

The Book Sector in 2000 in Eastern Europe and Central Asia

The surveys, conducted by the Open Society Institute with regard to the calendar years 1995, 1996, 1998, 1999 & 2000, are a unique source of information on the book sector in the countries of east central Europe and Central Asia. The information was collected with an active cooperation of Soros Foundations in these countries. The methodology is as simple as possible, in order that it could cover such a huge geographical and contents area and be repeated year after year: one questionnaire per country is responded, with the involvement of experts and practitioners of the respective fields. (See list of respondents.)

The fifth survey covered the state of the book sector in the year of 2000.

The preparation and administration of the surveys has taken considerable efforts on behalf of the OSI Center for Publishing Development since 1995. Initially, little energy was left for the analysis of the data. This fifth round has been given the greatest amount of follow-up, which also highlighted certain difficulties and shortcomings of the surveys.

All through the survey two conditions were repeated again and again, both by those, who asked, and those, who responded. One thing is the often total absence of reliable statistics, the other is the difficulty of defining the indeed non-existent "average", the typical. However, it is exactly these circumstances, which make the estimations valuable - especially if they are authentic, coming from professional sources. Some of the respondents have gone through a special kind of "in-service training" by having participated in the survey for a number of occasions.

A special difficulty was created by the very large scope of the survey. Few experts could cover all areas, even by reaching out for additional sources.

Considering all circumstances, it is still astonishing that information is so difficult to gather in most of the countries. Also, that in spite of the experience accumulated during the long years since the first OSI book sector survey was launched, often basic categories are extremely difficult to use. Since this survey does not cover western countries, where the book sector has always been an integral part of market economy, we can only guess that in those places the questions relating to cost analysis or sales figures would create less confusion than what we experienced with our questionnaire. The mission, therefore, of the survey is not only in communicating the *answers* (the collected data), but also in bringing home the relevance of the *questions*. Without clear notions of the economic and financial characteristics and dimensions of the book sector, its social and cultural impact is less likely to keep momentum.

The processing of the data needed a lot of guesswork, in quite many cases interpretative autonomous decisions, since chances for feedback were rather limited. Of course the original responses are carefully kept and open for consultation. The greatest absurdities were weeded out. However, quite a few unrealistic estimates have been left in the tables, when they nevertheless convincingly express tendencies.

In spite of all these difficulties and doubts, we are convinced about the necessity to go along and continue this iterative process, which – we very much believe – besides the provision of information, is an important learning process as well for the sectors in these countries. Especially if the comparative data are studied, discussed and contested by many sides, within and outside of the countries concerned.

The findings are presented in the next nine chapters.

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.

Table 9: Composition of the price of academic books without VAT

Costs of an average academic book in 2000, expressed in percentages of retail price, VAT and sales tax disregarded.

	production		author	publisher			distribution		total
	paper	print & bind		general	marketing	profit	wholesale	bookshop	
ALB	23	13	13	6	1	13	6	25	100
ARM	21	33	8	21	0	0	0	17	100
AZE	31	15	19	0	0	23	0	13	100
BOS	12	24	11	15	3	5	10	20	100
BUL	29	16	15	7	4	7	4	19	100
CRO	5	10	10	25	5	20	0	25	100
CZE	13	17	9	18	1	9	8	25	100
EST	16	32	5	7	3	0	11	26	100
GEO	10	25	10	3	2	20	10	20	100
HUN	24	14	7	6	2	8	9	30	100
KYR	15	26	7	21	3	12	0	15	100
LAT	11	18	31	12	3	16	8	0	100
LIT	20	25	10	12	3	10	0	20	100
POL	15	15	10	20	0	0	15	25	100
ROM		25	9	23	3	7	0	33	100
RUS	15	22	5	16	4	5	0	33	100
SLK	4	18	11	6	6	11	14	31	100
TAJ	35	18	7	12	5	5	9	9	100
UKR	15	18	3	14	3	12	15	20	100
YUG	9	12	24	6	2	22	0	24	100
average	16,2	19,7	11,2	12,5	2,6	10,3	5,9	21,5	100

All figures have been rounded up to full numbers. In a number of cases the original figures have been adjusted so that the 100% was reached. Where “from-to” scopes were given, the middle values have been taken. The few countries in *italics* are those, where no adjustment whatsoever has been made. The averages are simple arithmetic means of the 19 countries, without any weight applied.

Table 10: Production costs

ARM	54
TAJ	53
EST	47
AZE	46
LIT	45
BUL	44
KYR	41
HUN	38
RUS	37
BOS	36
average	35,9
ALB	35
GEO	35
UKR	33
CZE	30
POL	30
LAT	29
ROM	25
SLK	22
YUG	21
CRO	15

Percentage costs of paper and other material as well as printing and binding expenses in net retail price, VAT and sales tax disregarded.

The share of production costs relates to the general level of ‘development’ of the book sector; the more advanced the sector and the economic environment, the lower the relative cost of producing a book. Our rank list tends to support this.

The unusual position of Estonia and Lithuania needs further inquiry; the small size of the market is a partial response only. We cannot give a ‘historical’ explanation based on earlier data, as these two countries were missing from previous surveys. (Their neighbour, Latvia, too, reported a relatively high rate of 37% for 1999, however, the figure has since dropped almost 10 percentage points.)

In 1996, 14 countries replied to a slightly simpler set of questions (average production cost: 40,7%). They were 20 in 1999, almost half of them from CIS, averaging 44,4%.

Table 11: Publisher's costs and revenue

CRO	50
KYR	36
ROM	33
LAT	32
YUG	30
UKR	29
CZE	28
average	25,4
GEO	25
LIT	25
RUS	25
AZE	23
BOS	23
SLK	22
TAJ	22
ARM	21
ALB	20
POL	20
BUL	19
HUN	16
EST	11

Percentage costs of general and marketing expenses as well as profit of the publisher in net retail price, VAT and sales tax disregarded.

This question appeared in this tri-furcate way for the first time. In 1996 and 1999 the publisher's share only was asked (averaging 20,8 and 14,7% respectively).

Table 12: Distribution costs

SLK	44
POL	40
HUN	39
EST	37
UKR	35
CZE	33
ROM	33
RUS	33
ALB	32
BOS	30
GEO	30
average	27,4
CRO	25
YUG	24
BUL	22
LIT	20
TAJ	19
ARM	17
KYR	15
AZE	13
LAT	8

Percentage of wholesale and retail discount in net retail price, VAT and sales tax disregarded.

This indicator behaves in the opposite way as production costs, the more developed the environment is, the more must be spent on distribution.

Averages from previous years: 30,3% in 1996 and 27,8% in 1999; going against expectations. In reality, share distributions costs are bound to go higher.

Table 13: Composition of the price of an average academic book with VAT

	production		author	publisher			distribution		tax	total
	paper	print & bind		general	marketing	profit	wholesale	bookshop		
<i>ALB</i>	18	10	10	5	1	10	5	20	20	100
ARM	21	33	8	21	0	0	0	17	0	100
<i>AZE</i>	25	12	15	0	0	18	0	10	20	100
BOS	15	15	10	20	0	0	15	25	0	100
BUL	25	13	13	6	3	6	3	16	14	100
<i>CRO</i>	5	10	10	25	5	20	0	25	0	100
CZE	12	16	9	17	1	9	8	24	5	100
<i>EST</i>	15	30	5	7	3	0	10	25	5	100
<i>GEO</i>	10	25	10	3	2	20	10	20	0	100
HUN	21	13	6	5	2	7	8	27	11	100
KYR	12	20	6	16	2	10	0	12	20	100
LAT	11	18	31	12	3	16	8	0	0	100
<i>LIT</i>	20	25	10	12	3	10	0	20	0	100
<i>POL</i>	15	15	10	20	0	0	15	25	0	100
ROM		25	9	18	3	14	0	32	0	100
<i>RUS</i>	15	22	5	16	4	5	0	33	0	100
SLK	4	16	10	5	5	10	13	28	10	100
TAJ	35	18	7	12	5	5	9	9	0	100
UKR	15	18	3	14	3	12	15	20	0	100
<i>YUG</i>	8	10	20	5	2	19		20	17	100
average	16,4	17,0	10,3	12,0	2,3	9,5	5,9	18,7	6,2	100

Percentages of net retail price, VAT and sales tax included.

