the Library	Library networks established		
15. Institutionalise monitoring and evaluation in the LIS sector	The lack of institutional arrangements for regular monitoring & evaluation of individual LIS. Opportunity to demonstrate value & impact to communities & principals missed.	Create nation-wide capacity to collect & analyse data on the performance of all LIS	Dedicated capacity built for collecting & analysis of data in the sector	Institutional arrangements, ring-fenced budgets. Appreciation of the value of LIS.	NCLIS and LIASA. National, Provincial, Local and independent or private sector involvement	Medium term
HUMAN RESOURCES/CAPITAL						
16. Statutory regulated status for the profession	Poor status of the librarians in the country	LIASA work with DAC & NCLIS	Registration of LIASA as a professional body	LIASA registered as a professional body	LIASA	Short term
17. Status of the LIS sector	The low status associated with LIS. People with inappropriate training appointed to professional positions.	Remuneration policies toward librarians for a professional service consistent with comparable professions. Employment practices in line with requirements for professional appointments where required.	Government to align remuneration of librarians with all tiers of government.	Remuneration of LIS aligned with comparable professions	NCLIS, LIASA, Employing organisations – at provincial & local authority levels.	Medium Term
18. Establish full- and	Lack of posts for school	Make provisions for	Make provisions	Posts for school	DBE	Medium to

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
part-time school librarian posts	librarians	school library posts	for school library posts	libraries established		long
19. Mentoring coaching programme for school LIS professions	There are no mentoring programmes for school librarians to harness knowledge & expertise of current cohort of school librarians	Provide formal & informal education programmes & work experience	Professional bodies, provincial departments to create space for mentorship programmes.	Mentoring programmes for younger & new librarians in place	DBE & provincial departments of education and private sector	Medium term
20. Teacher education in colleges and universities to include modules in school librarianship and in children's and youth literature	Teachers lack awareness of the role of the school library & literature in teaching and learning	Curricula in teacher education to include specialised modules in school librarianship & children's & youth literature	Professional education & LIS bodies to lobby teacher education departments in universities & colleges	Appropriate curricula introduced, students recruited	Universities and colleges	Short
21. Information literacy education to be embedded in all teacher education programmes.	Teachers lack the skills to incorporate information literacy skills and LIS in their teaching.	Curricula in teacher education to build in information literacy education	Professional education & LIS bodies to lobby teacher education institutions, departments	Appropriate curricula introduced & taught	Universities & colleges	Short
22. Update LIS education and training	Lack of preparedness for the changing role of libraries in the 21 st century. Lack of curriculum responsive to transform LIS.	Curriculum changes should be made in the library schools across the country to cater for the 21 st century librarian	Establish forum of library schools	Education & training revised in all library schools in South Africa	LIASA's RETIG, HE institutions, NCLIS, , employer organisations, private sector	Medium to long term
23. LIS qualifications to be reviewed	. Confusion over NQF LIS qualifications, their articulation & entry requirements.	Review of formal LIS education and training qualifications.	Forum of library schools (RETIG) to consult with SAQA, universities and	The position of the various LIS qualifications is clearly defined	NCLIS, LIASA (RETIG), Library Schools, & SAQA	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
			employer organisations to streamline & harmonise formal qualifications.	and understood by all stakeholders.		
24. Provision of bursaries to increase the enrolments in library schools	Lack of bursaries & employment opportunities a deterrent to recruitment of LIS students	LIS plans to create a fund to finance bursaries for suitably qualified persons	Deliberate allocation of funds as ring-fenced for human capital development	Funding in place, increased number of enrolments	Library schools, Provinces, HE LIS, public libraries Government departments	Medium term
INFRASTRUCTURE						
25. Establish portable & transportable library services for dispersed communities	Dispersed rural communities often have no library services	A redress imperative for previously unserved communities	Provision of mobile bus services, container libraries & wheelie wagons to offer convenient & affordable service points.	Number of portable & affordable service points across the country	National, provincial & local governments & the private sector	Medium term
26. All public, school & post-school LIS should have sufficient computer capacity for management and service delivery	High costs of ICT installation & maintenance are barriers.	Policy intervention and private sector participation in providing resources	ICT companies' partnership with national, provincial, NGOs & local government in computer capacity procurement	Number of computers per head used in libraries Reduced waiting times to use computer facilities Investment incentives	DBE, DAC & DHET to provide incentives for investors in the computer capacity.	Medium term
27. Access to broad band connectivity	The digital divide Libraries are largely	Sustained commitment to	Partnerships between NLSA,	Number of libraries with	DAC, Provincial and local	Short term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
	untapped sites for public access to Internet.	promotion of Internet access for public libraries. LIS to be at centre of e-government strategies	DAC, LIASA, GCIS& public libraries. Private sector participation required	Internet access	governing structures and the private sector	
28. Enabling the Thusong centres to provide digital and open access to information and become IKS resource centres	Lack of an integrated service delivery model	Develop an integrated service delivery model that links library services to Thusong Centres and IKS documentation centres	DAC, DBE and DAC to work together with GCIS to consolidate their investment in the 283 municipalities	Number of integrated facilities involving Thusong centres, the LIS and IKS documentation centres	DAC, GCIS, DoC and DST	Medium
29. Procurement of LIS resources	Lack of an efficient procurement model	Procurement rules of LIS materials to be modified in accord with their nature and cost.	Develop a procurement model based on best practices	Standardised and best practices model developed	NCLIS, DAC, publishers, Provincial LIS, book sellers	Short term
FUNDING/FINANCE						
30. Schools LIS to be funded from schools' budgets	Lack of dedicated funding for school libraries.	Dedicated school libraries funded by the National Treasury	Continued discussions with and lobbying of DBE	Dedicated funding for schools LIS	DBE, NCLIS, LIASA	Medium
31. Adequate budgets be allocated to TVET College Libraries and to the provision of LIS in the new community colleges	Expansion of TVET Colleges and their heightened importance demand effective LIS	DHET and institutional policies	Develop strategy with DHET and TVET sector	Dedicated funds for improved and new LIS in TVET Colleges – and for LIS in the community colleges and their public adult	DHET, TVET Colleges, Community colleges, LIASA, NCLIS	Short

