

**OFFSHORE PRINTING: A STUDY ON THE PRINTING INDUSTRY
IN GHANA**

By

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DECLARATION

I hereby declare that this submission is my own work towards the Master of Arts Publishing Studies degree and that, to the best of my knowledge, it contains no material previously published by another person or material which has been accepted for the award of any other degree of the University, except where due acknowledgment has been made in the text.

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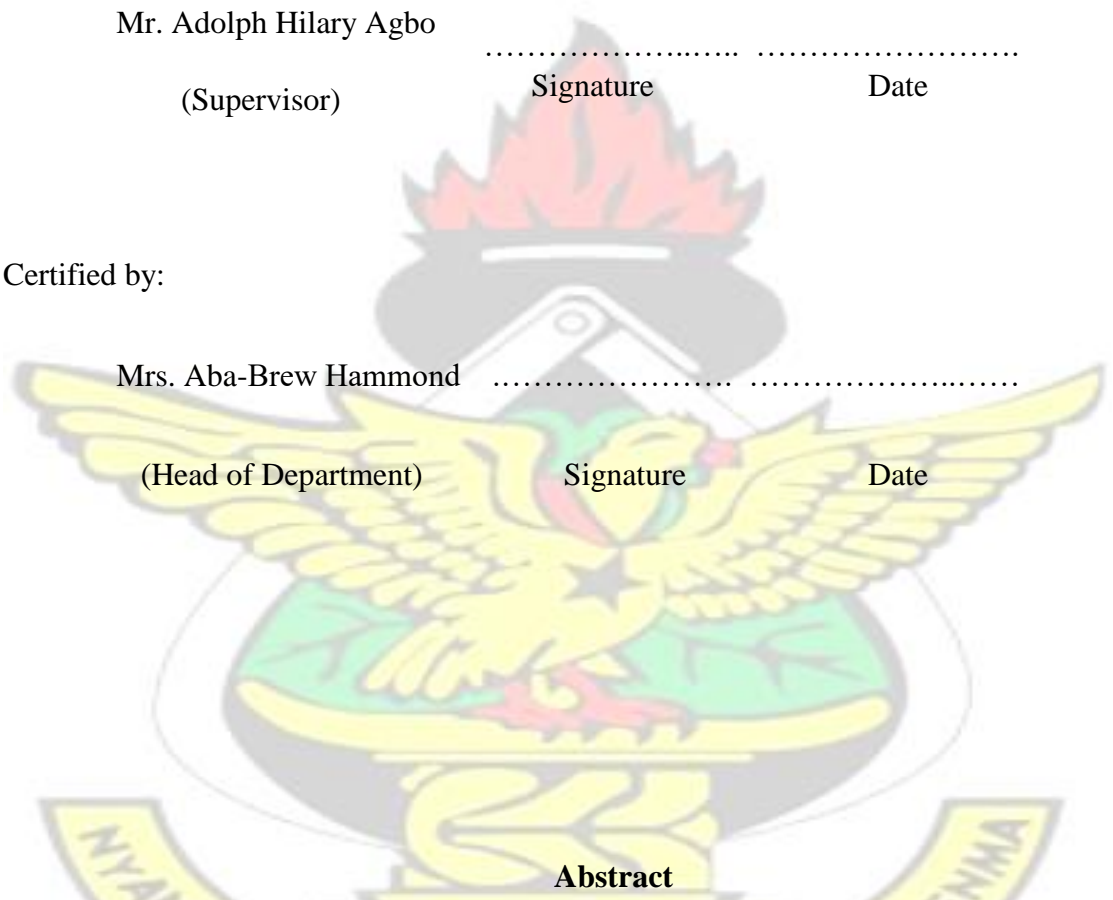
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Abstract

This study examines offshore printing of print products and services by Ghana Book Publishers Association and Ghana Printers and Paper Converters Association in the book industry, at the expense of the Ghanaian Printing industry. Publishing houses now send their works to printing houses offshore depriving the local printers of business expansion and overall industry growth. The study serves to provide a critical and analytical perspective on the state and impact of offshoring. The study is aimed at finding out whether the current

level of offshoring is causing a threat or an advantage to the growth of the Local Printing industry. It also details the merits and demerits of offshore printing and assesses the impact on the industry. The research methodology used for the study was Mixed method. The respondents were made up of the top Managers of the Publishing and Printing houses in both Kumasi and Accra. Interviews were also conducted. The total sample size for the study was 127 Printing and Publishing houses. The questionnaires retrieved from the respondents were 96; 20 representing 20.8% from Publishing houses whilst the remaining 76 representing 79.2% from the Printing houses. The results showed that 3% and 80% of Printers and Publishers respectively print their jobs offshore. Within the last 6 years (2010-2015), majority of publishers representing 56.25% have shown interest in printing offshore which shows a growth in offshore printing over the period. Printing offshore has some negative impact on the growth and at the same time, skills development of workers in the Ghanaian Printing Industry. Notable among them are increase in unemployment rate, redundancy, job insecurity, etc. Effective ways to mitigate offshore printing and its negative impacts was suggested (e.g. full printing of educational materials should be undertaken by publishers locally and tax waiver on printing materials be given to local printers) to curb offshoring and help grow the Local Printing industry.

Keywords: Outsourcing, Offshore printing, Printing, Printing industry.

DEDICATION

I dedicate this work to my father; Mr. J. K. Boadu, my late mother; Mrs. Rose Owusu, my brother; Akwasi Asare Boadu and Mr. and Mrs. Abaidoo for their enormous support and encouragement.

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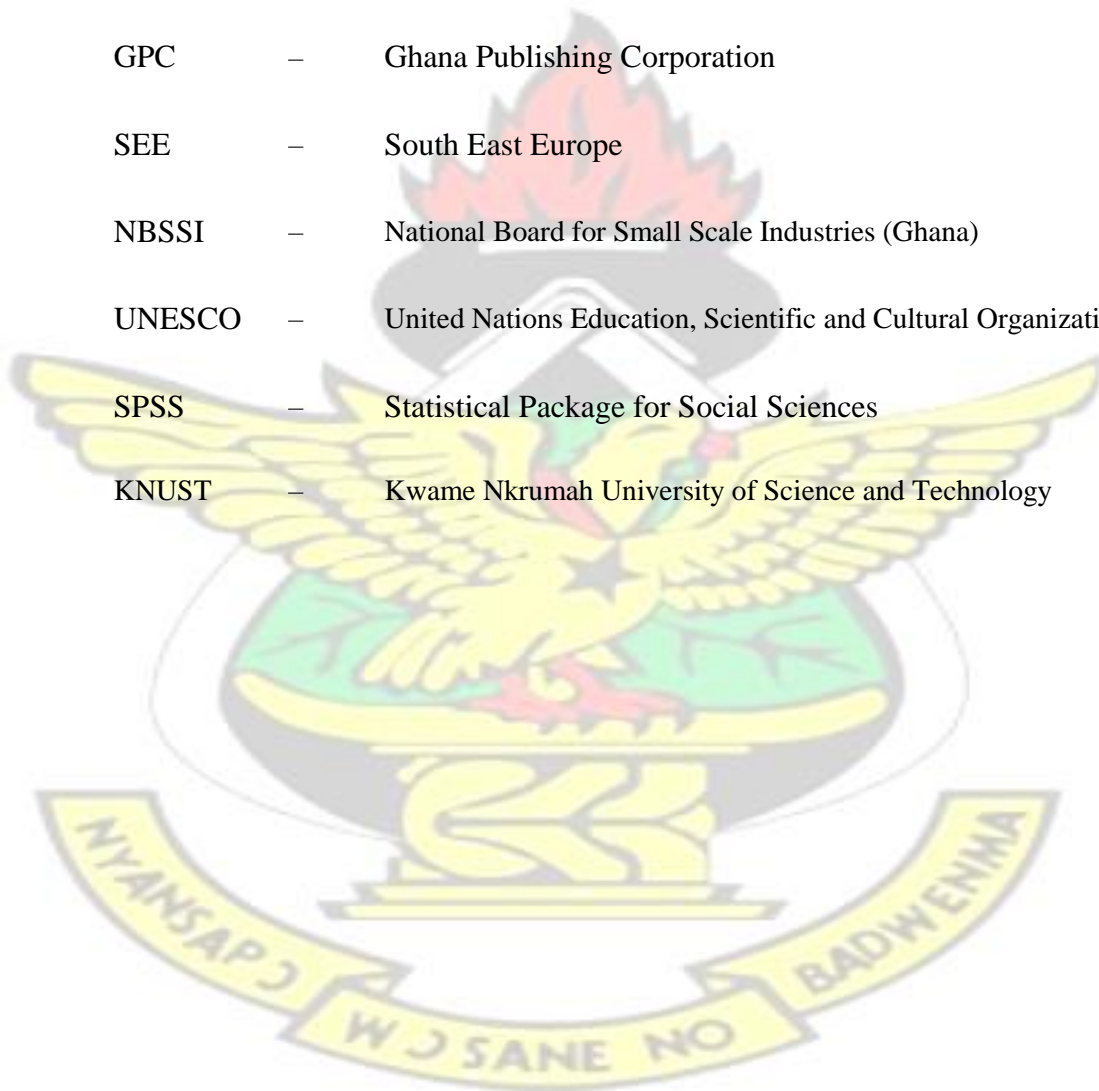
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LIST OF ABBREVIATIONS

UAE	–	United Arab Emirates
RIT	–	Rochester Institute of Technology
MoE	–	Ministry of Education
ECC	–	Evaluation Coordinating Committee

- GBDC – Ghana Book Development Council
- GCGL – Graphic Communications Group Limited
- GPPCA – Ghana Printers and Paper Converters Association
- GDP – Gross Domestic Product
- GBPA – Ghana Book Publishers Association
- BGL – Bureau of Ghana Languages
- GPC – Ghana Publishing Corporation
- SEE – South East Europe
- NBSSI – National Board for Small Scale Industries (Ghana)
- UNESCO – United Nations Education, Scientific and Cultural Organization
- SPSS – Statistical Package for Social Sciences
- KNUST – Kwame Nkrumah University of Science and Technology



CHAPTER ONE

INTRODUCTION

1.1 Background of Study

The existence and continued sustainability of any business organization, either production of goods or rendering services require continuous supply of jobs from customers. An organization, profit or non-profit must have some quota of jobs to keep it running. Without any operation, the business could quickly run into liquidation. Within the Printing industry, constant job availability and on-time delivery is key to the survival of the business. Therefore, the firm must undertake publishing and printing activities to help achieve and promote its objectives and aims (Rothenberg, Hira, & Tang, 2008).

Printing is the processes of manufacturing multiple copies of graphic image (Adams, Faux, & Reiber, 1988). In other words, Printing is the reproduction of multiple copies of text and images with the use of an image carrier to transfer impression onto a substrate. According to Rochester Institute of Technology (RIT) 2007, print touches our lives constantly in the form of product packaging, books, newspapers, magazines, mail, or any of the wide variety of printed items we use every day. Printing is an essential part of the traditional publishing. It is often carried out as a large-scale industrial process to create and manufacture products that communicate visually (e.g. Books, newspapers, magazines, etc.).

In addition, Rochester Institute of Technology (RIT) 2007 writes that “to treat printing as a stand-alone product, service, or process is impossible. It is a manufacturing industry in the strictest sense, but it is also a service industry.”

The printing section is one area that cannot be overlooked after a manuscript has been acquired, assessed, copyedited, well designed, and proofread in the

traditional form of publishing, before it gets to the finishing (post-press) stage. “Books are the main sources of formal knowledge and technical know-how required to propel the development process. Hence, they are indispensable in teaching and learning at all levels of the educational ladder both formal and informal” (GBPA, 2007).

The fast growing contemporary printing technology enables Printing houses to independently achieve the high-quality productivity that they need by printing outside the shores of Ghana. This capability is helping businesses cut down expenditure and rationalize operations. This is greatly achieved by either buying print within the country (outsourcing) or outside its shores (offshoring). Alexandrova (2006) emphasizes on the fact that, outsourcing is not a new phenomenon in the world managerial practice but still rapidly develops establishing the beginning of a new stage of international division of labour. The term outsourcing generally used in the industry refers to the purchasing of goods and services outside a particular Publishing or Printing house. Printing offshore is gradually becoming the preferred choice for some Publishing and Printing houses as well as individuals.

An appeal was made by the CEO’s of both Buck Press and Type Company Limited as well as the Managing Director of Graphic Communications Group Limited (GCGL), in a report filed in the Daily Graphic on August 31, 2015, captioned “We want to print majority of textbooks - Local printers appeal to gov’t”. They expressed their regret to the fact that government promised to give printers 20% and provided only 3% of printing jobs in 2014, at a total sum of US\$ 60 million and US\$ 2 million respectively. In addition, “the passage of the law on the waiver of import duty on paper products, leaving out inputs used by printers in the country”. This, they narrated had created a

disparity on the playing field, thus giving more advantage to publishers who chose to print books outside the country and import them duty free.

In another report published in the Business and Financial Times, the President of the Ghana Printers and Paper Converters Association (GPPCA), complained about how most Printing houses had laid-off a number of workers. He explained this was due to instability in government contract awards, which dropped from 60% to 40% for local printers whilst the rest were given to printers offshore.

Many people are scared to enter into the printing business now because of reasons such as; lack of startup capital, inadequate machinery and equipment, inadequate human resource, among others (Kuffour, Ansah, & OwusuAnsah, 2014). “Attention has been focused on the possibility that offshoring of services might lead to the migration of jobs to countries, such as India, where firms can pay qualified workers much less than in their home countries” (Amendola, 2010). Usually the effect on the growth of the Printing industry within the economy is overlooked. The danger here is that, it increases the Gross Domestic Product (GDP) of the country abroad leaving the outsourcing country undeveloped in that particular sector. This practice if not checked could have serious implications on the Printing industry of Ghana, in the long term.

1.2 Statement of the Problem

Many Printing presses are springing up across the country especially in Kumasi and Accra to augment the printing needs of the country. This trend of expansion is good for the growth of the local Printing industry. Publishers without in-house press seek the services of printers to get their printing needs

met (i.e. textbooks, supplementary readers, novels, magazines). Publishers who provide jobs to printers now print about two-thirds of their products offshore from countries like Germany, Malaysia, India, China and many others. (Bordoloi & Powell, 2013; Kuffour et al., 2014). Publishing houses are printing offshore with the assistance of offshore Printing houses that produce at cheaper cost. This practice gives more advantage to publishers who choose to print products outside the country and import them duty-free on rebate basis.

This situation is affecting the growth of the Printing industry in Ghana and denying it the opportunity to expand and improve upon its standards and capacity. Printers face difficulties such as insufficient job supply, inadequate contracts, 'huge' taxes on print materials (i.e. paper, ink, and spare parts), etc. Offshore printing at some point not only can be an advantage to both the outsourcer and the outsourcee, but also have a negative effect on the growth of the Ghanaian print industry when it continues in this direction. A policy by government to stop sending printing jobs outside Ghana will be the beginning and the evolution of the Ghanaian Printing industry.

A study in the US reported that the President of the United States of America was criticized for offshoring energy jobs, or simply not doing enough to slow the growth of outsourcing outside their country (Bordoloi & Powell, 2013).

If even the developed countries are fighting against sending jobs outside their country, how about a developing country like Ghana.

In view of this, the issue of offshore printing has raised many concerns among various stakeholders in the industry. Little however, has been researched regarding offshore printing in developing countries such as Ghana. Therefore, this research seeks to assess the current emerging print culture (trend) of

offshore printing and to know whether it is a threat or an advantage to the growth of the local print industry in Ghana.

1.3 Objectives of the Study

This study seeks to;

- Identify and discuss the various Publishing and Printing houses that print offshore.
 - Find out the Publishing and Printing houses in Ghana that print offshore.
 - Ascertain the types of print products that are offshored.
 - Identify reasons for offshoring print products.
- To assess the impact of offshore printing on the Ghanaian printing industry.
 - Discuss the Merits and Demerits of offshore printing to the industry.
 - Assess the impact of offshore printing on the industry.

1.4 Research questions

The research questions that guided this study were:

- i. How many Publishing and Printing houses in Ghana print offshore?
- ii. What kind of print products do publishers print offshore?
- iii. Why do publishers print offshore at the expense of the local Printing industry?
- iv. What are some of the advantages Publishers enjoy when printing offshore?

- v. What are some of the challenges publishers face when printing offshore?
- vi. Are there any impacts of offshore printing on the growth of the local Printing industry in Ghana?

1.5 Scope of study

This research is limited to the practice of sending printing jobs outside the shores of Ghana. The work mainly covers Managers of Publishing and Printing houses in both Kumasi and Accra, Ghana.

1.6 Significance of the study

The study will serve as a useful research material for governmental and non-governmental organizations, policymakers and all stakeholders in the Book industry and the nation as a whole. In addition, it will serve as a useful research material for the Publishing and Printing industry in Ghana as well as a useful material for lecturers and students in the Publishing Studies department and for further studies. It will provide a critical and analytical perspective on offshore printing and the challenges undermining the progress of the Printing industry in Ghana. A study of this nature will serve as a source of reference, adding up to literature and filling the gap on offshore printing on a developing country such as Ghana.

