BOOKS FOR ALL: ASEAN CONFERENCE ON BOOK DEVELOPMENT
"BOOKS FOR ALL:
ASEAN CONFERENCE ON BOOK
DEVELOPMENT"

KUALA LUMPUR, 13 -15 AUGUST 1996

ASEAN BOOK SCENE

by

PHAM ANH TUAN

Jointly Organised by:

PERPUSTAKAAN NEGARA MALAYSIA &
NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION
(ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
Ladies and gentlemen!

Vietnam became in July 1995 full member of ASEAN.

Only 5 months after that, under the auspices of ASEAN Committee for Culture and Information, the Preparatory Meeting for the Conference on ASEAN Book Development (Book for All) was held from 9th to 10th January 1996 in Langkawi, Malaysia as host country. Today we meet again to discuss our opinions and the topics as worked out by the Preparatory Meeting. In our own opinion, this is a great effort to make the initial success in our co-operation between ASEAN countries in the field of book publishing.

Dear participants!

Nowadays, the relationship between Vietnam and other ASEAN countries is developing for the sake of peace, stability, co-operation and development in the south-east Asian region. This development is unconvertible and in accordance with the trend in the region and the world. Amongst the many fields in the area of culture and information, as I know, book publishing industry leads on the way onto our mutual integration. Therefore, our task is to try to learn from your experiences in order to fall in line with you to make our ASEAN countries a "Common House". Here below are some difficulties involving in publishing management between ASEAN countries, as showed by the preparatory meeting in January 1996:

- There is not any regulation or rule existing in book publishing and trade of book between ASEAN countries.

- Lack of national book catalogue of each ASEAN country.

- Lack of Standardization and policy for publishing activity in the region.

- There is no strategy for the development and co-operation in publishing between ASEAN countries.

- Introduction and promotion for books between ASEAN countries is limited.
There is not any policy or coordination to exploit the advances of science and technology in publishing industry between ASEAN countries. This is an common difficulty for us, particularly for Vietnam, as we are a new member of the ASEAN just from July 1995. Meanwhile you all have already established your relationship over 30 years since Autumn 1967, when the ASEAN Association was founded in Bangkok, Thailand. However with your help and our own effort, Vietnam will contribute probably to our common target for book development.

Dear Participants!

I would like to present an overview about situation of book publishing in Vietnam:

1. Population of Vietnam (latest data): 73,950,000 with:

   Male : 36,092,000
   Female : 37,867,000

2. Education at all levels from kindergarten, to school and college:

   - Total number of all institutions involved: 34,195
   - Total number of learners each year:

     |------------|-------------|-------------|-------------|-------------|-------------|
     | The number of learners | 12,793,800  | 13,196,000  | 13,947,700  | 14,587,000  | 17,132,736  |

3. Libraries:

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<tr>
<td>Total</td>
<td>13,882</td>
<td>14,110</td>
<td>14,111</td>
<td>14,303</td>
<td>14,484</td>
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<tr>
<td>Central libraries</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
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<tr>
<td>Provincial/City Libraries</td>
<td>46</td>
<td>52</td>
<td>53</td>
<td>53</td>
<td>53</td>
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<tr>
<td>District/Commune Libraries</td>
<td>482</td>
<td>483</td>
<td>486</td>
<td>493</td>
<td>495</td>
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<tr>
<td>Libraries for Children</td>
<td>31</td>
<td>18</td>
<td>21</td>
<td>23</td>
<td>27</td>
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4. The number of Newspaper and Magazines:

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<tr>
<td>Total</td>
<td>430</td>
</tr>
<tr>
<td>Daily newspaper</td>
<td>6</td>
</tr>
<tr>
<td>Weekly newspaper</td>
<td>127</td>
</tr>
<tr>
<td>Magazine</td>
<td>240</td>
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<tr>
<td>News bulletin</td>
<td>57</td>
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5. Publishing Industry:

Vietnam has currently 39 publishers (please see "Vietnamese Publishing House Directory"), including "World Publishers", unique publisher which is specialised to publish Vietnamese books in foreign languages. Production of books in the period of 1991 - 1995 is as follows:

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<tbody>
<tr>
<td>Titles</td>
<td>3,429</td>
<td>4,707</td>
<td>5,531</td>
<td>7,020</td>
<td>8,185</td>
</tr>
<tr>
<td>Titles</td>
<td>65,070,00</td>
<td>77,498,000</td>
<td>83,595,000</td>
<td>119,000,000</td>
<td>170,000,000</td>
</tr>
</tbody>
</table>

- Vietnam has 316 printing enterprises, including 3 companies involving in import & export equipments and materials for printing.
- 1,200 bookshops under the General Distributor of Book.
- Book Import & Export Company (Xunhasaba Co.)

6. Training System:

- National Publishing College
- National Book Distribution College
- National Printing College
- National Library College, ....

7. Existing Laws, Regulations and Policies relating to Book Industry:

- Journalistic Law
- Publishing Law
- Copyright Protection Law
Different regulations and ordinances governing exports and imports of books in Vietnam.

Distinguished Audience!

As a Vietnamese proverb goes, it is the first step that costs, this is the first conference on book we attend. We would like to ask for you understanding if the above figures do not make you satisfied as expected.

In the current international and regional situation, Vietnam, with its potential available such as rich natural resources, natural geographical location, national intellect, cultural tradition,.... we commit ourselves to fulfil targets as set up for by this Conference.

Thank you very much for your attention.
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KUALA LUMPUR, 13 -15 AUGUST 1996

QUALITY CONTROL OF ASEAN PUBLICATIONS

by

BOONCHAI PANJARATTANAKORN

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA & NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION (ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
QUALITY CONTROL OF ASEAN PUBLICATIONS

Presented by

Boonchai Panjarattanakorn
International Division Manager
SE-EDUCATION PUBLIC COMPANY LIMITED
Bangkok, Thailand
ABSTRACT

Quality Control of ASEAN Publications

In this era of Information Society, there is no denying that book, as a branch of the mass media, is threatened by non-book media like TV, radio, audio/video tapes, and CD-ROM. Another emerging threat also comes from the fast growing information superhighway in the name of World Wide Web. To survive amidst these multimedia, book has no choice but to adjust itself. More serious attention should be paid to the quality of publication, which is dictated by customer requirement. For ASEAN publications, more than 300 million customers in the whole region are at stake. As far as publication is concerned, there are three main areas to make improvement on viz. contents quality, production quality and service quality. Contents quality can be achieved by setting selection criteria for authors/translators and by establishing a house style manual as an in-house publishing standard. Production quality can be attained by establishing minimum standard for raw material, printing, and binding. Service quality can be achieved by adopting the use of ISBN/ISSN, CIP, and barcode in every publication. Such proposed methods of improving publication quality are found to be in line with a number of requirements stated in ISO 9001 and ISO 9002. They are two of the three models for quality assurance set out in the ISO 9000 series, a family of international standards for quality system formulated by the International Organization of Standardization (IOS). Despite the quality program’s obvious promise, high costs of implementation are involved, at least in the initial stage. The decision to jump on this quality bandwagon requires a very sound judgment indeed. For better quality of ASEAN publications as a whole, government of each member country should play a more vital role in book production manpower development by promoting book production study at vocational school or tertiary education level as a degree course. Towards the same end, more technical know-how exchange on book production should be encouraged among the ASEAN members.
QUALITY CONTROL OF ASEAN PUBLICATIONS

Why should there be quality control?

It is common knowledge that nowadays the world has progressed towards the age of Information Society at full swing. Information technology has developed by leaps and bounds while the price of communication equipment continues to drop. This fact enables the consumers to have wider choice and control more than ever as far as information is concerned. Book, as a branch of the mass media including printed media themselves and electronic media such as radio and TV, has no choice but to adjust itself to survive amidst this free competition of these multimedia nowadays. Apart from the profound effect caused by CD-ROM media, it cannot be denied that the future of book, as a classic reservoir of information, has been threatened by the very existence of the fast growing information superhighway called the World Wide Web, or "Information at Your Fingertips", to quote Bill Gates, Microsoft CEO.

One way to stay alive in this information rat race is to pay more serious attention to the quality of book publications. Quality is what gives maximum satisfaction to the customers. As for ASEAN publications, it is estimated that there are no less than 300 million such customers in this region to serve. The region that has been among the world’s fastest growing regions for years. The region that is currently undergoing a major shift from agricultural and industrial society to the information society. The region that is expected to have ever-increasing demand for knowledge media in order to better prepare their people to meet new socio-economic challenges which are already at work.

Quality control of ASEAN publications will definitely raise the regional publication standard to be in a better position to compete with those imported publications from the US, UK, France or Germany, and to better serve the growing population in this part of the world who continues to have higher and higher standard of education. Moreover, these homegrown quality publications could have a vital role as an effective vehicle for the regional exchange of culture, information and technology. Especially if ASEAN publications manage to qualify for international quality standard, it would mean a better chance for them to make their presence in the world market, as another alternative for the world’s media consumers. The need to achieve such international standard is ever increasing nowadays when a standard like ISO 9000 has been used as another form of trade barrier to the European Community (EC) market for imported goods and service from non-EC countries.

In what areas could quality control be applied? And how?

The desirable quality of any publication in the eyes of the customers could be grouped into three main areas: contents quality, production quality, and service quality. The contents quality is quite obvious. The production quality involves raw material, printing, and binding. The service side involves vendors and customers.
To achieve such threefold quality in ASEAN publications requires profound understanding of customer needs. These needs will determine what standard to follow in order to attain the desired quality. What follows is our proposal of quality goals and their respective achieving method.

1. Contents Quality

Goals

- contents accuracy and credibility
- standardized presentation style used by author, editor and editorial staff, to achieve readability and consistency.

Means

- Be selective when choosing an author or translator. The selection criteria should be based on practical knowledge and hands-on experience of the person on the subject matter. Another important consideration is the person’s communication skill through the written words, and a knack of simplifying relatively difficult subject matter.
- Establish a House Style Manual to be used as a standard book production manual for authors and editors. In such manual there will be rules of uniformity in matters of punctuation, capitalization, word division, spelling, and other details of expression. The most famous style manual is probably the Chicago Manual of Style, or "The Chicago Manual", developed and adopted by University of Chicago Press, USA.
- Provide training for the editorial staff to make good use of the manual.

2. Production Quality

Goals

- To attain overall production quality: consistency and durability in all three areas, namely raw material, printing and binding.

Means

- Establish minimum production standard for raw material, printing, and
binding to be in line with customer expectation. Also set up measures to ensure quality at each stage of production in order to produce products with consistent quality and to minimize defective products.

- Provide training for the production staff

3. Service Quality

Goals

- To achieve speed, convenience and accuracy in order placing and bookselling.
- To increase efficiency of the printed media business management as a whole, involving publishers, distributors, booksellers, and libraries. Areas for improvement include order placing, paying for the goods, returning goods, and stock control.

Means

- Promote the application of ISBN/ISSN, Cataloging in Publication (CIP), and barcode with every publication. With ISBN as the common product code, communication among publishers, distributors, and purchasers could be substantially improved. The introduction of barcode will significantly improve book distribution and stock control. The CIP will make life a lot easier for those librarians with their routine task of putting new books on the shelf, thus minimizing the book's non-service time and quickening and their exposure on the shelf. (In Thailand, there has been a campaign towards this end since 1994, with my humble company's big boss, Mr. Thanong Chotisorayuth, as an ardent proponent of this practice. He is still actively involved on this move).

What is ISO 9000?

ISO 9000 series is a family of international standards for quality system formulated by the International Organization of Standardization (IOS). They are the standards for use by both the suppliers and purchasers. They tell suppliers and manufacturers what is required for a quality system. They are practical standards which can be applied by all types of industries, large and small. They identify the basic disciplines and specify the procedures and criteria to ensure that products or services meet the customer requirement.

ISO 9000 series is not a standard for the product or service, but it is a standard for the
management system aimed at satisfying the customer need. Consequently, those organizations who are certified for ISO 9000 cannot print or display the ISO 9000 logo directly on the product, for the simple reason that only their management systems are certified, not their product or service.

ISO 9000 application offers the following benefits to the adopting industry:

- reduce expenses
- bring about a more soundly based and more efficient work procedures
- ensure customer satisfaction and reduce customer complaints
- reduce waste and time-consuming reworking of product
- keep regular customers and attract new ones
- create systematic work environment, and common work standard
- enhance competitiveness of the product on the international market

ISO 9000 Series Structure

ISO 9000
Guidelines for selection and use

Non-agreement

Agreed-upon standards

ISO 9001 @ Design/Development
@ Servicing

ISO 9002 @ Production
@ Installation
@ Servicing

ISO 9003 @ Final Inspection and test

(Figure 1.0)
ISO 9000 family consists of 5 constituent parts, as shown in Figure 1.0, with quality assurance models set out in the three International Standards listed below, representing three distinct forms of quality system requirements suitable for the purpose of a supplier demonstrating its capability; and for the assessment of the capability of a supplier by external parties.

a) ISO 9001, Quality systems - Model of quality assurance in design, development, production, installation and servicing

b) ISO 9002, Quality systems - Model for quality assurance in production, installation and servicing.

   - for use when conformance to specified requirements is to be assured by the supplier during production, installation and servicing.

c) ISO 9003, Quality systems - Model for quality assurance in final inspection and test

   - for use when conformance to specified requirements is to be assured by the supplier solely at final inspection and test.

They are generic and independent of any specific industry or economic sector. The design and implementation of a quality system will be influenced by the varying needs of an organization, its particular objectives, the products and services supplied, and the processes and specific practices employed.

ISO 9000 Quality management and quality assurance models, and ISO 9004 Quality management and quality system elements together provide general guideline and guidelines for selection and use of appropriate quality assurance model, viz. ISO 9001, ISO 9002 or ISO 9003, the International Standards to be adopted and to be certified. Figure 2.0 shows the cross-reference of quality system elements in the ISO 9000 series.

Cross - reference list of quality system elements in ISO 9000

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<tr>
<th>Quality system requirement</th>
<th>ISO 9001</th>
<th>ISO 9002</th>
<th>ISO 9003</th>
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<tbody>
<tr>
<td>1. Management responsibility</td>
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<tr>
<td>2. Quality system</td>
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<tr>
<th>Quality system requirement</th>
<th>ISO 9001</th>
<th>ISO 9002</th>
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<tr>
<td>3. Contract review</td>
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<tr>
<td>4. Design control</td>
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<tr>
<td>5. Document and data control</td>
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<tr>
<td>6. Purchasing</td>
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<td>7. Control of customer-supplied product</td>
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<tr>
<td>8. Product identification and traceability</td>
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<tr>
<td>9. Process control</td>
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<td>*</td>
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<tr>
<td>10. Inspection and testing</td>
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<tr>
<td>11. Control of inspection, measuring, and</td>
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<td>*</td>
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<tr>
<td>test equipment</td>
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<tr>
<td>12. Inspection and test status</td>
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<td>13. Control of nonconforming product</td>
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<tr>
<td>14. Corrective and preventive action</td>
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<tr>
<td>15. Handling, storage, packaging,</td>
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<tr>
<td>preservation and delivery</td>
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<tr>
<td>16. Control of quality records</td>
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<td>17. Internal quality audits</td>
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<td>18. Training</td>
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<td>19. Servicing</td>
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<tr>
<td>20. Statistical techniques</td>
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</table>
Remarks

- ISO 9001, Quality system - Model for quality assurance in design/development, production, installation and servicing.
- ISO 9002, Quality system - Model for quality assurance in production, installation and servicing.
- ISO 9003, Quality system - Model for quality assurance in final inspection and test.

(Fig 2.0)

From the table in Fig. 2.0, it is evident that there are 20, 19 and 16 requirements specified in ISO 9001, ISO 9002, and ISO 9003 respectively. It is also obvious that ISO 9001 and ISO 9002 are almost identical except that the requirement for design control is not specified in ISO 9002.

How are the proposed quality standards consistent with ISO 9002?

According to ISO 9000, either ISO 9001 or ISO 9002 quality assurance models could be applied to publishing industry, depending on whether the manufacturer/publisher would like to certify his design process or not. Since the product design phase of this industry is not complicated and often follows the standard pattern, this paper is in favour of ISO 9002 as a standard to illustrate the case it is going to make.

What follows is the analysis of how the proposed quality standards are in line with ISO 9002:

In order to make quality policy effective, first of all the management must show strong leadership and determination to make such a policy and stick to it until all the goals are achieved. Hence the first quality system requirement is to specify management responsibility which includes quality policy, organization, and management review. All these topics are specified under item 4 Quality system requirements in ISO 9002.

Figure 3.0 summarizes the findings by matching each publication quality goal with corresponding requirements stated in ISO 9002 as interpreted through the proposed quality standards.
Contents Quality

- ISO 9002 has item 4.6 Purchasing, with sub-item 4.6.2 Evaluation of subcontractors, which could apply to publishing industry provided that authors/translators are seen as vendor/subcontractors of a publishing house. In order to assure the quality of a manuscript ("product"), the publisher needs to evaluate and select these subcontractors on the basis of their ability to meet the requirements set forth in the qualifications for the job. Besides, purchasing documents should be maintained, and verification of purchased product should be observed to ensure quality in the product supplied by these subcontractors.

- Item 4.9 Process control is where the supplier (publisher) shall identify and plan the production, and servicing processes which directly affect quality, and shall ensure that these processes are carried out under controlled conditions. One of these conditions is sub-item (f) Criteria for workmanship, which shall be stipulated in the clearest practical manner such as manual standards. This is in line with the proposed establishment of a house style manual.

- Item 4.18 Training is where the supplier shall identify training needs and provide for the training of all personnel performing activities affecting quality. The proposed training for editorial staff is in line with this item.

Production Quality

- If authors/translators are treated as vendor/subcontractor providing goods and service to a publishing house, so can be paper suppliers and bookbinders.
Hence item 4.6 fully applies to these vendor/subcontractors.

- In addition to item 4.9 Process control, several other items are essential to ensure production quality. One of them is item 4.8 Product identification and traceability where the publisher shall establish and maintain documented procedures for identifying the product by suitable means from receipt and during all stages of production and delivery. The publisher shall also establish and maintain documented procedures for unique identification of individual product or batches. Other essential items to observe are 4.10 Inspection and testing, 4.13 Control of nonconforming product and 4.14 Corrective and preventive action. All these contribute to consistent production quality and minimum defective products.

- Item 4.18 again applies for providing necessary training for production people.

**Service Quality**

- Item 4.5 Document and data control is probably the heart of the ISO 9002 matter. This item alone encompasses all documents and data that relate to the requirements of this International Standard by establishing and maintaining documented procedures to control them. In this particular area, the use of ISBN as a common product code for publication will definitely ease the job of referencing each and every publication in the entire system. It will also save time and increase efficiency. So will the use of barcode in the distribution area.

- To make any improvement on the publisher - customer relationship, one needs to view a purchase order as a form of contract between them, and applies item 4.3 Contract review to ensure that the publisher has the capability to meet the contract or order requirements. This item can also be applied to other related activities.