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
				learning centres		
32. Functional library services to meet the diverse needs of prison inmates & hospital patients to be established by Correctional Services & Hospitals	Diverse information needs of people in prisons & hospitals are often not met.	Government policies on LIS in prisons & hospitals	Develop strategies with DAC & Correctional Services & Departments of Health for provision of library and information services in these facilities	Funding made available. Increased number of LIS in prisons & hospitals	DAC, Provincial LIS, Health departments, Correctional Services, private sector	Medium term
33. Literacy and Information literacy campaigns & programmes	A large part of the population feels excluded from fulfilling their role as citizens because of being illiterate and lacking information literacy	Literacy and information literacy can unlock the doors to a reading culture, social cohesion and economic empowerment	Design & market literacy & information literacy campaigns in LIS facilities. Embed information literacy in the curriculum at all levels. Focus on family to improve reading & literacy skills. Increase scale of outreach activities in LIS	Number of literacy & information literacy campaigns & programmes in the LIS sector Level/nature/scale of participation in international events such as world book day, international literacy day, book fairs, wordfest events	LIS sector Teachers Trade Unions Religious organisations	Medium term
34. Establish a network to spark social innovation for the LIS sector	There is no focus on research development & innovation as a driver of the LIS sector	Establish a network to spark social innovation for the LIS sector	Establish networks through provision of incentives such as innovation awards in the sector	Establish a network to spark social innovation for the LIS sector	DAC, NCLIS	Medium to long term

Key Functions	Challenges	Policy & Legislative Recommendations	Recommended Implementation Strategy	Transformation Indicators	Responsibility	Time frame
35. A communication strategy to popularise the revised LIS Transformation Charter and promote the adoption of the ecosystem approach to the management of the LIS sector	Lack of concerted communication of public policy to the public	Communication strategy for the LIS sector. Development of a brochure, & posters summarising principal ideas of Charter for distribution to all LIS in the country	Focused content and policy driven media campaigns	Establish a strong and sustainable mechanism of leveraging media	DAC , NCLIS, LIASA	Short term
36. National consultation about Transformation Charter	Need for sector to engage with the Transformation Charter	Plan a national symposium	National symposium to discuss Transformation Charter	Successful national symposium convened and well attended	NCLIS, LIASA, DAC	Short
37. Private sector and international agencies resource mobilisation	Government is often targeted for funding and there is little or no private sector contribution	Mechanisms for public-private partnership in resource mobilisation	Provision of incentives for private and international agencies financial contribution for the LIS Sector	Amount of finances leveraged from the private and international agencies	DAC, DBE, NCLS and LIASA	Medium

Appendix 2

The Call for Action: Key Issues and Recommendations.

1. Methodology

- When the National Council for Library and Information Services, in consultation with the Department of Arts and Culture, formed the Technical Team and Reference Group to draft the Charter, some people responded, “Why do we need a Transformation Charter?” So we asked people and organizations to tell us: political leaders, government officials, policy experts, scholars and practitioners, community and civil society organizations, and users of Library and Information Services.

- The story that has unfolded is a complex one, for many of the issues impact on one another and cannot sensibly be addressed in isolation. The story takes this form:
 - First, beginning with an overview on how the challenges look like from a variety of perspectives, we reflect on how the Sector can be transformed such that it is accessible and beneficial to everybody.
 - Second, we look at the central issue on how to ensure that impediments to universal access and participation can be removed.
 - Third, we consider the relationship between National, Provincial and Local Government Departments, and how their respective mandates can be more clearly defined to avoid overlap and confusion.
 - Fourth, we provide a framework for the determination of national norms and standards which will help take the Sector on a decisive and measurable transformation path.
 - Fifth, in each of these areas we make specific recommendation based on evidence and testimonies from a range of stakeholders. These recommendations are spelled out in greater details in the final chapter on Implementation, Monitoring and Evaluation.