When people in business speak of prices, they usually mean net amount, i.e. without VAT, since in most cases VAT is refunded to them. For the public, however, VAT is also part of the price of a book (or any other commodity).

Again, *italics* mark countries, where all data in the table come from the questionnaire without any adjustment or rounding. Half of the 18 countries are subject to VAT, in Kyrgyzstan it is topped with sales tax as well. Note, that VAT, like all other components, is calculated from top down: this is how the 20% VAT + 5% sales tax becomes 20.49% of the Kyrgyz total.

Table 14: Production costs

ARM	54	UKR	33
TAJ	53	BOS	30
EST	45	POL	30
LIT	45	CZE	29
BUL	38	LAT	29
<i>AZE</i>	37	ALB	28
RUS	37	ROM	25
GEO	35	SLK	20
HUN	34	YUG	18
average	33,4	CRO	15
KYR	33		

Percentage costs of paper and other material as well as printing and binding expenses in net retail price, VAT and sales tax included.

The additional tax burden of 20% is considerable, which is seen in the position of the hardest hit three countries: Albania, Azerbaijan and Kyrgyzstan, where the relative weight of printing cost became smaller as compared to Table 2.

Table 15: Publisher's costs and revenue

CRO	50	TAJ	22
ROM	34	ARM	21
LAT	32	SLK	20
UKR	29	POL	20
KYR	29	BOS	20
CZE	27	AZE	18
YUG	25	BUL	16
RUS	25	ALB	16
LIT	25	HUN	14
GEO	25	EST	10
average	23,8		

Percentage costs of general and marketing expenses as well as profit of the publisher in net retail price, VAT and sales tax included.

Happy Croatia. Unless the respondent has been misled, about half of the price of a book gets to the publisher, a nice chunk of which is profit. From many points of view Croatia and Estonia appear to be two comparable societies: if this is so, their extreme positions in this table need a lot of explanation.

Table 16: Distribution costs

SLK	40	CRO	25
POL	40	ALB	25
BOS	40	YUG	20
UKR	35	LIT	20
HUN	35	TAJ	19
EST	35	BUL	19
RUS	33	ARM	17
ROM	32	KYR	12
CZE	31	AZE	10
GEO	30	LAT	8
average	26,3		

Percentage of wholesale and retail discount in net retail price, VAT and sales tax included.

With the tax burden added, the booksellers in Albania, Kyrgyzstan and Azerbaijan get even less of their meagre share of the price of books.

Sales

The following section of the questionnaire relates to the amount of sales in 2000:

#	Item	Remark
14	Sales (\$)	Total turnover of book market in 2000, accumulated net sales (without VAT or sales tax), of all categories covered in Questions 15-18. In some countries the statistical offices, in others tax authorities, yet in others publishers' associations can give or estimate the answers to this and the following questions.
15	Domestic books (%)	Questions 15-18 cover sales structure, composition of total turnover (Line 14) in 2000. Question 15 refers to share of books published by publishers of your country.
16	Imported books (%)	Share of books published abroad. Note! This is different from Lines 5 and 8, (books published in your country, only written or printed abroad) which are both included in Line 4.
17	Textbooks (%)	Share of textbooks in total sales.
18	Other (%)	Share of other items (if any). Note that Questions 15-18 are about the book market in your country, therefore only items closely related to books, or further special categories of books should be mentioned here. Incomes of publishers from other commodities, e.g. periodicals, calendars, recorded music etc. should not be included. Second-hand book-shops should also be disregarded. Note also that your 4 answers to Questions 15-18 should add up to 100 %.
19	Digital books (%)	From Line 14: Share of income for "books" sold in digital (electronic) form (e.g. CD-ROM) within total turnover in 2000, in the four categories of Questions 15-18 taken together.
20	Exports (\$)	Turnover from exporting books in 2000. This is an addition to 14, sales inside your country.

Table 17: Amount and structure of book sales in 2000

	Sales, million \$	Domestic %	Imported %	Textbook %	Other %	Digital %	Export million \$
ALB	5,6	59,0	5,0	36,0	0,0	0,0	0,43
ARM	0,2	93,0	6,0	1,5	1,0	1,0	0,50
AZE	2,0	30,0	20,0	50,0	0,0	0,0	0,00
BOS	2,2	35,0	28,0	32,0	5,0		0,18
BUL	7,3	95,0	4,0	62,5		0,4	0,07
CRO				70,0			
CZE	100,0	90,0	10,0	15,0			30,00
EST	20,0	20,0	7,0	30,0	43,0		
GEO	20,0	5,0	15,0	80,0	0,0	0,0	0,00
HUN	143,1	59,7	7,5	27,8		5	21,86
KYR	1,4	11,0	67,0	19,0	3,0	3,0	0,00
LAT	77,1	78,0		34,1			
LIT	30,0	97,0	3,0	10,0			
MAC	1,2						0,11
POL	42,6	62,0	8,0	30,0		6,0	2,28
ROM	30,7	97,0	3,0	30,5			
RUS	625,0	59,0	10,0	30,0	1,0	1,0	115,00
SLK	32,5	67,1	32,9	32,9		0,0	
SLN	16,8						0,64
TAJ	1,2	53,0	45,0	2,0			
UKR	100,0	10,0	75,0	15,0		0,1	
YUG		45,0	5,0	50,0	0,0	0,0	

Table 18: Sales

RUS	625,0
HUN	143,1
CZE	100,0
UKR	100,0
LAT	77,1
POL	42,6
SLK	32,5
ROM	30,7
LIT	30,0
EST	20,0
GEO	20,0
SLN	16,8
BUL	7,3
ALB	5,6
BOS	2,2
AZE	2,0
KYR	1,4
TAJ	1,2
MAC	1,2
ARM	0,2

Total turnover of the book market in 2000, accumulated net sales (without VAT or sales tax), of all categories, in million US dollars.

Top seeded Russia produced a turnover that equals the total sum of the remaining 19 countries in the table.

The second position of Hungary is an embarrassment, especially the nearly 50% margin over Czechs and Ukraine, while Poland remaining below with 300% is simply against common sense (the ratio of new copies was about the same rate, in opposite order!). The Hungarian figure, nevertheless, has been double-checked, which raises doubts about the over-modest Polish estimate.

The approximation for Georgia apparently suffers from the opposite, being overcharged.

Table 19: Per capita sales

LAT	32,1
HUN	14,3
EST	14,3
CZE	9,7
SLN	8,4
LIT	8,1
SLK	6,0
RUS	4,3
GEO	3,9
UKR	2,0
ALB	1,6
ROM	1,4
POL	1,1
BUL	0,9
BOS	0,6
MAC	0,6
AZE	0,6
KYR	0,3
TAJ	0,2
ARM	0,05

Ranklist of countries by book sales per inhabitant in 2000, in US dollars.

The table confirms that data from a few countries must be put between brackets, e.g. Georgia and Poland.

