

New Books

This is the second time that the annual survey maps book distribution in this manner in the new democracies of East and Central Europe and Central Asia. The following section of the questionnaire relates to this issue:

#	Item	Remark
4	New books (№)	№ of new titles in 2000, excluding textbooks.
5	Foreign works (% or №)	From Line 4: titles translated from foreign works.
6	Eastern works (% or №)	From Line 5: Share of titles from other ex-communist countries within all translated works.
7	Copies (№)	Total print run of all books published in 2000, excluding textbooks.
9	ISBN (%)	From 7: Share of copies with ISBN printed on them.
10	Bar coded ISBN (%)	From 7: Share of copies with ISBNs printed as bar codes.

Table 1: Number and structure of new titles

Percentages of sales in 2000 by channels.

	New titles	Foreign works, %	Eastern works, %	Million new copies	ISBN %	Bar code %
ALB	3 010	40	5,0	3	90	3
ARM	850	6	1,0	1	95	0
AZE	762	8	4,0	0	14	0
BOS	620	40	5,0	0	82	48
BUL	5 041	24	17,8	9	75	40
CRO	3 000	25	0,5			70
CZE	10 565	37	0,2	40	92	90
EST	2 890		1,3	4	100	98
GEO	950	3	1,0	1	73	6
HUN	7 409	35	0,4	24	90	20
KYR	463	0	1,0	0	90	
LAT	2 298	33	2,3	5	85	35
LIT	3 183	79	2,7	7	96	15
MAC	536	20		0	100	
POL	14 050	40	3,0	82	99	60
ROM	3 176	24		8	100	25
RUS	50 604	14	0,3	0	95	50
SLK	2 300	80	0,5	9	100	50
SLN	3 577	27	1,0	6	79	
TAJ	261	1		0		
UKR	7 577	5	21,0	27	84	1
YUG	6 845	0	0,02	4	75	30

The next tables present the data of Table 1 along different issues.

Table 2: New titles

RUS	50 604	CRO	3 000
POL	14 050	EST	2 890
CZE	10 565	SLK	2 300
UKR	7 577	LAT	2 298
HUN	7 409	GEO	950
YUG	6 845	ARM	850
BUL	5 041	AZE	762
SLN	3 577	BOS	620
LIT	3 183	MAC	536
ROM	3 176	KYR	463
ALB	3 010	TAJ	261

Ranklist of countries by the number of new titles published in 2000.

The high variance is beyond comprehension. The table proves that the Russian Federation is a separate class of its own. The large number of new titles is not explained by the size of the country only; this is indeed a federation of many republics and cultures.

At the other end of the scale one is confronted with the misery of some newly independent countries, with or without the threats and experiences of civil war.

Table 3: New titles related to the number of inhabitants

EST	2 064	484
SLN	1 789	559
CZE	1 026	975
LAT	958	1 044
LIT	860	1 162
ALB	860	1 163
YUG	835	1 198
HUN	741	1 350
CRO	612	1 633
BUL	607	1 646
average	591	
SLK	426	2 348
POL	364	2 747
RUS	344	2 905
MAC	268	3 731
ARM	243	4 118
average		4 137
AZE	218	4 593
GEO	183	5 474
BOS	163	6 129
UKR	154	6 481
ROM	141	7 084
KYR	99	10 151
TAJ	41	24 521

Number of new titles / million inhabitants (left column); inhabitants / new title (right column).

The two indexes are one another's inversion. On the example of top-ranked Estonia: the column on the left tells that in 2000 over two thousand new titles were published per one million inhabitants; the right column expresses the same ratio in an inverted way: each 484 Estonians shared a new title.

The regional average (arithmetic mean of the 22 states) says that it takes somewhat more than 4000 inhabitants to have a new title. The table demonstrates the efforts that small countries must make in order to maintain a diversity in the offer. But even if less than, or around 1000 citizens are bearing the weight of bringing out a title, compared to the many thousands in big countries, Table 2 above shows the disadvantageous position of the same small countries.

Of course, size is one of the factors only. The small population does not place Kyrgyzstan or Tajikistan on the top of this list. The very high position of Albania is nevertheless noteworthy.

