

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.