2. Challenges and Recommendations

a) National Norms and Standards

At the core of the transformation challenges is the lack of national policy on norms and standards. Given the time at our disposal, we could only develop a conceptual framework for the determination of norms and standards, with a recommendation that a separate process be initiated to complete the task as a matter of urgency.

b) Governance

Key to the governance challenges is overlapping mandates and the lack of capacity to transform the Sector in line with the Bill of Rights and applicable nation policies. The following things should be done:

- Legislation has to be reviewed to eliminate overlaps and confusion at the point of implementation.
- Measures must be taken to ensure that good information is easily accessible to all who need it. This is important for greater transparency in the management of the Sector. Government must put pressure on all its officials to be more transparent in their activities and to adhere to professional codes and standards of service.

c. Education and Training, Investing in People.

- The future of the Sector lies in its human resources, Indeed, the Sector must solve its training, recruitment and retention crisis if it is to contribute to national development and the Millennium Development Goals. For it to solve the crisis Government must make sure that Library and Information Science is offered at a number of tertiary institutions.

- An undertaking must be made to equip and motivate the staff for their work. This must include ensuring that their conditions of service and remuneration packages are *at par* with those of equivalent professionals
- Appointment processes must be monitored to ensure that only skilled candidates are selected.
- The Library and Information Science curriculum should provide relevant skills for contemporary national needs.
- In all educational institutions, Library and Information Services must be regarded as part of core business and not support structure, as it is currently the case.

d. Protecting the Most Vulnerable: People with Disabilities

- Government should enforce the United Nations Convention on the Rights of Persons with Disabilities in terms of which the Sector should develop a rights and inclusion framework.
- Government should provide direct budgetary support to the Sector for people with disabilities.
- Special facilities for children and youth must be provided.

e. Access and Participation

- As part of a wider set of measures to achieve equality and justice, the Sector must ensure easy and free access for all to Library and Information Services. In this regard, heightened attention must be given to the particular needs of people with disabilities.

f. Culture of Reading and the Transformation of National Culture

To develop a culture of reading, the following steps should be considered:

- Free and easy access for all to Library and Information Services,

- Enforce free and compulsory schooling up to undergraduate level,
- Mobilize TV and other forms of mass media in the campaign to resocialise all South Africans, especially children and the youth, within the framework of values provided by the Constitution and the White Paper on Batho Pele.

g) How to Ensure Effective Implementation

- If the Sector is to take responsibility for its own development, as it should, the Library and Information Association of South Africa and the National Council for Library and Information Services must be given greater influence in decision-making which affects it directly.
- Adequate funding must be provided.
- An independent monitoring and evaluation system must be established to make sure this happens.

Appendix 3. Questions for Library and Information Transformation Charter Public Consultations

- a. How many school and community libraries are available where you live, and how accessible are they to all those who need to use them? What can be done to ensure that there is equal access to Library and Information resources throughout the country? (Indicate whether you live in a suburb, a village, a township or any other location).
- b. In your view, do the Library and Information resources and services where you live serve all the needs of the community? For instance, do they serve the needs elementary school children, secondary and high school students, university students and adult learners?
- c. Is there a system where you live that ensures that Libraries serve the various needs of the community? If not, how can such a system be developed?
- d. There is a general concern about the lack of suitably qualified Librarians. What should be done to train, recruit and retain such personnel?
- e. Libraries in most communities are seldom integrated into the culture and experience, of the people. What can be done to facilitate such integration?
- f. Concern is often raised about coordination in the management of Library and Information resources and about confusion and conflicting mandates. Where exactly does such confusion manifest itself and how can it be eliminated?
- g. In which concrete ways can Libraries and Information Services contribute to the achievement of the following national objectives: eradication of illiteracy and poverty; social cohesion and nation building; human resources and development and skills training; xenophobia and regional integration in the context of SADC, for instance?
- h. What should be done in the very process of developing the Charter to ensure that its recommendations will be supported by government, civil society and the private sector? And there lessons that can be used from other policy processes in the last fourteen years?
- i. Apart from community, school and university libraries, are there alternative library forms that could be used to provide complementary or specialized

services? Substantiate your answer with concrete examples.

- j. Libraries and information services like other social institutions still retain large segments of the apartheid institutional culture, such as heavy bureaucracy and discriminatory treatment of sections of the general public. In your considered view, how can such institutional cultures and mindsets be eliminated? How can practitioners, bureaucrats and users be resocialised?
- k. What precisely should government, the private sector and civil society do to assist the poor to mobilize themselves such that they can assert their right to information? Are there practices from our own past and from other communities that we can learn from?
- l. How can we turn libraries into repositories for indigenous knowledge systems, research, documentation and practical purposes?
- m. What do you consider to be the necessary information system technology (IT) support for the libraries?
Think about the needed equipment, the cyber infrastructure (connectivity) and the human capital skills needed.

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