1.7 Definition of Terms

Business: The term business includes all activities from production to distribution of goods and services.

Offshoring: The practice of buying print abroad, usually by companies with the intention of reducing the cost of doing business and making profit.

Onshore: The process of moving a business operation from overseas to the local country; the opposite of offshoring.

Outsourcing: It refers to buying of print outside a particular Publishing or Printing house within or outside a country (offshore).

Prepress: this refers to all activities that occur before actual printing takes place. Examples include assessment of manuscript, editing, illustration, design and layout, imposition, etc.

Press: this is the department or section in a Printing house where actual printing (ink on paper) takes place.

Post press: this refers to all activities performed after the actual printing is done. This gives the printed material its desired finished aesthetics.

Examples include, folding, collating, cutting, binding, lamination, etc.

Printing: The processes of manufacturing/ making multiple copies of a graphic image (work).

Publishing: The trade, profession, or activity of preparing and producing material in printed or electronic form for distribution to the public.

Printing house: The firm/organization/business with the expertise to make multiple copies by applying ink onto a substrate (paper, rubber, etc.) using a printing machine.

Printing Industry: A group of Printing firms/organizations/businesses with a common goal of producing printed products.

Publishing house: The firm/organization/business with the expertise to prepare an author's work (manuscript), for consumption by the public.

1.6 Organization of the rest of the chapters

The work has five chapters in all. Chapter one is the introductory part and contains the background of the study, statement of the problem, research objectives and questions, significance of the study, Scope of the study, definition of terms and organization of the work.

Chapter two reviews the literature of related works. Chapter three also looks at the methodology and the method of data collection for this work. It contains the sampling technique, study population, research methodology, data collection tools and mode of analysis.

Chapter four presents the findings and discussions. Finally, chapter five includes summary of findings, conclusion and recommendation.

CHAPTER TWO

REVIEW OF RELATED LITERATURE

2.1 Overview

In order to have a genuine basis for this research, works of some authors were reviewed in the area of printing, publishing, offshore printing, etc. The literature review was organized through historical periods (thus, history of both printing and publishing in Ghana), causal analyses (e.g. reasons for offshoring) and the rest were discussed, compared and contrasted with an alternative or opposing position. The purpose of historical analysis is to examine how the meaning and value of past human intentions, decisions, and actions were

related to the new phenomena and events of printing and publishing (Cooper, Donohue, & Tharenou, 2007).

2.2 Concepts of Publishing and Printing

Books remain a primary means of communicating knowledge (Altbach, 1991). The power of books lies in their ability to disseminate information quickly and to a wide audience (Keh, 1998). According to Altbach (1991), books are central to providing information, entertainment, analysis, and education to millions throughout the world. Communication has been an essential part of human existence since creation. Communication can be effective through many ways and channels such as the newspaper, radio, television, etc. and books are no exception. However, printing still provides the greatest source of news, information, and knowledge known to our planet

(Eyiah, 2002).

According to Rao (1974), publishing is primarily the service of preparing work(s) of an author in the most suitable form and presenting it in the most efficient manner to the widest possible audience. 'To publish' is commonly defined as 'to make public' (Clark & Phillips, 2008). Publishing started with the early man through urgency to communicate and lived in caves. The cavemen (cave dwellers) during the oral era hunted for game and cultivated crops for meat and food respectively. They made marks on the bark of trees as well as the ground to show direction and then communicate with friends/family. In addition, the cave dwellers made outline drawings and engravings of animals they hunted on the surface of the rocks and caves for hunting purposes. Gradually, as communication developed and intelligence of man increased, he began to use images that represented/ looked like real objects (pictographs). The next step was to have drawings/ images that

symbolize ideas (ideogram). Ideograms are simple drawings that symbolize ideas or concepts rather than concrete objects. Later, the Phoenicians represented sounds by symbols (phonograms) and is the basis for most modern written language (Adams, Faux & Reiber, 1988).

In the olden days, very few people (church officials) could read and write. As population increased, people began to migrate and there came diversification of human settlement and language. People began to find information, knowledge and retain their culture. This revolution by the cave dwellers introduced and informed the current way of keeping the culture from oral to actually representing them in books. The book is an enduring medium through which ideas and knowledge are communicated, and a society's culture portrayed; and as such it is a primary resource for the student, the general reader and sometimes for the media (Clark & Phillips, 2008).

Publishing is a process and printing is one of the stages in the process (Djan, 2011). Therefore, printing is part of the publishing process, which is mostly confused by laypersons outside the book industry. Books are the oldest of the media, with the first known book written in Egypt around 1400 B.C. (Lee, n.d.). The work of a publisher is to coordinate every activity within the publishing chain (Author, Printer, and Bookseller) to make the books available to its final readers or widest possible audience through marketing, advertising, and promotion. Printing the book does not mean publishing the book. Printing is to make multiple copies or editions of an author's work, but the book after printing is to be made available and announced for sale to the widest possible audience by the publisher. Print production (printing) has been and still is a very vital part of the traditional publishing process.

2.2.1 History of Publishing in Ghana

The book industry has boosted the economies of countries such as the USA and Germany to mention a few (Nyadu-Addo, 2004). The establishment of publishing in Ghana can be associated with the activities and experience of the Europeans and Christian missionaries (Graham, 1971; Akyea, Kontoh, & Obeng, 2008). The prerequisite for them to provide reading materials and easy communication brought about this. Buah (1998), in his write-up, stresses into details that the Christian missionaries realized that the natives were not able to read the foreign language. Around this time, schools were also established and Christian literature translated into local languages. The foreign publishers opened branches in Ghana whilst missionaries transported printing machines for the missionary work. More local writers came up after the Second World War when they wanted to put across their experiences and this started local publishing.

Publishing in Ghana was closely related to the Christian missionary work, the growth of education, expansion of government business and increase in Printing presses. In addition, the growth of printing in Ghana has no doubt been a prerequisite for the rapid expansion of indigenous publishing, authorship, book manufacture, distribution, and mass reading.

During the mid-19th century, the Basel and Bremen religious mission had studied at least three Ghanaian languages in some depth. They were Twi, Ewe, and Ga. By 1880, they had published four Twi spelling and reading books. Several other books followed, written by expert writers like Johannes Zimmermann, J. B. Sehleges, Johann G. Christaller (Father of Twi literature), O. L. Carr and J. P. Brown. In the meantime, the Methodist mission had

established a model Printing press at Cape Coast, which the Basel mission made use of as far back as 1851 (Akyea et al., 2008).

However, between 1858 and 1859, a newspaper by the name “Accra Herald” was handwritten in Ghana until 1974 when they were printed by printing machines (Quartey, 1974). At this period, books for local schools (education) and religious (missionary) use were printed as more than periodicals and newspapers. There was a spectacular growth in the printing industry from 1907 – 1928 and 1932 – 1940 corresponding to the growth in government, industrial, commercial, and other activities.

Publishing in Ghana today, has embraced the publication of textbooks, university books, books for general reading, children’s books, translations, co-publications, scientific and technical books. This can be traced as far back as 1951 when the Accelerated Development Plan for Education in the then Gold Coast was published. There was then a general feeling of dissatisfaction for the nature and contents of all textbooks at notable Publishing houses. These were Oxford University press, University of London, Evans brothers, Macmillan, Longman and Cambridge University Press. The publishers took an important first step by commissioning Ghanaians and other African authors to write textbooks either alone or in groups (Djoleto, 1985). These books were based on the new syllabuses designed from these various countries.

In 1965, the Ghana Publishing Corporation was established to be responsible for textbooks (written and published entirely in Ghana) for at least elementary schools. Between 1975 and 1976, the Ghana Investment Policy Decree was ushered which banned abroad Publishing houses from engaging in publishing in the country (Akyea et al., 2008). Hence, this gave birth to publishing. Some

local representatives of the foreign publishers were transformed into local Publishing houses, manned wholly by Ghanaians with more expertise and experiences. The standard of work produced by these Ghanaian publishers enabled some to win the 1982 and 1983 Noma Award for Africa (a prize given for good publishing in Africa).

The Bureau of Ghana Languages (BGL), Waterville, Ghana Universities Press and Afram Publications, were the Publishing houses in existence before the investment policy decree of 1976. The BGL, which is a state Publishing organization, was established as early as 1951. A few Publishing houses that came after the investment decree and made a considerable impact on the publishing scene are; Sedco, Edupress, and Adwinsa.

2.2.2 Associations in the Book Industry

The Associations in the Book industry were primarily formed to fight for the common interest of their members. There are a number of Associations, formed in recent years to promote the work of the Book Industry in Ghana and these are:

- Ghana Book Publishers Association (GBPA),
- Ghana Printers and Paper Converters Association (GPPCA),
- Ghana Book Sellers Association (GBSA),
- Ghana Book Editors Association (GBAE), □ Designers and Illustrators Associations and □ Ghana Association of Writers (GAW).

These Associations sought to contribute to the continuous improvement and growth of the industry and fight for a common interest of their members to upgrade themselves through seminars and workshops. The Associations

represented their members for various additional reasons and these are as follows:

- As a means through which resources can be pooled together to overcome problems.
- To foster unity among members and
- As a means through which members can interact to form networks and share ideas.

2.2.3 History of Printing in Ghana

The Printing industry in Ghana (then Gold Coast) started on a very small scale in the 19th century, precisely 1822. With the commencement of the Printing industry innovated by the colonial power, the then British Governor, Sir Charles McCarthy launched a government sponsored national newspaper called the 'Royal Gold Coast Gazette' (Kostovic & Goldman-rakic, 1983). The newspaper, however, ceased publishing in 1824 after his demise

The history of Printing in Ghana continued with the early missionary work around 1851 (Eyiah, 2002). The Bannerman Brothers set-up their business and started the production of a newspaper in 1858 and 1859 called "Accra Herald" later known as "West Africa Herald" (Akyea et al., 2008). In 1873, the newspaper ceased operation because of the relocation of the press to Sierra Leone and then back to Ghana, finally siting it in Cape Coast. A man from Abura-Dunkwa in the Central Region, Hutton Brew, was the first African to establish a printing press in Ghana (Eyiah, 2002). He started his press in 1874, thus, printing of the newspaper 'Gold Coast Time' and later added "Western Echo." These however ended in 1885.

The early 1900's and the late 1930's saw a tremendous increase in the volume of printing works done in the country (Eyiah, 2002). This was due to the increase in industrial, commercial, and governmental activities coupled with developments in education and health. These early presses were more concerned with printing newspapers rather than books, though the early missionary presses ventured a bit into book production. The Printing industry was given a boost after independence with the introduction of free compulsory primary education scheme in 1961 (Kostovic & Goldman-rakic, 1983). This scheme called for the establishment of the Ghana Publishing Corporation (GPC) in 1965 by the government to publish and print books for the local schools. However, an earlier press, the Graphic Corporation, had been established in 1950 to print newspaper. Since then, printing has become an important aspect of the publishing industry in Ghana. Today, many newspapers such as Daily Graphic, The Dispatch, The Finder Newspaper, The Ghanaian Chronicle, Ghanaian Times, and so on are printed and circulated in Ghana. Due to digitalization and technological advancement, most newspapers in Ghana publish their news online as well.

As the world has moved into the technology age, the role of Printing presses in communication has become less oriented except for mass reproduction. The influx of new desktop computer printers, scanners, digital large format printers, computer-to-plate technology, web-to-print, etc. has enabled people to design, edit, and print materials more quickly as compared to the old traditional process that would have taken months to make production. This has greatly influenced some Publishing and Printing houses to send their printing works (e.g. manuscripts) offshore, for printing. According to the

U.S. Bureau of Labor Statistics (2010), “the print industry will evolve because of the greater use of digital printing for short print run jobs.”

2.3 Outsourcing

Many companies outsource (Bordoloi & Powell, 2013). Outsourcing refers to any type of external work that a business commissions someone to do, while offshoring refers to outsourcing work to a different country (Gibson, 2014). The aim of outsourcing is to ensure that expert service providers are used to optimize the cost-effective delivery of those services. Outsourcing is simply a customer (organization) deciding not to make part of their product or process in-house, but would prefer to purchase it from some other organization (Hira, 2004). Outsourcing is also the practice of contracting out business processes to a third party or to an external source (Dorasamy et al., 2010). From the above, outsourcing can be defined as contracting or sending jobs (printing jobs) to be printed outside a Printing or Publishing house in order to manage the other core competencies effectively and efficiently and tap into the ability of the outsourced Printing house.

The term outsourcing is usually ambiguous if not qualified with terminologies such as domestic or international (Mart, Ii, & Econ, 2011). Outsourcing is made up of:

1. Domestic contracting: this is when jobs are done internally in a particular country with assistance from the native/neighborhood firms.
2. Foreign contracting (offshore outsourcing): is also when jobs are done externally outside a particular country with assistance from overseas firms.

Outsourcing may also take many forms. These includes nearshoring, crowdsourcing, multisourcing and strategic outsourcing (Alder, 2006). In both outsourcing locally and offshore outsourcing (offshore printing), works are printed outside the Printing or Publishing house. Also, they show an increase in productivity, customer loyalty, in-house efficiency, and level of quality prints (Alexandrova, 2006).

2.3.1 Offshoring (Offshore Printing)

Offshoring is the process of outsourcing work to a country other than where your business is based (Gibson, 2014). Therefore, offshore printing is the act of sending printing jobs outside a country of residence to be printed by a foreign Printing house. It is also referred to as international outsourcing, offshore outsourcing, or offshoring (Ding, 2014; Egger & Falkinger, 2005).

Like a manufacturer, printers produce tangible goods but like a service the product is often highly customized requiring better advice to customers (Rothenberg et al., 2008). From the above, it can be concluded that print products such as textbooks are tangible outputs just as any manufactured products. Textbooks and other materials for educational purposes are mostly written, taken through the publishing processes by Publishers and later printed. Publishers have the option of printing firstly, in-house (in their printing section), secondly by Printing houses locally who are well resourced both in workforce and equipment or lastly, by printing abroad.

According to Buss (2005), businesses can expand rapidly by using offshoring to access a higher specialized, sophisticated job without incurring extra cost. This will help in the growth and development of the outsourced countries since it will help in the expansion of their Printing Industry but in a developing

country like Ghana, offshore printing will rather hinder the growth of the local Printing industry.

2.3.2 Reasons for Offshore Printing

Throughout literature, there are many key vital reasons for offshore printing that every researcher talks about; reduced cost, cheap labour, focus on core capabilities and responsibilities, access to professional expertise, and the desire for business process improvement. Alexandrova (2006) states that:

“the price level and quality of service appear to be key factors in gaining competitive advantages, i.e. the main concern of outsourcing (offshore) vendors in South East Europe (SEE) are to meet as high as possible standards with the lowest possible prices achieving global competitiveness.”

Some publishers and printers nowadays prefer to send their printing works offshore with many reasons and these are discussed as follows:

- i. Lower cost and price quotation is one of the determinant factors leading to cost efficiency (Lee, Huynh, & Chi-wai, 2000). Chow (2006) also defends this by stating that, “a majority of the companies are printing offshore because of a bigger cost saving.” According to Mallardi (2004), in North America, “if a job costs U.S. \$4,950, in Germany, the cost is about U.S. \$6,400, the cost in China would be only about U.S. \$2,245.” Also, many jobs are sent offshore with the desire to cut down cost (Ferguson, 2004; Belcourt, 2006; Gonzalez, Gasco, & Llopis, 2010).
- ii. Another reason is good quality print services to the satisfaction of the end user (Chow, 2006; Aron et al., 2007; Yang et al., 2007; Gonzalez, Gasco, & Llopis, 2010).

- iii. It is performed because of cheap labour. that is, to economise on labour costs (Bush et al., 2008; Girma & Görg, 2003).
- iv. Access to specialized expertise is a considering factor to send printing works abroad (Belcourt 2006; Laplante, Costello, Singh, Bindiganavile, & Landon, 2005).
- v. It helps also to achieve higher value added to the goods (Quinn, 1999). This strategy adds value to printed products whilst helping build a good relationship with customers by giving them exactly the output they need.
- vi. Offshoring enables companies to focus on their core activities (competences), to increase flexibility by achieving their bottom-line budget, and to assess their lean production by reducing operating costs, thus increasing profit (Yang et al., 2007; Buss, 2005; Gibson, 2014; Chamberland, 2005; Gonzalez, Gasco, & Llopis, 2010).
- vii. Large print plant capacity and ability to print large volumes of work within a shorter period are also factors to offshore printing. This is due to advancement in equipment and technology (Mahnke & Overby, 2003; Chow, 2006; Alexandrova, 2006; Belcourt, 2006).
- viii. The 24-hour (24/7) workforce abroad is another reason attributed to the increase in printing offshore (Laplante, Costello, Singh, Bindiganavile, & Landon, 2005; Aron et al., 2007).