Table 4: Foreign titles

SLK	80
LIT	79
POL	40
ALB	40
BOS	40
CZE	37
HUN	35
LAT	33
SLN	27
average	26
CRO	25
ROM	24
BUL	24
MAC	20
RUS	14
YUG	12
AZE	8
ARM	6
UKR	5
GEO	3
TAJ	1
KYR	0

Percentage of foreign titles (translated from books published abroad) between all titles published in 2000.

Again, we find astonishing differences; it remains to judge whether they reflect factual variance between

Table 5: Eastern titles

UKR	21,0	KYR	1,0
BUL	17,8	GEO	1,0
BOS	5,0	ARM	1,0
ALB	5,0	SLK	0,5
AZE	4,0	CRO	0,5
POL	3,0	HUN	0,4
LIT	2,7	RUS	0,3
LAT	2,3	CZE	0,2
EST	1,3	YUG	0,02
SLN	1,0		

Percentage of titles from another new democracy between all titles published in 2000.

The top position of the Ukraine reflects the need for the more differentiated approach advocated in the previous section. The respondents, who reported 5% for the share of all foreign titles, report that every 5th title published in the country is an adaptation of a

countries, or distances between estimated proportions (in the absence of exact statistics).

26%, the arithmetic mean of the 21 countries in the table roughly corresponds to the aggregate figures: out of a total of 130 thousand new titles appearing in these 21 countries, nearly 31 thousand (23,8%) titles were “foreign” in 2000.

Who is to judge, what is the ideal proportion? Whether the countries around the average values are “right”? (In this case Croatia and Slovenia?) Does the very high figure of Slovakia and Lithuania testify about an open, vigorous book market, having both the psychological and financial preconditions to absorb the offer of the outside world to such an extent? Or the contrary: a signal of vulnerability of the national market? The same questions apply, with opposite loading, to the countries at the low end of the list.

Obviously, in case of the ex-Soviet countries, the role of books in Russian is a key issue, which, therefore requires a more differentiated approach to the notion of “foreign”. Obviously, if a country can afford to publish a few hundred titles only in the national language, this small number will be dominated by national authors; for a considerable time Russian (and English) seem to remain the major vehicles of works written in all other parts of the world.

foreign title. One possible explanation is that the 5% above refers to titles translated from other than Ukrainian and Russian.

The lower part of the list brutally testifies about the situation. In some countries one can argue that a part of the public reads books in the closest Slavic languages – which of course needs confirmation – thus translation is not required. However, the 0,4% in Hungary means that one out of 250 new titles comes from another former member of “the socialist camp”. This table is a sad indication of a uni-polar, almost one-dimensional world. Most of these nations suffer from symptoms of being addicted to curiosity, respect, sympathy, solidarity etc coming from the outside world. Now how to expect all this, if so little is done in exchange?

Table 6: Million copies

RUS	326,7	YUG	4,4
POL	81,5	EST	4,0
CZE	40,0	ALB	2,6
UKR	26,5	ARM	0,6
HUN	24,3	GEO	0,5
SLK	9,3	MAC	0,5
BUL	9,0	AZE	0,4
ROM	8,5	BOS	0,4
LIT	7,2	KYR	0,4
SLN	6,0	TAJ	0,3
LAT	5,5		

Million new copies, published in 2000.

The ranking of the 21 countries reflects certain correlation with their sizes and GDP.

Table 7: New copies per inhabitant

CZE	3,9	UKR	0,5
SLN	3,0	ROM	0,4
EST	2,9	YUG	0,4
HUN	2,4	MAC	0,2
LAT	2,3	ARM	0,2
RUS	2,2	AZE	0,1
POL	2,1	BOS	0,1
LIT	2,0	GEO	0,1
SLK	1,7	KYR	0,1
BUL	1,1	TAJ	0,1
ALB	0,7		

The reader is reminded that the number of copies *bought* per inhabitant may be different. Quite normally, not every single published copy gets sold (unsold percentage may be estimated as high as 20-30% even on the national level). On the other hand, the amount of copies sold in the given year is increased by sales from earlier stock and by imported items.

The arithmetic mean of the table is 1,3 copies per inhabitant. The actual average is more favourable: the altogether 559 million copies divided by the 324 million inhabitants in these 21 countries result 1,6 new copies per inhabitant.

New copies published in 2000, per inhabitant.

In this table the low Romanian figure raises doubts – see for example the data from 1994 in the next table.