The arithmetic mean is \$5,5 per capita. However, by dividing the total sum of 1,2 milliard dollars by the 333 million inhabitants in these 20 countries, we arrive at a more realistic figure of \$3,8: this is the amount the book sector collected from the average citizen. (Since the situation is observed from the point of view of the sector, net figures are used. In countries where VAT or other sales tax applies, the average per inhabitant is increased by those amounts.)

Table 20: Copies sold per capita

LAT	10,71
HUN	6,36
SLN	4,67
EST	2,86
RUS	2,36
SLK	2,15
LIT	1,40
CZE	0,78
BOS	0,59
ALB	0,49
GEO	0,43
AZE	0,32
ROM	0,22
MAC	0,15
UKR	0,15
BUL	0,08
TAJ	0,04
ARM	0,03

The short title of this table may be misleading. No data were collected about the number of copies sold. The table contains a composite index of the following data: per capita sales and average book price in 2000. The figures express the number of average priced new books that an average citizen could purchase. By the Latvian example: \$3 was reported as the average book price in 2000; the \$32,14 per capita sales equal 10,71 such copies. If all constituent figures are approximately right, the actual number of copies bought by each Latvian inhabitant should be around this high figure of ten.

Table 21: Foreign books

UKR	75,0
KYR	67,0
TAJ	45,0
SLK	32,9
BOS	28,0
AZE	20,0
GEO	15,0
CZE	10,0
RUS	10,0
POL	8,0
HUN	7,5
EST	7,0
ARM	6,0
ALB	5,0
YUG	5,0
BUL	4,0
LIT	3,0
ROM	3,0

Percentage of books published abroad within the sales of 2000. Those, who responded correctly, gave (or estimated) the share of books with another country's ISBN.

No matter how shocking they are, these figure seem realistic. Book markets in a number of ex-USSR countries are still dominated by books in Russian and from Russia.

The high figures of Slovakia and Czech Republic are also partly due to the survival of links between the twin markets of the defunct CSSR. Bosnia-Herzegovina is an important market for the neighbouring ex-Yugoslav republics.

The 10% given for Russia is more difficult to explain. If the estimate is correct, this figure is a proof of the massive efforts of this nation to absorb information and values from the outside world, especially the West.

Table 22: Digital books

POL	6,0
HUN	5,0
KYR	3,0
ARM	1,0
RUS	1,0
BUL	0,4
UKR	0,1

Share of income for "books" sold in digital (electronic) form (e.g. CD-ROM) within total turnover in 2000. Very few countries ventured to give some figure to this question. The familiar problem is that most of these books go in couples: a printed volume accompanied by a CD and vice versa. (Which is a familiar challenge to tax collectors in countries where the two carry different VAT rates.)

One cannot infer very much from these few figures. This table should serve as an invitation so that next time more exact data should flow in about more national markets. Without knowing the order of size, no strategy can be developed.

Table 23: Sales abroad

	Export million \$	Export within sales, %
CZE	30,00	30,0
RUS	115,00	18,4
HUN	21,86	15,2
BUL	0,90	12,2
MAC	0,11	8,8
BOS	0,18	7,8
ALB	0,43	7,6
POL	2,28	5,3
SLN	0,64	3,8
KYR	0,00	0,2
GEO	0,00	0,01

Turnover from exporting books in 2000.

Similarly to the previous -and a number of other- items of the survey, here, too, above all the absence of information has been registered. Both the Czech and Hungarian respondents admitted that no data existed about the value of sales of books with Czech and Hungarian ISBN (Bulgaria appears to be a similar case); the high figures in the table largely stand for printing export, which is closely registered by the statistical systems – in fact, this is not what the survey was after.

The 115 million dollars collected by Russian publishers (and printers?) complements the high rate of Russian books imported by countries in Table 21.

Distribution Channels

The survey covers book distribution in this manner in the new democracies for the second time. The following section of the questionnaire relates to this issue:

#	Item	Remark
38	Bookshops (%)	Questions 38-46 analyze structure of Line 14: shares of distribution channels. This Line 38 includes those bookshops as well, which are in shopping centers.
39	Quasi bookshops (%)	Shops, where books stand for less than 1/3 of sales.
40	Supermarkets (%)	Book sections of supermarkets and department stores.
41	Book clubs (%)	
42	Outdoor (%)	Outdoor sales points: stalls, stands, kiosks, sidewalk desks etc.
43	Salesmen (%)	Door-to-door sales agents.
44	Direct sale (%)	Sales from publisher's own warehouse, publishers' kiosk at book fairs and other occasions.
45	Remainders (%)	Sales of new copies in remainder, 'discounted' or second-hand bookshops.
46	Other, if any (%)	Note that lines 38-46 should add up to 100%. If not, please re-calculate accordingly.

Table 24: Percentage structure of book distribution channels in 2000

	Bookshop	Quasi bookshop	Super-market	Book club	Outdoor	Salesman	Direct	Remainder	Other if any	Total
ALB	45	0	0	0	29	5	10	10	0	100
ARM	70	8	3	0	5	0	10	2	2	100
BOS	38	14	4	0	10	2	27	5	0	100
BUL	30	5	2	1	60	1	1	0	0	100
CRO	30	10	3	1	10	12	5	9	20	100
CZE	78	1	12	2	5	0	2	0	0	100
EST	60	0	20	5	3	0	7	5	0	100
GEO	2	10	5	0	80	1	2	0	0	100
HUN	70	6	5	10	5	0	0	4	0	100
KYR	74	3	2	2	15	0	5	0	0	100
LAT	27	40	5	0	27	0	0	1	0	100
LIT	82	0	6	0	2	2	8	0	0	100
POL	50	7	25	4	0	14	0	0	0	100
ROM	40	7	10	5	23	0	15	0	0	100
RUS	50	10	4	1	15	5	15	0	0	100
SLK	66	5	14	5	3	0	2	5	0	100
SLN	40	12	0	0	0	0	48	0	0	100
TAJ	29	0	0	0	49	5	10	7	0	100
UKR	30	10	0,1	5	35	5	15	0	0	100
YUG	65	5	-	-	15	1	13	1	0	100
average 2000	48,8	7,6	6,0	2,1	19,5	2,6	9,8	2,5		
average 1999	51,2	3,9	4,1	4,6	21,2	4,4	<i>not comparable</i>			

Some of the new democracies show signs of westernisation. Although sidewalks in these countries, too, were full of book vendors a few years ago, now they are quite insignificant; growing sales in shopping centres and book clubs is the current trend. At the other end of the region, outdoor sales are still estimated as being the leading commercial channel for books in a few countries.

Observe Russia: just like in another section of the survey (cost structure of academic books), the biggest country of the region at the same time appears to occupy the central position, always next to the middle value.

Table 25: Sales in bookshops

LIT	82	ALB	45
CZE	78	ROM	40
KYR	74	SLN	40
ARM	70	BOS	38
HUN	70	BUL	30
SLK	66	CRO	30
YUG	65	UKR	30
EST	60	TAJ	29
POL	50	LAT	27
RUS	50	MAC	5
average	46,7	GEO	2

Ranklist of countries by percentages of sales in bookshops.

The countries that have come quite close to being accepted into the EU reflect a picture that is too beautiful to remain as such for long. In the developed western countries we are witnessing a gradual retreat of sales in traditional bookshops to the benefit of alternative channels, especially supermarkets and ordering via Internet. We may perhaps get explanation later on about the unexpected position of Kyrgyzstan and Armenia, and about the unbelievably low figures of Georgia and Macedonia.

Table 26: Sales through supplementary channels

GEO	90
LAT	68
BUL	65
TAJ	56
UKR	45
ALB	39
ROM	30
average	29,6
CRO	29
BOS	29
RUS	25
YUG	21
KYR	18
ARM	15
HUN	15
SLK	13
SLN	12
EST	8
POL	7
CZE	6
LIT	2

Cumulated percentages of sales outdoors + in quasi bookshops + through remainders in 2000.