2.3.3 Challenges in Offshore Printing

Many publishers follow the crowd to print offshore; however, there are some hidden risks/challenges. For instance, language barriers (Ramingwong & Ramingwong, 2009; Gibson, 2014), shipping delays (Mann, n.d.; Rothenberg et al., 2008; Ludovico, 2012), job losses (Amiti & Wei, 2005; Park, 2009), dependence on a service provider (Gonzalez et al., 2010), piracy and security issues, etc.

Undoubtedly, there are increasing reproaches to offshoring. Unemployment, hidden costs, low-quality workforces, cultural differences and language proficiency are examples of these highly criticized elements (Ramingwong & Ramingwong, 2009). From the above, these advantages are better achieved in the developed countries and not a developing country like Ghana. For example, reduction in staff level (employees) will reduce the burden of human resource management of the company but forget that downsizing employees will affect the rate of employment in the country (Amiti & Wei, 2005; Park, 2009). The ability to appropriately identify, manage and mitigate risks can surely bring a significant competitive edge to an organization (Ramingwong & Ramingwong, 2009).

2.3.4 Impact of Offshore Printing

Offshore printing has some positive and negative effects on every industry and its country at large. In South Africa, the Printing Industries Federation responded to the claim that offshoring has long-term benefits for the economy notwithstanding the fact that it will also negatively affect employment, skills development and the growth of the South African economy (Lacy, 2013). Various industries send jobs offshore but most research done are in the

Information Technology (IT) sector. In a recent survey, 15% of all companies reported offshore outsourcing. Nevertheless, the same survey also showed that in 40% of the IT services and telecommunications industry companies, offshore outsourcing was occurring (Tambe & Hitt, 2010).

Printing offshore increases productivity (Aron et al., 2007; Ferguson, 2004; Amiti & Wei, 2005). In addition, Amiti and Wei (2005) reported a positive correlation between an increase in material offshoring and material productivity not considering labour productivity. Hira and Hira (2010) reported a fall in labour productivity resulting in a fall in labour wages, which caused millions of workers to be displaced because of offshoring services. This practice is also the major cause of unemployment in the Printing and Publishing houses. In 2008, out of 16,840 jobs, 994 were lost from the wood, paper and Printing industry because of offshoring and it took a year and a half for such people to find new jobs. These workers who lost their jobs were within the ages of 38-40 years and by implication their families and other people depended on them (Mohlmann, 2012). Prospective employees (graduates and skilled personnel) have remained unemployed whilst others have also lost their jobs due to offshoring (Park, 2009).

There is a reduction in the income levels of local presses hence, they do not have the financial capacity to purchase new machines and equipment. According to Sauvart (2004), it takes investment for firms to expand. Banks, on the other hand, have little confidence to invest their funds into the printing business likewise investors who also find the industry unattractive.

Outsourcing takes such investments to foreign industries rather than the domestic industries. Presses are still using old machines that cannot compare its print quality to sophisticated and modern machines used by printers abroad.

Also, there is the potential for a significant increase in cross-border trade (Alexandrova, 2006). Amiti & Wei (2005). argue that there is the promotion of international trade and globalization but this action will greatly affect the local country and benefit (grow) the country abroad.

Publishers invariably print more than they need when they print offshore to minimize their unit cost in order to get the most cost-effective deal available and thereby growing the foreign Printing house (foreign country at large) at the expense of the local Printing industry.

2.4 The Business of Printing in Ghana

Kipphan (2001) defines printing as a reproduction process in which printing ink is applied to a printing substrate in order to transmit information (images, graphics, text) in a repeatable form using an image-carrying medium (e.g. a printing plate). The Printing industry is constantly developing higher-quality and more efficient ways to meet the demand of the growing population (Hird & Finley, 2010). This capability is assisting businesses to cut down expenditure and streamline operations.

In today's competitive business environment, organizations can achieve more savings and drive efficiencies, without compromising the quality of their printed work. "printing firms are operating on very narrow profit margins due to price competition, increased costs and overcapacity caused by moves by publishers to print offshore" (Accenture, 2001). According to

National Board for Small Scale Industries (NBSSI), most Printing houses in Ghana operate under small-scale industries with workers ranging from 10-29; some are micro scale industries having about 6-9 workers at the press. Nyadu-

Addo (2004) affirms the fact that most Printing houses in Ghana are within the small-to-medium enterprise category.

Printing houses offer a number of print services such as prepress (preflight, colour separation, film and plate making, among others), press (single and multi-colour printing) and post press activities (collating, folding, binding, laminating, etc.). Most Printing houses in Ghana print products such as textbooks, exercise books, notebooks, flyers, brochures, funeral and invitation cards, calendars, receipt books, posters, business cards, newsletters, etc.

Printing businesses complain of low jobs but they can support the drive for efficiency by becoming more creative in developing corporate materials. Such solutions allow them to produce professional-looking documents quickly and efficiently. For Printing houses to compete well, they need to be skilled, knowledgeable and have adaptable workforces that have broad technical, but also more generic knowledge and skills set” (Callan and Ashworth 2004; Gibb 2004). Printing in Ghana come with lots of challenges from both capital input (loans), inadequate government contracts, and government policies such as huge taxes on raw materials (e.g. paper, ink, etc.) for local production.

2.4.1 The UNESCO Agreement

It is established that there are no customs duties imposed on books imported into the country (Ghana). This is because of Ghana being a signatory state to the UNESCO Florence Agreement and its protocol (June 17, 1950) and The Nairobi Protocol (November 26, 1976). Both Protocol agreements are the same but at different developmental stages. According to UNESCO (1976) its

principal goal, which was built on the ruins of the Second World War, was to contribute to conditions that will maintain peace in the world. With regards to Article I paragraph 2(a) of UNESCO's constitution, states the Organization will "collaborate in the work of advancing the mutual knowledge and understanding of people, through all means of mass communication and to that end recommend such international agreements as may be necessary to promote the free flow of ideas by words and images" (UNESCO, 2014). The Florence Agreements and its Protocol were then born to ensure this mandate.

The purpose of the Agreement and its Protocol, as their titles indicate is to ensure easier importation of educational, scientific, and cultural materials (UNESCO, 1976). They reduce tariffs, tax, currency rates, and trade obstacles to international circulation of these materials, permitting organizations and individuals to obtain them from abroad with less difficulty and at a lesser cost. The protocol broadens the agreement by extending the benefits it offers to additional objects and by granting further benefits to a number of materials. According to UNESCO (1976), these materials can be seen in their various Annex categories as stated in the 'Agreement and its Protocol' as:

Annex A- (books, documents, and other printed educational publications);

Annex B- (works of art and collector's pieces of an educational, scientific, or cultural character);

Annex C- (visual and auditory materials of an educational, scientific or cultural character);

Annex D- (scientific instruments and apparatus); and

Annex E- (articles for the blind)

Other categories were later created to include materials of sport, music, among others. The agreement, therefore, entreats every signatory state to ensure a

duty-free import of any material that falls within any of these categories from a member state. Almost every country in the world is a member.

2.4.2 GOVERNMENT POLICIES ON TAX EXEMPTION IN GHANA

In 2013, a bill was passed by the Parliament of Ghana to exempt some duties and other taxes in the country. Section 7 of the amended Customs and Excise Act 1996 (512) states that “the following goods are exempted from the payment of import duty:

- (a) raw materials for the local manufacture of HIV/AIDS drugs under the supervision of the Ministry of Health; and
- (b) raw material for local printing of textbooks and exercise books through tender administered by the Ministry of Education.” (Date of Gazette notification: November 28, 2013).

This law and other policies by the government had scarcely received any enforcement, compelling the GPPCA to renew its call on the government on September 29, 2014, with a caption “Local Printers initiate campaign against high import tax on raw materials” on Joy online (myjoyonline, 2014).

On October 13, 2014, following the call of the GPPCA, the government through the Deputy Minister of Education, Samuel Okudzeto Ablakwa, promised that local printers would no more be paying import taxes as long as they are used for the production of government books by the beginning of 2015. He explains that:

“what we discussed at the management level at the Ministry of Education is that we are inclined towards the option where after a company has won a bid to supply a textbook, it would have to indicate to us the quantities it would require (raw material). This will be subjected to independent verification and a waiver will be given to

import the raw materials. The process would, however, be policed to ensure the raw materials are used to produce the textbooks when it wins the contract to supply. Therefore, we are opting for a more targeted arrangement where we would be able to monitor and police the process to ensure quantities are used to print the textbooks. This is also to ensure that whilst trying to provide a solution to the identified problem, we do not create another problem that would lead to abuses and revenue losses.”

Mr. Ablakwa said it was part of government policy to implement a **100 percent** local content policy on textbook printing which requires government purchases at least **60 percent** of its education locally. He also said the government is committed to supporting local printers in creating more jobs in the economy regardless of the cost involved.

In the 2015 budget presented to the Parliament of Ghana by Hon. Seth E.

Terkper, Minister of Finance, stated that: “printers have been given special waiver on imported production materials. The budget made provision for six million (**6,000,000**) textbooks and fifteen million (**15,000,000**) exercise books for **38,685** basic schools to be produced locally.” This is a step in the right direction.

The initiative taken by government is recommendable at this time but if taxes on imported materials for local printing and textbook production can be waived, this will amount to lower production cost (lower quotation to customers), price becoming fairly competitive to foreign (offshore) printing and finally contribute massively to the growth and expansion of the local Printing industry in Ghana. Chow (2006), in his paper, tried to compare and find reasons why there is a lower cost of production in Asian countries than other countries. He stated that printing costs in Asia are much lower than in

U.S. or in Europe. Those savings come mostly from lower labour costs and from savings by using domestic paper instead of imported paper.

CHAPTER THREE

METHODOLOGY

3.0 Overview

This chapter describes and explains the method used in carrying out this study. Essentially, it provides in-depth explanation with respect to who, what, when, where and how of the study. That is, who are the participants? What variables are used in the study? What methods were employed? When and where the study took place, and finally, how the data was gathered and analyzed.

The chapter begins with the research design (i.e., the method and tools of data collection), population and sample, as well as the sample size and the analyses used. Most researchers in the area of offshoring adopt the use of research questions in their studies. Indeed any piece of research is likely to comprise a complex of research questions (Brannen, 2005).

3.1 Research Design

The research design is the overall plan or structure used to answer the research question (Cooper et al., 2007). The study used mixed method. Mixed methods research means adopting a research strategy employing more than one type of research method (Brannen, 2005). With mixed method, data

collection techniques can generate both qualitative (words) and quantitative (numbers) data (Cooper et al., 2007).

Creswell (2007) also explains that mixed method focuses on collecting, analyzing, and mixing both quantitative and qualitative data in a single study or series of studies. Its central premise is that the use of quantitative and qualitative approaches in combination provides a better understanding of research problems than either approach alone (Creswell, 2007).

The researcher administered questionnaires to Heads (top Managers) of both Publishing and Printing houses in Kumasi and Accra metropolises using stratified sampling method. In addition, interviews were conducted with both the Heads of GBPA (Accra) and GPPCA (Kumasi) using purposive sampling method.

3.2 Population and Sample

According to Busha & Harter (1980), “a population is any set of persons or objects that possesses at least one common characteristic.” The study considered the available Publishing and Printing houses in Ghana. To overcome this difficulty of travelling across Ghana, it was divided into two zones (sectors); the Northern and Southern. One region was chosen each from the southern and Northern sector. Both Publishing and Printing houses in these two regions were visited.

It was difficult getting the total number of Publishing and Printing houses in Ghana. The study areas chosen were Ashanti (Northern sector) and Greater Accra (Southern sector) Regions because they are the most populated Printing and Publishing houses in Ghana. About 95% of the registered and

unregistered presses are situated in Kumasi and Accra metropolises (Nyadu-Addo, 2004). The total population for both Publishing and Printing houses is 502; 102 Publishing and 400 Printing houses in both

Accra and Kumasi.

3.2.1 Sample Frame

There are many stakeholders in the book industry in Ghana. The stakeholders (associations) were setup to foster unity among members and for a common interest. Among these are; Ghana Book Publishers

Association (GBPA), Ghana Book Sellers Association (GBSA), Ghana Printers and Paper Converters Association (GPPCA), Ghana Book Editors Association (GBAE), Designers and Illustrators Associations Ghana Association of Writers (GAW) and others. For the purpose of this study, the sample frame was both the Ghana Book Publishers Association (GBPA) and Ghana Printers and Paper Converters Association (GPPCA).

Quantitative data was collected by administering questionnaire to each Publishing and Printing house whilst the qualitative data was derived from interviews with the Heads of both the Publishing and Printing Associations (GBPA and GPPCA). Table 3.1 shows the population breakdown:

Table 3.1			
<i>Population of Publishers was 102 and Printers also 400 for the study</i>			
NAME	POPULATION	PERCENTAGE	
Publishers Accra	87	85.29	100
Publishers Kumasi	15	14.71	
Printers Accra	250	62.5	100
Printers Kumasi	150	37.5	
TOTAL =	502		

Source: Publishing and Printing associations.

The Publishing and Printing houses in Accra are more than those in Kumasi because Accra is the largest business market and the capital city of Ghana.

3.2.2 Sample Size

To determine the sample size for the total population, the formula for determining sample size by Krejcie & Morgan (1970) was used:

$$s = \frac{X^2NP(1-P)}{d^2(N-1) + X^2P(1-P)}$$

The sample size for the study was 26 Publishing and 101 Printing houses in both Accra and Kumasi making a total of 127.

(See Appendix IV for calculation of the total sample size)

The ability to generalize the findings of a study to the population from which the sample came is an important aspect of external validity (Cooper et al., 2007). Each of the four divisions of the respondents (Publishing and Printing houses in both Accra and Kumasi) were calculated proportionately to the total sample size to the total population size as follows:

$$\frac{\text{Total Sample Size} \times \text{Population size}}{\text{Total Population Size}}$$

(See Appendix V for calculation on each of the sample size)

The summary of the Sample size for the study is illustrated in table 3.2 as follows:

Table 3.2		
<i>Sample size for both Publishers and Printers</i>		
NAME	SAMPLE SIZE (DECIMALS)	SAMPLE SIZE (ROUND FIGURE)
Publishers Accra	21.66	22
Publishers Kumasi	3.74	4
Printers Accra	62.25	63
Printers Kumasi	37.35	38
TOTAL =	125	127

(See Appendix V for calculation on each of the sample size)

In addition, one person each was chosen from GBPA and GPPCA to support the quantitative data based on their position and in-depth knowledge they possess.

The persons that were interviewed are:

1. The National President of GBPA Accra.
2. The President of GPPCA in Kumasi.

3.3 Data Collection Tools

3.3.1 Questionnaire

The major instrument that was employed to collect data to complete and ascertain the objectives of this study was the use of questionnaires. This type of data collected is a first-hand information that was obtained purposely for this research. The questionnaire was administered to the Heads or top Managers of various Publishing and Printing houses.

3.3.2 Interview

Qualitative research methods focus on discovering and understanding the experiences, perspectives, and thoughts of participants (Harwell, 2011). The researcher also used this method with the believe that, adding interview as a tool for gathering this data will provide him with an avenue to ask follow-up questions and get more information from both the publishing and Printing associations.

According to Opoku-Amankwa (2002), interviews have the advantages of being useful for collecting in-depth information; questions can be explained to make sure it is not misunderstood.

3.4 Data Analysis

Data analysis involved description, statistical analysis, and percentages to determine the impact of offshore printing on the Printing industry in Ghana. The researcher critically analyzed the data using “Statistical Package for the Social Sciences” (SPSS) package software and the results were presented using charts and diagrams as well as written discussion with short precise descriptive explanations.

3.5 Summary

The purpose of this chapter was to explain the sample frame used, describe the methodology for the study, data collection procedure and the mode of analysis.

CHAPTER FOUR

FINDINGS AND DISCUSSION

4.0 Introduction

This chapter details the analysis and results of the study. The study was to collect information primarily on offshore printing and the extent to which it affects the Ghanaian Printing Industry. The discussions of findings also stretches through the analysis and interpretation of questionnaire distributed to various Publishing and Printing houses on 'offshore printing' as well as interview with both Heads of GBPA (Accra) and GPPCA (Kumasi).

4.1 Response rate

One hundred and twenty-seven (127) questionnaires were administered to various Publishing and Printing houses in Kumasi and Accra. Out of the number distributed, ninety-six (96) were retrieved, representing 75.59%.

Table 4.1 explains the questionnaire distribution breakdown during the study.

O Name	Questionnaire Distributed	Questionnaire Retrieved	Questionnaire Retrieved	Percentage (%)
^u PUBLISHERS KUMASI	12	10		
t PUBLISHERS ACCRA	31	10	20	20.8
^o PRINTERS KUMASI	52	49		
f PRINTERS ACCRA	32	27	76	79.2
TOTAL	127	96	96	100.0

the ninety-six (96) questionnaires retrieved from the respondents, twenty (20) representing 20.8% constitute Publishing houses in Kumasi and Accra whilst the remaining seventy-six (76) representing 79.2% were from the Printing houses. Therefore, ninety-six (96) were used for the analyses.

The respondents that accepted the questionnaire but could not be retrieved gave some excuses of lack of time, bosses who gave orders that no one fills any questionnaire in their absence, misplacement of questionnaire. Refusal to answer questions in order not to violate their house policies (especially those into security printing).