- Item 4.19 Servicing best serves this particular quality. The publisher shall establish and maintain, again, documented procedures for performing, verifying and reporting that the servicing meets the specified requirements.

**Conclusion**

The concern with quality of ASEAN publications and the commitment to fulfil it is a noble cause every member country should be encouraged to pursue. However, before introducing any quality system into any production process, it is advisable for the top decision makers to carefully weigh its pros and cons. The benefits from adopting a quality program
seem obvious. Quality of publications will be closely monitored and approved. Publication quality will be more consistent. Production waste will be considerably reduced, and the cause can be accounted for. The product can better meet customer's need. Particularly if ISO 9001/9002 is adopted to assure quality in the production of ASEAN publications, they should stand a better chance of performing well on the world market.

Looking on the dark side of initiating such a quality program, the first drawback that comes to mind is probably the high costs of initial investment, especially if any of the International Standard is adopted. There are several reasons behind this. First, routine job steps will multiply because quality activity will be added at each step of production. Secondly, the heart of this quality system is to create a system by keeping documented procedures, or documentation, so that any nonconforming product or any quality problem can be traced and accounted for. The paperwork is sure to considerably expand. Thirdly, a lot of money and time must be spent to provide necessary training to accustom the personnel with this quality system. Fourthly, the costs of ISO 9000 certification is rather high. Lastly, the costs of hiring an ISO 9000 consultancy firm to help steer the quality program for inexperienced organizations are also very high.

As it is evident that this ISO 9000 quality initiative involves high costs and big promise, one has to be extra careful in making decision about it. If the long-term benefits of this quality program seem to far outweigh its big initial investment and, big money is no problem with you, perhaps it is right for you to jump on the quality bandwagon. If that is not the case, you can still reap benefits by simply reading this paper and adapting what you learn here to improve your product/service quality without parting with your dear money. Or you may opt for an alternative quality program at much lower costs. The choice is yours.
APPENDIX

Book production manpower development for better quality of ASEAN publications

1. The government should play a more active role in promoting book production study by providing a degree course at the vocational school level or the university level. This initiative is expected to create more qualified book publishing personnel to feed this expanding industry. The curriculum for book production study should cover subjects like writing, editing, illustrating, printing technique, etc. At tertiary education level, a faculty devoted entirely to teaching the art and science of bookmaking should be encouraged like we already have the faculty of journalism or mass communication to educate and train future journalists or mass media personnel.

2. More technical know-how exchange on book production should be encouraged among the ASEAN members e.g. organizing an educative tour of any ASEAN publishing house pioneering new production method or making a significant breakthrough in publishing, organizing more conferences to share know-how, strength, weakness, and to learn more from one another in the region.
FORUM ON THE ASEAN BOOK SCENE: COUNTRY REPORT - PHILIPPINES

by

ESTHER M. PACHECO

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KUALA LUMPUR, 13-15 AUGUST 1996
SUMMARY OF PHILIPPINE COUNTRY PAPER
by
Esther M Pacheco

The Philippine Book Publishing Development Act (R.A. 8047) of 1995 promises to liberate the Philippine book industry from the doldrums of the past three decades. The Act aims to develop the industry through a threefold thrust of (1) providing government incentives and assistance, (2) promoting readership and making books accessible to the greatest number of Filipinos; and (3) protecting the intellectual property rights of authors and publishers.

Indigenous publishing, which has had a long tradition that began in the sixteenth century, is concentrated in the areas of textbooks, literature, children’s books, scholarly books, and general-trade books. It is plagued by low readerhip, high prices, and high costs of production and distribution. It needs urgently to engage widely in publishing its books in the national language, which has to be promoted through a strong political will exercised by the nation’s leaders.
BOOK DEVELOPMENT IN THE PHILIPPINES: a Situationer
Paper delivered at the ASEAN Conference on Book Development
Kuala Lumpur, 13-15 August 1996

By Esther M. Pacheco

It is with great jubilation, I think, that our delegates from the Philippines face you at this conference “largely because we have good news, nay, GREAT news to report. The news is that a landmark legislation for book development has recently been passed by our Philippine Congress. Nothing of the kind, I am told on good authority, has ever come to any other country.

THE PHILIPPINE BOOK DEVELOPMENT ACT OF 1995

The Philippine book industry finally obtained passage in 1995 of Republic Act No. 8047- "An act providing for the development of the book publishing Industry through the formulation and implementation of a national book policy and a national book development plan;" This has come to pass after nearly a decade that included brainstorming, complaining among ourselves and to those in influential places who cared to listen, writing a white paper on the state of publishing in the country, agreeing among key book persons and the legislation on the book industry should be, and then finally lobbying for months on end with legislators to pass the bill. This is the fruit of the work done mainly by the Association of Philippine Booksellers (APB), the Book Development Association of the Philippines (BDAP), and the Philippine Educational Publishers Association (PEPA).

In the decade just preceding, the BDAP gradually evolved a paper consolidated from the thinking of many key persons in the Philippine book industry about the basic obstacles to a healthy book industry. The introductory note to the paper points out government neglect:

The critical role of books in national development is not sufficiently acknowledged. and the present problem of an improvised state of book development has not been addressed. The Philippines lags behind most Asian countries in book production” and worldwide, publishes the least number of books per capita. The Philippine book publishing industry lives a deplorable existence. Government attitude towards its development is one of complete indifference. Hence, book publishing is not regarded as a priority nor an essential industry. The industry does not even merit mention in the development plan of the National Economic Development authority (NEDA). Book publishing is literally allowed to fend for itself and survives precariously without government support nor assistance.
Specific problems enumerated by the policy draft are reproduced below.

1. Book publishers have no access to liberal financing. Consequently, the industry attracts very little investment. Proof of this is that only about 30 fulltime companies engage in book publishing.

2. Imported paper to be used in book production is heavily taxed; the country imports finished books tax-free, but it cannot import raw materials for books tax-free.

3. The government policy of protecting local producers of paper and ink has contributed to the continuing poor quality, inadequate supply, and high cost of raw materials for books.

4. Inadequate marketing facilities hamper the distribution of books even to a limited market. Outside of Metro Manila there is a dearth of bookstores. Furthermore, the cost of distributing books is exceedingly high, since transportation and postal facilities are inadequate and mostly unreliable. As a consequence, 95 percent of book sales are made in Metro Manila.

5. A functioning nationwide public library system does not exist, and the present skeleton of a national library can barely survive with the meager resources allocated for it in the budget of the Department of Education.

6. The government monopoly in textbook production has stifled local private book production and is retarding the growth of the book publishing industry.

7. Poor enforcement of copyright laws results in rampant disregard for intellectual property rights that serves to discourage creativity and legitimate entrepreneurship in the book publishing industry.

8. There is no coordinated, rationalized program to develop skilled personnel for the book publishing industry - in publishing management, marketing, editing, book design and printing.

9. No effective agency exists to coordinate book concerns and implement book policies; to compile, provide data and information; and to generate research studies on books and the book industry.

To solve these problems, the BDAP proposed a threefold thrust: (1) developing the industry through a provision for incentives and assistance; (2) promoting readership and making books accessible to the greatest number of Filipinos; and (3) providing better protection for the intellectual property rights of authors and publishers.
The National Book Policy draft therefore focused on these basic purposes and objectives:

1. To create conditions conducive to ensuring infrastructural facilities for development, production and distribution of books;

2. To obtain priority status for the book publishing industry;

3. To ensure an adequate and accessible supply of books for all segments of the population;

4. To promote book readership especially among the young and neoliterates, through programs of promoting literacy and good reading habits, through the holding of book fairs and exhibits; and through the establishment of an efficient nationwide system of libraries and reading centers especially in the rural areas;

5. To promote the development of translations and of indigenous authorship among various language groups in the country;

6. To promote the effective distribution of books nationwide through adequate, efficient, and reliable postal and transport delivery services at concessional rates;

7. To foster the development of the skills of personnel engaged in book publishing through in-service training programs and through establishing formal degree and non-degree book publishing courses in schools;

8. To inculcate in citizens the concept of intellectual property ownership and to protect the rights of authors and publishers by strictly enforcing copyright laws and providing legal assistance to authors and publishers in suits related thereto; and

9. To reaffirm and ensure the country’s commitment to the UNESCO principle of free flow of information and other related provisions as embodied in the Florence Agreement and in other similar international agreements.

Two special provisions of the book policy were foreseen to vitalize and support publishing. The first provision limits the participation of government to (1) setting specifications, evaluating, approving books and materials submitted by publishers for multiple adoption; and (2) distributing the books to the public school system. In this way, government ceases to be a competitor in publishing and becomes supportive of private enterprise which is, after all, its avowed policy. The second provision sets forth two significant incentives that will encourage business persons to invest in publishing and to bring about production of more and better books; (1) duty-free importation of paper by bonafide publishers for exclusive use in book publication, and (2) access to government credit facilities with interest rates and privileges as are accorded to priority industries.
So that the aims and objectives of the policy can be pursued actively, the policy draft stipulates the creation not only of a National Book Development Plan but also of a National Book Development Board. The Board, to be directly under the office of the Philippine President, shall be tasked to pursue the aims of the Book Development Plan by implementing programs and policy guidelines relative to book development and book publishing as well as obtaining and monitoring information on book production while providing an active forum for interaction among all segments of the book publishing industry.

With the enactment of the Book Development Act, these concerns will now be addressed. Just a few months back, the National Book Development Board was created under the Office of the Philippine President. We expect very much from the Book Development Board, which has just made the first steps in what we surmise will be a long and arduous task to put in place the infrastructures necessary for an industry long neglected.

But what is the book industry like that is to be developed and made more vibrant by the Philippine Book Act? I shall briefly describe the industry as it presently obtains through a discussion in turn of the following topics: (1) the komiks, or the "national book," (2) the romance novels, a publishing phenomenon, (3) literary publishing, (4) scholarly publishing, (5) textbooks for the nation's schools, (6) general trade publishing, and (7) the state of the industry.

THE KOMIKS: THE "NATIONAL BOOK"

Today some 10 million Filipinos, or about 14 percent of the population, read the komiks, dubbed the "national book." Originally derived from the American comic book in format, the komiks has become an Institution. It has enjoyed the greatest popularity among all publications for five decades now. It merits an examination in any account of Philippine book publishing, as its phenomenal success provides valuable lessons for serious adult book publishing.

Of these full-color, illustrated, 32 pages of newsprint, some 100 titles and 1.5 million copies are published weekly, with a total diffusion of 10 million, since each copy is passed around to an average of 6-7 readers. The komiks as a separate book (it had earlier been merrily a feature of popular weekly magazines) began in the late forties when komiks pioneer writer and illustrator Tony Velasquez brought together under his wing writers and illustrators for Ace publications, developing the high-standard classics of the trade: Pilipino Komiks (1947), Tagalog Klassiks (1949), /Hiwaga (1950), and Espesyal (1952).

Because of its wide diffusion among millions. The komiks has been published even by noncommercial groups, especially the government. John Lent, director of Third World Associates and author of works on mass communications in the developing countries, says that the country probably using the most extensive and varied use of comics for development is the Philippines, with the government subtly sending messages on promoting family planning the Green Revolution, pollution, alcoholism, drugs.1
As the most popular medium, the komiks has taken on different roles purveyor of entertainment and moral lessons, disseminator of values and attitudes, and even a source of practical knowledge on farming, government, politics, medicine, and science.¹

Most of its readers are not affluent, but they spend on komiks an average of 12 million pesos a week, or nearly 600 million pesos a year. The komiks is highly popular because it has a mass folk appeal in content. Is illustrated, low-priced at about seven pesos (the price of a softdrink) and, above all, written in Filipino, the people’s language.

Though heavily borrowing from twentieth-century America in style and format, themes, and characters, the komiks is a uniquely Filipino "reflection of people's collective consciousness, a mirror of the folk mind," says a scholar of popular culture.²

It is a transmuted form of the vernacular literatures that trace their beginnings to the myths, legends, epics, folk tales of Philippine prehistoric times. Side by side with folk stories hewing close to folk tradition and those borrowing from the medieval metrical romances of Spanish times, korido and awit, are the more realistic renderings of people's experience clothed in the novels of the early twentieth century and the contemporary stories dealing with the clash between Western and traditional values, corruption and violence, social consciousness. The komiks also includes local versions of the American superheroes and such movie hits as Rocky, Earthquake—all revealing the immense ability to absorb foreign influences. Still, it has, through the years, adapted to Filipino sensibility and taste. Inherent in the komiks throughout is the function of literature i.e., education and entertainment. Furthermore, each is guaranteed to provide not only reader satisfaction but also a profitable return on publishers’ investment.³

The industry produces its 100 titles of serialized illustrated novels with about a hundred writers and illustrators to satisfy the demands of the market. Writers and illustrators earn a lot per month by producing a lot, the top ones earning the equivalent of a university professor’s salary.

The komiks is here to stay, but as communication educationist Del Mundo says. What should be done now is to study how it can grow as a medium. The quotes Nestor Redondo, who now works with comic book publishers in the U.S. as saying that komiks is the pabulum of art appreciation, that one needs to feed a child with soft food, before giving him something hard like a piece of steak. Still, the komiks must indeed grow in content and form for the needs of adult readers, else they will forever prefer the taste of pabulum and remain retarded.

THE ROMANCE NOVELS: A PUBLISHING PHENOMENON

It appears that the new and fast-growing publishing phenomenon of romance novels is in fact providing that bridge from the komiks to adult reading fare.⁴ In their many variations today, the romance novels are selling some 1.5 million copies yearly.

Began in 1984, the now highly profitable Filipino-language romance series took its lead from the success of the komiks. In that year, when the country was plunged into an economic crisis following the assassination of the charismatic political leader Benigno Aquino, Jr.,
books for Pleasure chief Benjamin Ocampo practically closed shop as he could get no foreign exchange to continue importing the trade books that his company was distributing in the country. The crisis provided him the opportunity to rethink his business. He guessed rightly that the time was ripe to put in the form of short novels the story materials that writers were providing for the komiks, something akin to the stories of the novels of Mills and Boon, Harlequin and Loveswept romances. Thus was Valentine Romances born.

In about a decade, the venture has grown from an original 4 to nearly 600 titles; it maintains an active backlist of; 160 titles and a continuing production of 10 new titles a month with a minimum total print run of 100,000 copies monthly-in addition to some 40,000 copies per quarter of its 4 other series for juveniles, for mature readers, for men. Success continues to sell. Aside from the big local market, the many Filipino worker communities in Hongkong, Singapore, Japan, Taiwan, the Middle East, and Europe provide regular additional groups of buyers.

The books are maintained at 128 pages and are sold at the very low price of about 40 pesos (the price of a hamburger). The success venture is being actively copied by several Manila publishers such that 30 imprints of the kind now offer competition. A variation is the minipocketbook, or novelette, made up of only 50 pages and sold at the same rock bottom price of the komiks. There are some 20 new titles issued each week, at a total weekly run of 100,000 copies. Not without pride, the general manager of the company considers this copying a compliment to his companies efforts. Even Harlequin Romance, the American publishing giant owned by Mills and Boon is now translating its own English stories into the Filipino language.

That these contemporary Filipino novels, light reading fare though they be, are reaching some two million readers yearly (since copies bought are inevitably borrowed by others) represents a welcome development in Philippine book publishing, which has been in the doldrums for the past several decades. This advance from komiks-rereading may yet be the spur toward the publishing and reading of more serious books, And the signs point to the important factors of successful publishing: catering to the sensibility of the audience, pricing books low, using the language of the people, and not a borrowed tongue. The language is all-important; for with Filipino, one reaches potentially 95 percent of the country’s literates.

This development in Philippine publishing also points to the fact that it is literature that seems to appeal most to Philippine readers. This is proven also by the record of serious literary publishing in the country.

LITERARY PUBLISHING

Its universal appeal and it being rooted in the very rich oral tradition in the many vernaculars of the country make literature a natural area of publishing. Its most popular expression in contemporary times, as earlier indicated, is the komik - largely literature in illustrated form.

Early published literature for the masses, which were in Philippine vernaculars, drew from the long narrative tradition of folklore that had been flourishing long before the Spanish
conquerors first set foot on the islands in 1521.\(^6\)

The first Filipino novel published in book form was Nena at Neneng in 1904. Before this, novels in Tagalog (one of eight major vernaculars and the basis of the national language) were being serialized in such newspapers as Ang Kapatid ng Bayan and Ang Kaliwanagan. At the turn of the century, weekly magazines appeared and for many decades provided the outlets for hundreds of serialized novels. In these serious novels and short stories written in Tagalog and other vernaculars, the mass majority of the educated minority in English found their literary fare. The greater number of people then had a lot to read, for literature flourished.

Responsible for the rapid development of the Tagalog novel at the turn of the century were: (1) the appearance of secular newspapers where the first novels were published (these brought a new writing to many readers by new novelists who were first trained as journalists used to relating to mass audiences); (2) the increasing ownership by Filipinos of printing presses (earlier in the hands of religious orders), which gave impetus to publishers' encouragement of the writing of novels that appealed to the masses; (3) the use of the people's language in writing the novels, as novelists wanted to enrich and deepen Filipino nationalism; (4) the prominence given to experience close to the reader's daily life (plots and characters easy to identify with in real life); and (5) the steady increase in the number of Filipino readers as public schools flourished (the number of students in the schools grew steadily such that in 1902, there were 160,000 students; in 1911, 500,000; and in 1925, 1,100,000).\(^7\)

In twenty years, print tradition was given importance over oral tradition, and the fact helped in the kinds of novels produced. The successful early printing presses were instrumental in stimulating the new printed literature.

When America took over Spanish rule in early 1900, an entirely different colonial policy was enforced. Spain's main goal was to spread Christianity and therefore found it unnecessary to teach the natives the foreign language; rather, the missionaries learned the native languages for purposes of teaching the faith. Opportunities for education during the Spanish regime were very limited so that at the end of the Spanish period, only 1.6 percent of Filipinos had any school education, and it would take some three centuries after the Spaniards' arrival before the first novel in Spanish would be written (Ninay by Pedro Paterno).

On the other hand, America used popular education as its primary Instrument for governing the Islands. And the Filipinos took to learning English with such passion that, in only twenty years, they already had the first novel in English, A Child of Sorrow, by Zoilo Galang. General anthologies would follow.

By 1966, some 64 Filipino novels in English had been published. This, a Malaysian scholar finds a remarkable feat: "In none of the former British colonies in Asia, Africa, and the West Indies was an English novel produced so shortly after the arrival of the English language. Even India, the first of the British colonies to issue a novel. Did so long after some two centuries of British rule".\(^8\) For literary works in English, the following magazines served as outlets; Philippines Free Press (founded 1905), Philippines Herald, Philippine Teachers,
Today, serious book publishing in literature is carried out by relatively young publishing houses-New Day, Solidaridad (which is actively issuing a translation series of Asian writings with a grant from the Toyota Foundation), Book-mark, Anvil, and the very new Giraffe Books, as well as by the three university presses of the country-Ateneo de Manila, De la Salle, and the University of the Philippines. The overwhelming majority of these books today are in English, but the small growing number of those in the national language, Filipino, represent the Philippine classics in fiction, poetry, drama and these are done in the main by the university presses which have committed themselves not only to republishing several of the now-out-of print landmark Tagalog fiction but also to translating into the national language and publishing under their Panitikan (Literature) series those considered literary canons in the country’s major vernacular languages.