These categories were first used in previous year's questionnaire; find the definitions above.

The category called "quasi bookshop" may be specific of the transition period from centralised economy. This indicates mainly those retail units which used to be state bookshops, often still are called bookshops, but under new circumstances the decisive majority of their sales is stationery, calendars, bianco invoices, batteries, music cassettes etc.

Also the term *remainder* is an approximative denotation for the *discount shops* that sell large amounts of new books, often of dubious origin.

How to explain the position of the countries on the top, above the double of the average? Whether by tectonic changes in the bookselling infrastructure; local traditions; extreme pessimism (honesty, modesty, rigour etc.) on the part of the respondent? And whether the mere 2% in Lithuania may be explained by the same factors, with opposite + or - sign?

Bookshops

Bookshops are covered by 4 items in the questionnaire, for the second time in the annual OSI surveys. In addition, the numbers of inhabitants were used, which we took over from other sources.

47	Bookshops (№)	Number of bookshops in your country in 2000: retail outlets, whose turnover is 2/3 or more from books; excluding categories covered by Lines 39, 40 and 42.
48	Bookshops in the capital city (№)	
49	Quality bookshops (№)	Bookshops with at least 100 titles of stock on social sciences.
50	Campus bookshops (№)	Those quality bookshops, which are in or next to higher education institutions and are predominantly used by students and lecturers.

Number of bookshops

The analysis of the various book distribution channels showed that on the average a little over 50% of sales takes place in bookshops. Having seen their relative weight, the next table shows the absolute figures of bookshops. The picture we get is an approximation only, for at least two reasons. Again, in the absence of reliable statistics, from some countries rough estimates are available only. Besides, there are no internationally prevailing definitions as to a "bookshop". We devised the *definition retail outlets, whose turnover is 2/3 or more from books* for purposes of the questionnaire. (Which is more or less the inverse of the definition of a "quasi bookshop" given elsewhere in the questionnaire.)

Table 27: Bookshops

	bookshops	1000 inhabitants / bookshop	bookshops / 100 000 inhabitants	bookshops in capital city	concentration in capital city	quality bookshops	% of quality bookshops	1000 inhabitants / quality bookshop	quality bookshops / 100 000 inhabitants	campus bookshops
ALB	350	10	10,0	55	16	12	3	292	0,3	40
ARM	20	175	0,6	10	50	0	0	0	0,0	2
AZE	200	18	5,7	86	43	140	70	25	4,0	1
BOS	19	184	0,5	9	47	17	89	206	0,5	1
BUL	350	24	4,2	55	16	12	3	692	0,1	40
CRO	56	88	1,1	22	39	10	18	490	0,2	
CZE	600	17	5,8	80	13	150	25	69	1,5	12
EST	95	15	6,8	23	24	7	7	200	0,5	3
GEO	126	41	2,4	41	33	33	26	160	0,6	0
HUN	600	17	6,0	175	29	40	7	250	0,4	20
KYR	18	261	0,4	12	67	0	0	0	0,0	8
LAT	300	8	12,5	132	44	8	3	300	0,3	8
LIT	200	19	5,4	35	18	100	50	37	2,7	7
MAC	412	5	20,6							
POL	3000	13	7,8	200	7	600	20	64	1,6	70
ROM	3000	8	13,3	200	7	60	2	375	0,3	20
RUS	5000	29	3,4	150	3	50	1	2940	0,0	..
SLK	300	18	5,6	30	10	50	17	108	0,9	10
SLN	36	56	1,8	20	56	10	28	200	0,5	1
TAJ	60	107	0,9	11	18	2	3	3200	0,0	9
UKR	700	70	1,4	40	6	0				
YUG	297	28	3,6	163	55	45	15	182	0,5	5
total	15 739			1549		1346				168
average		22,0	4,5		10,1		9,5	259,6	0,4	

The "average" line is a combined regional average, computed from the total line; it is not the arithmetic mean of the national indices.

Different circumstances or different perceptions?

Besides the actual state of affairs, the number in the corresponding grid apparently also reflects the perception in the local community about what qualifies as a bookshop. There is a striking variation between the Armenian and Azerbaijani figures on bookshops in general and quality bookshops in particular. This may indeed indicate sharp differences in the two neighbouring countries (e.g. the effect of the ban on open-air sales in Azerbaijan); but also can be explained by the way our respondents apply definitions. See also the distances between Latvia and Lithuania with regard to quality bookshops - although this is in keeping with the very high rate (over 80%) given for the share of bookshops between distribution channels in Lithuania. The high number of bookshops in Albania may have to be revised, too (their share in sales is a realistic 45% though). One of the purposes of displaying the findings of the survey is to bring definitions and perceptions closer to one another. Readers are invited to comment on data, especially if they seem to contradict their experiences.

People and bookshops

The numbers given were related to the number of inhabitants of the country, in two ways. The first indicator tells *how many people are served by one bookshop* on the average.

Table 28: Ratio of bookshops and inhabitants

MAC	5
ROM	8
LAT	8
ALB	10
POL	13
EST	15
HUN	17
CZE	17
AZE	18
SLK	18
LIT	19
average	22,0
BUL	24
YUG	28
RUS	29
GEO	41
SLN	56
UKR	70
CRO	88
TAJ	107
ARM	175
BOS	200
KYR	261

The figures stand for thousand inhabitants served by one bookshop.

The average is calculated on a regional scale: the altogether 346 million people in these 22 countries were divided by the 15 739 bookshops. The average (approximate) number is 22 thousand inhabitants per book-shop. (In 1999 we received the similar index of 23 thousand, for 17 countries, of which 14 were the same in both years, including all countries over 20 million inhabitants.)

Bulgarians appear to occupy a typical position in this respect; also Russia is near to the average, which this time is also due to its large weight in computing the average.

By applying the inverted ratio of *the number of bookshops per 100 000 inhabitants* we of course receive the same ranking order between countries. Yet this indicator, also frequently used by statisticians, illuminates the same phenomenon from a different angle. Thus one hundred thousand inhabitants between the Odera and Kamchatka are served on the average by 4,5 bookshops.

Distance from bookshops

Distance is an important factor. Characteristically people that live in the countryside have a much poorer access to books than their country fellows in big cities. This is particularly true of those countries where the bad conditions of roads and the almost total absence of public traffic confine people to their homes much more than - say - in the EU accession countries. This is why, the OSI surveys have always asked about the level of concentration of the book trade in the capital city.

Table 29: Concentration of bookshops in the capital city

KYR	67
SLN	56
YUG	55
ARM	50
BOS	47
LAT	44
AZE	43
CRO	39
GEO	33
HUN	29
average	28,5
EST	24
LIT	18
TAJ	18
ALB	16
BUL	16
CZE	13
SLK	10
POL	7
ROM	7
UKR	6
RUS	3

Rate of bookshops in the capital city with regard to all bookshops in the country.

The number of bookshops is not the same as the share in sales. This latter would show a much higher degree of concentration - unfortunately we do not have data on that. We can suppose, however, that the rank order of countries would remain the same.

The average in the table is the arithmetic mean of the countries. This number is clearly "distorted" by the enormous size of Russia, where 3% of shops is reported to be in Moscow. Taken together, 9,3% of all bookshops in these 21 countries are situated in the respective capitals.

Quality

The survey made an attempt to identify the quality component in book sales. The definition does not carry the word "quality", instead it inspires a more objective approach by stating: *bookshops with at least 100 titles of stock on social sciences*. In spite of certain differences in interpretation, this definition appears to be appropriate to denote quality in book trade.