Table 8: 1994 versus 2000

	new titles			million copies		new copies per capita		
	1994	2000	2000 /1994	1994	2000	1994	2000	2000 /1994
ALB	365	3 010	8,2	0,7	2,6	0,2	0,7	3,6
ARM	260	850	3,3	1,8	0,6	0,5	0,2	0,3
BUL	5 925	5 041	0,9	43,0	9,0	5,2	1,1	0,2
EST	2 291	2 890	1,3	8,6	4,0	6,1	2,9	0,5
GEO	350	950	2,7	2,4	0,5	0,5	0,1	0,2
HUN	9 383	7 409	0,8	70,0	24,3	7,0	2,4	0,3
KYR	328	463	1,4	1,9	0,4	0,4	0,1	0,2
LAT	1 677	2 298	1,4	10,8	5,5	4,5	2,3	0,5
LIT	2 885	3 183	1,1	10,6	7,2	2,9	2,0	0,7
POL	11 200	14 050	1,3	102,0	81,5	2,6	2,1	0,8
ROM	3 700	3 176	0,9	48,0	8,5	2,1	0,4	0,2
RUS	30 390	50 604	1,7	562,0	326,7	3,8	2,2	0,6
UKR	4 752	7 577	1,6	52,0	26,5	1,1	0,5	0,5

The OSI Book Sector Surveys provide comparative data from 13 countries with regard to 1994 and 2000. Albania is the only country that shows considerable progress in each of the three aspects compared: this fact corroborates our knowledge about the depths from which this country had to get out in the past ten years.

The stable increase of the scope of new titles in ten countries is an indication of ongoing consolidation of the book sector. Book markets in Bulgaria, Hungary and Romania witnessed sudden growth in the 1990s, after the disappearance of ideological and infrastructural limitations, and appear to have reached a point of saturation – one wonders whether lasting of temporary.

The high print-runs in 1994 responded to the thirst for new kinds of publications, experienced in that period. Decrease was predictable, not perhaps to the extent that is demonstrated in the table. In half of the countries the total output fell to less than half in six years.

Combining the two aspects – number of titles and of copies, Poland has shown the highest level of stability over the span of the past 6 years. Similarly balanced are the figures of Russia and Lithuania.

Cost Structure of Academic Books

This is the fifth time that the survey inquires about the costs of producing academic books in the ex-totalitarian countries of East and Central Europe and Central Asia. The issue was covered by the following questions:

#	Item	Remark
23	Price of academic books (\$)	Average 250-page paperback on a social science subject.
24	Paper (%)	Questions 24-33 analyze structure of Line 23: price of academic books in 2000. Beside paper, this line includes all materials: ink, glue etc.
25	Printing and binding (%)	
26	Authors' fees, royalties (%)	Including all kinds of copyright, e.g. for illustration.
27	Publisher's expenses (%)	Publisher's expenses in addition to specific costs covered separately, e.g. marketing. Includes general overhead costs of publisher ('Regie'). Indicate, if transport costs are borne by publisher.
28	Publisher's marketing expenses (%)	E.g. advertisements.
29	Publisher's profit (%)	
30	Wholesaler/distributor (%)	This line has sense only if a significant part, e.g. at least 1/3 of copies are sold via a wholesaler or distributor. Indicate if transport costs are borne by distributor.
31	Bookshop (%)	
32	Other, if any (%)	Please, specify.
33	VAT or sales tax (%)	Note that lines 24-33 should add up to 100%. If not, please re-calculate accordingly.

The double dilemmas of lack of data and difficulty of defining what 'average' is, prevailed at this part of the survey as well. The editors of the questions can help overcome these barriers; it can be established that this endeavour led to partial success only, although questions on cost structure have been asked in the surveys since 1996. On the basis of previous surveys, the questionnaire on 2000 had become more complex, thus more difficult to complete. The number of corrections and additional clarifications is therefore even higher than earlier. For most respondents it was rather difficult to relate various percentages to the 100% total of the full retail price of a book. (E.g. if one hears that "the author gets 10%", this usually refers to 10% of the net revenue of the publisher, and depending on the booksellers' share and eventual VAT, the author may easily end up with 5% of the retail price indeed.)

The issue of VAT is really a special problem, therefore the responses were analysed both with or without VAT.

Russia will not be singled out when the extremes of the following tables are discussed; indeed, this country shows the most balance record, its figures being always in the neighbourhood of the average.