4.2 Demographic characteristics of Respondents

4.2.1 Years in existence of Publishing and Printing houses

The years in existence of the respondents of the study can be shown in figure 4.1:

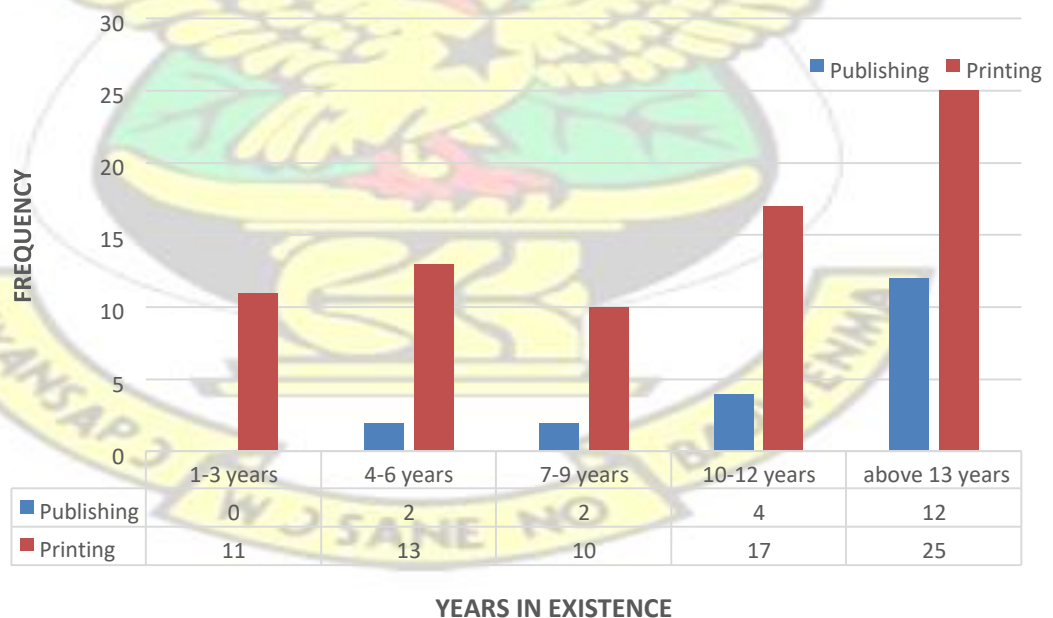


Figure 4.1: A bar graph showing the years in existence

Source: Field data

As shown in figure 4.1, twenty-five (25) Printing houses and twelve (12) Publishing houses representing 32.89% and 60% respectively who

participated in the study make up the majority, and indicates the industry has been in existence for more than 13 years. Within 1-3 years, no Publishing house was set-up whilst eleven (11) Printing houses representing 14.47% were also set up to meet the printing needs of the country. This indicates that the industry has been in existence for a long time and continues to grow.

4.2.2 Area of Specialization of Printing and Publishing Houses

4.2.2.1 Area of Specialization of Printing Houses

Printing presses usually specialize in either one or more areas in the various sections namely; pre-press, press and post press. All activities performed before printing begins are known as pre-press and press is the section or department in a press house where actual printing takes place. The operations performed after the job has left the press (printing section) are referred to as the post press or finishing. Table 4.2 details the various responses:

Printing services offered	Responses (N=76)	Percent of each case
Pre-press	46	60.5%
Press	73	96.1%
Post press / finishing	57	75%

According to the data gathered, the Printing houses specialized in either one or more areas. Each category (pre-press, press and post press) was out of the total seventy-six (76) respondents.

From table 4.2, forty-six (46) out of seventy-six (76) respondents representing 60.5% has pre-press section attached to their Printing house. Seventy-three (73) respondents representing 96.1% out of the seventy-six (76) are into

printing whilst the remaining 3.9% of the respondents specialize in only post press also referred to as finishing operations.

4.2.2.2 Area of Specialization of Publishing Houses

Some publishers in both Accra and Kumasi also specialize in their business activities just as across the world. The publishers specialize in as many areas as their house policy and core activities permit such as textbooks, supplementary readers, magazines, and others. Table 4.3 shows the various areas of specialization.

Specialization	Responses (N=20)	Percentage of Cases
Textbook	18	90%
Magazine	3	15%
Supplementary reader	9	45%
Children storybook	2	10%
Catholic Newspaper	1	5%

Each specialization is made up of the total twenty (20) respondents because some Publishing houses engaged in more than one area of specialization. As indicated above, eighteen (18) respondents representing 90% constituted the majority are into textbooks. This shows that most publishers in Kumasi and Accra are into textbook publishing.

Also, 15%, 45%, 10%, and 5% representing three (3), nine (9), two (2) and one (1) of the respondents were into magazines, supplementary readers,

Children's storybook and Catholic newspaper respectively. This shows that majority of the Publishing houses are into educational materials.

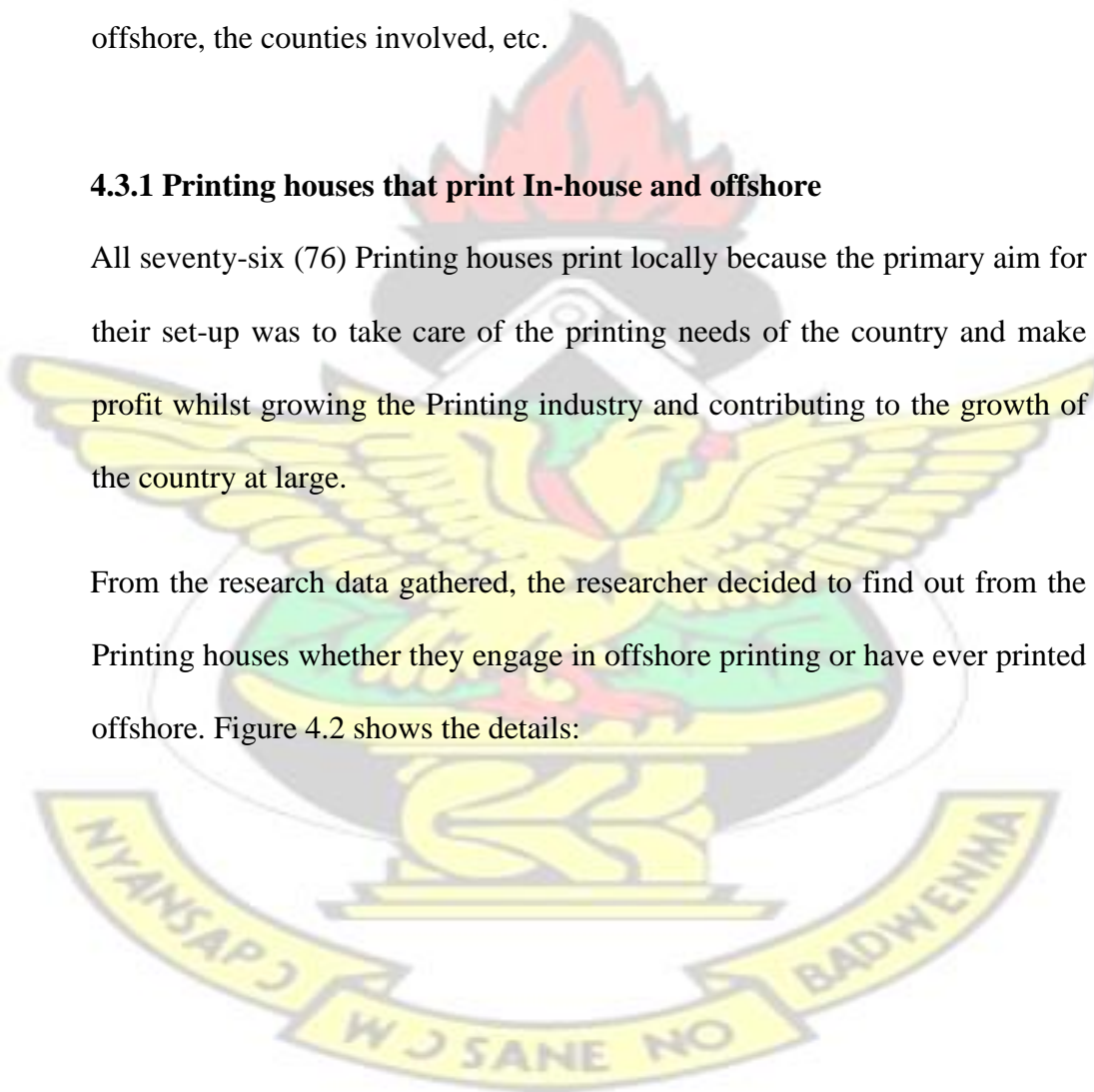
4.3 Identifying the various Publishing and Printing Houses that Print Offshore.

In identifying the Printing and Publishing houses that practice offshore printing, some areas such as; printing in-house, Frequency of printing offshore, how long in years they have printed offshore, percentage of works printed offshore, the counties involved, etc.

4.3.1 Printing houses that print In-house and offshore

All seventy-six (76) Printing houses print locally because the primary aim for their set-up was to take care of the printing needs of the country and make profit whilst growing the Printing industry and contributing to the growth of the country at large.

From the research data gathered, the researcher decided to find out from the Printing houses whether they engage in offshore printing or have ever printed offshore. Figure 4.2 shows the details:



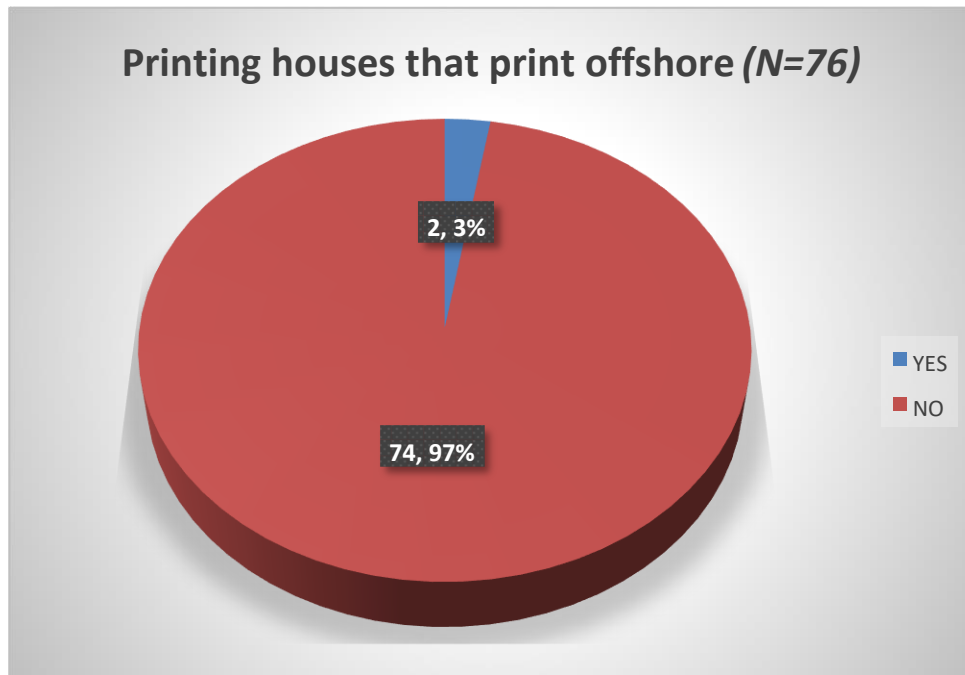


Figure 4.2: Printing houses that print offshore

Source: Field data

From figure 4.2, majority representing 97% do not and have never printed offshore whilst the remaining 3% (2 Printing houses) have printed offshore before.

The reasons given by the first Printing house for printing offshore was that, it was a high security job and did not have the technology to print in Ghana. The delivery time was near and the quantity was also large. The press finally printed in India.

The second Press also ended up printing in the United Kingdom because the customer insisted that the pre-press (design) should be prepared offshore due to the special nature of the work.

4.3.2 Publishing houses that print In-house and Offshore

Similar questionnaire was given to each of the various Publishing houses in both Accra and Kumasi. Since Publishing is a process that includes printing as a subset, Publishing houses seek the services of Printing houses to make multiple copies of their manuscript if they do not have a printing section/department (machines and operators) attached to print. The details are shown in table 4.4 as follows:

	Having In-house Press	Printing In-house	Printing all products In-house
YES	12 (60.0%)	10 (50.0%)	4 (20.0%)
NO	8 (40.0 %)	10 (50.0%)	16 (80.0%)
Total	20 (100%)	20 (100%)	20 (100%)

From the data gathered, twelve (12) representing 60% out of the twenty (20)

Publishing houses had a printing department/section attached to their house.

This means that they are able to print their works in-house without buying print.

Ten (10) of the respondents representing 50% actually print within their Publishing houses. However, not all their products are printed locally, they outsource a certain percentage offshore. Only four (4) representing 20% of the respondents actually print all their products in-house without buying print within the country or offshore.

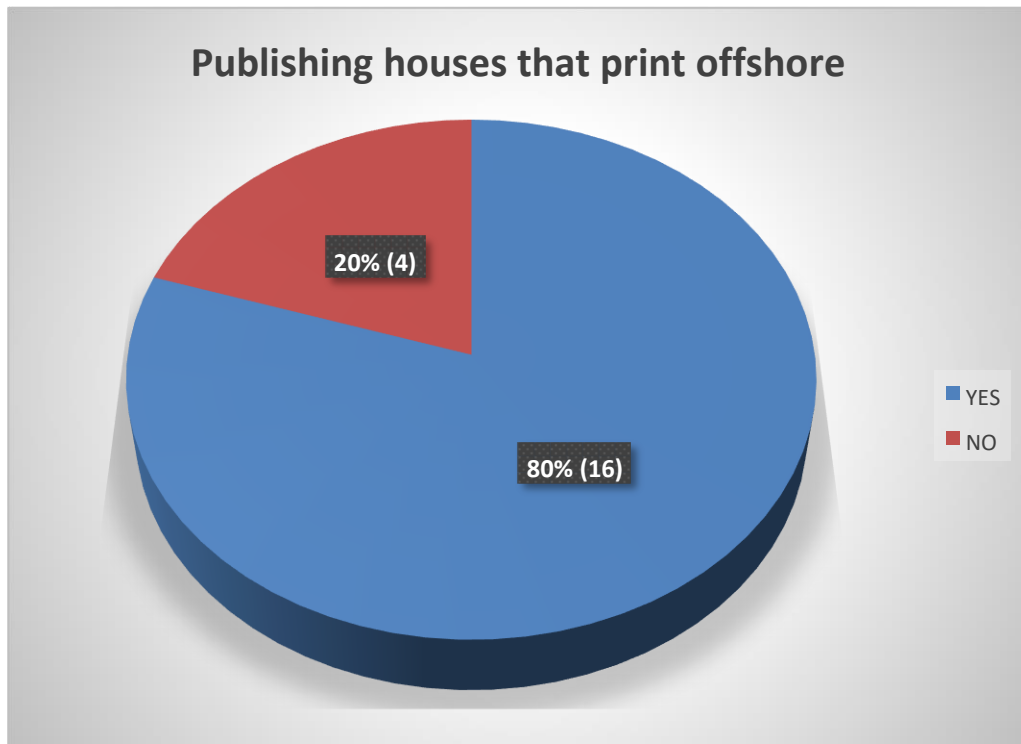


Figure 4.3: Publishing houses that print offshore
Source: Field data

Figure 4.3 shows that just a few (20%) of the respondents' print all their jobs in-house and 80% print their jobs offshore. This means majority of the Publishing houses print their works offshore at the expense of the local Printing industry.

4.3.2.1 Percentage of work printed offshore

Publishers, after getting a softcopy of their works seek the services of Printing houses if there is no in-house press. The percentage of printing locally and offshore is in tandem. Therefore, both the percentage printed locally and offshore sum up to 100%.

Figure 4.4 is a graph that details the data gathered on the percentage of works printed offshore by publishers.