Table 30: Population served by a quality bookshop

AZE	25
LIT	37
POL	64
CZE	69
SLK	108
GEO	160
YUG	182
EST	200
SLN	200
BOS	224
HUN	250
average	257,5
ALB	292
LAT	300
ROM	375
CRO	490
BUL	692
RUS	2940
TAJ	3200

Thousand inhabitants per one bookshop that stocks at least 100 titles on social sciences.

The very high percentages given in a few countries are not necessarily due to interpretation errors. It is logical that where there are few bookshops these must necessarily take a larger share of quality supply, including of social sciences. Of course, the wide distances between responses need further insights; e.g. indeed, nearly 3 million Russian citizens are served by one well-supplied bookshop while some other countries are reporting a hundred times fewer customers per "quality" bookshop. (See remark below.)

Data from a few countries (especially Poland and the Czech Republic) seem to be realistic and reflect a comfortable state for both sides: the customers and the shopkeepers.

A remark from the previous survey could partly explain the situation about quality bookshops: "In Russia and Ukraine there are not only quality bookshops, but quality stands. In Kiev it is usual to buy books at certain stands, that specialize on very narrow topics. There are two good philosophy books street stands and three elsewhere. For Moscow this figure is a bit bigger, but still these places are more popular than elitist bookshops (the latter are very expensive, sometimes they have double price). The same with books in history, philology and motor engineering. At special institutions there are stands that work only once or twice a week (depends on gathering days in Institutes).

These stands are run by individual enterprisers and are hidden from statistics, they simply are out of tax informatics. Usually these entrepreneurs are former Institute employees and are real specialists in the area of their specialized selling. Take into account that network of Academy of Science in Ukraine and Russia is still very good and well-spread. It gives you about 2000 elitist bookshops that work often "upon request" and have really good information on all new books printed in area of specialization."

Campus bookshops

As a next attempt towards differentiation, the last column of Table 1 tries to identify those campus bookshops, which are little known outside of colleges but are taken care of by publishers and importers in academic subjects, including social sciences: *bookshops, used over 80% by students and lecturers.*

Salaries and Prices

The following questions inquire about some salaries, fees and prices:

No	Question	Explanation
1	Exchange rate of USD	Give the exchange rate of USD to your national currency, which is applied in your answers. If possible, use the official average in 2000. Where a different rate is used, make a note.
2	Monthly net salary (\$)	National average. Indicate source: e.g. statistical office, estimate etc.
3	Professor's net monthly salary (\$)	Indicate source: e.g. official data on average higher education lecturer's salary; or salary of a typical, 'average' university professor etc.
21	Book price (\$)	Average 250-page paperback fiction.
22	Newspaper price (\$)	Best read general daily paper (not tabloid).
23	Price of academic books (\$)	Average 250-page paperback on a social science subject.
36	Authors's fee	Average fee for work in social science, one author's sheet (40 000 characters including spaces).
37	Translator'fee (\$)	Average fee for translating from foreign language, one author's sheet.

Table 31: Salaries, fees and prices (US dollar, publisher's sheet, see questionnaire above)

	Monthly net salary	Professor's salary	Book price	Newspaper price	Academic book price	Author's fee	Translator's fee
ALB	120	165	3,30	0,30	4,70	150	..
ARM	25	50	1,80	0,20	2,50	40	140
AZE	46	37	1,00	0,22	1,56	0	10
BOS	250	380	11,00	0,50	20,00	68	100
BUL	115	90	3,30	0,30	4,50	150	3
CRO	365	394	12,50	0,75	25,00	..	110
CZE	353	455	5,00	0,20	9,00	..	..
EST	286	743	9,00	0,50	12,00	57	100
GEO	33	40	2,25	0,25	3,25	..	13
HUN	207	296	2,96	0,27	4,44	139	226
KYR	30	50	3,00	0,30	3,25	57	..
LAT	179	689	5,80	0,34	5,10	115	75
LIT	270	450	4,00	0,85	5,00	57	120
MAC	179	689	..	0,34	5,1	..	75
POL	242	600	6,20	0,40	6,00	57	80
ROM	110	160	2,8	0,2	3,6	0	40
RUS	82	92	1,80	0,14	3,00	7	8
SLK	167	205	5,41	0,19	5,41	108	72
SLN	542	620	14,00	0,60	14,00	..	47
TAJ	10	6	2,00	0,12	3,20	14	10
UKR	40	100	1,8	0,1	2	40	60
YUG	79	133	6,00	2,20	7,00	28	50

Conditions for the general public

From the data received one can conclude about the general purchase power with regard to books and newspapers as well as academic publications. Clearly, the greater the social differences are, the less meaningful the notion of average monthly salary is. It is clear again, however, that data to be handled with great care are worth more than no information whatsoever.

With this, let us proceed to a closer observation of the relationship between average citizen income and prices of printed goods.

Table 32: Average salaries, average prices

The monthly salaries income per hour and minute were calculated according to the following: a minute's salary = monthly salary / 22 days / 8 hours / 60 minutes, in US cents.

	Average monthly net salary	Average hour's salary	Book price	Academic book price	Hours to work for a book	Hours to work for an academic book	Average minute's salary (cent)	Newspaper price	Minutes to work for a newspaper (cent)
ALB	120	0,68	3,30	4,70	4,8	6,9	1,1	0,30	26
ARM	25	0,14	1,80	2,50	12,7	17,6	0,2	0,20	84
AZE	46	0,26	1,00	1,56	3,8	6,0	0,4	0,22	51
BOS	250	1,42	11,00	20,00	7,7	14,1	2,4	0,50	21
BUL	115	0,65	3,30	4,50	5,1	6,9	1,1	0,30	28
CRO	365	2,07	12,50	25,00	6,0	12,1	3,5	0,75	22
CZE	353	2,01	5,00	9,00	2,5	4,5	3,3	0,20	6
EST	286	1,63	9,00	12,00	5,5	7,4	2,7	0,50	18
GEO	33	0,18	2,25	3,25	12,2	17,6	0,3	0,25	81
HUN	207	1,17	2,96	4,44	2,5	4,02	2,0	0,27	14
KYR	30	0,17	3,00	3,25	17,6	19,1	0,3	0,30	106
LAT	179	1,02	5,80	5,10	5,7	5,0	1,7	0,34	20
LIT	270	1,53	4,00	5,00	2,6	3,3	2,6	0,85	33
MAC	179	1,01	..	5,1	0,0	4,65	1,7	0,34	20
POL	242	1,38	6,20	6,00	4,5	4,4	2,3	0,40	17
ROM	110	0,63	2,8	3,6	4,5	7,46	1,0	0,20	15
RUS	82	0,47	1,80	3,00	3,8	6,4	0,8	0,14	18
SLK	167	0,95	5,41	5,41	5,7	5,7	1,6	0,19	12
SLN	542	3,08	14,00	14,00	4,5	4,5	5,1	0,60	12
TAJ	10	0,05	2,00	3,20	37,1	59,3	0,1	0,12	133
UKR	40	0,23	1,8	2,00	7,9	20,43	0,4	0,10	21
YUG	79	0,45	6,00	7,00	13,4	15,6	0,7	2,20	294

The table helps us perceive the enormous differences that prevail between living conditions in the huge geographic area, which, from the point of view of recent history, can be taken as one big unit: the countries which used to belong to the „second world” of Communism until about 1989. Distances are brutal, even without including member countries of the European Union. Are we conscious enough about the differences between circumstances where people work 6 minutes for a daily paper like an average citizen in Czech Republic; or 51 minutes like in Azerbaijan; or even more like in Tajikistan or in today's Serbia?

The academic world

We can compare first a university professor's average income – as reported by our partners – to the average general salary in that country. The table is arranged in the order that the academic income exceeds the common people's salaries. Which shows that a Latvian professor earns nearly four times above the national average, while his Tajik colleague is paid about 2/3 of an average citizen in that country.