At any given period in Philippine publishing history, literary publishing appears to be the most flourishing, as it is the most appealing to the greater masses of people. Furthermore, it receives the greatest amount of support from society. Scholars’ writings and articles in the printed media reflect greater concern for Philippine literature than for textbooks or scholars’ works. Writers’ workshops, fellowships, conferences are all organized for writers of literature; most of the national awards for writers are for literature. Writers associations as well are all for writers of literature-the Philippine Literary Arts Council (PLAC), The PEN (Poets, Essayists, Novelists), the Writers’ Union, and several groups writing in the vernacular-the GUMIL (for Ilokano writers) the GAT, UMPIL, and PANULAT (all three for writers in Tagalog or Filipino), and the Cebuano writers groups.

SCHOLARLY PUBLISHING

It is scholarly publishing that has the longest continuing tradition in the industry. The earliest books were scholarly, for they were published in the interest of scholarship and for specialized audience; these were dictionaries, grammars, and the like.9

Publishing in the country started in 1593, nearly eighty years after the Spaniards had established their rule. Within one century, from 1610 to 1703, only two books of native Filipinos were published.

In the interim, before the 1900s, censorship prevented publishing books with liberal ideas. After the short-lived Revolution against Spain and later against the U.S. at the turn of the century, Filipinos took to learning English as a new language, mainly through the widespread public school system that the American colonizers established.

A survey of serious books published between 1900 and 1935 and now in the University of the Philippines Library disclosed only about a dozen titles. The number grew to about one a year before the Second World War, and to about 50 currently. More scholarly books are now being produced each year than in the first forty years of the American occupation. Still, scholarly books constitute less than 10 percent of total local book production.
Today scholarly book publishing in the country is carried out by different agencies: general publishing houses, research centers and institutes, government offices, and university presses.

The three university presses in the country—Ateneo de Manila, De La Salle, and the University of the Philippines—make up the core of scholarly publishing. Not surprisingly, their mother universities are the most prestigious among some 70 universities in the Philippines.

Many of the books that university presses publish are highly specialized, even esoteric. But these are the books that specialists most directly need, and it is for this type of book that the university presses were primarily established. Today, however, these presses' books have increasingly grown beyond esoterica, as they now publish not only more and more books for the educated general reader but also literature and textbooks.

The scholarly books published in the country are overwhelmingly Filipiniana—that is, those that deal with Philippine society and culture. Titles are typically devoted to Philippine socioeconomics and political history; the sociopolitical issues of language, land reform, and the foreign debt problem; Filipino psychology; and philosophy and religion. One can say that there is a conscious effort to publish those books that help bring about intelligent understanding of the country's past and its contemporary sociopolitical, economic, and cultural life.

TEXTBOOKS FOR THE NATION'S SCHOOLS

Textbooks are the mainstay of publishing in the country, as they serve one of the largest school systems in the world. In school year 1990-91, 16.5 million were enrolled in the nation's schools a fourth of the total population. It is not surprising then that about 70 percent of books being published in the Philippines are textbooks. For most of those who enter school, the textbook could be the only book they will ever read since dropout rate is very high: In the elementary schools (which makes up about half of the total student population), some 66 percent reach sixth grade and of all—elementary school pupils, only 55 percent reach high school. (Enrolled in public schools are 95 percent of all pupils—the largest portion of the schoolbook market). Those in tertiary schools (1,755 institutions of high learning) count about 1.4 million.

The Congressional Commission on Education (EDCOM), in its report in June 1992, points out that large disparities exist in physical access to basic education between rich and poor, urban and rural, high-income and low-income families and among exclusive groups. Quality is poor as well. Pupils on average learn only 55 percent or less of what must be learned at every grade level. These facts help explain the impoverished state of reading and books but they also carry serious implications for the publishing of textbooks which must be effectively written and low-priced as well.

In 1958, the Philippine Educational Publishers Association (PEPA) was organized to meet the challenges of educational book publishing. It aimed to Publish textbooks and other educational materials of highest quality.... at affordable prices in line with national development plans and educational goals and programs; to motivate, assist, and encourage
Filipino writers, researchers, editors, designers, and illustrators in their professional growth and advancement; to contribute to the country's development by initiating measures for government legislation aimed at revitalizing and making the publishing industry viable, alive, robust, and responsive to the educational, social, and cultural needs of the Filipino people.  

Although the government purchased for its public schools large amounts of textbooks from 1960 to 1971, the ratio of book to pupil was only 1:4. Before 1972, when Martial law was imposed on the country by Ferdinand Marcos, all textbooks in the public schools (which make up some 90 percent of the aggregate school population) were produced by private publishers that vied with each other for government approval of titles submitted in biddings.

In 1972 the government took over development and production of text-books for all public elementary schools and about half of secondary schools nationwide. Publishers were left to compete among themselves for the limited market of the private schools-5 percent of elementary schools and 48 percent of secondary schools. Tertiary schools are practically no market for local publishing houses, since the overwhelming majority of college textbooks are imported.

From 1976 to 1988, the government distributed to 40,000 schools, on loan-free basis, 123 million textbooks and improved the pupil-to-book ratio from 1:10 to 1:2. This has been the largest publishing activity in the Philippines-in scale, complexity, and organizations.

The government monopoly has cut off the main client of the publishing industry, which is heavily concentrated on textbook publishing. This monopoly has been met with the consistent and unwavering opposition by the PEPA.

The PEPA maintains that government is competing unfairly with private enterprise, since it publishes books with subsidy from government loans. Furthermore, the government's publishing arm, the Instructional Materials Corporation (IMC), gets paper tax-free, while private publishers pay a 30-50 percent tax on paper. This is contrary to the avowed government policy of privatization. Furthermore, quality is not served by a monopoly.

The IMC answers the objections by saying that the government textbook project is temporary in nature. It was launched to meet a critical need the gaping lack of textbooks in the public schools which, before the project began, had the distribution ratio of one book to 10 pupils in grades 1:4 and one for every 12 in grades 5 to 6. Furthermore, the process of developing and distributing textbooks was insufficient and irregular.

The government textbook project, IMC avers, not only raised the standards of quality in the publishing industry (especially design, typesetting, illustrations), but also infused into the economy some US$3 million every year from 1978 to 1988.

Government publishing of textbooks for the nation's public schools will soon be a thing of the past, however, since the Book Act of 1995 prescribes the final phase out of government-published textbooks within three years.

Thus, we shall soon test whether or not market-driven textbook publishing for government schools will not only develop a built-in system of improving book quality but also
bring about the spirit of competition to come up with the best-quality books produced at minimal costs while maximizing profits.

An important criticism leveled against the government’s textbook project is its failure to imbue true nationalism, which is fundamental to a colonized country like the Philippines. The textbooks, a critic says, produce noncritical individuals, offering the myth of equality as if social stratification does not exist. The distortion is carried throughout, for the American colonizer is held up as a great savior, who gave education, roads, democracy, self-government, and sanitary toilets:

Finally, the child is asked: What would have happened to our culture if foreigners had not come to our country and after reading his book, what is a poor child to answer? "We would be without the joys of television or Coca-Cola. Thank God we were conquered!" That would be his answer. He would be afflicted with a colonial mentality for the rest of his life.16

A need exists for rewriting textbooks to imbue nationalism and not distort economic and political reality. In teaching the young, all programs should be subjected to one yardstick—whether or not they will ultimately benefit the majority of the Filipino people.17

Yet, the criticism is to be shared by private textbook publishers as well for most of their history books present the Filipino as merely passive receivers of the many influences that various foreigners have imprinted on them. They fail to present the Filipino as an active maker of his history; they neglect to show the Filipino of precolonial Philippines for what he was-independent, creative, excellent builder of boats and intrepid sailor of the seas, practitioner of sophisticated commerce, agriculture, and the arts.18

Aside from elementary and secondary textbooks, tertiary textbooks are an area that will need the attention of Philippine publishers—if college students are to be effectively taught what is relevant to them. Unless some important changes are introduced, however, not much writing in this area can be expected, as authors from among college faculty will always be few, being overburdened as they are with heavy teaching loads and curricular activities that occupy practically all their working hours. Furthermore, tertiary-textbook writing and publishing is dampened by the Reprint Law of 1974 and 1977 which authorizes the reprinting of foreign books "whenever the prices thereof become so exorbitant as to be detrimental to the national interest." A wide range of foreign books, especially tertiary-level textbooks, continue to be reprinted, and they offer unfair competition to locally published books, since reprinting carries no development costs. The reprint law, however, will soon be abrogated once the now-pending copyright bill in the legislature is passed into law.

GENERAL TRADE PUBLISHING

A fastgrowing-local publishing effort is general trade book publishing that includes mainly dictionaries, anthologies, culture and travel books, cookbooks, how-to-books, art and coffee-table books. All these are inner-directed however, as they are focused on things Philippine and are written for Filipino readers. This explains why most Philippine books find no foreign market.
These general trade books, all in English as are most other titles published in the
country, are being produced by small commercial publishers which are on the way to becoming
the publishers of general-interest books in the coming decade.

Considering the limited readership in English, which is not the language of the
Philippine masses, it would seem that the trend will continue to be small-scale publishing
which, even in the United States, appears to be the most lively, varied, and expanding
segment of the trade. What John Baker writes about U.S. publishing holds true for Philippine
book publishing in English. These publishing houses, which belong to the "small press
movement," he says, have a clear sense of their own aims and limitations; they aim only at
a small profit, have low overheads, market their books intensively to readers they know how
to reach, cut costs on printing and distribution; and their operations are be coming more
viable with the growth of word processors that easily interface with typesetting equipment.19

General trade publishers include New Day (trade name of the Christian literature
Society of the Philippines); Bookmark, basically a bookstore chain that is now actively
publishing travel, nature, and culture books; Anvil Publishing, which is putting out some 100
titles a year; Clarettian Publishers, which concentrates in republishing religious books
originated in America and European countries; and Giraffe Books, the youngest of the lot.

For children's books, the leaders are the Children's Communication Center, Cacho
Hermanos, and Tahanan books. Together these publishers have about a hundred titles in their
active list of well-written and well-produced children's books in Filipino that have a high
average print run of 5,000 copies and reprints sometimes reaching 50,000 copies. Still,
considering that there are some 22 million children 12 years and below, the number of titles
and print runs are exceedingly small, merely pointing to the dearth of indigenous books for
children in the country.

A PRECARIOUS EXISTENCE FOR BOOK PUBLISHING

A survey of book publishing in the Philippines today shows a lot of promise, as new
publishers go into such untried ventures as novelettes and the quick-selling romances in
Filipino.

Yet, book publishing still lives a precarious existence, as certain key basic
infrastructures for books are not in place. For one, book readership is extremely poor. A
Unesco-sponsored survey in 1980 on reading habits of persons 15-64 years of age discovered
that those who use media use more nonprint rather than print; that among print, newspapers
and magazines are more likely to be read rather than books. Books read are likely to be
text-books and references more than any other kind—which confirms the common enough
observation that most book-reading is done while in school and that, once out of school adults
rarely read books. This finding is confirmed by a 1996 survey by the government's National
Statistics Office (NSO), which questioned 50 million Filipinos over ten years old. Filipinos,
the survey says, are reading less and relying more on television and radio to be informed and
entertained. A slight improvement is noted in that rural populations were reading more
books—a rise to 33 percent from 31 percent; but the number of urban readers fell from 43
percent to 39 percent. Seen overall, then, no rise in readership seems to have taken place.
Even teachers, a 1992 survey shows, are reading only the textbooks used in their classrooms and actually read no other books outside those used for their classes—implying an alarming no-book-reading studentry and citizenry.\textsuperscript{20}

There is, it seems, a lot to overcome before a book reading culture is developed and set in place. And the government must take a large part of the blame for not putting its resources behind developing a national reading habit. As a columnist rightly points out, "Because we do not read enough and read the wrong things, all the more we need a rational, systematic and sustained program of reading [which] must be given a feasible hedge. At present reading suffers in competition, as evidenced by the scarcity of quality books and magazines . . . in the context of geopolitics, we do not employ books as tools for realizing our societal objectives and as weapons for fighting national ignorance. This lamentable failure may explain to a great extent the state of our underdevelopment.\textsuperscript{21}

This need to develop books and reading cannot be emphasized enough. Time and again Filipinos in book development stress the importance of lobbying with government to focus maximum efforts on books as an instrument of the country's development. As a longtime publisher put it: we must expose the fact that books have as much significance and consequence as that of roads and bridges.\textsuperscript{22} (I would edit that statement to say that books are of even greater significance than roads and bridges, or even better that books are the roads and the bridges of the mind and therefore merit building up to develop peoples.)

While book readership is all-important in promoting book development, much remains, on the other hand, to be done in the areas of book production and book distribution in order to promote book readership. This is brought to the fore in what I find is a very enlightening study on Philippine book publishing by Professor Shigeo Minowa.\textsuperscript{23}

In 1994 and 1995, Professor Minowa (communications professor in Japan, former director of the University of Tokyo Press and of the United Nations University Press, and past president of the International Association of Scholarly Publishers), did a quantitative study of Malaysian and Philippine book publishing that was sponsored by the Toyota Foundation. The 1990 data he collected on the Philippines is summarized in the table below. The data were gathered through reading of publications, interview with publishers and book-sellers, visits to libraries, research institutes, and a survey via a questionnaire sent out to participants at the Philippine bookfair. The accuracy of the approximated figures were confirmed by active publishers in the Philippines. Professor Minowa's aim in view was to identify what the bottlenecks are in Philippine publishing.
### Table 1

Outline of the Production and Distribution of Publications in the Philippines in 1990

<table>
<thead>
<tr>
<th>Category</th>
<th>No. of new titles</th>
<th>No. of new titles</th>
<th>Av. no. of copies</th>
<th>Total no. of copies (copies 10,000)</th>
<th>Av. retail price (pesos)</th>
<th>Total sum (mill. pesos)</th>
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</thead>
<tbody>
<tr>
<td>School textbooks</td>
<td>513</td>
<td>1209</td>
<td>5600</td>
<td>967</td>
<td>44</td>
<td>429</td>
</tr>
<tr>
<td>College textbooks</td>
<td>433</td>
<td>363</td>
<td>2000</td>
<td>160</td>
<td>90</td>
<td>141</td>
</tr>
<tr>
<td>Scholarly books</td>
<td>50</td>
<td></td>
<td>1000</td>
<td>5</td>
<td>150</td>
<td>7</td>
</tr>
<tr>
<td>Literary books</td>
<td>140</td>
<td>94</td>
<td>3700</td>
<td>86</td>
<td>35</td>
<td>30</td>
</tr>
<tr>
<td>Children’s books</td>
<td>67</td>
<td>172</td>
<td>5000</td>
<td>119</td>
<td>42</td>
<td>50</td>
</tr>
<tr>
<td>General books</td>
<td>408</td>
<td>164</td>
<td>2000</td>
<td>114</td>
<td>90</td>
<td>101</td>
</tr>
<tr>
<td>Dictionaries, etc.</td>
<td>17</td>
<td>67</td>
<td>2000</td>
<td>18</td>
<td>55</td>
<td>10</td>
</tr>
<tr>
<td><strong>Total of publishing house</strong></td>
<td><strong>1628</strong></td>
<td><strong>2069</strong></td>
<td><strong>1469</strong></td>
<td><strong>768</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government—issued</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>school textbooks</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Government publications</td>
<td>119</td>
<td>1000</td>
<td>11</td>
<td>100</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Publications of research</td>
<td>342</td>
<td>1000</td>
<td>34</td>
<td>100</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>bodies &amp; other organizations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private publications, etc.</td>
<td>87</td>
<td>1000</td>
<td>8</td>
<td>100</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td><strong>Total of non-publishing houses</strong></td>
<td><strong>568</strong></td>
<td></td>
<td></td>
<td><strong>338</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total of books</strong></td>
<td><strong>2196</strong></td>
<td><strong>2069</strong></td>
<td><strong>3522</strong></td>
<td><strong>1106</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Magazine</td>
<td>163</td>
<td></td>
<td>12855</td>
<td>5</td>
<td>655</td>
<td></td>
</tr>
<tr>
<td>Comics</td>
<td>81</td>
<td></td>
<td>8996</td>
<td>5</td>
<td>449</td>
<td></td>
</tr>
<tr>
<td><strong>Total of domestic publications</strong></td>
<td><strong>84</strong></td>
<td></td>
<td></td>
<td><strong>1498</strong></td>
<td></td>
<td></td>
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<td>Imported books</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Imported Magazines</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total of imports</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Philippines expenditure for publications</strong></td>
<td><strong>2500</strong></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

The data in this table he subjects to various analyses and summarizes them under the rubrics (1) scale of publishing, (2) book spending ratio, (3) the invasion by multinationals, and (4) book pricing.

Let me summarize the information he provides.

1. **ON SCALE OF PUBLISHING** derived from summaries indicating types of books and magazines locally published or imported, their print runs or copies sold, their retail prices and total sales:

   1.1. the total number of new book titles released in 1990 by government and commercial book companies was 2,196, and the total number of reprints was 2,069; magazines and comics had 244 new titles; together, these titles had a total sale of 2,210 million pesos;
1.2 imported books and magazines, however, sold a total of 2,500 million pesos; and

1.3 while local books had total sales of 1,106 million pesos, imported books accounted for sales of 2,045 million pesos.

2. **ON BOOK SPENDING RATIO**, which is the proportion of expenditures on books and magazines to the gross national income (or gross national product), namely 4,710 million pesos divided by 1,100 billion pesos, gives the ratio of 43 percent. This ratio is very large when compared to 16 other countries (In Minowa’s table 2), the general ratio of which hovers on 35 percent.

What does this mean? It means that Filipinos as a whole buy books at a greater sacrifice than do people in developed countries. This appears to be a very encouraging fact. But it is not so, when we push the analysis further.

3. **ON BOOK PRICES**, the picture turns from bright to dim. By asking how many books Filipinos get at such great economic sacrifice (total number of books available per year divided by total population), the answer is 0.66 meaning each Filipino buys less than one book a year.

This translates, Minowa says, into less than one-tenth of the number books available to Americans, Japanese, or Germans (who average 7-8 copies a year per head).

This means further that book prices are too high relative to people’s incomes. If one segregates the accessibility ratio (average price of book over per-capita income) to foreign books from accessibility to local books, one finds that accessibility ratio to foreign books is ten times higher than it is to local books (1.86 vs. 0.18 for local books). The very high level of imported book prices then, is the biggest reason for the poverty of access to books. Yet, even the prices of local books is high relative to people’s incomes. The main reason for the high price of local non-textbooks, the study points out is the relative inefficiency of production as well as highly bloated overhead costs and relatively high profits. "The first factor inhibiting the access of the Philippine population to books," Minowa summarizes, "is the heavy dependence on imports, and the second, the high price of domestically produced books in relative terms."