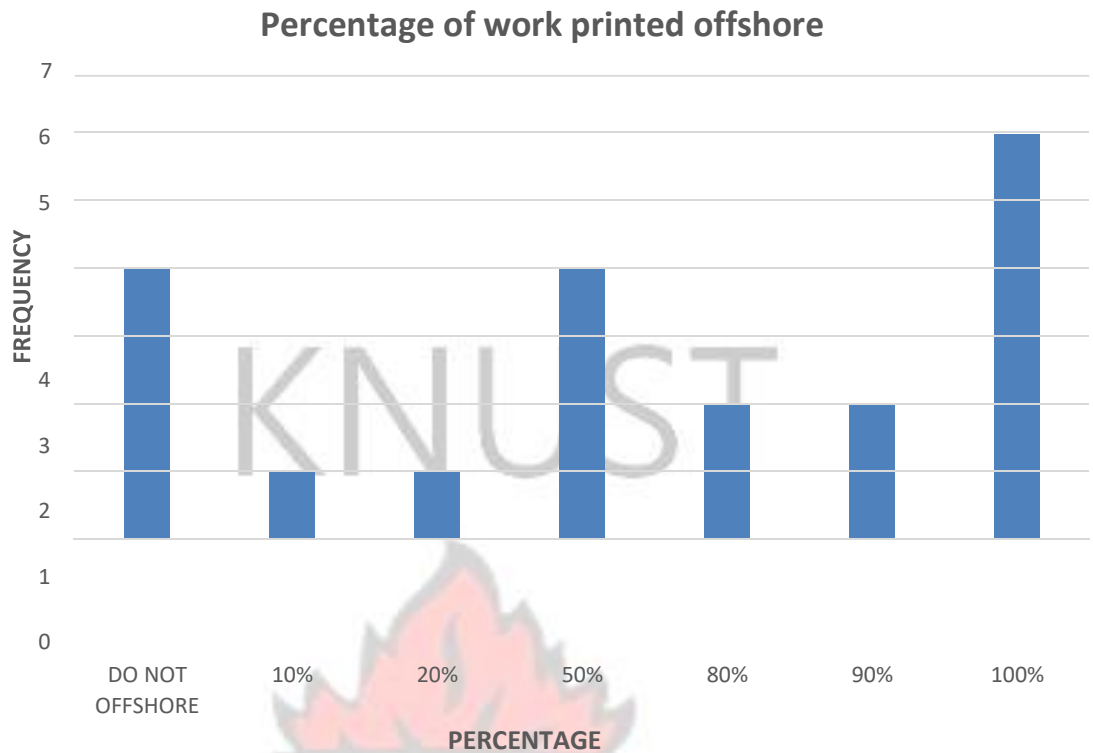


Figure 4.4: Percentage of work printed offshore

Six (6) Publishers print 100% of their works offshore and nothing locally. Four (4) respondents printed half of their works offshore and the remaining half locally. The percentage of printing 80% and 90% of works offshore recorded two (2) responses. The percentage of printing 10% and 20% of works offshore also had one (1) response each indicating that 90% and 80% of works are printed locally respectively, which is good for the growth of the Printing industry. Finally, 20% of the respondents do not print or have never printed offshore before whilst, 20%, 30%, 40%, 60% and 70% did not record any response.

4.3.2.2 Frequency of Publishers printing offshore

Sixteen (16) out of the twenty (20) respondents that printed offshore were used for the analysis since the remaining were not printing offshore. The frequency of publishers printing offshore was analyzed using ‘always’,

‘often’ and ‘occasionally’.

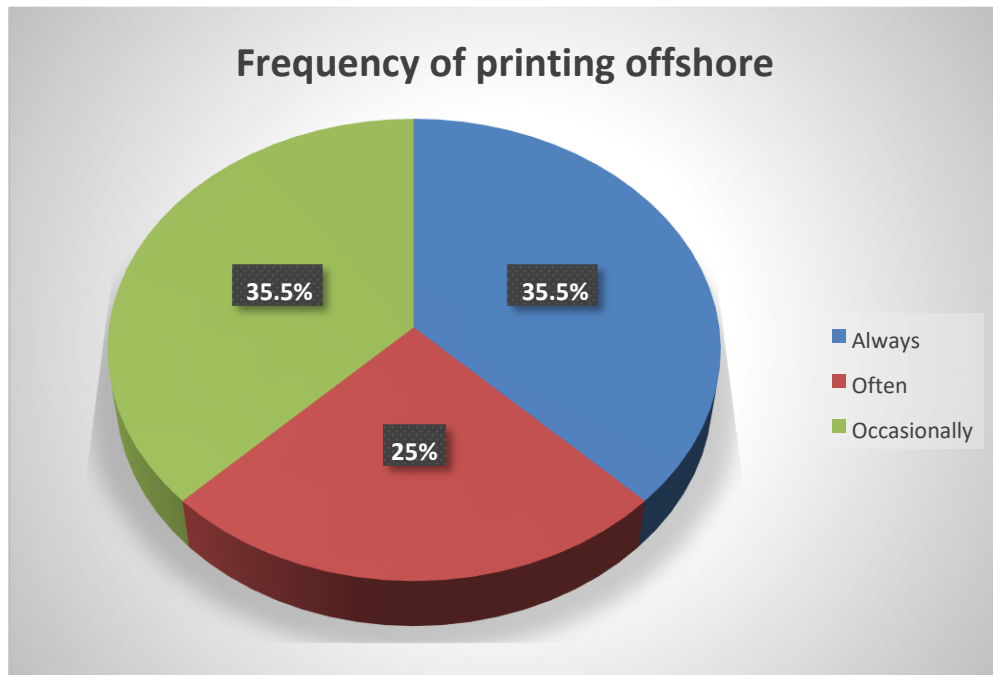


Figure 4.5: Frequency of Publishers printing offshore

Source: Field data

The data reveals that 35.5% of the respondents ‘always’ send their works offshore. This means that, at all times and constantly their works are sent offshore within a certain period. Also, 25% of the respondents ‘Often’ print offshore. This also means that many at times four (4) of the respondents print offshore or seek for printing services locally. Finally, six (6) respondents representing 35.5% of the respondents print occasionally from offshore. This means that they print offshore from time to time.

4.3.2.3 The number of years Publishers have printed offshore The practice of printing works offshore is not a new phenomenon and therefore not new to Ghana. The table below shows the number of years publishers have printed offshore.

Table 4.5: <i>Number of years Publishers have been printing offshore</i>		
Years	Frequency	Percent (100%)
2010-2015	9	56.25
2004-2009	3	18.75
1998-2003	1	6.25
Before 1998	3	18.75
Total	16	100.0

Source: Field data

From the table 4.5, majority representing 56.25% of the respondents started printing offshore from 2010 to 2015. On the other hand, three (3) of the respondents representing 18.75% also started printing offshore over eighteen (18) years ago.

The trend line graph as shown in figure 4.6 indicates a sharp growth of offshore printing over the period. Between 2010-2015, about nine (9) of the respondents joined the practice of sending jobs offshore.

Trendline showing when Publishers Started Printing Offshore

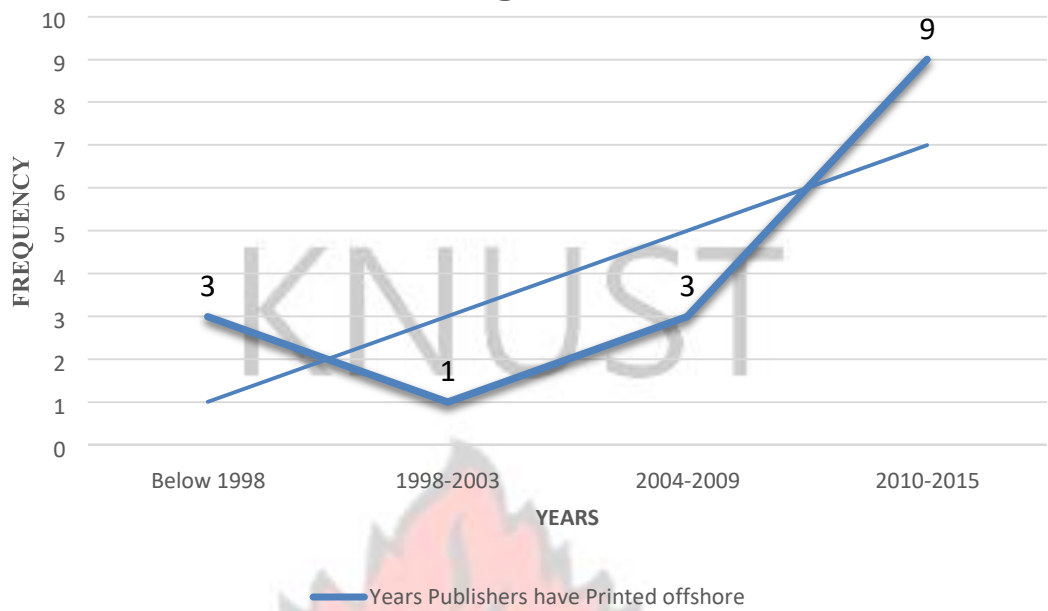


Figure 4.6: Trendline showing when Publishers Started Printing Offshore

4.4 Types of print services and products publishers print from offshore

4.4.1 Print services sought offshore

Publishers believe that to be able to satisfy the customer well, two things are vital namely the quality and price. According to Kipphan (2001), the quality of a print product depends greatly on the preparatory work done in the prepress, the printing process, and the materials used for the print such as ink and paper.

The quality of a final printed product is greatly affected by the finishing operations involved (Kipphan, 2001). Therefore, to get a work done, some publishers seek for various services including Pre-press and design. Table 4.6 elaborates much on the type of print services sought offshore.

Table 4.6

Print services sought offshore by Publishers

Print Services	Frequency (N=16 each)	Percent (100%)
Pre-press	4	25.0
Printing	16	100.0
Finishing	16	100.0

Source: Field data

From the data gathered, table 4.6 shows that four (4) of the respondents representing 25% seek for pre-press services and continue to print and bind their products offshore. Both Printing and Finishing services recorded 100% patronage by the respondents who sought for print services offshore.

This indicates that, majority of printing works are sent offshore and further add finishing to make the product complete and ready for the intended consumers.

4.4.2 Print products publishers print offshore

Publishers in Ghana print many products such as colour picture books, periodicals, catalogs, magazines, supplementary readers, textbooks, etc. Printing houses can print their products here in Ghana. Figure 4.7 below shows the type of products that publishers print offshore.

**Products publishers print offshore
(N=16 each)**

16

14

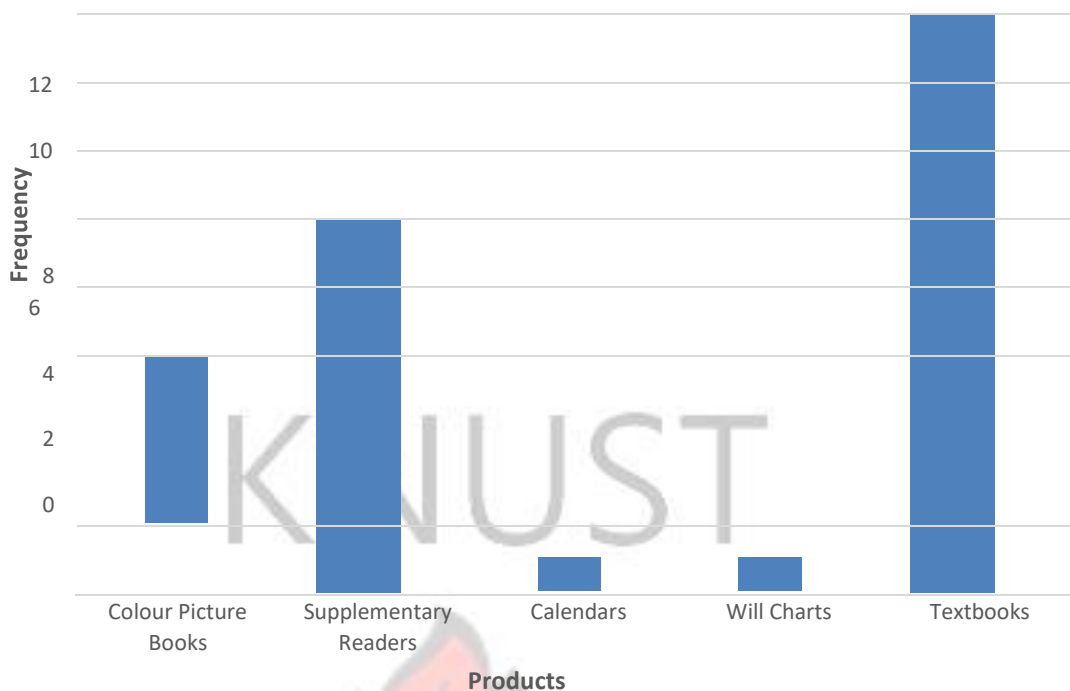


Figure 4.7: *Print products publishers print offshore*

Out of the sixteen (16) respondents who responded to each of the products printed offshore, Textbooks representing 87.5% were the most products printed offshore. An interview conducted confirmed this result that, educational and teaching materials in Ghana always have a ready market. Colour picture books and supplementary readers also recorded five (5) and eight (8) responses, each representing 31.5% and 50% respectively. Wall charts and calendars had the lowest percentage of 6.25 responses each.

4.4.3 Countries from which Publishers offshore printing jobs

Due to globalization and cross-country trade coupled with innovations and advancement in technology, foreign Printing houses are willing to print from all corners of the world and deliver on time. An interview conducted revealed that Printers print jobs from countries such as Malaysia (Vivar Printing), India (Repro India, Quaterfold Printabilities), Hong Kong (Regal Printing), Bahrain (Oriental Press), etc. Figure 4.8 shows the various responses given by the respondents:

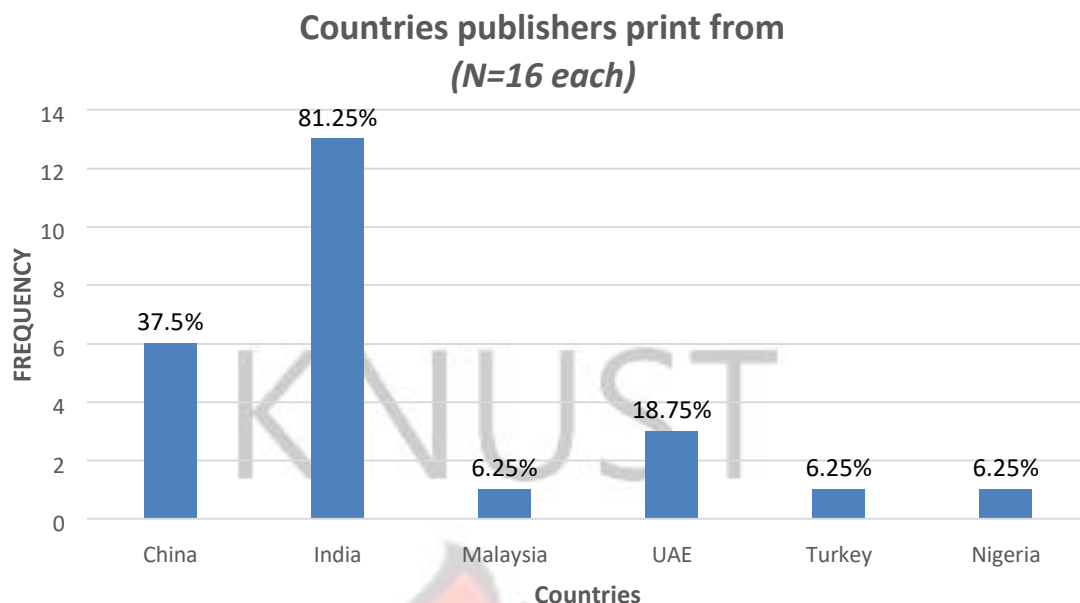


Figure 4.8: Countries Publishers print from

From the data collected, a respondent can seek for print services from one or more countries abroad. India recorded the highest number of responses representing 81.25%, followed by china – 37.5% and United Arab Emirates (UAE) – 18.75%. Malaysia, Turkey, and Nigeria also had one (1) response each representing 6.25%.

4.4.4 Comparing product quality from Abroad and Ghana

Print quality is printing according to a known standard. Once a customer is satisfied with a print output, the printers work has been executed. The quality of a printed product depends not only on the quality of ink on paper but also proper pre-press operation, state of the machine, accurate registration and the kind of finishing operation used.

Table 4.7		
<i>Print quality abroad and in Ghana</i>		
Quality concerns	Frequency (N = 16)	Percent (100%)
Abroad is of significantly higher quality than in Ghana	12	75.0

Abroad is of slightly higher quality than in Ghana	3	18.75
Abroad is of same quality as in Ghana	1	6.25
Ghana is of slightly higher quality than Abroad	0	0
Ghana is of significantly higher quality than Abroad	0	0
Total	16	100.0

Source: Field data

It can be deduced from table 4.7 that, 75% of the respondents believe printing abroad is of significantly higher quality than in Ghana. Also, 18.75% were of the view that printing abroad is of slightly higher quality than in Ghana whilst 6.25% also is of the view that abroad is of the same quality as in Ghana. None of the respondents responded to the statement that Ghana is of slightly and significantly higher quality than Abroad.