Table 33: Average versus academic salaries

	Average monthly net salary	Professor's salary	Ratio of professor's / general
LAT	179,0	689,0	385%
MAC	179,0	689,0	385%
EST	285,7	742,9	260%
UKR	40,0	100,0	250%
POL	242,0	600,0	248%
ARM	25	50	200%
average	169,5	292,6	170%
KYR	30,0	50,0	167%
LIT	270,0	450,0	167%
YUG	79,1	126,1	159%
BOS	250,0	380,0	152%
ROM	110,0	160,0	145%
HUN	207,0	296,0	143%
ALB	120	165	138%
CZE	353,0	455,0	129%
GEO	32,5	40,0	123%
SLK	166,7	205,0	123%
SLN	541,8	620,3	114%
RUS	82,4	92,0	112%
CRO	365,0	394,0	108%
AZE	46	37	81%
BUL	114,6	90,1	79%
TAJ	9,5	5,9	62%

Rather few of the data – especially on university professors' salaries – come from official sources. They are supposed, however, to be reliable estimates.

The arithmetic mean of the countries suggests that professors earn 70% more than the average citizen. It would be difficult to find correlation with other indicators. Countries with low and high level GDP are rather evenly distributed between the various parts of the ranklist. What are then the decisive factors that determine the ratio? Local traditions? Incidental circumstances, like the personal conviction of the prime minister or the educational minister?

Table 34: Academic salaries and prices

	Professor's salary	Professor's hourly salary \$	Academic book price \$	Academic books for a month's salary of a professor	Hours to work for a professor for an academic book	Author's fee \$ / sheet	Academic books to buy for an author's fee for a sheet	Translator's fee \$ / sheet	Academic books to buy for a translator's fee for a sheet
ALB	165	0,9	4,70	35	5,2	150	31,9	..	..
ARM	50	0,3	2,50	20	8,3	40	16,0	140	56,0
AZE	37	0,2	1,56	24	7,8	..	..	10	6,4
BOS	380	2,2	20,00	19	9,1	68	3,4	100	5,0
BUL	90	0,5	4,50	20	9,0	150	33,3	3	0,7
CRO	394	2,2	25,00	16	11,4	..	..	110	4,4
CZE	455	2,6	9,00	51	3,5	..	..	..	..
EST	743	4,2	12,00	62	2,9	57	4,8	100	8,3
GEO	40	0,2	3,25	12	16,3	..	..	13	3,8
HUN	296	1,7	4,44	67	2,6	139	31,3	226	50,9
KYR	50	0,3	3,25	15	10,8	57	17,5	..	..
LAT	689	3,9	5,10	135	1,3	115	22,5	75	14,7
LIT	450	2,6	5,00	90	1,9	57	11,4	120	24,0
MAC	689	3,9	5,10	135	1,3	..	..	75	14,7
POL	600	3,4	6,00	100	1,8	57	9,5	80	13,3
ROM	160	0,9	3,60	44	4,0	..	..	40	11,1
RUS	92	0,5	3,00	31	6,0	7	2,3	8	2,7
SLK	205	1,2	5,41	38	4,5	108	20,0	72	13,3
SLN	620	3,5	14,00	44	4,0	..	..	47	3,3
TAJ	6	0,0	3,20	2	0	14	4,4	10	3,1
UKR	100	0,6	2,00	50	3,3	40	20,0	60	30,0
YUG	133	0,8	7,00	19	8,8	28	4,0	50	7,1

Table 34 is perhaps the most controversial of all. Especially the last columns. Differently from the previous decades, authors' and translators' fees are negotiable, often treated confidentially. Furthermore, authors increasingly tend to receive royalties, established in percentage of the income for the book. Nonetheless there is something like a typical amount per sheet, in a given period (in our case in the year of 2000). It is rather unlikely that a translator in Armenia is valued about 50 times more than one in Bulgaria ... yet a substantial difference must exist. (Also it must be borne in mind that this index combines two factors: the translator's fee and the average price of a local academic book.) Notwithstanding these difficulties, the data lend themselves to interesting conclusions. And since they are put on display on the web, they also lend themselves to comments and motions for eventual rectification.

The Textbook Market

The following items of the questionnaire relate to school textbooks:

#	Item	Remark
17	Textbooks (%)	Share of textbooks in total sales.
34	VAT on textbooks (%)	Books used as course books in the education system; textbooks.
53	Pupils in primary (№)	Explain, how 'primary' and 'secondary' school levels are defined in your country. The two should cover schooling before 3 rd level (higher education). If you have difficulties, combine the two categories.
54	Pupils in secondary (№)	
55	New titles in primary (№)	How many new textbooks, with separate ISBN, were published for 1 st level in 2000?
56	New titles in secondary (№)	
57	Copies in primary (№)	How many copies were printed for 1 st level in 2000: new titles and old ones (reprints) together?
58	Copies in secondary (№)	
59	Share of new titles in primary (%)	From 57, from newly printed copies, which was the proportion of newly published titles (Line 55)?
60	Share of new titles in secondary (%)	
61	Old copies in primary (%)	In what proportion did pupils learn from used, second-hand textbooks in 2000?
62	Old copies in secondary (%)	
63	Textbook ownership	Are textbooks purchased or rented? If parallel models exist, give proportions.
64	Textbook burden at 6 (\$)	What is the average cost of buying (renting) the entire textbook package for a first grade pupil?
65	Textbook burden at 16 (\$)	What is the average cost of buying (renting) the entire textbook package for a 16-year-old pupil?
66	Textbook distribution	When and how are orders collected? When and how do copies get to the pupils?
67	State support	Describe in what forms the state supports textbooks. If available, give figures.

Table 35: Basic data on textbooks

Question #	34	53-54	55+56	57+58	59	60	61	62	64	65
ALB	20	368	20	3746	5	19	23	30	7,0	9,2
ARM		580	59	34	29		84		0,0	40,0
AZE	0	0	1				70		0,0	22,4
BOS		0	248	823	65	72	36	40	32,0	84,0
BUL	20	1070	165		30	92	70	70	18,4	37,7
CRO	0	601	314	15					35,0	80,0
CZE	5	1720						50	72,5	85,5
EST	0	217			25	25	75	75	23,0	58,0
GEO	0	720	9	105	8	8			10,0	20,0
HUN	0	1347	317	9171	35	25			33,5	57,0
KYR	20	789	20	503	14	8	86	92	6,0	35,0
LAT	0	789	248	835					28,0	93,0
LIT		530	66	553	2	13				
POL	0	7990	984	41380	70		35	15	23,0	65,0
ROM	0	3000	342	11200	23	50	0	0	0,0	25,0
RUS	0	19499			55	18			12,0	28,0
SLK	10	927	306	5008	46	47			6,5	10,8
SLN	8	286	191		96	58	90	65	60,0	140,0
TAJ	22	1750	10	1440	25	8	85	70		8,0
UKR			742	1026	26	46	9	19	15,1	22,6
YUG	17	1038	82	6275	16	6	25	65	22,0	36,7

Table 36: New titles in primary education

SLN	96
POL	70
BOS	65
RUS	55
SLK	46
HUN	35
BUL	30
ARM	29
UKR	26

EST	25
TAJ	25
ROM	23
YUG	16
KYR	14
GEO	8
ALB	5
LIT	2

Questions 59 and 60 aimed to assess the dynamics of rotation of school-books. Respondents were required to tell that in textbook production for the two levels of education how many per cent were copies of new titles. The questions were somewhat awkward: they hoped to specify the amount of new titles among actual copies.