4. **ON THE INVASION BY MULTINATIONAL PUBLISHERS**, the study establishes that as long as the Philippines uses English as the main medium of communication, it will be difficult if not impossible for Filipino publishers to compete with major American or British publishers. The case of Australia and Canada illustrates this vividly. "Given the mechanism of publishing which presupposes a mass and rivalry in the number of copies issues and sold, it is
virtually impossible for indigenous publishers, facing competition from their American and British counterparts, to achieve decent editing, book production and distribution."

But even more insidious an effect of the multinational invasion is the undermining of the country’s cultural identity. No wonder Indonesia and Malaysia insist on developing and propagating their national languages. Furthermore, the invasion deprives the Philippines of a large part of its already scanty foreign currency reserves.

I agree fully with Shigeo Minowa when he says there is only one thing the book industry of a developing country can do to successfully compete with international products which are better edited, more beautifully designed, and less expensively produced (relative to the people’s income). It is to encircle its market with the barrier of its own language," Yet, I foresee that this cannot be done in the Philippines unless a strong political will (as in Indonesia and Malaysia) imposes the national language as THE language for national life.

Let me end with that statement as one of the challenges that our National Book Development Board will have to meet. With the Book Act now in place, monumental strides can be made toward establishing a vibrant publishing industry that helps create a book and a reading society. Then, the quiet renascence of publishing can be nurtured and grow to combat, even outside the confines of formal schooling, the enemy that is illiteracy - a major constraint in attaining socioeconomic progress. This way, the book becomes, for the Philippines, as the Book Act says, "the most effective and economical tool for achieving enduring educational growth; for imparting knowledge and information; and for recording, preserving and disseminating the nation’s cultural heritage."

NOTES


5. Information on Valentine Romances comes from the company's executives Beniarnin Ocampo and Ramon Fabella.


7. See Soledad Reyes, Nobelang Tagalog (Quezon City; Ateneo de Manila University Press, 1982).


10. See Ester M. Pacheco, "University Press Publishing In the Philippines", Solidarity (special issue on publishing in Asia), which argues for a wider role for university presses in the developing countries, to include publication not only of scholarly books and journals but also of textbooks and literature. The writer makes a case for book publishing to bring about liberation from colonial mindedness.

11. This is the highest gross enrollment ratio (38 percent) among countries in the ASEAN countries. In comparison, Indonesia is 6.5 percent, Malaysia, 6 percent, Singapore, 11.8 percent, and Thailand, 19.6 percent. In proportion of college-educated to total population, the Philippines is preeminent among all countries, comparable to the U.S.

12. PEPA brochure, circa 1990.


15. The views of the government in this section are taken from IMC reports and from writings of Pacifico Aprieto, the first head of the IMC and later consultant to the corporation.


17. Ibid.


22. Alberto Benipayo, In a July 1972 Tokyo Experts Meeting on Book Development In Asia.


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"BOOKS FOR ALL: ASEAN CONFERENCE ON BOOK DEVELOPMENT"

KUALA LUMPUR, 13 - 15 AUGUST 1996

FORUM ON THE ASEAN BOOK SCENE: COUNTRY REPORT - THAILAND

by

PRACHARK WATTANANUSIT

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA & NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION (ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
Thailand Country Report

Forum on the ASEAN Book Scene : Thailand

to be presented at

Conference on ASEAN Book Development (Book for All)

Kuala Lumpur Malaysia

13-15 August 1996

by

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National Library of Thailand
Thailand Country Report
Forum on ASEAN Book Scene: Thailand

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Mr. Prachark Wattananusit

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Abstract

Book publishing and printing in Thailand are about 150 years old. Publishing and printing industries are developing side by side with the national education development and reading promotion under the 1st - 7th National Social and Economic Development Plans. Thanks to His Majesty the King Bhumibol Adulyadej’s government education and literacy campaign, the percentage of Thailand population’s literacy is now about 93%. Books and periodicals become part of Thai life especially in cities, towns and district centers. There are about 2200 printers and 200 publishers in Bangkok and 75 provinces. According the statistics collected by the National Library, there are about 8,000 titles of all subjects published each year. While the printing manpower development is constantly improving through programs of government and private institutes as well as private associations. In this circumstance, the National Commission for Book Development, National Book Week, National Book Awards, SEA Write Awards and library services are among many programs and projects to promote books and periodicals in Thailand. As in many countries in Asia IT is also extended its role to book industry while the copyright law had been amended in 1995. In some extent problems related to books have not yet solved. But some problems especially high cost of paper has been solved and make printed materials cost lower than ever before.
Abstract

Book publishing and printing in Thailand are about 150 years old. Publishing and printing industries are developing side by side with the national education development and reading promotion under the 1st - 7th National Social and Economic Development Plans. Thanks to His Majesty the King Bhumibol Adulyadej's government education and literacy campaign, the percentage of Thailand population's literacy is now about 93%. Books and periodicals become part of Thai life especially in cities, towns, and district centers. There are about 2200 printers and 200 publishers in Bangkok and 75 provinces. According to the statistics collected by the National Library, there are about 8,000 titles of all subjects published each year. While the printing manpower development is constantly improving through programs of government and private institutes as well as private associations. In this circumstance, the National Commission for Book Development, National Book Week, National Book Awards, SEA Write Awards and library services are among many programs and projects to promote books and periodicals in Thailand. As in many countries in Asia IT is also extended its role to book industry while the copyright law had been amended in 1995. In some extent problems related to books have not yet solved. But some problems especially high cost of paper has been solved and make printed materials cost lower than ever before.
Thailand Country Report

Forum on the ASEAN Book Scene: Thailand

by

Mr. Prachark Wattananasit

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1. Background Data on Thailand
   1.1 General Background

The Kingdom of Thailand, covering an area of 514,000 square kilometers, lies in the heart of Southeast Asia, roughly equidistant between India and China. It shares border with Myanmar to the west and north, Laos to the northeast, Kampuchea to the east and Malaysia to the south.

Buddhism is the national religion of 59 million Thai. Anyhow there are religious freedom and all faiths are allowed to practice. Under the constitution the King is Buddhist and the upholder of all religions.

The official language of Thailand is Thai. It is commonly used with regional dialectical variations by most Thai people. English is used only in some government documents intend for foreign use and circulation abroad and in modern business documents.

Economic development is a phenomenon now in Thailand. GDP growth is average 7.8 per year. Per capita rose from 2,100 Bahts in 1961 to 68,000 Bahts in 1995 or 32 times, making Thailand’s economy one of the fastest growing in the world.
The 8th National Economic and Social Development Plan which is going to be implemented in 1997 has a direct goal to human development. According to that plan, human is the center of development. Thereby cultural institutions, e.g., libraries, information centers, learning centers, publishing industry, etc., have important roles in the national human development.

1.2 Education

As a means to achieve the goal of the National Education Scheme, the five-year National Education Development Plans has been formulated since 1961. The present plan is the Seventh National Education Development Plan (1992-1996). It aims at qualitative improvement of citizens on ethnics, morality, intellect, health, occupation, knowledge, and skills so that they will be self-reliant, able to live a happy life under the constitutional monarchy, able to adjust themselves properly in any situation, be creative and initiative, and able to lead national development in the right direction. Furthermore, it is expected that they will be able to support socio-economic changes in a systematic and harmonious pattern, corresponding to the limitation of resources, needs of individuals, communities, and societies.

Education administration system, parallel to all other sectors of public administration, follows a three-level approach, namely the central or national, regional, and local levels. There are four main education agencies in Thailand. Of them are the Office of the National Education Commission attached to the Office of the Prime Minister, The Ministry...
of Education, the Ministry of Interior and the Ministry of University Affairs. There are also other government organizations responsible for other special education.

All children aged seven are required to attend school until they reach the age of 14. First 6 years is compulsory and second 6 years (secondary education) is not yet compulsory. There are two alternative channels of education, academic and vocational. The academic channel prepares students for universities whilst the vocational channel prepares for skilled labor market.

Rate of literacy is about 93%. Reading promotion has done through many authorities and projects e.g. Department of Curriculum and Instruction Development, Department of Non Formal Education, Department of General Education, Office of the National Primary Education Commission and the National Library under the Ministry of Education. These also includ Departments under other Ministries e.g. Ministry of Interior and Ministry of University Affairs etc. The Thai Library Association is also active in reading promotion.

1.3 Habit of Book Buying

At present readers are prepared to buy books than ever before due to better earning and living condition. It is able to notice this changing through the book production that there were the changing in number of titles published each year. For example there were 6,198 titles in 1991, 7,585 titles, in 1992, and 7,689 titles
in 1993. It is noticable that nowadays there are many book shops, book stalls in all community centers, department stores in Bangkok as well as in provinces all over the Kingdom. But of course people in very remote areas still lack of books to read. This problem, anyway, is fighting by many government and private agencies, especially the Department of Non Formal Education Ministry of Education and all libraries.

2. **Overview of publishing and book development**

Although Thai alphabets is about 713 years old since King Ramahaeng had created these alphabets in A.D. 1283, but the publishing industry is not as old as such. The publishing started by American Missionary Charles Robinson in the time of wellknown Missionary Bradley. Later on Prince Mongkut (King Rama IV of Chakri Dynasty, Bangkok period) while he was in monkhood of Wat Bovornnivet had set up the press in that monastery for the propagation of Buddhism. He was also ordered to set up the Aksornpimkarn printing press in the Grand Palace to publish official documents. It is, therefore, suitable to note that King Monkut was the first Thai monarch who realized on the importance of book publishing in Thailand.

2.1 **Publishers** There are about 200 publishers who are membered of the Publishers and Booksellers Association of Thailand. (PUBAT) But in actual there should be more publishing firm because most of publishers under government ministries are not member of this Association. Anyhow we categorized publishers in Thailand in 5 groups as following :-
2.1.1 **Business enterprises** in this group there are two sub-groups - general publishers such as Kurusapa Business Organization, the state enterprise under the Ministry of Education and specific specializing in particular subjects such as Nivitet specializing in law books; Dhammasapha, special in Buddhist books.

2.1.2 **Scholarly and non profit publishing houses** publishing text book for university level students. Most of this group are university presses such as Chulalongkorn University Press, Thammasat University Press, Sukhothai Thammathirat Press and Ramkhamhang Press. These publishing house sell books at cheaper prices.

2.1.3 **Publishing units of the governmental administrative agencies** such as the National Identity Board and the National Committee for Historical Publications under the Prime Minister’s Office, the Department of Fine Arts and the Office of the National Culture Commission under the Ministry of Education. This group of publishing houses publish book on Thai history culture and knowledge about Thailand. Most of their publications are distributed free of charge, or at low price.

2.1.4 **Non-governmental organizations** who published books and journal in subject of their concerns, at low price, or for distribution among their members only, such as the Thai Library Association, The Social Science Society and the Siam Society.
2.1.5 Private individuals who are, most of them, writers, publishers and book sellers. There are about 200 of them in Bangkok and about 60 in provinces. These include members of the Publishers and Booksellers Association of Thailand (PUBAT). Names of member are available in "Directory of ASEAN Publishers".

2.2 Printers There are about 2,200 printers in Thailand. Out of this number, about 60% are in Bangkok and 40% in 75 provinces. There are about 10% of large and medium printers. Others trend to be small printers. Anyhow this statistics is not included government, state enterprises, banks and other organization's printers.

2.3 Title published At present there is no agency responsible for the collection and maintenance of book production in Thailand. But the National Library upon constantly request of Unesco had compiled statistics on book production from number of books received by the National Library from many sources. These statistics divided into Library Science Universal Decimal Classification (UDC) subject groups e.g. generalities, philosophy and psychology, religion and theology, social sciences, phylology, pure sciences, applied sciences, art and recreation, literature and geography and history. These are the most refered statistics on book production in Thailand. Even though, according to the National Library, they are far from completion. It would be useful to mention here that representative of 11 countries of Unesco Sub-Regional Workshop on Statistics of Book Publishing, Bangkok 19-22 June 1995, had expressed about the complication of the collection and the compilation of statistics.
of book production according to the present Unesco’s form.

Anyhow from the statistics of books published in Thailand during 1990-1993 (Appendix) readers of this paper would recognize that books of most subjects had published in distributed manner. The author has found that there were many titles on business, technology and modern living published during 1994, 1995 and first half of 1996 too. Last but not least, the year 1996 the Thai Nation celebrates The Fiftieth Anniversary (Golden Jubilee Celebration of His Majesty’s Accession to the Throne) there are many titles published and being published about His Majesty King Bhumipol Aduladej of Thailand activities.

3. Manpower Development
3.1 Formal Education

Bangkok Technical college (At present-Rajamangala Institute of Technology Bangkok Technical campus) had open the course on printing since 1958. Number of students were about 30-40 persons a year. Later on this college offered the diploma on this subject. There were about 20 diploma holders each year. At present this program is also leading to bachelor degree but number of student is still very small.

Bangkok Polytechnic School under the Industrial and Community Education College Division, Department of Vocational Education Ministry of Education had offered the 150 hours course for anyone who passed elementary education since 1978. Number of student each year is only about 15.
Don Bosco Private Technical School under the guidance of the Office of the Private Education Commission Ministry of Education also open a course on printing too.

At university level, Chulalongkorn University’s Department of Photography Science and Printing Technology, Faculty of Science had open the B.Sc. program in this subject since 1971. Until 1995 there were 298 students received B.Sc. in Photography Science and Printing Technology.

3.2 National Printing Technology Training Center

Sukhothaithammathirat Open University, Ministry of University Affairs had, on 1989, open the National Printing Technology Training Center to develop Thailand Printing technic and humanpower under the technical cooperation program between the German Government and Thai Government through the German Agency for Technical Cooperation due to the shortage of humanpower in this field. There are two levels of curriculum i.e. the 2 years course for skill worker and the short course for technician. The two years program stresses on the offset printing, typography, reproduction, printing and book binding.

3.3 The Federation of Thai Printing Industries’ Program

The Federation of Thai Printing Industries (FTPI) which was initiated through the cooperation of eight associations involved in printing industry, viz; The Thai Printing Association, the Colour Separators Association, the Thai Electronic Printers Association, the Printing-Industry Association, the Printing Promotion Association, The Publishers and Book sellers Association of Thailand, the Thai Screen Printing Association and the Thai Packaging Association.

Important policies determined by the federation are to promote the development of the printing trade within the country which includes good manpower experience as well as the technological aspect and to generate good relationships with similar organizations overseas etc.

Major achievement already carried out are the formation of a curriculum for workers in the printing industry in the collaboration with the Sukhothaithammathirat Open University and the Ratchamangala Institute of Technology as mentioned earlier. Another achievement is the request to the government to reduce imported paper tax from 35% + 5% to 20% which will be very much effected to the cost of books and periodical Thailand.

3.4 Overseas Training

To develop manpower, acquire new technology as well as to experience the book production.
Thailand also sent her personnel to attend workshop, meeting and training in foreign countries too for example 2 Thais attended the Regional Training Course on Book Production in Asia/Pacific Tokyo 21 September - 8 October 1994 on "How to Establish Effective Book Marketing and Distribution Systems in Asia-Pacific under the Asia/Pacific Cultural Center for Unesco (ACCU) programs.

As Thailand advancing towards industrialized country, book become an important part in Thai life. Market for imported foreign language books should be expanding. At the same time books and other printed materials by of thai publishers should be more available in other countries. The Publishers and Book Sellers Association of Thailand (PUBAT) has been actively involved in expanding the printing and bookselling industry in the country as well as international markets.

4. Book trade, marketing, import and export procedures.

Thai publishers have become more professional in recent years. In general market surveys are conducted before new books are introduced. Book design are also chosen as a result of these surveys.

In 1994 there were about 400 bookshops and 20 distributing agents for books and 4 for newspapers and magazines. In the year retail book shops rapidly increased with the growth rate of 50% in Bangkok area and 40% in provincial area. Compared to an average growth of 37% in retail outlets in other industries, book business marked the highest growth.
4.1 Book Marketing

There are four types of books which are very competitive in book market, as follows:

1. Children book for the child 10 months old to primary school level;
2. Textbook for kindergarten level to university level;
3. Other book for the youth of secondary level and up; and
4. Newspaper and magazine for both children and adults which is very famous and can also categorized as documentary and leisure.

4.2 Imported Books market in Thailand

Since the majority Thais do not read English or other international foreign languages, the local imported books market has been traditionally very small. During recently years, however, due to rapid industrialization and tourism, the market has been expanding. Newspapers/magazines/journals accounted for 3.6 to 4 percent of the total import value. About 86 percent of imported book in 1992 was from the U.S.A, Singapore, Japan, United Kingdom and Hongkong. Apart from Singapore, other ASEAN countries exported very small value of books to Thailand.

4.3 Structure of book marketing in Thailand

Following charts show the structure of book marketing in Thailand

1. Children book

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Publisher — Wholesaler — Retailer — Consumer
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2. Textbook

Publisher → Wholeseller → Retailer → Consumer

School, Universities

3. Other book

Publisher → Wholeseller

Books Rent Shop → Retailer

Schools

Mail (Domestic and Overseas) → Consumer

4. Newspaper and Magazine

Publisher → Agent → Retailer → Consumer

Membership

Mail
4.4 Import and Import Tax

With only few exceptions, book and other printed materials can be freely import into Thailand. Import duties are not levied on non-Thai books except for the following categories:

- Newspapers, journal and periodicals 5 percent
- Children’s picture drawing 5 percent
- Music, printed or in manuscript 5 percent
- Map and hydrographic charts in book-form 5 percent
- Picture, designs, photographs 40 percent
- Advertising material and commercial catalogues 40 percent

5. Promoting the Book and Reading

Many government and private agencies had supported book promotion, reading promotion and book industries since the Second World War especially within the last two decades. As announced by Unesco Thailand had announced "International Book Year 1972", recognized World congress on Book 1982, and London Declaration on Book as well as accepted the thought on "Reading Society"

Activities related to book were included the establishment of National Commission for Book Development the announcement of National Policy and Planning for Book Development and the organizing of yearly national book week since 1972. Following are some of the main book promotion organizations and activities in Thailand
5.1 National Committee for Book Development

Government of Thailand under the leadership of Prime Minister Prem Tinsulanond had, in 6th October 1987, approved the National Policy and Planning for Book Development. This policy and planning was drafted by the National Committee for Book Development under the Thai National Committee for Unesco. This National Committee for Book Development is chaired by the Minister of Education. Members are representatives of various related government and private organizations such as the Department of Non-Formal Education, the National Library, the Thai Library Association, the Writer's Association, Prof. Khunung Maenmas Chavalit, the Publishers and Book Sellers Association of Thailand etc. Main activities of this Committee are the book development, publishing promotion and reading promotion. Best Book Award and the National Book Week which was first started in 1972 was organized it's 24th during 29 March - 7 April 1996. The Best Book Award as well as technical seminars on book writing, painting, illustration and reading promotion etc. is also organized yearly. This Best Book Award is great inspiration to the book creation in Thailand. This award gives 13 prizes yearly such as fiction, non-fiction, poetry, collection of short stories, children book, Kartoon book and beautiful book. According to Mr. Prapat Saengvanit Vice President National Commission for Book Development, nowadays are many applications of each category sent to the Sub Committee on Book Award each year for example in 1996 there were nearly 50 applications of non-fiction category. Number of children book's application is also increasing year by year. It should mean that there are many children book products of cause very useful for Thai Children.
5.2 The Mass Media for the Youth Award

The National Youth Bureau under the Prime Minister’s Office had yearly organized the mass media for the youth contest since 1980 to promote and encourage authors and publishers who produce good and suitable mass media for the development of the youth in Thailand. Out of 17 awards given yearly are journal, children book, translation book, newspaper, calendar, music tape, motion pictures as well as radio and television programs.