4.5. Things publishers consider when printing offshore

Printing outside the shores of a country obviously may have challenges just like any other entity. Some of the reasons stated are as follows:

18 _____

16

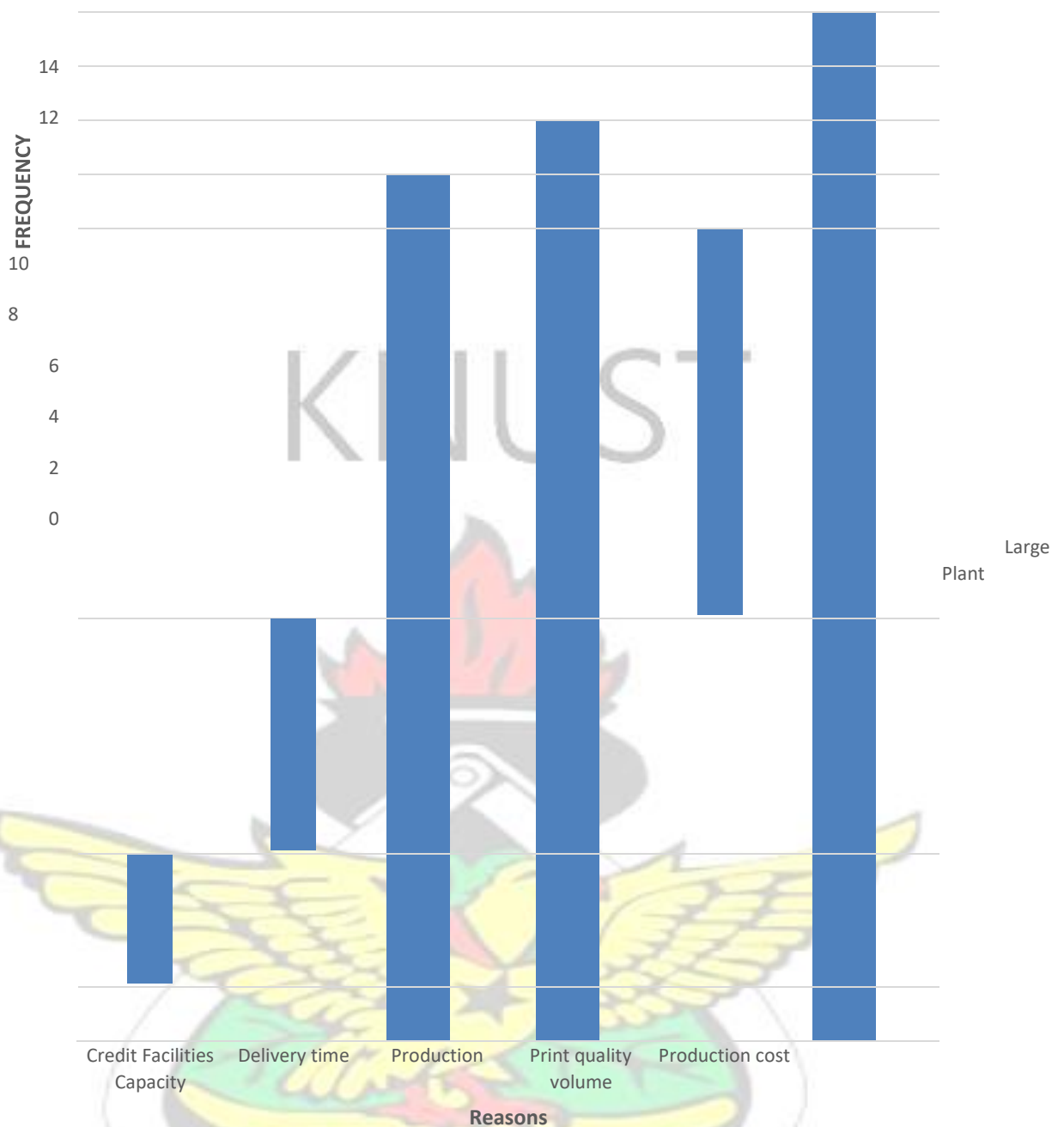


Figure 4.9: Things publishers consider when printing offshore

There is the availability of highly sophisticated machines that can perform a given task within a short period abroad, however, in Ghana majority of the work is done manually. From figure 4.8, five (5) representing 31.25% said large plant capacity is a good reason to consider printing offshore. The ability for a publisher to get a percentage of his/her work printed on credit is a considerable factor when deciding which Printing house to send the work. From the figure 4.8, nine (9) representing 56.25% also consider credit facility

when considering printing offshore at the expense of the local Printing industry.

In the field of printing, time is an essential resource. Majority of the respondents are into educational materials namely; textbooks, supplementary readers, and colour picture books. The educational market is seasonal, especially at its peak at the beginning (re-opening) of every first term for schools. The market is timely and publishers expect their works to be printed and delivered on time. From the chart, ten (10) of the respondents representing 62.5% also consider delivery time in order to retain their intended target consumers.

Twelve (12) of the respondents representing 75% print larger quantities which they believe the local Printing houses do not have the materials to meet the volume demanded. From the Publishers who print offshore, fifteen (15) of the respondents representing 93.75% also print offshore with the quest for quality printing of publications. From the data gathered, books printed offshore are of greater quality than those printed in Ghana. The kind of paper(s) used, the binding, the finishing technique, and packaging are some reasons for this choice.

Finally, high cost of doing business in Ghana by publishers is another major factor. All the respondents representing 100% said the cost of production (quotation given) is almost twice or sometimes three times the price lesser when printed offshore.

These reasons given by the respondents are genuine but on the larger scale, it creates an unhealthy competition among competitors (Publishers) in the same field but producing locally, according to the president of GBPA.

4.6 Challenges publishers face when printing locally and offshore

4.6.1 Challenges publishers encounter when printing locally

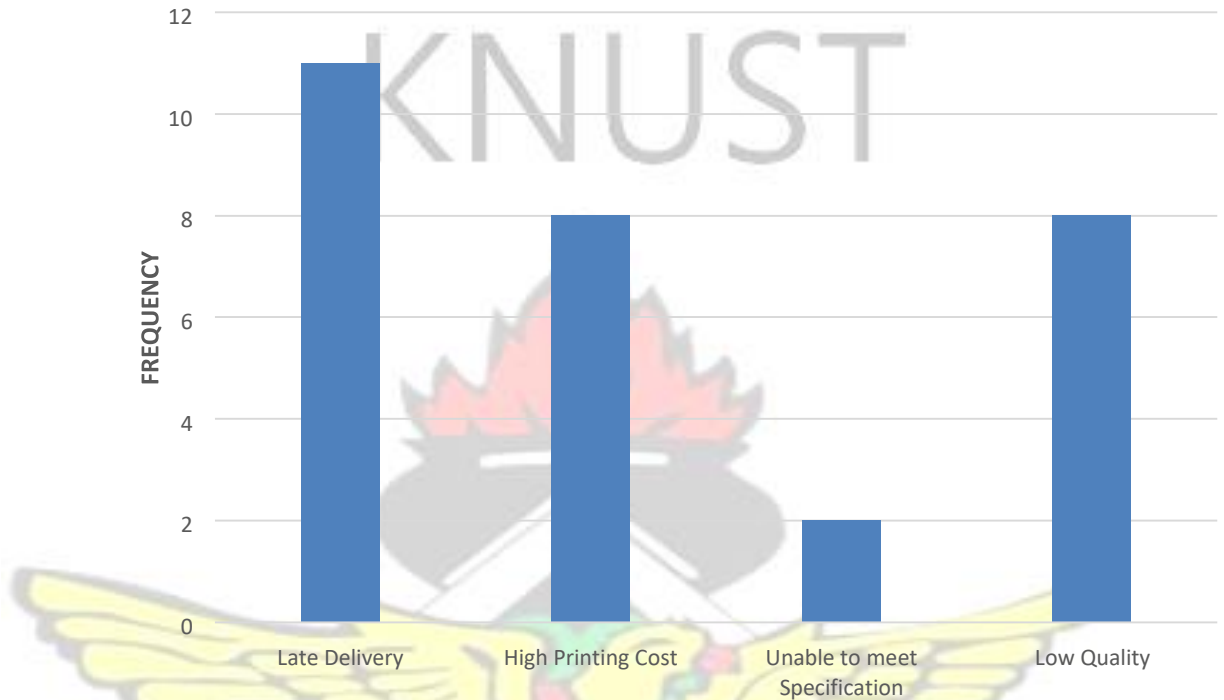


Figure 4.10: Challenges publishers face when printing locally

Source: Field data

From the above, majority (11) of the respondents representing 68.75% complained of late delivery on the part of local printers. High printing cost which is as a result of the cost of raw materials that increases the final printing cost also recorded eight (8) responses representing 50%. Low quality recorded eight (8) responses as well whilst the least recorded challenging factor faced was printers' inability to meet stated specification.

4.6.2 Challenges publishers face when printing offshore

Some publishers said they are forced to send their works abroad because of the challenges they face printing locally. Figure 4.11 shows some challenges publishers face when printing offshore:

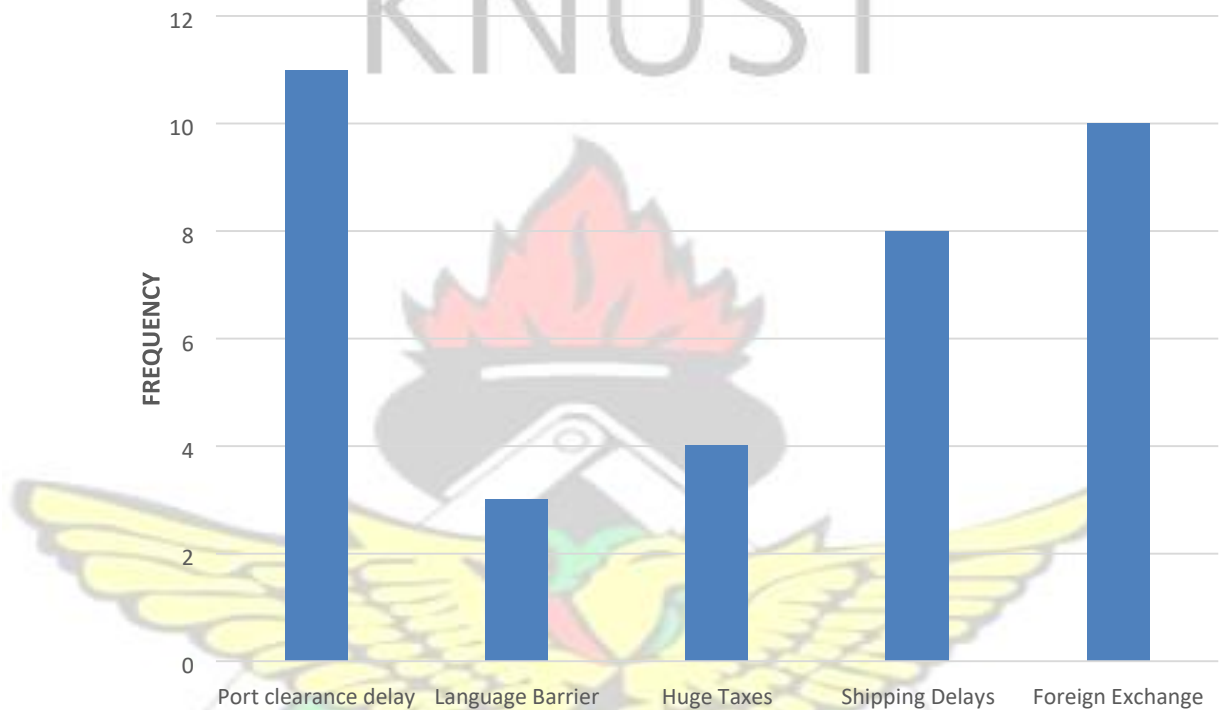


Figure 4.11: Challenges publishers face when printing offshore

Source: Field data

From figure 4.11, port clearance delay representing 68.75% was the major challenge, followed by foreign exchange representing 62.5% and shipping delays 50%. Huge taxes and language barrier recorded 25% and 18.75% respectively.

Figure 4.11 clearly explains that publishers have no challenge with quality of print, cost of production and Damage to goods when they print offshore.

Whilst on the contrary, publishers have challenges with low print quality,

late delivery and printers unable to meet customer specification when they print within the country.

High cost of printing locally against no response to high printing cost offshore implies that pricing is competitive when compared to that of domestic printers. Publishers also having challenges with port clearance delay, language barrier, foreign exchange, and shipping delays is obvious due to distance and transportation offshore.

Ghana is an English-speaking country. There is always a break in communication if the country the printing works are offshored to is not an English-speaking one. Communication would have to be executed effectively through an interpreter and this can lead to breakdown misunderstanding.

When printing firms do not go through the proper process of offshoring, it can lead to product inconsistency. Raw material usage sometimes does not meet the required specification. At least a member should visit the Printing house abroad to check that the right thing is done to come out with the required products.

4.7 Examining the impact of offshore printing on the Printing industry

The study revealed that, offshoring print jobs not only has advantages but also some negative impact on employment, physical growth and skills development of workers in the Ghanaian Printing Industry.

4.7.1 Merits and Demerits of offshore printing

4.7.1.1 Merits of offshore printing

Printing offshore comes with some merits such as cost reduction, improved service, print quality, ability to concentrate on core activities, and others.

From the field work, those who print offshore gave the following merits;

- i. Cheaper cost per book for larger print quantities
- ii. Guaranteed quality print output
- iii. Less time consuming (saves time)
- iv. Ability to concentrate on core activities of business
- v. Cheaper labour cost
- vi. No tax payment on raw materials and tax-free import duties
- vii. Assured delivery time
- viii. Exact specifications are met.

4.7.1.2 Demerits of offshore printing

Offshore printing as stated above has many merits but also has some demerits. The situation has led to most press houses in Ghana retrenching employees, hence leading to an increase in the unemployment rate. Ding (2014), explains that “it deprives the U.S. of jobs, leaves some workers unemployed, and seems to undermine the domestic economy.”

4.7.2 Assessing the impact of offshore printing on the Printing Industry

The emerging and continuous growth of offshore printing has some effects on the Printing industry in Ghana. This practice is rather growing the economy of the offshored country whilst the local industry remains static with little or no growth. The impact cuts across unemployment, job insecurity, reduction of income, slower rate of expansion, willingness of banks to invest, new investors finding the industry unattractive, reduction in the avenue for training

manpower, and others. Figure 4.12 shows the field data collected during the study.

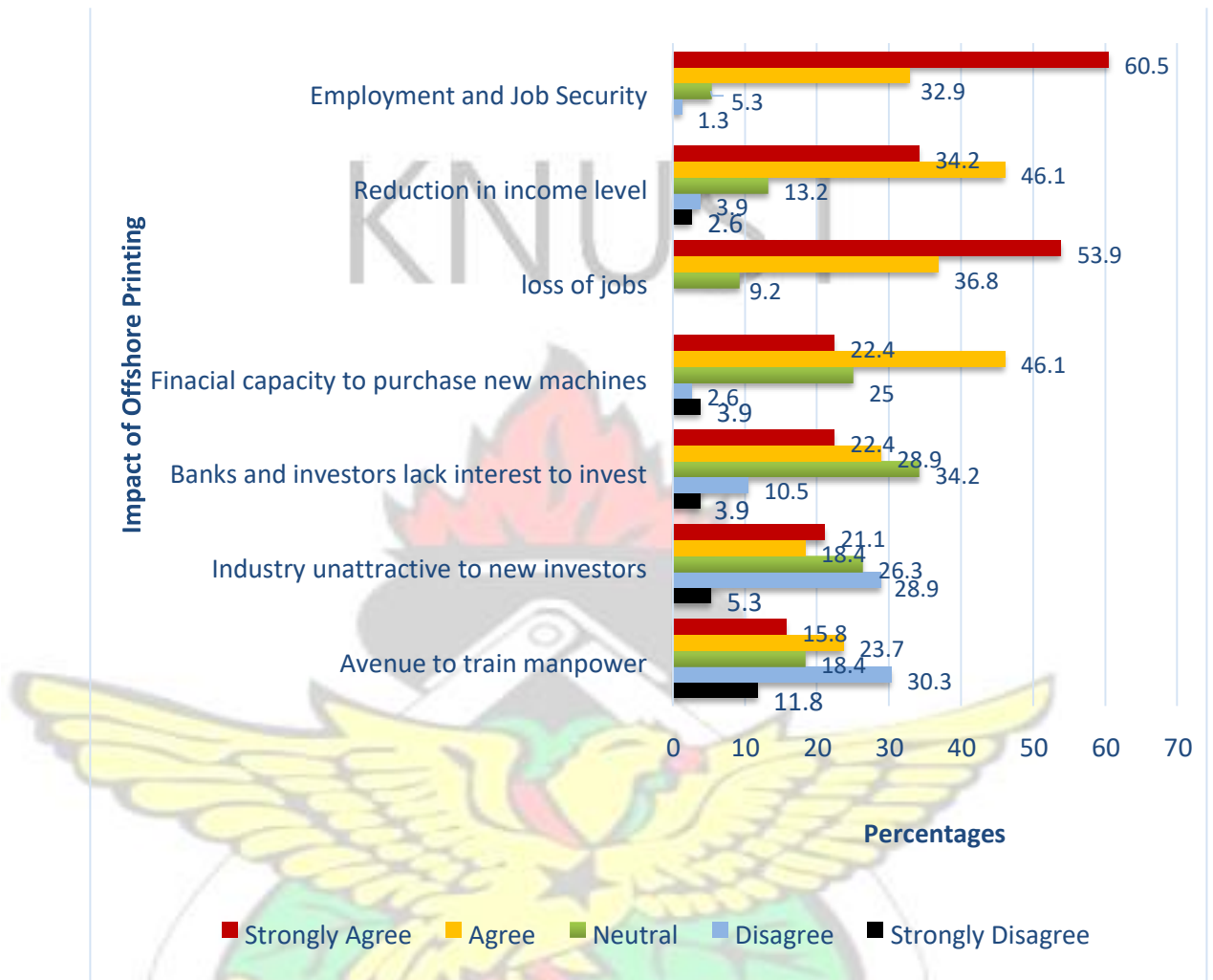


Figure 4.12: Impact of Offshore Printing

Source: Field data

4.7.2.1 Impact on Employment and Job Security

There is an embargo on employment by the government, which is affecting graduates and other persons into the government sector in the country. Some management practices like printing offshore are preventing some Publishing and Printing houses from recruiting new staff. Those employed in these organizations are afraid of losing their jobs due to the fear of job insecurity.

