



## The Turkish Book Trade

The publishing branch forges links between cultures. To put it in other words, it is the heart and mind of the intellectual life and is one of the essential characteristics of any modern country.

Due to the small number of readers, books were not published in the Ottoman Empire. In a time where only 10% of the people could read and write, publishing activities focused rather on newspapers and magazines and only a very small number of books were printed.

The reforms in the field of education were one of the first changes that took place after the foundation of the Republic. The Latin alphabet was introduced and thanks to a large-scale and comprehensive initiative, literacy was substantially boosted in a short period of time. By the year 1938, there was a sufficient number of followers to make book printing feasible. At the same time, primary and secondary education was disseminated.

As the result of the long war years and the failing economic and social system of the Ottoman Empire, a private sector did not exist in the young republic that could have had sufficient financial resources at its disposal. The political stakeholders made an appropriate decision assuming this task on behalf of the Turkish state. The Ministry of National Education became the most significant publisher. It published as well as printed the national text books. Great pieces of classic literature were also translated into Turkish and published by the Ministry.

This dominating role of the state lasted for several years and the private sector could not flourish. The publishing houses that were not state-run, focused their activities on the so-called cultural works in the field of literature and research-intensive books. In the 80s, the state had a total share of 75% of the publishing market and almost 90-95% of the text book market. Three of the five publishing houses with the highest circulation were state-owned (the Ministry for National Education, Ministry of Culture and the Prime Ministry).

Turkey started changing itself through its new economic policy during the 80s. The state's share in the national economy and industry decreased, the obstacles arising from the tariff system were removed and Turkey opened itself for international competition. These developments had also positive effects for the publishing sector and the number of private companies started to rise rapidly. The state was stripped from its monopoly in the text book publishing sector and opened to international competitors from the private sector.

These changes started in the 1990s in particular in the section of cultural publications and resulted in the publishing sector gaining momentum in the context of text books and books in foreign languages.

Starting from the year 2005, the government started to hand out school books free of charge which had a negative impact on the publishing sector. Several bookshops had to close down or specialise themselves in other fields. Once again, the Ministry of Education became the biggest publisher of school books and published about 40% of the school books in the year 2007.

The Turkish publishing sector in facts and figures:

### **TURKISH PUBLISHING FIGURES**

- Total population 70.286,056 (60% above the age of 30)
- Population growth 1,4%
- Per capita income 9,629 US\$ (IMF estimates for 2007)
- Inflation rate 7,5% (2007)
- Number of primary and secondary schools 34,656
- Number of colleges 7,937
- Universities 115 (85 state-funded and 30 funded by foundations)
- Number of students 16.5 million
  - Primary and secondary schools 10.8 million (8 years)
  - Colleges 3.3 million (3 years)
  - University 2.4 million
- Public libraries 1,435
- University library 50
- Literacy rate 87,4%

### **Publishing Branch**

- Number of publishing houses 1,724 (ISBN figures)
- Number of bookstores 6,000
- Number of distributors 150
- Number of published works 32,750 (ISBN figures)  
figures according to the ISBN

### **Sector Potential**

- Total market that could be tapped 810 million US dollar

<b>Segments</b>	<b>Current (million US \$)</b>	<b>Percentage</b>
School books	190	23,5
Learning aids	190	23,5
Cultural publications	300	37
Academic publications	75	9
Imported books	55	7
<b>Total</b>	<b>810</b>	<b>100</b>

## **CRUCIAL CHARACTERISTICS OF THE MAIN MARKET SEGMENT**

### **School Books**

- Average market selling price: 1.2 US dollar
- Schools book in primary and secondary public schools are handed out free of charge by the Ministry for Education (except private schools).
- All books have to be approved by the Ministry of Education.
- 45% of the schools books are published by the Ministry of Education
- Learning aides are sold to wholesalers with a 45-55% discount, to booksellers with a 30-45% discount.

### **Cultural Publications**

- Average market selling price: 10 US \$
- Nearly 40 % of all publications in this area are composed of translations from foreign languages
- Most translations are made from English. Other foreign languages from which a big number translations are made include German, French, Spanish
- Cultural publications are sold to wholesalers with a 40 – 45 % discount rate, to booksellers with a 30-35 % discount rate.

### **Academic Publications**

- Average market selling price: 10 US dollar.
- University students buy the books themselves.
- An individual student spends about 70-145 US dollar per year for text books. Students at private universities spend between 145-320 US dollar for text books in foreign languages.
- 80% of the academic publications are Turkish and 20% are translated publications.
- Academic publications are sold to wholesalers with a 30% discount.

### **Imported Books**

- Market for foreign books: 26 million US dollar.
- Market for imported academic publications: 21 million US dollar.
- Market for imported reference books that are used as sources: 2 million US dollar.
- Imported books are sold to wholesalers with an discount of 40% and to booksellers with an discount of 20-25%.
- In 2006, the Ministry for Education reduced the number of English lessons and started to publish itself the school books required for the teaching of foreign languages.