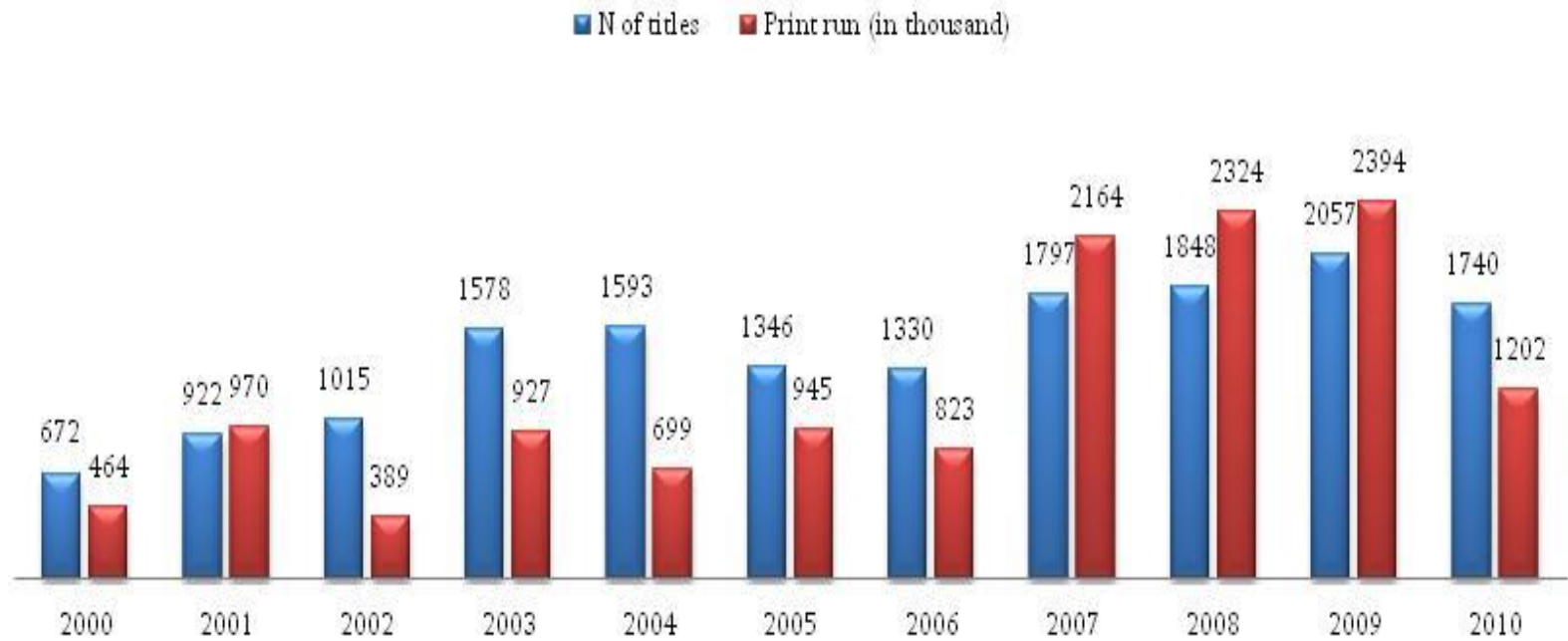


Armenia

- Population of 3.3 m (98 % ethnically Armenians)
- Armenia declared independence in 1990
- Armed conflicts with Azerbaijan
- Economic crisis 2008
- GDP (PPP) \$ 5,384
- 10 million copies of books per year at end of Soviet Union
- > 0.5 million in 1995
- > 1.2 million in 2010
- New title production up & down
- 1989: 1003
- 1990: 784
- 2009: 2057
- 2010: 1740

Armenia

Print run and number of titles released in Armenia, 2000-2010



Armenia

- And old tradition of books and literature
- Government programs to foster book sector
- Textbooks 80% of market
- No special legal restrictions to publishers
- 1998 ISBN adopted
- 2000 Bern convention
- Joined all relevant EU copyright conventions

Armenia

- And old tradition of books and literature
- Government programs to foster book sector
- Capital Yerevan: 50 bookshops
- 1500 public libraries
- 5 leading book chains: Antares, Zangak-97, Edit Print, Manmar and Printinfo