5.3 The SEA Write Award

The Southeast Asian Writers Award was established in 1979 with the dual aim of encourage authors and poets in the then five ASEAN countries, and wider recognition to the literary talents of the region. It honours equally authors from Thailand, the Philippines, Malaysia, Singapore, Indonesia and since 1986 Brunei. The home of the prize, however, Bangkok particularly the Oriental Hotel. The award is open to any work of fiction, prose or poetry by an ASEAN writer, which has been published within five years of the selection year. Winners, one from each of the ASEAN countries, are selected by the writers peers in their own nation. The SEA Writer Awards chaired by Prof. MC Subhadradis Diskul is, how more than just an excuse for a gala occasion; it is achieving wider awareness of Asian Writing. To give but one example, the 1988 prize winning novel by Thai awardee Nikom Raiyawa has subsequently been translated into English and published by Penguin.
5.4 Professional Associations There are at least eight associations in Thailand cooperated with each other to promote the printing industry in Thailand and all its peripheral activities. These associations had formed themselves into the Federation of Thai Printing Industries (FTPI). Those members are The Thai Printing Association, the colour Separators Association etc. the Thai Screen Printing Association and the Thai (already mentioned in page 9) Beyond these there are other associations, foundations who are also contribute to the development of books and readers for example Newspaper Association of Thailand, reading Association of Thailand, Language and Books Association of Thailand, Thai Library Association and Good Books for Rural Area Foundation etc.

5.5 The Publishers and Booksellers Association of Thailand (PUBAT)

PUBAT was established by various publishing companies and its objectives include protecting the publishing industry in helping to develop the nation. PUBAT does not belong to any individual publishing house but it is the communal property of all publishers in Thailand. Main activities of PUBAT are: creating markets, market expansion, reducing price structure, developing personnel in book trade, promotion book standard such as the printing ISBN Barcodes/CIP inside books, coordinating matter between book dealers and other concerned parties and developing a basic system on market information and on the production of all books as well as all those involved such as credit rating, retail outlets, writers, translators etc.
Some of 1994-1995 activities of PUBAT are as following: a conference on the effects of Copyright Law on the printing industry, seminars for its member to discuss the benefits on using ISBN numbers, CIP and barcoding in books, cooperation with the National Committee for Book Development to organize National Book Week Fair of the Government and the Annual Book Week Fair of the Association as well as taking part in international book fairs held in Frankfurt, Taiwan, South Korea, Singapore and Japan.

6. Application of Information Technology in Publishing and Book Trade

Information technology had within this decade been applied to various government and private activities. As planned by the Ministry of Education and Ministry University Affairs, the use of computer is a subject of learning in secondary school colleges and Universities throughout the country. In many colleges, institutes and universities computer application, computer science have been taught. Information technology courses are available for successful entrance examinee In some prominent universities and institutes such as King Monkut Institute of Technology.

Most libraries are aware of information technology and many libraries had already applied IT in their works for example the National Library and university libraries. The Unesco and IFLA program "Universal Availability of Publication-UAP", the resource sharing activities are also applied in library cooperation program.

Information technology had also extended to the printing and publishing industry. The application of computer in typesetting had replaced the "pick-and choose"
method and traditional artworking. At present desktop publishing, laser printer, color scanners, artwork in diskette and color seperator are practice. No longer can Thailand be regarded as the poor relative in the international printing and publishing scene. She has all the modern equipment. The 5-color offset printing machines, matte UV lamination capabilities, binding etc. Information technology is also helped to ease book market and book trade. Major trading companies, book stores and branches applied computer in their operation. With their own databank and network, book stores are conveniently operated and selling their books.

7. copyright

The Royal Decree on Copyright (1994) and other relevant laws, such as the civil and commercial code are in force now in Thailand. This copyright covers literary works, works on performing art, visual art, music audio visual, motion pictures, boardcasting: radio and TV and other works in literary, science and art sections. The copyright belongs to the author and its last until 50 years after the author or the last co-author dead. The copyright of applied art last 25 years after the dead of the creator. Government work’s copyright also last 50 years after the creation and publishing of that work. These copyright are able to transfer from the present to the next owner too. The administration of copyright in Thailand now is under the Department of Intellectual Property Right, Ministry of Commerce.

8. Problems and Issues Relating to Publishing and Book Trades

Problems relating to publishing and book trades in Thailand are as following
8.1 Publishing area

8.1.1 High cost of productions - because of paper cost;
8.1.2 Government tax of 7%
8.1.3 Copyright lease or royaltys; In general authors demands 10% of book price, multiply with number of print run. For translates books, the payment to the original author is approximately around 5.6% The royalty paid to the original author plus that for translator in general, will be around 10 + 5%;
8.1.4 Inadequacy of qualified manpower to handle book publishing;

8.2 Problem arising from socio-economic and cultural environment.

8.2.1 Book distribution system are not adequate and not well organized;
8.2.2 Inadequacy of outlets;
8.2.3 Inadequacy transportation and postal system, in particular to remote areas;
8.2.4 Limited market because of the non-reading culture of the Thai society in general;
8.2.5 Book budget of the government libraries have not been large enough to ensure purchasing of books for primary, secondary schools, libraries and public libraries;
8.2.6 Books have not been considered an important commodity in everyday life;
8.2.7 The competition from other media especially electronic media.
8.3 Issues for the improvement

8.3.1 The Publishers and Booksellers Association of Thailand (PUBAT), which is a member of the committee lobbying to have import tax on paper and printed materials reduced, submitted a proposal to the cabinet via the National Commission for Book Development in conjunction on August, 1995 to lower the cost of publications in Thailand.

8.3.2 Asia-Pacific Cooperative Programme for Reading Promotion and Book Development (APPREB) is requested to continue its activities to assist participating countries in Asia Pacific to develop formation of book development programme and its implementation training course, workshops and seminar, APPREB is also requested to be the center for copyright negotiation.

8.3.3 Education book development and promotion had been promoting strongly in Thailand through many programs and activities for example formal and non-formal education, library service development, annual national book week, annual book award, seminar on universal availability of publications and seminar on book for all as well as annual meeting of Thai Library Association etc.
9. Conclusion

Over the whole of Thailand book scene, His Majesty the King Bhumibol Adulyadej who has exceptional genius in national public administration, science and technology, the maintenance of Thai long history, solidarity and harmony, he had also contributed to the richness of Thai language, book creation, education as well as library and information services. Some of his marvelous achievement in the arts during 50 years of his reign are the use of foreign and Thai languages, the initiation of the encyclopedia for the youth project, the translation and writing of books etc. His latest book "Phra Maha Janaka" published in 1996 is really reveal his statecraft philosophy.
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Asia/Pacific Cultural Centre for UNESCO (ACCU).

Charun Potcharamani and Chankit Chophapit Book and printing

Department of Curriculum and Instruction Development

Department of Export Promotion, Trade Information Division Printing product National Seminar on Book Development : Policy and Direction organized by the National Council for Book Development and the Department of Curriculum and Instruction Development. Bangkok 16-17 December 1993. (in Thai)


Prapat Saengwanit Vice-President of National Commission for Book Development, interviewed on Book development in Thailand by Mr. Prachark Wattananusit on 10 July 1996. (in Thai)


Thara Kanakamani "Book development in Thailand" National Seminar on Reading Habit Promotion: All are reading a project of ASEAN-COCI Bangkok: Thai Library Association 1994 (in Thai)

Vichai Payakhaso. Book Development at the national level National Seminar on Reading Habit Promotion: All are reading a project of ASEAN-COCI. Bangkok : Thai Library Association, 1994. (in Thai)
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<td>12. Mathematics</td>
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<td>13. Natural sciences</td>
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<td>APPLIED SCIENCES</td>
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<td>14. Medical sciences, public health</td>
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<td>15. Engineering, technology, industries, trades and crafts</td>
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<td>16. Agriculture, forestry, stockbreeding, hunting and fisheries</td>
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<td>17. Domestic Science</td>
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<td>18. Management, administration and organization</td>
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<td>ARTS AND RECREATION</td>
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<td>19. Physical planning, town and country planning, architecture</td>
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<td>20. Plastic and graphic arts, photography</td>
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<td>21. Music, performing arts, theatre, film and cinema</td>
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<td>22. Games and sports</td>
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<td>LITERATURE</td>
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<td>23. (a) History of literature and literary criticism</td>
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<td>Subject groups</td>
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<td>(b) Literary texts</td>
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<td>GEOGRAPHY/HISTORY</td>
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<td>24. Geography</td>
<td>185  2  187</td>
<td>184  2  186</td>
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<tr>
<td>25. History, biography</td>
<td>234  3  237</td>
<td>230  3  233</td>
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<td>Total</td>
<td>7689  65  7754</td>
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<td>(a) School textbooks</td>
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<td>(b) Children’s books</td>
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<td>(c) Government publications</td>
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"BOOKS FOR ALL
ASEAN CONFERENCE ON BOOK
DEVELOPMENT"

KUALA LUMPUR, 13 -15 AUGUST 1996

BOOKS IN THE 21st. CENTURY

by

DICK FLETCHER

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA &
NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION
(ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
Machiavelli - that Italian Renaissance promoter of pragmatism:

"It must be considered that there is nothing more difficult to carry out... than to initiate a new order of things. For the reformer has enemies in all those who profit by the old order, and only lukewarm defenders in all those who would profit by the new order.

This lukewarmness arises... partly from the incredulity of mankind, who do not truly believe in anything new until they had actual experience of it."

Information Technology - Threat or Opportunity?

We have already entered an age in which our reliance on print on paper is diminishing. This is not a threat, but an opportunity. Many glorious civilisations have survived and prospered without books. Some of the most enduring works of man are completely unrelated to the book. Some of man's greatest talents have been handed down from generation to generation by word of mouth. And print on paper is a pretty limited technology. You may be able to take a good book to bed, but you have a devil of a job if you want to get to grips with aleatoric music, to understand what happens when you drop Caesium in water or you want to know the names of some two star hotels in the 19th Arrondissement in Paris.

Technology has the answer. The multimedia music encyclopedia will not only take you to all references using the world "aleatory" despite there not being an entry under that head word, not only tell you about the role of Betsy Jolas, but it will play you some examples of aleatoric music. The multimedia chemistry disc will only give you an illustration of every single element (something no book does), but will also show you the effect of caesium being dropped in water, and why graphite is a good lubricant. And from the Internet you can download a list of two star hotels in the 19th Arrondissement in Paris. Who needs to buy the World Hotel Directory (if such a thing exists, if you can afford it, if it is in stock, and the shops are open when you want the information)?
Are the livelihoods of booksellers, publishers and librarians threatened by technological change? Yes, they are. But with every threat comes a glorious opportunity. The book industry is about to expand dynamically, but also to change beyond all recognition. Who is going to benefit from the expansion? Who is going to be left behind?

New Technology, New Benefits

If you think about it, the print-on-paper communication system is fraught with complexity. We spend four or five years in school learning to read - learning just the mechanics of encoding and decoding information. Some of us never find ourselves fully at ease with the written word. Warehouses are crammed with books, many of them to our chagrin remaindered. The British Library, which has a right to a copy of every book published in Britain, adds half a metre of books every hour of every day of every week of every year - that's over four kilometres of shelves a year. Good work for carpenters; bad news for trees. A compact disc, one millimetre wide by 120 millimetres deep, can be used to hold with ease several copies of a 20-volume encyclopedia, several metres long. If my maths is correct, that will reduce 4 kilometres to just over 2 and a half metres.

And a lot of our endeavour with print on paper is no longer necessary. With radios, with television, with telephones, with modems and with computers we have today a more efficient means of communicating than anyone ever imagined - even fifteen years ago.

We can retrieve information more effectively as well. My company, New Media, has just completed the production of an interactive multimedia CD-ROM called "Centenary". It celebrates 100 years of the British Newspaper, "The Daily Mail". In 100 years, there were about 36,000 issues of the newspaper. This CD-ROM has 5,000,000 words, 4,000 pictures, 5 hours of audio and 55 video clips. Each individual word is accessible; each word can be combined with any two other words to narrow down a search. The winner of every major UK sporting event in the last 100 years can be found in a moment. You can see Jesse Owens winning an Olympic gold medal in 1936. You can share the excitement of Bannister breaking the four-minute mile.

And the information we get is the original, direct from the source as it exists in the "Daily Mail" archive and in the Pathne News archive. Not a version created years later with the benefit of hindsight. Students of history can now get to the original source materials as well as the academic researcher. But are they buying it from you?

Change is Here to Stay

Society is already changing. Children have less respect for the written word than they used. They spend more time at computer games and video than curled up with a good book. All over the world, a single culture is invading our communities in a more invidious but just as threatening a way as the imperialists of the nineteenth century. Much as we might all regret it, the individual cultures of minorities, the variety of choice and custom appear to be fast disappearing.
Electronic Shop Windows

The Internet is a miracle, a surrogate neural network that allows individual to speak to individual; allows the customer direct access to the product supplier. This is the very opposite of junk mail. Dial a number, type in some code and you can retrieve information for yourself from half way across the globe. At insignificant cost any enterprise can set up a shop window to be viewed by anyone anywhere in the world who has a mind to search. And the wonderful thing is that there is no limit to the number of shop windows that any enterprise can set up - one dedicated display for every single book that a publisher publishers, or a bookseller stocks.

Technology Forces Changes in Behaviour

Many of the most far-reaching changes in the twentieth century have been driven by ideas -independence from imperial domination, equality of opportunity, the right to be educated. However, a significant proportion have been driven by technology - electricity, the telephone, television. In my country five hundred years ago William Caxton introduced the movable type press. It took four hundred years for that to generate the concept of universal literacy, and four hundred and fifty years for a global publishing industry to emerge.

The Nature of Change is Changing

The arrival of digital technology is already having a greater impact, in a much shorter time. Our livelihood now depends on our attitude to change. Do we recognise the threat, check the defences and find some good ways of fighting the invaders off? If so, we shall lose. Do we recognise the threat, seek out the opportunities and prepare to open the gates? If so, we may win. Or do we ensure our business is in good state, focus on the opportunities, and go out to define new markets and new boundaries. If we do, we shall remain in control of our destiny. Whether we will or lose depends on fortune, hard work and skill. At least that is not changing.

So what if we do decide to rise to the challenge. What can this new technology do, and how will it change the business of creating and selling books?

The Consequences - New Ways to Make Money

The first thing to realise is that the trading rules are different - in fact non-existent. There is a confluence in the market of companies trading in video, in audio, in books, in computer software. Each market has its own rules evolved over time. In my company, we were horrified when book traders - both shops and wholesalers - expected to pay us at 90 or even 120 days. Even worse, some of them expected to be able to send the goods back if they did not sell. No way. What is even worse for those who remain entrenched in current practice is that we have been more successful at selling our products direct to our target market than through any intermediary.
Second, a lot more information can be made available - whether on a CD-ROM or on another digital storage device - than in a book. That’s good, and convenient for users. There is no longer the problem of trying to refer across volumes. Of course it also means that people expect to get more information than in a book.

The nice thing is that it is not essential to give them more information - just let them perceive that they have received value for money. One of the age old crafts of the book industry has been to work out how thin you can slice the salami. Buyers could flick through the pages and notice that there are only two colour illustrations, or only 96 pages and all in large type. With a CD-ROM there is nothing to flick through. And even a measurement in megabytes may mean nothing.

Many people ask how long a CD-ROM can be played for. The answer must be that good ones will last as long as there is time to play them. The craft of good interactive design is to ensure that a product continues to give satisfying experiences for an extremely long period. We call it depth. Unlike a textbook, our CD-ROM The Chemistry Set is good for use in both secondary schools and at universities. It can be used over and over again to illustrate most points which will arise in the course of studying chemistry from getting an early understanding of where the heat is in the flame from a Bunsen burner right through to general science courses at university.

So large bodies of information can be sold. On the Internet you can do the opposite and sell information by the piece. Whereas a business directory with 10,000 references may sell for £100, you can now well just one of the references - a name and address - for £1. So here’s an opportunity to charge people every time they open your book. Not a bad living to be had there.

This ability to segment the information also contains a threat. Now that I can call up the British Council web site on the Internet and get information about a seminar on Noise and the Environment, or about special seminars organised for teacher trainers, I no longer need to contact the British Council office in Kuala Lumpur. One less reason for the British Council to maintain a presence in KL, unless of course it also takes on the challenge of change and adapts its role to meet new sets of needs ...

Dropping intermediaries from the communication chain is another important feature of the new technologies. The role of a teacher is to educate - to develop the pupils' abilities. Yet many teachers spend most of their time informing, and pupils taking notes. This can now be done by computer. Text books require human mediation, yet controlling a lot of the tasks and marking answers is a drudgery teachers can do without. Our Chemistry Set Lessons set clear learning objectives, guide pupils through a series of research tasks and then in a series of exercises check out how much has been understood. This results in the teacher collecting a set of data on a floppy disc instead of a pile of workbooks. He or she has only then to look through the results files to find which pupils had difficulty and which sailed through the work getting each answer right first time. This is not a threat to teachers, though it probably is to those textbook publishers who don’t want to learn new tricks. The days are fast disappearing when schools would automatically purchase 35-set packets of cheaply produced workbooks for each class at the start of a new year.
What Business Are You In?

The old barriers between the media are breaking down. The publisher used to look forward to selling the film or television rights to a book; and the book seller looked forward to a boost to book sales when the film or television programme appeared. Now, the film producer can be the publisher. When he is ready to release his film, he also offers his own book, his own audiotaape, his own video, even I regret to admit, his own CD-ROM. Canny authors have for sometime refused to sign away all-encompassing universal rights to their material in exchange for an advance and a royalty. The boot has now moved to the other foot. Even cannier authors are inviting print-on-paper publishers to bid to become just one part of publishing team. The global instant release is a merchandising reality. But in that threat to small local publishers lies the opportunity. The big boys spend big bucks on the big deal. There are lots of good livings to be made from niche markets, and the electronic media permit smaller and smaller print runs with more and more customisation as the emphasis moves from transporting atoms to transporting bits. Follow the pattern of the big guys and form alliances with people in complementary businesses.