The practice of sending printing works offshore is affecting the printing industry greatly. Therefore, the researcher sought to find out whether

prospective employees get jobs when they come to the Printing houses and whether some employees have lost their jobs.

From figure 4.12 (under employment), majority of the respondents, representing 60.5% strongly agreed with 32.9% agreeing to the fact that, prospective employees with adequate knowledge about the operations in the book industry have remained unemployed. Again, 5.3% out of the total of 76 respondents remained neutral. Only 1 respondent representing 1.3% disagreed whilst no respondent strongly disagreed. Printing houses are willing to employ more hands but do not have the capacity to do so.

As depicted in figure 4.12 (loss of jobs), none of the respondents strongly disagreed or disagreed to the allusion that some employees have lost their jobs due to offshore printing. 9.2% remained neutral whilst 36.8% agree that some employees has lost their jobs because of offshore printing and 53.9% strongly agreed that offshore printing has rendered most employees in the industry jobless. Management usually after offshoring works, later decides to downsize staff whose services are no more needed.

4.7.2.2 Impact on Income Levels of Press Houses

As indicated in figure 4.12 (reduction in the income levels), it was realized during the data collection that, there has been reduction in the income level of some press houses. Responses received showed that, 2(2.6%) respondents strongly disagreed offshore printing leads to the reduction in the income levels with 3(3.9%) also disagreeing, Neutral responses recorded was 10(13.2%). Also, 35(46.1%) respondents representing the majority, agreed that offshore printing reduces income of the local print houses with the second majority of respondents 26(34.2%) respondents strongly agreeing that offshore printing has

contributed greatly to reduction in their income levels , hence, having a ripple effect on the income of the Printing houses.

4.7.2.3 Financial capacity to purchase new machines

The industry today complains of less quality output and in order to achieve better quality output, machines must be in good condition and properly maintained. From the research conducted, as shown in figure 4.12, majority of the Printing houses use old machines as compared to their counterparts abroad.

From figure 4.12 (Financial capacity to purchase new machines), 3.9% strongly disagree that they do not have the financial capacity to purchase new machines, 2.6% disagree, 25% of them were neutral, 46.1% agree that they do not have the financial capacity to purchase new machines and finally, 22.4% strongly agree that they do not have the financial capacity to purchase new machines.

4.7.2.4 Willingness of Banks and Investors to invest in the Printing Industry

Banks and investors mostly feel reluctant to invest in ventures that they feel might not yield enough profit. In view of this, Managers of the Press houses used for the study were requested to indicate if banks are willing to give out loans and investors willing to invest in the printing business.

From figure 4.12 (banks and investors lack interest to invest), 3 out of 76 representing 3.9% strongly disagree that banks are no longer willing to invest their funds into the business due to offshore printing while 8 out of 76 representing 10.5% disagree that the banks are no longer willing to invest their funds into the business due to offshore printing, 26 out of 76 representing 34.2% of them were neutral, 22 out of 76 representing 28.9% agree that banks are no longer willing to invest their funds into the business due to offshore

printing and 17 out of 76 representing 22.4% strongly agree that banks are no longer willing to invest their funds into the business due to offshore printing.

From the table 4.13, four (4) out of seventy-six (76) representing 5.3% strongly disagree that new investors find the industry unattractive to invest their resources because of offshore printing. Also, twenty-two (22) of the respondents representing 28.9% disagree whilst twenty (20) representing 26.3% were neutral. Fourteen (14) representing 18.4% agree and sixteen (16) representing 21.1% strongly agree that new investors find the industry unattractive due to offshore printing. Therefore, majority disagree with the statement that, new investors find the industry unattractive due to offshore printing.

4.7.2.5 The avenue for training manpower in Press houses Press house Managers were asked to indicate their agreement level on declined training avenue of manpower in the press houses. Results are shown in figure 4.12 (avenue to train manpower). From figure 4.12, nine (9) out of seventy-six (76) representing 11.8% strongly disagree that the avenue for training manpower in the presses has declined. Twenty-three (23) representing 30.3% disagree that the avenue for training manpower in the presses has declined, 14 out of 76 representing 18.4% were neutral, 18 out of 76 representing 23.7% agree that the avenue for training manpower in the presses has declined and 12 out of 76 representing 15.8% strongly agree that avenues for training manpower in the presses has declined.

KNUST

4.7.2 Challenges facing the Printing Industry

An interview with the President of GPPCA, Kumasi; revealed that despite the increasing number and growth of the Printing industry today, it faces certain challenges. For a book to be produced in Ghana, the Printing house is required to pay 32.5% tax on inputs. The amount of tax levied on locally produced books automatically increases the cost of production. In addition, the printer like any other manufacturing company pays 17.5% tax to government for the production of textbooks and any other ordinary production. This also ends up increasing the quotation given to customers before production. On the contrary, books printed offshore do not attract taxes but and most of these foreign print houses operate under free zone conditions.

Energy supply is a major setback for printers since most of the printing activities and machinery are power driven. Constant power failure affects and cost the Printing houses to spend huge sums of money on generators. Furthermore, the influx of desktop publishers with little or no training with respect to the Industry, flood the market with substandard products. In addition, machines used by most printers are obsolete and far behind the

trending technology in the world. Lack of qualified personnel to operate the modern machines, constant breakdown of machines and inadequate competent engineers in the country are few of the setbacks.

Finally, some press houses are now adding digital printing machines to the traditional setup to print posters, etc. in order not to lose their customers who wish to print on sticker papers. According to the U.S. Bureau of Labor Statistics (2010), “the print industry will evolve because of the greater use of digital printing and shorter-run print jobs.”

4.8 Measures put in place to mitigate the practice of offshore printing

4.8.1 Ghana Book Publishers Association (GBPA)

From the data collected, it is clear that majority of the publishers representing 80% print some or all of their works offshore. An interview with the President of GBPA, revealed that the association currently does not have any plans in place to reduce or stop members from accessing printing services offshore.

From the interview, publishers mostly print full colour works and their expectation is mostly to get high quality output at lower price quotation, which are usually not met locally. The President indicated that Printing houses in Ghana are far behind technology. That is, comparing them to the Printing houses abroad, most operate with web-to-print, computer-to-press (CTPr) and computer-to-plate (CTP) technology whilst in Ghana, just a few have now adapted to the use of CTP technology with majority still using the computer-to-film (CTF) technology.

According to the President of GBPA, the association would wish that the printers would be able to reduce their cost, upgrade their machines, and pay

attention to security at their various premises in order to get printing works from Publishers and win more government contracts through tenders.

4.8.1.1 Publishing houses stopping offshore printing

The researcher decided to find out whether the respondents who print offshore are willing to stop and print locally. The responses given are illustrated in table 4.8.

Table 4.8 <i>Publishers plans of stopping offshoring in future</i>		
PLANS OF STOPPING OFFSHORING	FREQUENCY	PERCENTAGE (%)
YES	3	18.8
NO	13	81.2
Total	16	100

From table 4.8, four (4) respondents do not print outside Ghana. Thirteen (13) respondents representing 81.2% out of the total who print outside Ghana responded ‘NO’ to whether they have considered stopping offshoring. The remaining three (3) representing 18.8% have plans in place which according to them; they have gone through an evaluation and plan to stop it in the coming years.

4.8.2 Ghana Printers and Paper Converters Association (GPPCA) The data collected indicates that majority of the print houses print their works locally. In an interview with, President of GPPCA, revealed that the association is currently pleading with government to print its entire works locally and give more contracts to them as promised.

From the interview, it was discovered that Printing houses are battling with lot of taxes such as import duties, taxes on raw materials for production (e.g. paper, ink) etc.

4.8.2.1 Technology in use by Printers locally

Due to keen competition in the global world of business, technology keeps changing and it comes with upgrade on old machines. This has led to the invention of much sophisticated equipment for production to meet the required standards in the business market. Organizations are compelled to acquire modern and highly productive machines to meeting the high quality and fast demands of their customers. These also make the Printing Industry competent to stand the competition in the world of business. From the research conducted, Printing houses were asked to find out the kind of technology they use and the responses are given in table 4.9.

	Frequency	Percent	Cumulative Percent
Only Finishing Operations	3	3.9	3.9
Computer-to-Film (CTF)	61	80.3	84.2
Computer-to-Plate (CTP)	12	15.8	100.0
Computer-to-Press (CTPr)	0	0	100.0
Total	76	100.0	

Table 4.9 indicates that none of the respondents used Computer-to-Press technology in their printing operations. Twelve (12) out seventy-six (76) representing 15.8% of the respondents used Computer-to-Plate technology in their printing operations. Also, sixty-one (61) representing 80.3% of the

respondents used Computer-to-Film technology in their printing operations and three (3) of the respondents representing 3.9% did not have printing machines and therefore engaged in only finishing operations.

It can be deduced that just a few Printing houses are using Computer-to-Plate technology, which is not encouraging as compared to that of the fast growing world at large. However, the local Printing industry is not expanding and not abreast with the advanced technology. The implication of this is that, as technology advances, the industry will be incapacitated to catch up and so will eventually become redundant if this practice is not addressed.



CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

5.0 Introduction

This chapter provides the summary, conclusion and recommendations on the findings made in the study.

5.1 Summary of findings

In summary, the data revealed that 60% of the press houses has been in existence for long. 3% and 80% of Printers and Publishers respectively print their jobs offshore. Within the last 6 years (2010-2015), majority representing 56.25% of publishers have shown interest in printing offshore which shows a growth of offshore printing over the period. Thirteen (13) respondents representing 81.2% who print offshore responded 'NO' to whether they have considered stopping offshoring. The remaining three (3) representing 18.8% have plans to stop printing offshore in the coming years.

The study has shown that, printing offshore has some negative impact on the growth, skills development of workers, unemployment rate, redundancy and job insecurity, etc. in the Ghanaian Printing Industry.

5.1 Conclusion

Offshore printing is not a new phenomenon in Ghana and will continue to grow nationwide. There are several factors leading to this rapidly growing trend such as poor print quality, high price quotation, and others. This practice is good for any industry but its adverse effect is that, it negatively affects the local Printing industry in every developing country (such as Ghana).

From the study conducted, it can also be concluded that the Printing industry plays a very important role in the economic development and academic growth in Ghana. Therefore, it is essential for all stakeholders to adopt pragmatic measures to minimize the practice.

In addition, the practice is not helping the local Printing industry to grow and expand its capacity in order to meet international standards. Whether moving printing jobs offshore is good or bad, it is already happening and constantly escalating into volumes of printing jobs being moved abroad (offshore). It can therefore be concluded that, offshore printing is a threat to the growth of the local print industry in Ghana. It is better to find effective ways to mitigate its significant negative impacts now.

5.2 Recommendations

From the study, it is recommended that:

- Government should make a policy that Publishing houses should print all their publications in Ghana to curb offshoring of print jobs and help grow the local Printing industry.
- Government should reduce or remove taxes on raw materials for the Printing industry, to create a healthy and balanced competition on the global market.
- GPPCA should collaborate with the Department of Publishing Studies, KNUST to organize workshops, seminars and conferences to help train

and upgrade skills of the professionals in the industry to meet the growing standards.

- Printing houses should merge in order to increase their capital base.
- Printing houses should invest in advanced technologies and buy new machines to provide good and quality print out to customers' satisfaction.
- GBPA should organize regional Book fair's to help promote reading and encourage more authors to write books.

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APPENDICES

APPENDIX I

QUESTIONNAIRE ON THE IMPACT OF OFFSHORE PRINTING FOR PUBLISHERS

Dear Sir/Madam

The researcher is conducting a study on offshore printing and your company has been randomly selected for the study. This research seeks to find out **the extent to which offshore printing affect the Ghanaian Printing Industry**. All information obtained will be used only for the purpose of the research and held confidentially. In case you need to contact the researcher for any clarification, you can reach him on **0247047853** or email: **yoboadu1.cass@st.knust.edu.gh**.

Thank You.

A. Background Information

1. Name of Company:
Location:
2. Area of Specialization
 - a. Textbook Publishing
 - b. Magazines
 - c. Supplementary readers
 - d. Other, Please specify:.....
3. How long has your company been in existence?

1-3yrs 4- 6yrs 7- 9yrs 10-12yrs above 13yrs

4. What is your Position in the company? Please specify:.....

B. Printing In-house

5. Do you have in-house Press?

a. Yes b. No

6. Do you Print your products in-house?

a. Yes b. No

7. If Yes, how frequently do you print your products in-house?

a. Always b. Often c. Occasionally

C. Outsourcing within the country

8. Do you print your products outside your Publishing house in Ghana?

a. Yes b. No

9. If yes, how often do you print from presses within the country?

a. Always b. Often c. Occasionally

10. What do you consider when outsourcing print from printers within the country?

(Tick those that apply)

a. Print Quality d. Production Volume
(quantity)
b. Pricing e. Large plant capacity
c. Timely delivery f. Credit facilities State other(s):
.....
.....

11. What challenges do you face when printing from other presses in Ghana?

(Tick as many as applicable)

a. Low quality d. Late delivery
b. High printing cost e. Unable to meet material
specification State other(s):
.....
.....

D. Offshore Printing

12. Do you print outside Ghana?

a. Yes b. No

If you answered YES to question 12, please go on and answer 13 to 29, otherwise move on to question 30

13. How often do you print outside Ghana)?

- a. Always
- b. Often
- c. Occasionally

14. What type of print service(s) do you seek offshore? (Check those that apply)

- a. Prepress and Design
- b. Finishing
- c. Printing
- d. Packaging

Other(s), please specify:

.....

.....

15. What type of products do you print offshore? (Tick those that apply)

- a. Colour picture books
- b. Catalogs
- c. Boxes/ bags
- d. Directories
- e. Supplementary readers
- f. Posters
- g. Periodicals
- h. Labels
- i. Magazine
- j. Business Forms
- k. Textbooks

Other(s), please specify:

.....

16. What do you consider when printing offshore? (Tick as many as applicable)

- a. Credit facilities
- b. Print Quality
- c. Delivery time
- d. Production Cost
- e. Production volume
- f. Large plant capacity

State other(s):

.....

.....

17. For how long (in years) have you been printing offshore?

.....

18. Please, tick the year range as applicable

- Before 1998
- 1998 – 2003
- 2004 – 2009
- 2010 – 2015

19. Which country(ies) do you Print from offshore?

- a. China
- b. India
- c. Malaysia
- d. Turkey
- e. UAE

Other(s), please specify:.....

20. What is the average percentage of printing work done offshore within the last decade?

YEARS	2006	2007	2008	2009	2010
PERCENTAGE (%)					
YEARS	2011	2012	2013	2014	2015
PERCENTAGE (%)					

21. On the average, how much does it cost to print offshore?

- a. Below \$100, 000 d. \$500,001 – \$700,000
 b. \$100,000 – \$300,000 e. \$700,001 – \$1,000,000
 c. \$300,001 – \$500,000 f. Above \$1,000,000

Specify Other:

22. On the average, what is the quantity of books printed offshore?

- a. 10,000 – 100,000 d. 300,001 – 400,000
 b. 100,001 – 200,000 e. 400,001 – 500,000
 c. 200,001 – 300,000 f. above 500,000

Specify Other:

23. Is printing offshore profitable than in Ghana?

- a. YES b. NO

24. If yes/no, what is your reason:

.....

25. What challenges do you face when printing offshore? (*Tick as many as applicable*)

- a. Low quality e. Language barrier
 b. High printing cost f. Shipping delay
 c. Huge tax g. Foreign exchange
 b. Damages to goods h. Port clearance delay

State other(s):

.....

26. How would you compare print product quality from Abroad and Ghana?

- a. Abroad is of significantly higher quality than in Ghana
 b. Abroad is of slightly higher quality than in Ghana
 c. Abroad is of same quality as in Ghana
 d. Abroad is of slightly lower quality than in Ghana

e. Abroad is of significantly lower quality than in Ghana

27. On the average, how long does shipping take from Abroad to Ghana port?

a. 1 month b. 3 months c. 4 months d. Other

28. On the average, how long does it take to clear the products from the port?

a. 1 month b. 2 months c. 3 months d. Other

29. Do you have any plans of stopping offshoring?

a. Yes b. No

Why?
.....

Please answer the rest of the questions that follows.

30. If you print in Ghana or Abroad, what percentage do you print in each case?
(Tick only one)

	% in Ghana	% Abroad
a. <input type="checkbox"/>	100	0
b. <input type="checkbox"/>	60	40
c. <input type="checkbox"/>	50	50
d. <input type="checkbox"/>	0	100

Other specify.....