The scope of Tables 36 and 37 could hardly be larger. Slovenia claims that nearly all copies in primaries belonged to new releases, a complete regeneration of the offer. Any country over 50% maintains practically the same.

Table 37: New titles in secondary education

BUL	92
BOS	72
SLN	58
ROM	50
SLK	47
UKR	46
HUN	25
EST	25

ALB	19
RUS	18
LIT	13
TAJ	8
KYR	8
GEO	8
YUG	6

The pace of replacement of textbooks must be an important indicator of any school system. The definition has a number of pitfalls. First of all the category of “new”. Ideally textbooks are being continuously corrected and revised. It is not clear if the practices in the various countries of giving new ISBN –or keeping the original- are comparable. Besides, this question was asked for the first time: reliable picture about the mobility of a market requires a minimum of two years. Due to these ambiguities Table 36 and 37 do not lend themselves to further interpretation.

Table 38: Copies per pupil

ALB	10,2
HUN	6,8
YUG	6,0
SLK	5,4
POL	5,2
ROM	3,7
LAT	1,1
LIT	1,0
TAJ	0,8
KYR	0,6
MAC	0,2
GEO	0,1
ARM	0,1

New textbook copies, printed in 2000, divided by the number of pupils.

Only 13 respondents had or risked an answer to the number of new copies. Provided the figure is right, 2000 must have witnessed a massive influx of textbooks into the Albanian schools.

Table 39: Used copies in primary

SLN	90
KYR	86
TAJ	85
ARM	84
EST	75
BUL	70
AZE	70
BOS	36
POL	35
YUG	25
ALB	23
UKR	9
ROM	0

How many per cent of textbooks used at school are second-hand copies, used previously by another pupil?

The variance is as big as in the previous couple of questions. It is still an open question whether it is due to a variance of facts or a variance of interpretation. The roundness of most figures implies estimation; from a few countries, however, exact figures arrived (etc. Ukraine in both cases).

The highest figure tells us that 92% of textbooks used by teenage pupils in Kyrghizia are serving their second term at least. While the respondent from Romania reports that this practice is unknown in that country.

Table 40: Used copies in secondary

KYR	92
EST	75
TAJ	70
BUL	70
SLN	65
YUG	65
CZE	50
BOS	40
ALB	30
UKR	19
POL	15
ROM	0

Similarly to the pace of replacement of titles, this issue also appeared for the first time, and it is too early to attempt at judgments on the basis of the data received. It would be of course too ambitious to tell what are the optimal figures or ranges; it is not over-ambitious, however, to come to grips with national or regional facts and characteristics.

Table 41: Financial burden of parents at primary

CZE	72,5	UKR	15,1
SLN	60,0	RUS	12,0
CRO	35,0	GEO	10,0
HUN	33,5	ALB	7,0
BOS	32,0	SLK	6,5
LAT	28,0	KYR	6,0
EST	23,0	ROM	0,0
POL	23,0	ARM	0,0
YUG	22,0	AZE	0,0
BUL	18,4		

The average cost of acquiring the necessary textbooks for a 6-year-old pupil in US dollars.

Predictably, there is a rather close correlation with the general economic level. A notable exception is Bosnia-Herzegovina, although the next table shows that the actual burden may not be that hard as one presumes from the rank list of Table 41. The top position of Czech Republic is ironic in the view of the relative cheapness of books in the general market. Especially striking is the difference from closest neighbour Slovakia.

Table 42: Salaries and cost of textbooks at 6

GEO	30,8	CRO	9,6
CZE	20,5	POL	9,5
KYR	20	ALB	5,8
HUN	16,2	SLK	3,9
BUL	16	ARM	0
LAT	15,6	AZE	0
RUS	14,6	LIT	0
BOS	12,8	ROM	0
SLN	11,1	TAJ	0

The table is an index composed of responses given to questions 2 and 64: what percentage of an average monthly salary goes to buying the textbook kit of a 6-year-old child?

Czech are still high but topped by poor Georgian families, where nearly one third of a month's salary is needed for the schoolbooks. The countries with 0 are those, where the state provides textbooks free of charge. There are mixed practices in many places: e.g. in Hungary a large number of municipalities take charge of paying for the books in the lower grades.

Table 43: Financial burden at secondary

SLN	140	YUG	36,7
LAT	93	KYR	35
CZE	85,5	RUS	28
BOS	84	ROM	25
CRO	80	UKR	22,6
POL	65	AZE	22,4
EST	58	GEO	20
HUN	57	SLK	10,8
average	47,9	ALB	9,2
ARM	40	TAJ	8
BUL	37,7		

The average cost of acquiring the necessary textbooks for a 6-year-old pupil in US dollars.

This is a replica of Table 41, adapted to 16 year-olds. Slovenia juts out: a set of textbooks at this age group costs almost three times as much as the arithmetic mean in these 20 countries. Of course, parents in neighbouring Austria, at half an hour's drive from Ljubljana, would be pleased with the 140 dollars; at the other end of Austria, there is another ex-communist capital, Bratislava, where the price of a similar kit is reported to be 10,8 dollars!

Table 44: Salaries and cost of textbooks at 16

ARM	160,0
KYR	116,7
TAJ	84,2
GEO	61,5
LAT	52,0
AZE	48,8
average	41,4
RUS	34,0
BOS	33,6
BUL	32,9
HUN	27,5
POL	26,9
SLN	25,8
CZE	24,2
ROM	22,7
CRO	21,9
ALB	7,7
SLK	6,5

Similarly to Table 42, the absolute burden is translated into a relative one, percentage of an average monthly salary.

The cost of 40 dollars, which is near the average on the scale of countries, is a huge burden for average Armenian families: over one and a half month's salary. The westernmost countries of the region seem to be settled around 25%; this might imply that spending a fourth of an average income on the textbooks of a 16-year-old pupil is a "normal" phenomenon, and a target for less fortunate countries.

Ordering and distribution

The questions on textbook distribution mechanisms produced very different answers. Although one open question is not really appropriate to learn the prevailing systems in details, it appears that the 22 countries are divided between the two basic models by 50-50. In half of them the books are bought and owned by the families (pupils, students), in the other half they are property of the school (school library) and are lent to the pupils.

Both groups are furthermore divided roughly by half. In about half of the first group (say, a quarter of the 22 countries) the state does not provide substantial subsidy to the publisher or the families concerned (Croatia, Georgia, Latvia and Yugoslavia); in the rest subsidies go to the publishers. In Albania the government covers 50% of the printing costs.

Where schools lend books, in about half of the cases no (or insignificant) renting fee is applied. In other countries the fees are supposed to cover the expense of the book in 3 years (Slovenia), or 4 years (Armenia, Estonia, Russia).

Similarly varied are the procedures of ordering and distributing textbooks. In 2000 these ranged from total freedom of market forces (e.g. Bulgaria), to very sophisticated systems of commissioning publishing (Lithuania). In at least four countries special state enterprises do the distribution of textbooks: Albania, Lithuania, Slovakia and Yugoslavia.