What Are You Selling?

Just the book? No way. Even librarians will soon start buying books from supermarkets. What used to be a product-focused business, based on clear definitions - I publish directories, I sell novels - is fast becoming an activity-focused business. What do you want to do? Do you want to be entertained; do you want information; do you want to learn? New technology is empowering the customer, and publishers are learning to offer a different kind of value for money. Not only is the price of CD-ROMs tumbling, but the amount of material on them is increasing. I used to publish a directory - both in print and on CD-ROM. The volume of CD-ROM sales were about 2% of print sales so we increased the price of the directory and gave the CD-ROM away. Now, in the ownership of another publisher, the directory has been amalgamated with another and both are being sold for less than the single volume. There’s nothing now to stop individual pieces of information being sold on-line on demand. Who wants to buy a thick book that clutters up the shelves when once or twice a month a single piece of information is needed? The threat of course is that libraries no longer need to have the latest volume on their shelves. All they need provide is a computer terminal with access to the Internet. Individual users can then seek out the information without a single piece of paper being handled.

What Are your Customers Buying?

This business of change affects the customers also. There is no way at present of judging the merits of one particular CD-ROM or piece of software from another. They tend all to be boxed in the same way, with a lot of air and cardboard wrapped around a silver disc. Boxes are garish and tend to make exaggerated claims for the product. Prices vary from as low as a low-priced videotape to many thousands of pounds. A lot of software is given away free with computers. This tends to devalue that piece of software. Why should I buy the 1996 edition of "Encarta" when I got the 1995 version free with my computer? Yes, who in the print publishing industry ever pulled the trick of selling a complete new edition of a
20 volume encyclopedia each year? Time are changing.

I believe retailers are going to have to offer not only in-store demonstrations, but try-before-you-buy facilities. It is not a new concept. When I was young we used to go down to the music record store on a Saturday morning. There were booths into which we could take records. After some time listening, we would then emerge and listen to some more before deciding to buy one particular disc. It might have driven the retailer to distraction, but we had a good time ... and we got into the habit of buying records each week. We were the generation which created "Top of the Pops", and enabled a new industry to emerge with record shops and record publishers helping musicians earn real money.

Then of course computers are notoriously unreliable ... and no one over the age 15 can understand how to use them. But that is because no one over the age of 15 is prepared to stop all the other things they are doing and invest the time in understanding them. Can you imagine the scene in Westminster in English in 1477 when Caxton pulled the wraps off the first movable type press? Sceptics would have focused on the threat to the makers of vellum, the threat to the jobs of monks employed to transcribe bibles by hand, on where the increased numbers of publications are going to be housed and distributed. No one saw the big danger - loss of power by the establishment - the king, the barons, the church. Universal literacy has been achieved at the cost of taking children in from working in the fields to spend five years learning to decode and encode text. Providing a similar investment in the understanding of how computers work will ensure that the next generation has reliable, user-friendly machines.

We are at the very beginning of an exciting revolution. I have not spoken much of the Internet and Cyber Cafes. The first years of the 21st Century are going to see the growth of a global neural network. Already 20% of libraries in Britain are offering its members access to the Internet. That's what libraries were set up for - to give those who could not afford books of their own, access to knowledge. Well, the rules have not changed. The meaning of the word "book" has changed, and it is complex and often unreliable. But so were the first motor cars, the first telephones, the first radios. Remember that when electricity first entered people's homes in Croydon in South London, they used to put covers on the electric socket to stop the electricity leaking out when there was not a plug in.

A person need no longer be "well read". No longer do we emerge as adults from our teens "educated for life" with a set of skills to provide a good living. We need to make sure that the next generation is not just just "computerate", but has the ability to find information when it is needed. A battered old book beside my desk tells me that it was George Eliot in *Middlemarch* who said that prophecy is the most gratuitous form of error. The Chairman of IBM in 1943 thought there was a world market for about five computers, and Thomas Edison in 1922 thought the telephone would be used for broadcasting, that "the radio craze will die out in time". Well, he may yet be proved to have been right. Before the end of the century next year, the year after or the year after that - we might well be surfing the Internet for our news and entertainment. Radio is fast being relegated to something we listen to while stuck in traffic jams.
What are "Books" For?

- to store the sum of human knowledge
- to find information
- to be beautiful objects
- to entertain
- to teach
- to evangelise
- to buy and sell
- to provide a living for publishers, booksellers and librarians.

None of these will change in the next thousand years - only the definition of the word "book". It is not the landscape which is changing. It is the very ground beneath your feet.

Here are some more questions which it might be wise to address:

- How do you sell "books"?
- How do the economics work?
- Who are your customers?
- How do you get to them?
- Does this mean reorganisation?

Epilogue

We might be well advised to adapt the well-known words of Lewis Carroll in Alice in Wonderland "What is the use of book", thought Alice, "without pictures or conversations?". Twenty-first Century child is going to ask "What is the use of a book without motion video, thousands of pictures, hours of audio and some really good animations?"

Demonstrations from:

Centenary - 100 Amazing Years of The Daily Mail
The Chemistry Set
The Lettermen go to a party
The Penguin Hutchinson Reference Library
"BOOKS FOR ALL: ASEAN CONFERENCE ON BOOK DEVELOPMENT"

KUALA LUMPUR, 13-15 AUGUST 1996

ENRICHING ASEAN LITERATURE THROUGH TRANSLATIONS

by

TRAN VAN PHUONG

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA & NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION (ASEAN-CCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
ENRICHING ASEAN LITERATURE THROUGH TRANSLATIONS
(Presented by Vietnam)
At 9.45, August 14th, 1996.

Tran Van Phuong
Vietnamese Ministry of Culture and Information

Dear ladies and gentlemen,

On the assignment of the Prepartory Meeting for the Conference on ASEAN Book Development (Book for All) held in Langkawi, Malaysia from 9-10 January 1996, today I would like to present the topic of "Enriching ASEAN Literature through Translations".

First of all, I would like to express my gratitude to Ms Shahar Banun Jaafar, Chairperson of the Conference and all participants for allowing me to prepare this contribution.

Dear Ladies and Gentlemen,

This topic is both a science and an actuality now that Vietnam wants to become friend with all nations around the world for the sake of peace, independence and development. Vietnam and all ASEAN countries have long-aged culture, and a rich, diversified and original literature and art. In addition, our of us are living in an area with plenty of sunshine, no snow, and the many similar customs and habits. These are favourable conditions for us to co-operate, exchange, and translate in order to enrich our own literature respectively.

In this paper, I would like to present three points, as follows:

i. The role of literature in people's life
ii. What should we do to enrich ASEAN literature?
iii. Some aspects of Vietnamese publishing situation, including translated books.
Part 1

The Role of Literature in People’s Life:

As you know, there are many disciplines such as: medicine, biology, history, jurisprudence, sociology, education, psychology, etc which studies a particular aspect, activity of human being. Literature by itself, tries to discover the man in its wholeness of social relations. Literature describes human being by means of language and image. It can bring happiness and sorrow, compassion and hatred. It can also bring awareness and conscienteness, teach aesthetics and right-doing to help people aspire to Eternal Truth and Beauty. Literature is thus considered a humanity.

Dear Audience,

Every nation has its own literature. Literature brings service to a nation and is a mirror of a nation as well. The contribution of literature to the nation’s life is, however, dependent on educational level of that nation. Literary translation represents the unique permanent and the most important mode of exchange between different nations. Human kind was born to live in community. So exchange is a necessity. The higher level of civilization is, the more cultural exchange needed.

Literary translation enriches literature of a nation when it inherits the cultural essence of each and vice versa.

Part II

What should we do to enrich ASEAN literature through translation?

ASEAN countries want to enrich their literature through translation. Language and writing system are prerequisite. To develop economics and culture, a nation must have a language and writing system, a valuable treasure. And what we have to do is to preserve, develop and disseminate it widely, because it is a material expession of thinking. The higher level of language and writing system is, the higher development of thinking is. The more language you learn and understand, the more knowledge you get. If a nation with its citizens know many foreign languages, it will have an enriched culture in general and an enriched literature in particular.

A Vietnamese saying goes, one day you travel, many lessons you learn. If ASEAN countries want to enrich literature through translation, the first thing we have to do is to know languages of each other. This is a key element. In Vietnam we consider that knowing a language is knowing a nation.

2
Dear listeners,

To learn a mother tongue is difficult, but learning a foreign language is much more difficult. It is not enough to know vocabulary and grammar, we should know phonetic system of a language, customs and habits of the people speaking that language. To meet the demand of enrichment of ASEAN literature through translation, I would like to propose the following measures:

1. Learning languages of each other. To do this we need qualified experts for languages of ASEAN countries. In Vietnam, we have the the Hanoi Teachers' Foreign Languages Training College and the Hanoi Foreign Language University, this second teaches translators and interpreters. In addition, we have an Institute of South-East Asian Studies.

2. Helping one another between ASEAN countries in collecting, selecting and introducing the best publications for being translated.

3. Organising regularly meetings between authors, writers and publishers.

4. Together we organize "Week of ASEAN Books" in each country celebrating National Day of a country. There a Vietnamese saying: "Many small bricks build a big house".

5. In the meanwhile, we need the dictionary of ASEAN official languages as a tool for reference and looking up.

Part III

Some aspects of Vietnamese Publishing Situation including Translated Books

Dear Listeners!

In Vietnam, literary books account for 25.70% of total published books. Amongst translated books, we have published translations from ASEAN countries, including Brunei, Indonesia, Malaysia, Philippines, Singapore, Laos, Cambodia, ... (please see the list of published books and books in print). However, this work is only at the initial step.

Dear listeners!

It took 10,000 years to develop the present agricultural civilization and it took 300 years for the industrial one. ASEAN countries are entering the multimedia age.
We really hope that our cause will be developed more and more to strengthen our friendship, mutual understanding to contribute to safeguard peace and stability in the region.

Thank you very much for your attention and listening.

Great thanks to the host country for providing all the favours for the success of our conference.
FORUM ON THE ASEAN BOOK SCENE : COUNTRY REPORT - INDONESIA

by

DR. B. P. SITEPU

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA & NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION (ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
CONFERENCE ON

ASEAN BOOK DEVELOPMENT:

BOOK FOR ALL

COUNTRY REPORT

INDONESIA

by

B. P. Sitepu

1996
Introduction

In writing this country report, efforts have been given to follow the guidelines prepared by the Organizing Committee of the ASEAN Conference on Book Development. The scope and the structure of this report were based on the agreement in the preparatory meeting for the conference. However, the scarcity of statistical data and up-to-date information about the development of book industry in Indonesia have made this report unable to complete all requirements. Eventhough, the following information may give a picture of book development in Indonesia as an input to stimulate further discussion during the conference.

A. Background

1. Demography

Indonesia is the world’s largest archipelago with 13,677 islands of which about 950 or seven percent are inhabited. The islands stretch along the equator for 5,120 km (twice the distance from London to Moscow) - or, as Indonesians say, from "Sabang to Merauke". There are five major islands namely Sumatra, Java, Kalimantan, Sulawesi, and Irian Jaya. The country is divided into 27 provinces, 303 districts, 3,839 sub-districts and 65,198 villages. It has a population of nearly 190 million (1995) making it the fourth most populous country in the world - comprising not less than 300 ethnic groups who speak an estimated 583 languages and dialects. The annual birthrate is about 2 %. The people are living unevenly distributed, with around 60 % on the island of Java, the most populated island in the area. Indonesia also has the world’s largest Muslim population.

Indonesia's geography is just as varied. There are glaciers in the central high-lands of Irian Jaya, and vast expanses of tropical swamps in Kalimantan and Sumatra. Across the archipelago there are over 300 volcanoes, more than 200 of which have been active in the historical times. The climate is hot with very high humidity.

With such a bewildering mosaic of cultures, landscapes and histories, no wonder Indonesia's motto is Bhinneka Tunggal Ika, officially - rather loosely - translated is "Unity in Diversity". Indonesia's coat of arms is the Garuda, the Eagle of ancient Indonesian mythology, symbolizing creative energy. The official national language is "Bahasa Indonesia". The national ideology is "Pancasila" (five principles) consisting of the five inseparable and mutually qualifying principles i.e. Belief in One Supreme God, Just and Civilised Humanism, the Unity of Indonesia, Democracy wisely led by the wisdom of deliberations among representatives, Social Justice for the whole of People of Indonesia.

2. Educational Background

The National Education System of Indonesia is generally aimed at elevating the intellectual life of the nation and developing the Indonesian people fully, i.e. as people who are devoted to God, have knowledge and skills, are in good physical and spiritual health, are independent and fair, and feel responsible for their countrymen and nation.
The education system also strives to create a patriotic spirit, strengthen love for the fatherland, enhance the nation spirit, social solidarity and awareness of nation history for the nation heroes, and create forward-looking attitude. The learning and teaching climate has to generate self confidence and a learning culture among all layers of society that induces an attitude and behaviour of creativity, innovative thinking and orientation toward the future.

The Indonesian system has its roots in the Indonesian culture based on Pancasila and the 1945 Constitution. In the National Education Law No. 2 of 1989, the system aims at generating abilities and increasing the standard of leaving and dignity of the Indonesian people in order to achieve the national development objectives. Based on the National Education Law, the national education system is identified in term of units, paths, types, and levels of education. The units of education organize learning and teaching activities which are implemented respectively inside and outside the schools. The paths of education are recognized as school based and out-of-school education. The national education system consists of seven types of education, they are general education, vocational education, special education, service related education service related education, and vocational education. Out-of-school education may include courses, group learning or any other option like apprenticeship.

The success of development in education sector, in particular of primary education, can be also seen in school age children's participation in education. More and more children and youth are going to schools or following out-of-school education programs. At the primary education level, including Madrasah Ibtidayah, children of 7-12 years old who are attending schools rose from 64.6 percent in 1973 to 92.6 percent in 1992; at junior secondary level, from 18.5 percent to 53 percent; at senior secondary level, from 9.4 percent to 35 percent, and at higher learning institution, from 2 percent to 7.5 percent. The achievement in education sector has encouraged the Government to develop compulsory education program from six years to nine years of schooling which is regarded as a basic education. This nine year basic education has been implemented since 1994.

3. Literacy Rate

The development of human resources, through the provision of equal distribution of learning opportunities, has experienced fast progress since Indonesia’s independence. In 1930, less than six percent of the population of Indonesia was literate. In 1951 this percentage increased to 20 percent. In 1985, 81 percent of the population older than 10 years of age was literate. The population census of 1990 indicated that 84.1 percent of the population of 10 years are literate. In 1993 the percentage of literate was estimated 85.72 percent.

The achievement of reading and literacy is one of the main objectives to be accomplished during primary education. Mastery of basic reading skills is a necessary condition for development of the reading habit. Nowadays the reading demand of the population, especially of children can be seen in the bookshops stored with a good bookstock, which are usually filled with people reading. However in general, reading levels in the country are not as high as expected yet, largely because of the lack of a receptive reading environment and reading culture.
4. Book Buying Habit

In developing people to become a reading and learning society, books obviously play an important role. The development in education sector has drastically increased the literacy rate in Indonesia. However it is difficult to say that this high literacy rate has also automatically created a reading minded society with a good book buying habit. Due to certain reasons - such as books have not become a daily basic need or weak purchasing power - book buying has not become a habit for majority of people. This fact is also reflected from the data for the per capita consumption of non food issued by the Central Bureau of Statistics (1994) which has not included book as an item to be consumed.

B. Publishing and Book Development

1. Publishers

Realizing the strategic role of books in implementing the programs of education for all, the Indonesian Parliament stated in the Guide Lines of State Policy (1993) concerning the book development as follows:

1. Writing and translating as well as producing textbooks and other other science books are directed to improve the quality of education and to widen the thinking horizon and to develop reading and learning habit of the students.

2. Free textbooks for every student are to be provided particularly in the poor and isolated areas. The reading books such as folk tales popular science, and others will be made available in reachable price for all societies. These books are also to be provided in the school and public libraries in order to socialize and develop cultural value of the nation and technology. For this purpose the school and public libraries are to be developed in all over the country.

3. Writing translating and publishing books are enhanced by giving the authors the appropriate appreciation and granting the copyright of their works.

The government fully acknowledges the private sector roles in provision of school textbooks. Chapter III of Education Law (1989) clearly states that the textbooks may be produced by either the Government or the private sector.

The Government's policy to develop education sector has also encouraged the growth and the development of publishing business. The available data (Appendix I) shows there are 597 publishing houses and 85.43 percent or 510 of them are associated in the nesian Book Publishing Association (IKAPI). Most of them or 92.96 percent are located in Java and 306 or 51,26 percent are in Jakarta. The remainings (7.04 percent) are located in Sumatera (5.6 percent), in Kalimantan (0.33 percent), in Sulawesi (0.17 percent) and in Bali (0.5 percent), in Nusa Tenggara Barat (0.17 percent) and Nusa Tenggara Timur (0.17 percent). Almost all of the publishers are concentrated in the cities. The data in Appendix I also shows that 11 out of 27 provinces do not have any commercial publishing houses. The locations of
publishers as described above indicate the uneven distribution which significantly affect the book price in each province.

The most recent analysis of IKAPI’s membership shows that 40 percent of its members publish school textbooks only, 20 percent publish children’s books only, and 10 percent publish both school textbooks and children’s books. This leaves 30 percent as publishers of adult books of all kinds. This composition has not much changed compared to IKAPI’s data of 1989 showing that 65 of its members considered themselves to be educational publishers, 15 percent religious, 15 percent university, and 5 percent other. Since print runs for school textbooks are known to be substantially greater than those for other varieties of book, it is clear that the industry is very heavily weighted towards educational publishing.

It seems difficult to obtain an accurate publishing data of new titles and print runs for each title. However it is estimated that not less than 4,000 new titles published every year with the average print runs of 3,000 copies for each title. These figures indicate that the average annual production of each publisher is less than eight new titles. The large and well established publishing houses (about a 20 percent of the total number) produce 15 new titles or more yearly, but 40 percent of the Indonesian publishers operate on a rather limited base: less than five new titles a year.

The total number of print runs which is about 12 million copies is considered a very small amount compared to the literate population. Employing literacy rate resulted from National Census of 1990, the total literate population in 1996 would not be less than 90 million. The ratio of book to reader, therefore, is 0.13 or 13 copies for 100 readers.

The capacity of the Indonesian publishers is not separated from various limitations they have to face such as:

1. the problem of finding original manuscripts that the consumers need;
2. short for capital and the difficulty to acquire credits from the bank;
3. short for experts in editing, design, sales, marketing, and professional manager in book publishing business;
4. problem in spreading out the books;
5. the problem of minimizing the price to meet the public buying capacity;
6. the piration of the products, and
7. reading interest that is not very high.
2. **Booksellers**

GATBI or the Indonesian Booksellers Trade Association has 2,902 members spread out all over the country but most of them are located in the cities and towns (Appendix II). The figure makes the ratio of bookseller to subdistrict is 0.76 meaning that one bookseller serves more than one subdistrict. Compared to the number of the villages (65,198), the ratio of bookseller to village is 0.04 or one bookseller for 25 villages. But it should be soon taken into mind that not all booksellers are registered as GATBI's members. There are still a considerable numbers of book kiosks, bookshops, bookstores and other booksellers out of GATBI. Nevertheless, the given data indicates the problems of book distribution in making book available for all.