31. Is your company registered with the Ghana Book Publishers Association?

a. Yes b. No

32. Has your company won a government contract within the last decade?

a. Yes b. No

33. If yes, where did you print the products?

a. In Ghana only b. Abroad only c. Both

34. If both, what percentage of your last contract was printed in Ghana and Abroad?

	% in Ghana	% Abroad
a. <input type="checkbox"/>	100	0
b. <input type="checkbox"/>	60	40
c. <input type="checkbox"/>	50	50
d. <input type="checkbox"/>	0	100

Other specify.....

35. Which of the following statements best describes your Publishing house with regard to offshoring? (Check ONE only)

a. We've talked about it, but never seriously considered it

b. We've considered it, evaluated it, and rejected it

- c. It's never even come up for discussion
- d. We've gone through an evaluation and plan to do it in the future

36. If you do not have plans to print offshore, please indicate which of the following reasons apply:

- a. Do not know how to do it
- b. Turnaround times do not allow it
- c. Pricing is not attractive enough to justify additional complexity
- d. Hard to control overseas print process
- e. Quality concerns
- f. Concerns about confidentiality Other(s)

specify:.....

37. Do you have any other comment(s) regarding the effect of offshore Printing on your house or the printing industry?

.....

APPENDIX II

QUESTIONNAIRE ON THE IMPACT OF OFFSHORE PRINTING FOR PRINTERS

Dear Sir/Madam

The researcher is conducting a study on offshore printing and your company has been randomly selected for the study. This research seeks to find out **the extent to which offshore printing affect the Ghanaian Printing Industry**. All information obtained will be used only for the purpose of the research and held confidentially. In case you need to contact the researcher for any clarification, you can reach him on **0247047853** or email: **yoboadu1.cass@st.knust.edu.gh**.

Thank You.

A. Background Information

1. Name _____ of _____ Company:

Location:

2. What kind of Printing services do you offer?

- a. Pre-press Operations
- b. Printing
- c. Finishing
- d. Packaging

Other, Please specify:.....

3. How long has your company been in business?

- 1-3yrs 4- 6yrs 7- 9yrs 10-12yrs above 13yrs

4. How many employees are in your company?

Pre-press: Press:

Post-press: Management:

B. Printing In-house

5. Do you Print your products in-house?

- a. Yes b. No

6. If Yes, how frequently do you print your products in-house?

- a. Always b. Often c. Occasionally

7. Which of these technologies do you use?

- a. Computer to Film
- b. Computer to Plate
- c. Computer to Press

Other, Please specify:.....

C. Outsourcing within the country

8. Do you get printing jobs from Publishers in Ghana?

- a. Yes b. No

9. If Yes, how often?

- a. Always b. Often c. Occasionally

10. If No, what do you think are the reasons why Publishers send their jobs offshore?

(Tick those that apply)

- a. Late delivery
- b. Poor Print Quality (quantity)
- c. Small capacity in Human Resource and machinery State
- d. Higher job quotation
- e. Production volume

other(s):

.....
.....
11. Do you print some of your products outside your press in Ghana?

- a. Yes b. No

12. If yes, how often do you print from other presses within the country?

- a. Always b. Often c. Occasionally

13. Why do you print jobs from other presses within Ghana?
.....
.....

14. What challenges do you face when printing from other presses in Ghana?

(Tick as many as applicable)

- a. Low quality c. Late delivery
b. High printing cost d. Unable to meet material specification
State other(s):
.....
.....

D. Offshore Printing

15. Do you print outside Ghana?

- a. Yes b. No

If you answered YES to question 15, please go on and answer 16 to 30, otherwise move on to question 31.

16. How often do you print outside Ghana?

- a. Always b. Often c. Occasionally

17. What type of print service(s) do you seek offshore? *(Check those that apply)*

- a. Prepress and Design c. Printing
b. Finishing d. Packaging

Other(s), please specify:.....
.....

18. What type of products do you print offshore? *(Tick those that apply)*

- a. Colour picture books g. Periodicals
b. Catalogs h. Labels
c. Boxes/ bags i. Magazine
d. Directories j. Business Forms
e. Supplementary readers k. Textbooks
f. Posters

Other(s), please specify:.....
.....

19. What do you consider when printing offshore? *(Tick as many as applicable)*

- a. Inventory level
 - b. Print Quality
 - c. Delivery time
 - d. Credit facilities
 - e. Production Cost
 - f. Production volume
 - g. Large plant capacity
- State other(s):
-

20. For how long (in years) have you been printing offshore?

.....

21. Please, tick the range of year as applicable (Tick as many as possible)

- Before 1998
- 1998 – 2003
- 2004 – 2009
- 2010 – 2015

22. What is the average percentage of printing work done offshore within the last decade?

YEARS	2006	2007	2008	2009	2010
PERCENTAGE (%)					
YEARS	2011	2012	2013	2014	2015
PERCENTAGE (%)					

23. On the average, how much does it cost to print offshore?

- a. Below \$100, 000
- b. \$100,000 – \$300,000
- c. \$300,001 – \$500,000
- d. \$500,001 – \$700,000
- e. \$700,001 – \$1,000,000
- f. Above \$1,000,000

Specify other:

24. Which country(ies) do you Print from offshore?

- a. China
- b. India
- c. Malaysia
- d. Turkey
- e. UAE

Other(s), please specify:.....

25. Is printing offshore profitable than in Ghana?

- a. YES
- b. NO

26. If yes/no, what is your reason:

.....

.....

27. What challenges do you face when printing offshore? (Tick as many as applicable)

- a. Low quality
- e. Language barrier

- b. High printing cost
- c. Huge tax
- d. Damages to goods
- f. Shipping delay
- g. Foreign exchange
- h. Port clearance delay

State other(s):

.....
 .

28. How would you compare print product quality from Abroad and Ghana?

- a. Abroad is of significantly higher quality than in Ghana
- b. Abroad is of slightly higher quality than in Ghana
- c. Abroad is of same quality as in Ghana
- d. Abroad is of slightly lower quality than in Ghana
- e. Abroad is of significantly lower quality than in Ghana

29. On the average, how long does shipping take from Abroad to Ghana port?

- a. 1 month
- b. 3 months
- c. 4 months
- d. Other

30. On the average, how long does it take to clear the products from the port?

- b. 1 month
- b. 2 months
- c. 3 months
- d. Other

31. Do you have any plans of stopping offshoring?

- c. Yes
- b. No

Why?.....

Please answer the rest of the questions that follows.

32. Do you receive printing jobs from other countries outside Ghana?

- a. YES
- b. NO

33. If yes, which country(ies) is/are they?

.....

34. If you print in Ghana or Abroad, what percentages do you print in each case?

(Tick only one)

- | % in Ghana | % Abroad |
|---------------------------------|----------|
| a. <input type="checkbox"/> 100 | 0 |
| b. <input type="checkbox"/> 60 | 40 |
| c. <input type="checkbox"/> 50 | 50 |
| d. <input type="checkbox"/> 0 | 100 |

Other specify:.....

35. Is your company registered with the Ghana Printers and Paper Converters Association (GPPCA)?

- a. Yes b. No

36. Has your company won a government contract within the last decade?

- a. Yes b. No

37. If yes, where did you print the products?

- a. In Ghana only b. Abroad only c. Both

38. If both, what percentage of your last contract was printed in Ghana and Abroad?

- | | % in Ghana | % Abroad |
|-----------------------------|-------------------|-----------------|
| a. <input type="checkbox"/> | 100 | 0 |
| b. <input type="checkbox"/> | 60 | 40 |
| c. <input type="checkbox"/> | 50 | 50 |
| d. <input type="checkbox"/> | 0 | 100 |

Other specify:.....

39. Do you have an idea about the government printing 60% of all textbooks funded by the Ministry of Education (including donor funding) in Ghana?

- a. Yes b. No

40. Which of the following statements best describes your Printing house with regard to offshoring? (*Check ONE only*)

- a. We've talked about it, but never seriously considered it
 b. We've considered it, evaluated it, and rejected it
 c. It's never even come up for discussion
 d. We've gone through an evaluation and plan to do it in future

41. If you do not have plans to print offshore, please indicate the following reasons which apply:

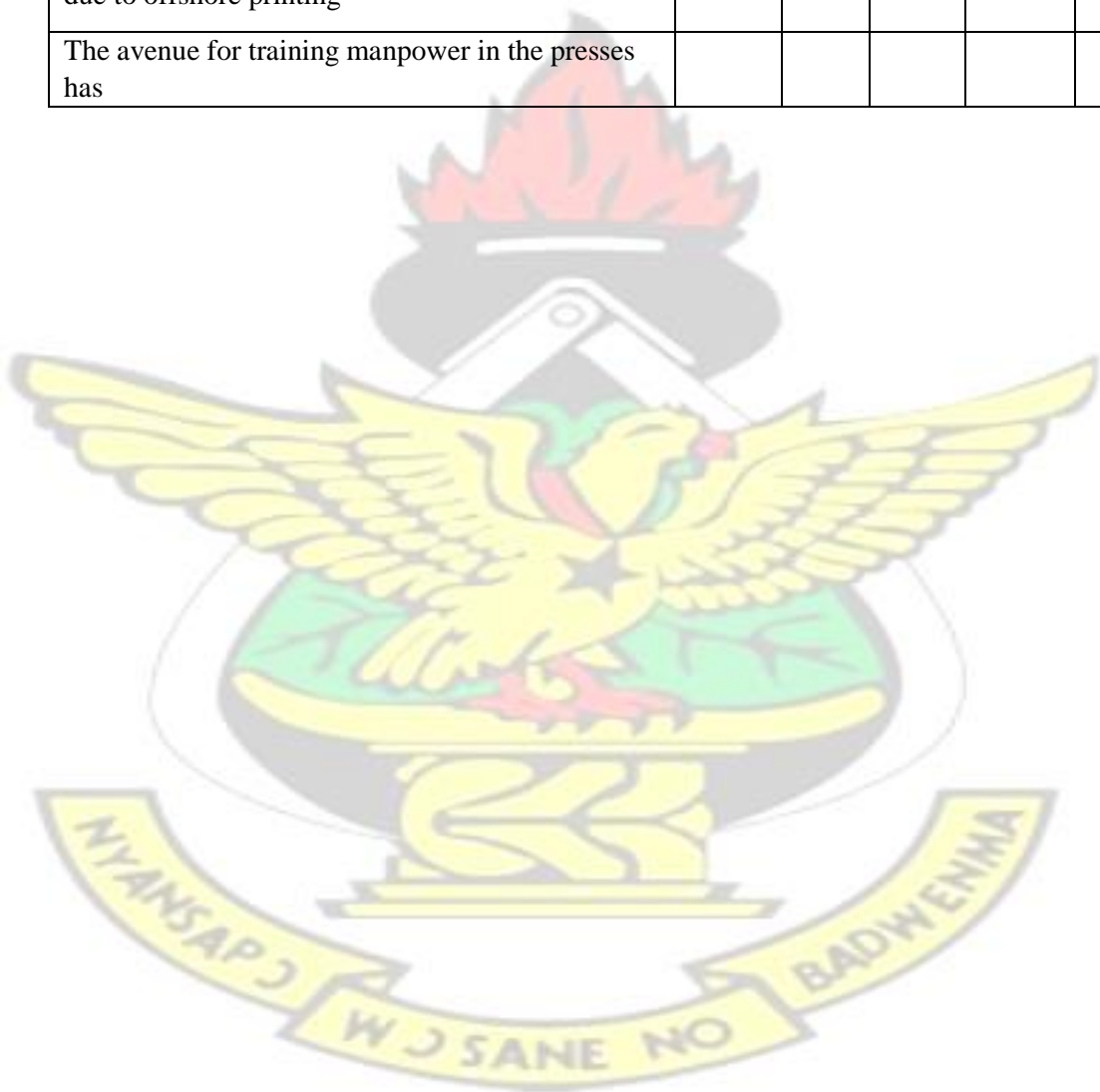
- a. Do not know how to do it
 b. Turnaround times do not allow it
 c. Pricing is not attractive enough to justify additional complexity
 d. Hard to control overseas print process
 e. Quality concerns
 f. Concerns about confidentiality Other(s)

specify:.....

42. The practice of printing offshore is having the following impact on the Printing Industry.

Tick one response to each of the options provided below:

	Strongly	Agree	Neutral	Disagree	Strongly
Prospective employees have remained unemployed					
Some employees have lost their jobs due to offshore					
This practice has brought about a reduction in the income level in your press					
Firms do not have the financial capacity to purchase machines					
Banks are no longer willing to invest their funds into due to offshore printing					
New investors are finding the industry unattractive due to offshore printing					
The avenue for training manpower in the presses has					



Ministry of Education



REPUBLIC OF GHANA

**Textbook Development
&
Distribution Policy
For
Pre-Tertiary Education**

1. SCOPE OF THE TEXTBOOK POLICY

The Textbook Policy specified in this document applies to all textbooks, teacher's guides and associated learning materials (e.g. workbooks), plus supplementary reading materials for PreTertiary i.e. Pre-School, Primary, JHS, SHS and Technical Vocational Institutes (TVI) including Special and Integrated Schools.

Contained in this document comprise the following areas:

- Textbook, teacher's guide and workbook requirements
- Sale of syllabuses
- The Language Policy
- Textbook production in Ghanaian languages
- Textbook writing and publishing
- Testing of manuscripts
- Conflict of Interest
- Submission of proposals for evaluation
- Evaluation of textbook proposals
- Selection and recommendation of textbooks by the ECC
- Selection and ordering of textbooks by schools
- Copyright issues
- Printing and production of textbooks
- Textbook pricing
- Financing of textbooks
- Target book: pupil ratios
- Target book life
- Distribution of textbooks
- Revision of syllabuses and textbooks
- Book conservation, repair and loss and damage
- Supply of books to school and public libraries

14. PRINTING AND PRODUCTION OF TEXTBOOKS

- i. It is an objective of the MoE that local capacity for the printing and binding of textbooks up to the quality standards specified in this policy document should be developed as rapidly as possible. It is, therefore, a target of the current textbook policy that 60% of all textbooks funded by the MoE (including donor funding) should be produced in Ghana.
- ii. The achievement of the production target specified in Section 14 (i), above, depends upon the availability of satisfactory local printing and

binding capacity capable of meeting the specified production standards at prices which are comparable with good international prices (including freight costs) and in conformity with the MoE delivery deadlines. This in turn requires the creation of an operational environment conducive to the development of a high quality and competitive textbook manufacturing capacity inside Ghana.

- iii. The Ghana Book Development Council (GBDC) shall liaise with Ghanaian printers, the MoE and other relevant government ministries to develop a comprehensive strategy and a conducive environment in support of the development of local textbook manufacturing capacity.
- iv. The Ghana Book Development Council shall also co-ordinate an initial survey of local book printers to determine the local capacity required to meet the specified production targets and price competitiveness; and shall repeat this survey on a regular basis as a means of monitoring the development of local printing and production capacity. The GBDC should be provided with the necessary facilities to conduct the survey and will be responsible for recommending strategies to Government to assist in the development of high quality, price competitive, local textbook printing and binding capacity
- v. The MoE recommends that paper and cover card imports for local textbook production should be duty - free on a rebate (duty draw-back) basis.

APPENDIX IV

CALCULATION OF TOTAL SAMPLE SIZE

Formulae: $s = X^2NP(1-P) \div d^2(N-1) + X^2P(1-$

$P)$

Where:

s = Sample Size

X = Confidence Level (99% which is 2.576 according to Z score table)

N = Population Size

P = Population Proportion/ Standard Deviation (assumed to be .50) d =

Degree of Accuracy/ Margin of Error in proportion (0.1 for this study)

Therefore:

$$X= 2.576, \quad N= 502, \quad P= 0.50, \quad d= 0.1$$

$$s = \frac{(2.576)^2 \times (502) \times 0.5(1-0.5)}{(0.1)^2 \times (502-1) + (2.576)^2 \times 0.5(1-0.5)}$$

$$s = \frac{6.635776 \times 502 \times 0.25}{0.01(501) + 6.635776 \times 0.25}$$

$$s = \frac{6.635776 \times 125.5}{5.01 + 1.658944} \quad s = 832.789888$$

$$\frac{6.668944}{s} = 124.875826 \quad s \text{ is approximately } 125$$

Therefore, the total Sample Size is **125**.

APPENDIX V

CALCULATION OF EACH SAMPLE SIZE OF THE ASSOCIATIONS

Formulae: $\frac{\text{Total Sample Size} \times \text{Population of Each}}{\text{Total Population Size}}$

Where:

$$\text{Total Sample Size} = 125$$

$$\text{Total Population Size} = 502 \text{ Population}$$

of Each:

- Publishers Accra (87) =

$$\text{Therefore: } \frac{125 \times 87}{502} = \mathbf{21.66}$$

• Publishers Kumasi (15) =
Therefore: $\frac{125 \times 15}{502} = 3.735$

• Printers Accra (250) =
Therefore: $\frac{125 \times 250}{502} = 62.25$

• Printers Kumasi (150) =
Therefore: $\frac{125 \times 150}{502} = 37.35$