Printing

Data on the state of the printing sector were collected twice by the OSI surveys: on 1997 and 2000. In the latest questionnaire the following items inquire about printing:

68	Large print run price (\$)	Average printing price per book copy, 250-page paperback, 10 000 copies, excluding paper.
69	Short run printing price (\$)	Average printing price per book copy, 250-page paperback, 1000 copies, excluding paper.
70	Print-on-demand price (\$)	Average printing price per book copy, 250-page paperback, with print-on-demand technology.
71	Print-on-demand	Describe the situation; is this technology used, by whom, what are the prospects etc.
72	Printing export (%)	In what proportion is the country's book printing capacity used for export: printing books for foreign publishers?
73	Printing import (%)	What is the share of books printed abroad (from Lines 7, 57 and 58)?
74	Price (rank)	Questions 75-78 analyze the reasons for choosing import printing. Write rank-numbers 1-4 (or 1-5, if you fill in Line 78, too) to express order of importance. E.g. if you think quality is the most important factor, put 1 in Line 76.
75	Reliability (rank)	
76	Quality (rank)	
77	Speed (rank)	

Table 45: Data on book printing

	10 000 price \$	1000 price \$	POD price \$	Export %	Import %	Price rank	Reliability rank	Quality rank	Speed rank
#	68	69	70	72	73 (8)	74	75	76	77
ALB	1,40	1,80	1,70	0	4	4	2	1	3
ARM	0,40	0,60		5	10	1	4	2	3
AZE	0,90	1,10	1,10	0	1		1	1	1
BOS	1,80	2,60			18	1	2	4	3
BUL	4,25	4,53	4,81	1	0	3	2	1	4
CRO		2,50	2,00		5	1	2	3	4
CZE						1		2	
EST	5,72	8,58		15	20	2		1	
GEO	0,50	1,00		4	8	1	3	2	4
HUN	0,74	1,48		7	23	1	2	4	3
KYR	1,25	2,75			7	1	4	2	3
LAT	0,35	1,40	5,20						
LIT	0,70	3,50	3,00		10	1	4	2	3
POL	1,00	2,50	3,50	4	25	2	3	1	4
ROM	0,64	0,87	4,00	0	11		1	1	1
RUS	0,32	0,75			7	4	1	2	3
SLK	1,04	1,30			0	1			
SLN	0,82	1,59		21	4	2	3	4	1
TAJ	2,83	1,70	2,09		80	4	3	1	2
UKR	0,30	0,55				1	3	2	4
YUG	0,59	0,70							

Table 46: Large print run prices

BUL	4,25
TAJ	2,83
BOS	1,80
ALB	1,40
KYR	1,25
SLK	1,04
POL	1,00
AZE	0,90
SLN	0,82
HUN	0,74
LIT	0,70
ROM	0,64
YUG	0,59
EST	0,57
GEO	0,50
ARM	0,40
LAT	0,35
RUS	0,32
UKR	0,30

Table 47: Short print run prices

BUL	4,53
LIT	3,50
KYR	2,75
BOS	2,60
CRO	2,50
POL	2,50
ALB	1,80
TAJ	1,70
SLN	1,59
HUN	1,48
LAT	1,40
SLK	1,30
AZE	1,10
GEO	1,00
ROM	0,87
EST	0,86
RUS	0,75
YUG	0,70
ARM	0,60
UKR	0,55

Figures in both tables stand for US dollars: average printing price per book copy in 2000, 250-page paperback, excluding paper. In Table 46 with regard to 10 000 copies, in Table 47 - 1000 copies.

In our context the prices of short print run publishing are of greater concern. Table 46 serves therefore as background information for Table 47.

Some of the figures seem apparently to have been misinterpreted. But even if some of these are removed, one is confronted again with breathtaking distances. Twenty years ago “agit-prop” efforts were made to picture the world of the existing socialism as a homogenous entity. Indeed, western observers –especially the little informed general public – tended to treat “the second world” as such. Lithuania and Ukraine or Armenia, at the far ends of Table 33, used to belong to the same country ten years before the survey. Certainly, differences were not as striking then, as now, after the fall of the system. In fact, little evidence remained about the real differences. Printing prices were defined centrally and the system allowed for little variance.

For countries with large population, i.e. with bigger potential book markets, short print run prices are less critical. In theory, unit prices depend only in an indirect way on the size of the country. Ironically, bigger countries are doing well in this respect, see particularly the low Russian prices.

The responses that describe the position of digital printing or print on demand indicate that 2000 saw nowhere in the region the breakthrough of this technology.

Table 48: Printing import

TAJ	80
POL	25
HUN	23
EST	20
BOS	18
ROM	11
ARM	10
LIT	10
GEO	8
KYR	7
RUS	7
CRO	5
SLN	4
ALB	4
AZE	1
BUL	0
SLK	0

Percentage of books published in 2000 that were printed abroad.

Civil war ridden Tajikistan is a particular case. Apart from indicating the tragic state of the Tajik industry, this high figure points at the potentials of relations over the border, when the minimum requirements are there.

In the next three countries of the list the high proportion of printing abroad is an indicator of the opposite: of the consolidation of the publishing sector. Publisher in these countries appear to be able to take international price conditions into consideration. Also, they integrated into larger markets: the adoption of licences on specific books, sold by (typically) large western publishers certainly stand for a significant portion of the 20-25%.

The factors behind choosing a foreign publisher instead of one in the country were put in the following order by the 19 respondents: price – quality – reliability – speed.

Public Support to Publishing

One item of the questionnaire inquires about the existence and nature of public support to publishing.

#	Item	Remark
52	State support	Describe in what forms the state supports the book sector (excluding textbooks). If available, give figures.

It seems that public support to publishing is a luxury of the countries that are better off; as we shall see, some of them have developed sophisticated supporting mechanisms. At the other end, where the needs are the greatest, no such systems prevail. Out of the 22 countries from where responses arrived, four indicated the absence of any state support whatsoever: Albania, Georgia, Kyrgyzstan and Macedonia. In Bosnia-Herzegovina, too, public support is but “symbolic”.

In Azerbaijan public care is constituted by the maintenance of state owned publishers. Somewhat similar is the situation in Tajikistan. The information coming from Armenia suggests a related regime, whereby the state commissions the publishing of 35-40 titles a year.

In 12 countries, which is the majority, one or other granting mechanism functions. Although no detailed description was given, in most cases the simplest procedure is followed: publishers apply for subsidy to specific titles. Slovenia appears to be the exception, where on the basis of former performance and future plans, publishers can receive general subsidy from the cultural government.

Table 49: Size of support

1	2	3	4
SLN	1 859	11,1	93
LIT	1 240	4,1	34
EST	539	2,7	39
UKR	1 321	1,3	3
HUN	1 311	0,9	13
POL	377	0,9	1
RUS	3 000	0,5	2
LAT	343	0,4	14
ROM	109	0,4	0,5
SLK	67	0,2	1

Column 2 tells how many thousand US dollars worth of public support went to publishing in the respective country in 2000.

In Column 3 this amount is expressed in percentage of total sales. It is presumed that state subsidy is not included in the sales amount: it is an addition. Over 10% is extremely remarkable: this is the case of Slovenia.

Column 4 relates state subsidy to cents per inhabitant. The advantage of Slovenia is even more marked in these terms.

There are various ways as to how the grants are administered. At quite a few places parallel central funds or agencies distribute grants: this is the case in Bulgaria, Estonia, Hungary, Lithuania and Poland. In Bulgaria, however, clear distinction is made between grants coming from the National Book Centre, which covers 30% of publishing expenses, and from the Cultural Fund, which can subsidise up to 80% of such costs. In Estonia and Lithuania one of these funds: the Culture Endowment is financed from alcohol and tobacco revenues.

Several respondents made mention of state support to various projects of the publishing sector, like attending international fairs and exhibitions.

From some countries central purchasing for public libraries was also reported between forms of state support. This raises methodological problems. Since public libraries (including school and college libraries) are almost exclusively run on public resources (central or local government budgets), each book they buy qualifies as “public support”. However, in some countries, probably in the majority of them, sums serving for purchases of libraries on the national book market are not earmarked, therefore they can only be indirectly identified within overall sales figures.

Zero VAT is a great help. Ten out of 22 countries help the book sector by this means: Armenia, Bosnia, Croatia, Georgia, Latvia, Lithuania, Poland, Romania, Russia and Tajikistan.