3. **Book Importers**

There are 23 book importers; all of them found in Jakarta and Bandung (West Java). They are associated in Indonesian Booksellers Association. Majority of the imported books are in science and technology and a few of them are novels, but the number and the proportion of the books cannot be estimated due to the scarcity of data available. The existing regulations still prohibit importing any books printed in Bahasa Indonesia.

C. **Manpower Development**

1. **Profesional Organization**

Profesional organizations in book industry have been growing and developing from time to time. The existing organizations are as follows.

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<td>g. Booksellers</td>
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</table>
h. Librarians 1. P.I. 4,652

I. Others
1. KPBA (children's book club) 110
2. K.P.I. (library club) 4,318
4. P.M.G.M (reading societies) 82

The other organizations responsible for implementing the many government laws, regulations, and rules dealing with book development are: National Book Development Council, National Library, the Centre for Book Development, and Balai Pustaka.

2. Training Courses

The greatest needs in book manufacture are for training in both technical and administrative areas of the industry. Pusat Grafiка Indonesia (Centre for Graphic Training) provides a number of training with a direct relevance to publishing and printing such as illustration, book design, page layout, production, publishing finance and promotion. A polytechnic of the University of Indonesia housed at Pusat Grafiка is now running two three-year full time courses - one for publishing and one for graphic arts. The students are chosen on the basis of examination results. The greatest needs in book manufacture are for training in both technical and administrative areas of the industry.

To meet the need for middle level manpower, there are four Government-run Senior Technical Schools for Graphics with modern equipment. However, there is still a need for expanding publishing and printing training resources outside Java To fulfill the manpower demand in graphics the Centre for Graphic Training (Pusat Grafiка) is establishing its offices and is providing trainings in Medan and Ujungpandang.

Pusat Perbukuan (Centre for Book Development) conducts short training for textbook writers in each province. These trainings are attended mostly by teachers. This Centre also organizes trainings for editors and illustrators but not on regular basis.

Trainings for librarians are offered by National Library and Provincial Libraries. While degree program in Library Science is offered by the University of Indonesia.

D. Book Trade, Marketing, Import and Export Procedures

1. Book Trade

Estimates of total book sales (excluding imports) are about 40 million books in 1991, with gross sales amounting to the equivalent of about US$ 55 million per year. This includes both textbooks and general books. Textbooks and other schoolbooks constitute about 70 percent of total book sales. With exception of schoolbooks, the Government imposes very few
regulations on publishers, printers, and booksellers. As a result, the book industry continues to grow in size, technical competence, and sophistication. For quality reasons, controls and regulations on schoolbooks exist. All books from private publishers to be used in the school must go through an approval mechanism. A select list of titles is distributed to all schools throughout the country.

Private publishers claim that the price of books is much affected by high taxes, but now the Government has agreed upon a mechanism under which the Value Added Tax (VAT) of 10 percent for approved educational and religious books will be borne by the Government. Although one could make the case that all books should be tax exempt because virtually all contribute to reading and gathering knowledge, the new mechanism is a major step in the right direction.

2. Marketing

One of the main difficulties in making books available in Indonesia is the extreme geographic dispersion and the need to provide access across wide areas, many of which are difficult to reach. This has affected the government distribution of textbooks and library books, which therefore require specific distribution budgets to allow for distribution to the school level. Particularly in Maluku and Irian Jaya Provinces, the scale and magnitude of the distribution difficulties will require specific targeted action to resolve. It is also a problem for the private sector, which has to make a sufficient number of retail outlets available, which carry a large enough selection of books to be appealing to the local clientele. So far retail outlets for books are largely concentrated in the cities and towns.

Although the book industry is showing signs of initiatives everywhere in finding alternative ways of bringing their books to the customers. There is still considerable scope for improvement. In recent years, the Government has contributed to building up the local book trade by decentralizing printing of its textbooks at the provincial levels and by requiring public libraries to buy for their collections from local bookshops.

Most publishers hand distribution over to specialist distributors, but some of the larger ones undertake their own distribution. Wholesalers are widely used. IKAPI (1992) listed a total of 63 wholesalers, 18 of these are found in Jakarta, a further 20 elsewhere in Java, 14 in Sumatra and remaining 11 elsewhere in Indonesia. Within Java, distribution is reasonably efficient but the outer islands are far less well served. Distribution costs are high outside Java, and this is often reflected in increased selling price of books.

The greatest number of consumers are children in school and their parents. They buy books from bookshops or through the school directly from the publishers. There is a small buying public of both adults and children which is mostly urban. The books that are most widely sold are self-improvement, management, technology, social science, computers, and religion. Publishers claim that fiction accounts for half the sales of non-educational books. Children's books and comics also sell reasonably. Many of the publishers still depend their selling on the Government, the biggest buyer of the books.
3. Import and Export Procedures

The existing regulations of importing and exporting books are intended to facilitate the book industry. It is also for the sake of book industry development that importing books printed in Bahasa Indonesia are prohibited. There are no duties on imported books. More detailed discussion about import and export procedures is presented in Mr. Taryadi’s paper.

E. Programmes and Projects Promoting the Book Industry

1. Book Fair

Promoting book industry and reading habits, IKAPI organizes an annual international book fair in Jakarta and national book fairs in the cities where IKAPI’s branches exit (Jakarta, West Java, Central Java, Jogjakarta, East Java and North Sumatra). In other provinces the Centre for Book Development initiates organizing national book fairs in two or three provinces every year. Book promotion through expositions also conducted by the National Library, the Provincial Libraries, and student organizations. The increasing awareness of the importance of promoting books is shown in the increasing number of publishers involved and the number of books expose.

2. Literary Awards

Book promotion is also done through literary awards. Every year Yayasan Buku Utama, a foundation supported by the Ministry of Education and Culture, giving awards to the best books for children and adults. Besides the Centre for Language Development gives awards to the best books in literature.

3. Others

It is also important to note that nowadays more and more Government and private organization concern in promoting the books aiming at improving reading habit and developing book industry. The National Book Council (BPPBN) organizes regional seminars in some provinces and do researches in book development. The results of the seminars and researches are formulated to be come a series of recommendations including on book promotion. The professional organizations in book industry (KPI, GATBI, MMPI, and PMGM) are also active promoting books through their programmes.

In 1995 President of the Republic of Indonesia officially declared May as the National Book Month and September as the National Reading Month. These two months are filled with various activities aiming at book promotion. The First National Congress of Book Societies organized on 29 - 31 May 1995 was to formulate the problems in developing book industry and identify alternative solutions.
F. Application of I.T in Publishing and Book Trade

Information technology is understood as "a generic term to cover the acquisition, processing, storage, and dissemination of information textual, numerical, pictorian and vocal. The term is restricted to systems dependent on a microelectronics-based combination of computing and telecommunication technology" (Prytherch, p.424). With such a notion, Information Technology (IT) has been also developing fast and benefitted well in many fields. However at present, this technology has not been benefitted well in publishing and book trade in Indonesia with one of the reasons that it is considered too expensive for most of the publishers and booksellers. Just for an illustration, there are still very few publishers and booksellers using internet to obtain information of books matters and to promote their books. It is expected that in the near future the present development of communication technology will enforce the application of information technology in publishing and book trade.

G. Copyright

Copyright Law No. 6 of 1982 was amended by Law No. 7 of 1987, which spelled out in more detail which activities were covered, and which substantially increased penalties for violations of the law. Unfortunately, implementation of the legal provision still seems to be difficult, costly and slow. Implementation is the responsibility of the Copyright Division of the Department of Justice but its efforts still seem to be focussed on awareness raising.

As the Copyright Law has not been implemented strictly, pirating of the work of both foreign and local publishers and writers become a major disincentive for the development of an efficient book industry in Indonesia. Pirating takes place both by publishers and printers on a substantial scale and by small neighbourhood print-shops on a small scales. With the rapid growth of to produce quick and cheap copies, small-scale pirating is probably uneasy to eliminate.

H. Problems and Issues

1. The majority of titles published in Indonesia are by authors who have not received not a commission from a publisher, but who have written in the hope of getting published. Since publishers have very little working capital to enable them to pay advances to authors, are, they choose to publish titles taken from these unsolicited manuscripts. When publishers do seek to commission an author for a specific title, they often find it difficult to locate someone suitable.

2. Authors, translators, illustrators, and editors are not well paid and too few in number. There is a great demand to improve their skillls to be more professional. through trainings.

3. Author’s copyright is not adequately protected and fear of piracy may deter potential authors. There are some authors who are paid royalties can not always be sure that they receive accurate reports of the number of copies of their titles that the publisher
Publishers suffer from a lack of working capital. Because the potential market is still small, and because the buying power of the public is limited, publishers can only publish small editions at low prices. Publishers also suffer from the fact that booksellers are slow to settle their account.

Management and entrepreneurial skills are missing in many publishers. There is a lack of training facilities applies to almost all tasks in publishing and book trade.

There is a great need for cheaper, quicker, and more efficient methods of distribution for books throughout Indonesia.

Statistics are not available but it seems that amount sales of books, other than textbooks, reach a level somewhere between one for every four and on for every ten Indonesians. Consumers of newspapers and magazines seem to be more plentiful than those for books.
Reference


Departemen Pendidikan dan Kebudayaan.


World Bank Team (1993). Book and reading development unpublished report
### NUMBER OF PUBLISHERS IN INDONESIA, 1995
(BY PROVINCE)

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Total: 2902
# Jumlah Penerbit Buku Non Anggota IKAPI 1995

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<th>1995</th>
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**Total:** 76

**Total:** 87
### Perkembangan Jumlah Judul Buku

Terbitan Penerbit Anggota IKAPI

**Tahun 1973 - 1995**

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*Sumber IKAPI 1995*

### Perkembangan Jumlah Judul Buku
di Pameran IKAPI

**Tahun 1988 - 1995**

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<th>No</th>
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FORUM ON THE ASEAN BOOK SCENE: COUNTRY REPORT - MALAYSIA

by

DR. Y. MANSOOR MARICAN

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA & NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION (ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
BOOK INDUSTRY IN MALAYSIA
by
Dr. Y. Mansoor Marican

Introduction

Malaysia has a natural resource rich land area of 300,000 sq. km. Its 19 million population enjoy a per capita income of approximately US$3915 (1995). The country has an outstanding record of political stability. It has an economy described as "upper-middle-income" by the World Bank.

On independence, many predicted that Malaysia's multi-ethnic society would collapse. Malaysia has not only survived, but has also prospered, with its economy registering one of the highest growth rates in the world (8%-plus for 8 years). Today Malaysians are bristling with self-confidence as they march towards the vision of a fully developed nation by 2020.

The book industry in Malaysia, like most other sectors, has also benefited from the nation's economic boom. Almost every aspect of the book industry - output of local book publishers, number and quality of retail outlets, representation of overseas publishers in the local market, participation in international trade fairs, governmental support for the industry - has witnessed very positive and encouraging figures. For example, the average daily output of new titles in 1966 was less than 2; currently, it is nearly 20. At the international level, the size of the national stand at the Frankfurt Book Fair never exceeded 4 sq. m. up to the mid-1980s; in 1995, the national stand covered an area of 50 sq. m.

Though Malaysia is currently in the fortunate position of trying to manage its economic "success", it is also confronted with serious challenges. A big trade deficit (US$7.25 billion), severe manpower shortages resulting in a high dependence on immigrant labour, and an increase in the number of drug addicts are amongst the well known challenges testing the national leadership's problem solving skills. In the book industry, several issues have remained unresolved. For example, the problems of poor quality of textbooks and late delivery of these books to schools by publishers have plagued the industry for several years. Several earlier policy measures have failed. In July 1996, the Education Ministry has announced a new set of measures to resolve these problems.

Reading Habit

In the book industry, it is widely claimed that the poor reading habits of Malaysians is the most important factor affecting nearly all problems in the industry. A lot of impressionistic evidence has been offered in support of this claim. However, this claim has yet to be substantiated by properly conducted survey data which is reflective of the current situation. The last survey was conducted by Atan Long fourteen years ago. Recently, the National Library has commissioned a survey research company, Frank Small and Associates, to conduct a study on the readership profile and the nation's literacy rate (the 1993 Word Education Report's figure of 78.4% has been disputed by many). Conducted at a cost of
US$320 million, this study began in April 1996 and is expected to be completed by January 1997.

Since early 1980s, numerous "reading campaigns" have been conducted to get Malaysians to read more. Committees exist at the national and state level with the National Library serving as the Secretariat to oversee these campaigns. The public libraries, education departments and Dewan Bahasa dan Pustaka (DBP) have been most active in these campaigns. Many of these campaigns have been conducted in conjunction with book fairs. Among the numerous activities are arranging visits to book fairs, using mobile libraries to bring books to distant areas, storytelling competitions, demonstrations on the setting up of home libraries, and public forums. There is no denying that these activities would have increased public awareness on the importance of reading. It is difficult, however, to measure the effectiveness of these campaigns in quantitative terms, given the nature of these activities.

Book Publishing

Has the alleged "low" level of reading affected the business of Malaysian book publishing companies? While there are numerous examples of book publishing companies that have prospered, there are also examples of companies that have failed even with a substantial portion of their business "guaranteed" by the government. The explanation for this contrasting outcomes lies more in business skills and attitudes and, to some extent, in government policies, than in the "low" level of reading.

The main feature of Malaysia's book publishing industry is that it is primarily domestic market focused, with school textbooks/revision guides/model answer books publishing constituting the major area of publishing (nearly 70% of the copies published). Print runs for school textbooks range from 7,000 to 100,000 copies. In the non-textbook area, children's books publishing dominate with print runs ranging from 5,000 to 10,000 copies. Print runs for general trade titles range from 1,000 to 3,000 copies. The lower print runs for general trade titles has obviously meant high retail prices which, in turn, has been linked to lower purchases. The current turnover value of the book publishing industry is approximately US$282 million.

There are about 500 companies registered as "publishers" with the Registrar of Companies. They range from one person publishing houses to bigger entities with more than fifty employees in each. Of the 500, it is estimated that only about 150 could be considered as active publishers. The majority are located in the Klang Valley with the rest located primarily in various state capitals.

The multi-ethnic composition of the country and related national policies have also shaped the development of the book publishing industry. With Malay as the national language and as the main medium of instruction in the country’s educational system, it is not surprising that titles in the Malay language take up nearly 60% of the total output. Of the remainder, nearly 25% are titles in the English language with the balance consisting of titles in Chinese, Tamil and other languages.
Book publishing for the export market by Malaysian publishers is minimal. This is understandable given the preoccupation with school textbooks/revision books market and the dominance of titles in the Malay language in local publishing. The current estimate of book exports by Malaysian companies is US$7 million. With the gradual increase in participation in international book fairs, this figure is likely to increase in the years ahead.

Distribution

It is common practice amongst Malaysian book publishers to handle their own marketing and distribution. This is usually done through sales representatives based in HQ covering the retail outlets and libraries in the Klang Valley and also making periodic visits to the different states. Most of the bigger publishing houses have representatives based in some states to provide better service. In addition, local publishers also rely on wholesalers and distributors to service accounts and areas not covered by them.

In addition to locally published titles, Malaysian publishers and distributors represent 420 overseas publishers. Of the 420, 114 are US companies and 90 are UK companies. The rest are mostly from India, Japan, Holland, Germany, Switzerland and Australia. Amongst ASEAN countries, Indonesia and Singapore have the most representation. These representations take several forms: exclusive distributorship, stockist, or reprint arrangements.

There are no import duties on books. Books packaged together with audio/video cassettes are subject to duty on the value of the non-book component. With the exception of Israel, books from other countries can be imported. Import of books that are likely to cause religious/ racial animosity and public unrest and those under the category of pornography are prohibited. There are no reliable statistics on the value of imported books because the customs tariff codes used to record the import of books includes several items (for examples, maps and pamphlets) that would not be considered as books by the industry. One local estimate is US$60 million with the USA and UK accounting for about 60% of the import value; the UNESCO figure is US$35 million.

The wholesale and retail conversion rates for the sale of imported books are reviewed and announced every six months by a committee consisting of representatives from the associations representing book retailers and importers. The committee uses a formula which takes into account, among others, currency fluctuations over the last six months. Though there is no legal requirement, the recommended figures are generally followed. The present conversion rates are given below:
Foreign Currency

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<thead>
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<th>Currency</th>
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<td>(US$0.04)</td>
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Retailing

The sales of books to the consumers take place through approximately 400 book retailers in the country. They range from the owner operated single bookshops to retail chains. Amongst the more well known retail chains are Times, MPH, Popular, Berita and Minerva. Most of the retail book stores are concentrated in the urban centres. It has also become a trend amongst supermarkets to set aside areas for books, particularly children's books. There are also several direct marketing companies selling books. Their areas of concentration include encyclopedias, children's learning sets, and language learning sets. Over the last decade, a few book retailers have concentrated on the sale of remainders.

Library Sales

Library sales constitute a significant component for the book industry. These include sales to the National Library, public libraries, libraries of 8 universities, private college libraries, school libraries, government departments and private company libraries. The total number of libraries exceeds 10,000. Of this figure, approximately 9,000 are school libraries. There are no statistics on the total value of the library books market. The allocation for the purchase of books by the government in the current budget is US$20 million. A federal government ruling requires that the supply of imported books (journals and rare books are excluded) to all government departments and libraries be channelled through bumiputra book
contractors registered with the Ministry of Finance.

Book Trade Organizations

National Book Industry Council: Formerly known as the National Book Trade Council, it is an informal set-up composed of representatives from various book trade associations. It meets to discuss matters of mutual interest amongst the trade associations and organizes the annual book trade convention. These conventions have substantive themes with presentations by representatives from within and outside of the book industry. They are held at different locations each year and have served important social objectives by bringing together members of the book industry in very relaxed settings.

Malaysian Book Importers Association (MBIA): Established in 1980, it represents book wholesalers and distributors. It has a membership of 56 companies. Of these, 30 are full members and 26 are associate members. Nearly all companies involved in book wholesaling and distribution are members.

Malaysian Booksellers Association (MBA): With 112 companies as members, the MBA represents the book retailers in the country. Established in 1969, it is the oldest book trade association. Together with the MBIA, it fixes the conversion rates for the sale of imported books.

Malaysian Book Publishers Association (MABOPA): With 74 publishers as members, MABOPA represents the interests of the local book publishing industry. Its representatives participate in various dialogue sessions with the ministries of finance, trade, and consumer affairs. Among the issues that MABOPA has continuously addressed are those relating to textbook publishing, fair trade practices in the book industry, discount structures, copyright, piracy, and governmental support for the industry.