Armenia

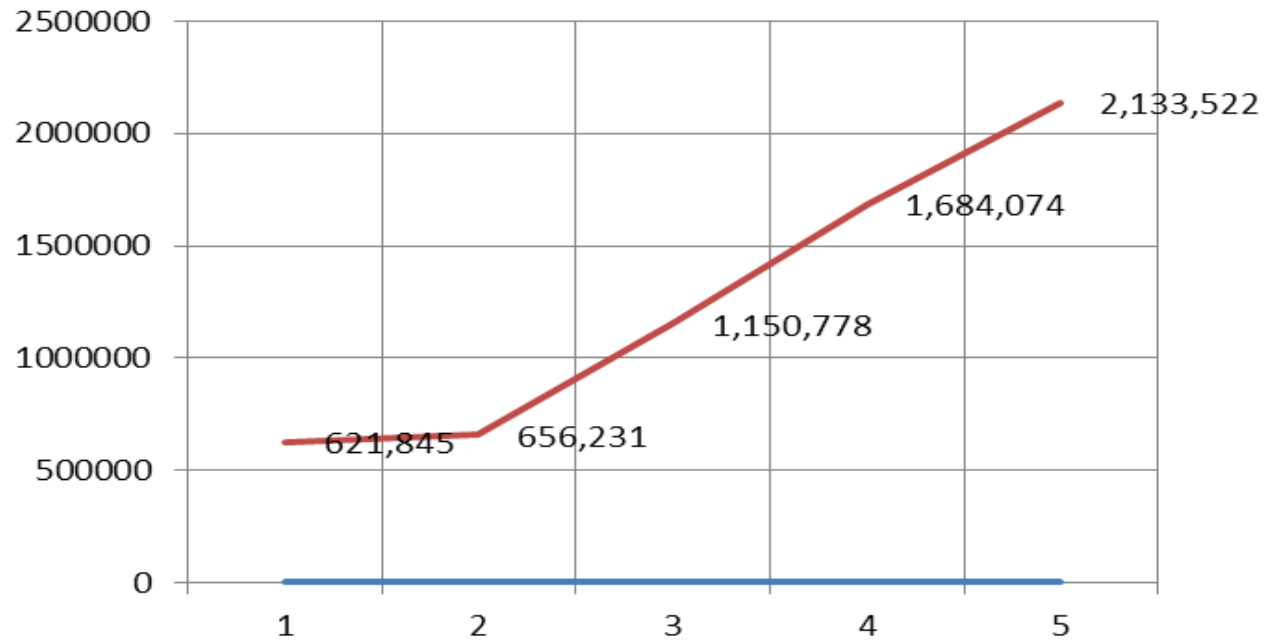
- And old tradition of books and literature
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Georgia

- Population 4.6 million (84% ethnic Georgians)
- 2003 *„Rose Revolution“*
- 2008 economic crisis and armed conflict with Russia
- 2012 GDP (PPP) \$ 5930
- 37% of households own PC, 90% Internet access
- Continuous growth in book sector
- Publishers' net revenues
 - 2007: \$6 m
 - 2011: \$11 m
- 2011: 3420 new titles (incl. 1126 works of fiction, 266 translations, 102 from English)

Georgia

Number of books sold by Georgian publishers during 2008-2012



Georgia

- Old tradition of book culture and literature
- Economy: „Caucasian Tiger“
- Book business shaped by small entities
- 70 of publishers have staff of 10 or less, and earnings under \$30,000
- Textbooks only 11%
- Government tender for educational;
- From 2013, textbooks to be distributed for free

Georgia

- Old tradition of book culture and literature
- Economy: „Caucasian Tiger“
- Retail: Mostly small bookshops (staff of 5 or less)
- Three big local actors: Palitra, Bakur Sulakauri and Diogene
- Half of imports from Russia, 1/3 English (2012)
- 1995 Bern convention
- 68 registered book publishers (45 members at professional association)

Ukraine

- Population 45 million 77.8 % Ukrainian, and 17.3 % Russian
- Independence since 1991
- 2008 crisis brings down economy by 20%
- GDP (PPP) \$7210
- This study only about Ukrainian language part of the market (20-23% of total)
- Market value of of UAH 1600 m (2011, € 154 m, down from UAH 1800 m, 2010)
- Publishers net sales ca. UAH 1,000 m
- Russian book market ca. 73-74%

Ukraine

- A complex trajectory reflecting economic and political complexities
- 1990: 7000 new titles, 177 million copies distributed (3,4 copies per inhabitant)
- 1999 down to 0,4 books per inhabitant
- 2011 up to 1.26 books (47 m copies)
- 2008: 22,815 new title and 1225 re-editions
- 2011: 21,500 new titles and 1326 re-editions

Ukraine

- Legislation and tax exemption to boost book sector
- 19,300 public libraries and 20,000+ school libraries
- In retail, large presence of chains from Russia (Eksmo) and Poland (Empik)
- Local small shops and kiosks
- Very strong impact of piracy

Ukraine

- Legislation and tax exemption to boost book sector
- 1997: Law “on the publishing business in the Ukraine”
- 2001 publishers exempt from VAT
- Legal deposit of 10-17 copies per title
- Expensive cost of ISBN
- Educational:
- Many institutions to produce their own materials, resulting in 16,000 available titles

Findings and recommendations

- Findings
 - Book markets reflecting ups and downs from economic and political strains across post Soviet era
 - Strong local traditions and small actors challenged by neighboring stronger markets and imports (Ukraine, Georgia)
 - Local sector dominated by a few strong local actors in retail (Armenia, Georgia)

Findings and recommendations

- Recommendations
 - Increase professional knowhow and practices with input from international
 - Link professional education domestically to national book / award festivals, and cooperate with international professional educators
 - Upgrade infrastructure (notably IT and warehousing systems, distribution and wholesales)
 - Improve statistics along international standards

Thank you very much

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