National Bumiputra Book Publishers Association (IKATAN): With 47 bumiputra owned companies as members, IKATAN represents the specialized interests of bumiputra businessmen in the book industry. It has been active in governmental forums seeking greater governmental support for its members. The government has responded positively and many have benefited considerably from the government dictated textbook publishing programme.

Malaysian Book Contractors Association: It has 29 companies as members. They are all bumiputra companies registered with the Ministry of Finance as book suppliers to government departments and agencies, and public libraries. All companies seeking to supply books to government departments and agencies in excess of US$4000 are required to register with the Ministry.

National Book Development Council (MBKM): This Council is part of the Ministry of Education. The Council is composed of representatives from various book trade associations, other related associations, and relevant government departments and agencies. Its activities include holding seminars and forums, organizing the National Book Awards, coordinating book fair activities, participating in dialogue sessions with relevant government bodies, and supporting research activities.
In addition to the above, there are other associations whose activities directly or indirectly affect the development of the book industry. Among these are Malaysian Reading Association (MRA), National Writers Association (GAPENA), Malaysian Academic Publishers Association (PAPIM).

Book Awards

To encourage excellence in book making, the National Book Development Council organizes the annual National Book Awards. It is open to all Malaysian publishers and only books published in the Malay language and in the previous year are considered for the awards. Approximately 120 titles are received for consideration. Prizes are awarded for the best books in various categories. There are also special prizes for the "Book of the Year" and for "Best Editing" and "Best Design/Layout". The cash prize awarded for the various categories ranges from US$1200 to US$6000. These awards are usually announced during the national book fair.

Book Fairs

Like most book fairs in other countries, the book fairs in Malaysia are really book "bazaars" and not trade fairs. The most important book fair in Malaysia is the national book fair, officially known as the "KL International Book Fair". It was formerly organized by the National Book Development Council in collaboration with the book trade associations. Beginning this year, this task has been taken over by a private limited company, Malaysia Book Promotions Sdn Bhd. Equity in this company is held by the book trade associations. The fair is held over a 10-day period and during school holidays. Over 100 local and foreign publishers exhibit at this Fair. It attracts about 1/2 million visitors.

Book fairs are also held at the state level. The organization of these fairs is left in the hands of state education departments, state libraries and local bookshops.

Attendance at international book fairs is gradually increasing. Amongst the fairs attended by representatives of Malaysian book companies are Frankfurt, London, ABA, Cairo, Teheran, Singapore, Hong Kong, Beijing, Sydney, Tokyo, Jakarta and New Delhi. The reasons for attending these fairs include: acquiring agencies, strengthening existing agency arrangements, buying reprint rights and placing orders for new publications. It is a common practice amongst some book companies to sponsor visits by librarians to these fairs, especially those from libraries with substantial unspent allocations.

Malaysia has taken up national stands in several international fairs. These stands have usually been managed by representatives from Dewan Bahasa dan Pustaka. It is in the Frankfurt Book Fair, however, that there is a substantial Malaysian presence. The national stand will occupy an area of 100 sq. m in this year’s Fair and five Malaysian publishers will be exhibiting in their own separate stands.
Law and the Book Industry

Internal Security Act (ISA): This act is aimed at a variety of activities considered as threats to national security. Under this act, books can be banned. Being a multi-ethnic and multi-religious nation, Malaysia has to be highly sensitive to publications that can contribute to the outbreak of racial riots and religious conflicts. Books that fall under this category of publications are banned. This decision is made only after the books have become available. In other words, prior clearance from the Home Affairs ministry is not required. In the case of imported books, if particular titles in the invoice arouse the suspicion of the inspecting officer at the customs, then sample copies have to be submitted for examination. Up to the '80s, a lot of the books banned came under the "communist propaganda" category. The current focus is more on books that touch on racial and religious sensitivities.

Deposit of Library Materials Act, 1986: This Act replaced The Preservation of Books Act, 1966. The main aim of this act is to ensure that all materials published in the country are "preserved" for current and future use. Under this Act, it is mandatory for all publishers (private companies, individuals, government departments and agencies, research institutes, etc.) to submit 5 copies of every printed material (e.g., books, journals, newsletters, maps, newspapers) and 2 copies of non-printed materials (e.g., CD-ROM, audio and video recordings, cinematographic films) to the National Library. Penalty not exceeding US$1200 can be imposed for failure to submit. Reminder letters from the National Library and increasing awareness of this requirement have ensured a high degree of compliance. In the past, it was difficult for the National Library to monitor the numerous titles published in the country. Now, with more organizations using the ISBN (which is issued by the National Library), it has become easier to monitor and take follow-up actions. As can be seen from the following figures, there has been a steady increase in the number of book titles registered with the National Library: 3695 copies (1992), 3799 (1993), 4050 (1994), and 6465 (1995).

Printing Presses and Publications Act 1984: This is an important act which everyone in the book industry must understand and comply. Though book publishing, importing, wholesaling and retailing do not require government licenses, there are important provisions relating to "undesirable publications" which affect the book industry. Under this Act, such publications are those prejudicial to public order, morality, security, the relationship with any foreign country or government, or which is likely to alarm public opinion, or which is contrary to any law or is otherwise prejudicial to public interest or national interest. Any person who publishes, imports or distributes such publications can be fined up to US$8000 or jailed 3 years. This Act is currently being reviewed to tighten some of the provisions. For example, those involved in selling pornographic materials are allegedly making big profits from this business and many have returned to this business after paying the fines. There is a proposal to increase the fine to a maximum of US$40,000 and the jail sentence to 5 years.

Copyright Act 1987: This is a comprehensive Act covering numerous aspects relating to copyright protection for published editions and other creative works. This Act provides copyright protection for 50 years for published editions from the beginning of the calendar year next following the year in which the edition was first published. Under this Act, copyright is considered as movable property which can be transferred by assignment or by operation of law. Penalties under this Act for copyright offences are severe. A fine not exceeding US$4000 for each infringing copy, or imprisonment for a term not exceeding 5 years or both can be imposed on first offenders. For any subsequent offence, a fine not
exceeding US$8000 for each infringing copy, or imprisonment for a term not exceeding 10 years or both can be imposed.

Book piracy in Malaysia has declined over the years. Today, it is no longer considered a serious enforcement matter, though reports of infringement do surface once in a while. There is a widespread feeling, however, that book piracy is quite widespread in the area of Islamic publications. The Malaysian book market for this type of publications is currently enjoying a boom. One can pick up several Islamic books in retail stores and from roadside vendors without proper copyright credit in the books or claims of permission to reprint. As the original owners have not lodged reports with the ministry, it is difficult to take action against this kind of haram activity!

Of course, book piracy can take a variety of forms. Today, photostating of, in many instances, the entire book is considered an important problem area requiring action. This type of book piracy is big business for several photostatting shops. In particular, expensive tertiary level student textbooks and reference books attract this type of piracy. To deal with this problems, three book trade associations (MABOPA, MBIA, IKATAN) have formed a private limited company, Copyright Clearance Centre Malaysia Sdn Bhd, to license photostatting companies to collect royalties on behalf of publishers. Because of various difficulties, this company has yet to start its activities.

Other legislations that are relevant to the book industry are Trade Marks Act 1976, Trade Descriptions Act, 1972 and Cheap Sale Price Regulations 1987. In some instances, it would be easier to take action under the Trade Marks or Trade Descriptions Act for copyright infringement. For those planning to hold book warehouse or retail sales, familiarity and compliance with the regulations concerning them are required.

Prospects and Problems

With the economy projected to maintain a growth rate sufficient to achieve the nation's vision of a developed society by 2020, the book industry in Malaysia can be expected to grow substantially in the years ahead. Of course, this will not automatically happen. It would depend substantially on whether those in the local book industry can 'detect' the future and seize the opportunities ahead of others. Some of the factors that will provide tremendous opportunities for the book industry in Malaysia are: increase in both the size and quality of the population, expansion of the tourism industry, the plan to increase enrolment in the 8 local universities to 160,000, the policy to make Malaysia a centre of educational excellence, the proliferation of private educational institutions, the expected setting up of branch campuses by foreign universities, increase in "leisure" and health consciousness amongst the local population, the expansion of automotive and aerospace industries, and greater Islamic awareness amongst the Muslim population. Each one of these factors has important implications for the book industry. They present formidable challenges to the entrepreneurial skills of those in the book industry. In this case, the late 'bird' will only get the 'worms'!

To seize the opportunities and thrive, those in the local industry would have to undergo no less than a major "paradigm shift" in the way they are conducting their present businesses. They have to become proactive, think "win-win", wean themselves away from a total dependence on governmental support for business survival, read more (many in this industry don't read!), invest in human resources especially in training (the fact that I have not
even included a section on this subject in this paper is indicative of the current situation in the Malaysian book industry! approach book publishing as a 'creative' (and not 'imitative') activity, avoid being overly secretive about their business operations and open themselves to form strategic alliances, view themselves as businessmen in the global book market, update themselves with the new trends in information technology, particularly electronic publishing and, most important, develop a vision for the industry that will inspire and guide them. "Nothing happens unless first a dream."

Concluding Remarks

I would like to submit the following proposals for consideration by the delegates to this conference. The aims of these proposals are to encourage greater cooperation amongst the ASEAN book trade fraternity for common gain and to increase international awareness of the region's book industry to pave the way for the region's entry into the global market as exporters.

a. Standardization of customs tariff codes for the import and export of books so that the statistical base used for comparisons and policy planning will be uniform throughout the region;

b. ASEAN Book Trade Fair. This could be held once every two years on a rotational basis amongst the ASEAN countries. It would help to promote greater collaborative effort amongst ASEAN book publishers, distributors and retailers.

c. ASEAN stand at the Frankfurt Book Fair. The present national stands should be replaced with one stand for ASEAN. This would help to create a bigger impact with all members standing to benefit from it.

d. "ASEAN" Year at Frankfurt Book Fair. Every Frankfurt Book Fair is devoted to highlighting the book industry in one country or region. We should work towards getting the organizer of the Fair to adopt "ASEAN" as the theme country for the Fair in the year 2001.

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"BOOKS FOR ALL:
ASEAN CONFERENCE ON BOOK DEVELOPMENT"

KUALA LUMPUR, 13 -15 AUGUST 1996

PROMOTING THE FREE FLOW OF BOOKS
IN ASEAN

by

DRS. ALFONS TARYADI

Jointly Organized by:

PERPUSTAKAAN NEGARA MALAYSIA &
NATIONAL BOOK COUNCIL OF MALAYSIA

Sponsored by:

ASEAN COMMITTEE ON CULTURE AND INFORMATION
(ASEAN - COCI)

With the Cooperation of:

MINISTRY OF CULTURE, ARTS & TOURISM
PROMOTING THE FREE FLOW OF BOOKS IN ASEAN

Alfons Taryadi

Introduction

The main dynamic of growth and change in Asia in the 1990's is located among others in the countries of the ASEAN region. Such is the view of John Naisbitt expounded in his book *Megatrends ASIA*. Furthermore, he writes: "Up until 1990's everything revolved around the West. The West set the rules. Japan was run by those rules during its economic emergence. But now Asia - the rest of Asia - are creating their own rules and will soon determine the games as well. Even Japan will be left behind as the countries of South East Asia, led by the Overseas Chineses and China, increasingly hold economic sway." (Naisbitt, 1995, IX)

What a prediction! To become true, however, it certainly requires the utmost efforts of the countries involved, including of course those of ASEAN region.

In view of the mondial trend towards the knowledge society, where, according to Peter F. Druckker, the basic economic resource will be no longer capital, nor natural resources, nor labour, but is and still be knowledge (Drucker, 1994, 8) the crucial challenge ASEAN countries have to face will be that of developing their human resources to master the kinds of knowledges required to solve problems in an information-rich society.

Obviously, in such a society, the role of books as vehicle for information, education and research and as resource of culture and recreations, as firmly believed in the London Declaration of the World Congress on Books in 1982, is very important. Consequently, ASEAN member countries have to seriously develop their capacity of providing books for their people. Here, a dismal fact confronting the Southeast Asian counties is that there is a gaping lack of books for the burgeoning populations, while at the same time their distribution, due to various reasons, is far from adequate. (Pacheco, 1992, 86) Besides, the movement of books within ASEAN is limited.

On the other hand, it is an undeniable reality that at present the people of Southeast Asia is being flooded by innumerable goods from the developed countries ranging from fast foods, household utensils, movies, music cassettes to mass communication media such as magazines, newspapers, television programmes, softwares, multimedia products and books. Already in 1978, UNESCO has been taking a note of a growing concern that the dissemination of information is largely a one way process. At the international level, the information flow is predominantly one way, out from the industrialized countries - inevitably reflecting its origin and tending to impose unwanted cultural models -(UNESCO, 1978, 20, 21, )
From what has just been said before, it is clear that concerning the flow of books within the ASEAN region, there are at least two basic problems, namely the limitedness of movement of books within the region and the imbalance of flow of books between ASEAN counties and those of developed nations. The latter problem is not within the scope of this paper. So I will limit the discussion to the first one.

The topic will be approached according to the following scheme:

I. The Clarification of the Term "Promotion"

II. The Need to Disseminate Books Within ASEAN Region
   1. The Guiding Principles
   2. The Flow of Books within ASEAN Region
      a) For Commercial Purpose
      b) For Non-Commercial Purpose

III. Factors Behind the Flow of Books within ASEAN Region
   1. An Appropriate Climate
   2. Import/Export Procedures
   3. National Book Policies
   4. Copyright Laws and Other Legislation
   5. Existing Conditions of Book Industry and Book Trade
   6. The Recent Development of the Internet

IV. Who are Responsible for the Promotion of the Free Flow of Books
   1. Governments
   2. Book Societies

V. Measures to Promote the Free Flow of Books

VI. Conclusions and Recommendations

I. The Clarification of the Term Promotion

The term "promotion" in this paper is taken to mean: 1) publicity, that is providing information to win public interest and 2) improvement or advancement (Hornby 1974, 668). Hence the promotion of the free flow of books does not mean only to make people know and support the idea that the flow of books is to be unhindered, but also to make efforts to eliminate the factors hampering the flow of books.

II. The Need to Disseminate Books within the ASEAN Region

Why there should be a free flow of books among ASEAN countries! There are at least three principles embodied in the Charter of the Book agreed upon by the international professional organizations in 1972 which are relevant to be taken as guiding principles in this context. Those principles are 1) that everyone has the right to read, 2) that books serve and
promote international understanding and peaceful cooperation and 3) that the free flow of books between countries is of fundamental importance. (USESCO, 1982, 19)

1. The Guiding Principles

a). The Right To Read

"Society has an obligation to ensure that everyone has the opportunity to enjoy the benefit of reading. Therefore governments have the responsibility of helping to obliterate the scourge of illiteracy. They should encourage provision of printed materials needed to build and maintain the skill of reading. Bilateral and multilateral assistance should be made available as needed to the book profession. The producers and distributors of books, for their part, have the obligation to ensure that the ideas and information thus conveyed continue to meet the changing needs of the reader and of society as a whole". Such is the explanation of the first principle contained in the Charter of the Book (Barker and Robert Escarpit, 1973, 152).

In view of the responsibilities of governments mentioned above, it is appropriate that the governments of ASEAN countries have put illiteracy as one of their main objectives as it was manifest in the Declaration of ASEAN Concord issued in Bali 24 February 1976. There it is written that "the elimination of poverty, hunger, disease and illiteracy is a primary concern of member states" (German, 1992, 140)

In this context, it is good to glance at the literacy figure of the population of ASEAN countries

<table>
<thead>
<tr>
<th>Countries</th>
<th>Literacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brunei Darussalam</td>
<td>85.1 %</td>
</tr>
<tr>
<td>Indonesia</td>
<td>85.0 %</td>
</tr>
<tr>
<td>Malaysia</td>
<td>78.0 %</td>
</tr>
<tr>
<td>Phillipines</td>
<td>89.9 %</td>
</tr>
<tr>
<td>Thailand</td>
<td>93.0 %</td>
</tr>
<tr>
<td>Singapore</td>
<td>90.1 %</td>
</tr>
</tbody>
</table>

( German, 2 )

As it has been shown just now, the right of everyone to read implies many consequences on the part of book publishers, distributors as well as governments. Judging from the general conditions of the present book publishing in ASEAN countries as can be glimpsed through some reports (Pacheco, 1992, 1995, Gopinathan, 1995, Sivaraka, 1995, Taryadi, 1992, 1995,) many things have to be done by every member states of ASEAN to provide books needed by the people in their own respective countries.
b) Books serve international understanding and peaceful cooperation

The UNESCO’s constitution states that since was begin in the minds of men, it is in the minds of men that the defences of peace has to be constructed. Books constitute one of the major defences of peace because of their enormous influence in creating an intellectual climate of friendship and mutual understanding. All those concerned have obligation to ensure that the content of books promote individual fulfillment social and economical progress, international understanding and peace. (Barker and Robert Escarpit, 155)

Having such potential benefits, books are certainly needed by ASEAN member countries which in accordance to Declaration of ASEAN Concord "shall strive, individually and collectively, to create condition of peaceful cooperation among the nations of Southeast Asia on the basis of mutual respect and mutual benefit". (Gertnat, 141).

c) The Importance of the Free Flow of Books Between Countries.

UNESCO has worked to promote the free flow of ideas by word and image from its earliest days. The aim was written into its Constitution because UNESCO founders believed that unhindered exchange of information between peoples would help rid their minds of the seed of war. (UNESCO, 1978, 2).

Besides, to enable all to share in the world’s creativity, the unhampereed flow of books is vital. Obstacles such as tariffs and taxes can be eliminated through wide-spread application of UNESCO’s agreements and other international recommendations and treaties. (Barker and Robert Escarpit, 234).

It was in the same spirit as was just described that the participants of the World Congress on Books in 1982 call upon all concerned, particularly governments, to seek the removal of restraints of all kinds on the creation, production and publication of books and their distribution within and across national boundaries in both directions. (UNESCO, 1982, 19).

It stands to reason that all which have been said above, have certainly bearing on ASEAN member countries. And since book publishing in the member states of ASEAN is not in the same conditions, the protection of the principle of free flow of books should not be construed to imply unlimited trade in books which could have unfavourable balance of trade consequences for the member states where the book publishing industry is weak and not yet developed. So where ever the flow is one way, measures have to be taken to ensure reciprocity. The promotion of the free flow of information should not be exploited for purely commercial advantage (UNESCO, 1982, 10).

Anyhow, all in all, it is recommendable that national book policies of the ASEAN member states should reaffirm and ensure the country’s commitment to UNFESCO’s principle of free flow of information and other related provisions as embodied in the Florence Agreement and other international agreements. (Pacheco, 1992, 89)
2. The Flow of Books Within ASEAN Region

How is the flow of books within ASEAN region? To answer this question one has to know certain hard data on book publishing in ASEAN member countries. That is precisely the hardest part of the task this paper has to tackle.

Common to Southeast Asian countries is what Gopinathan calls "the paucity of hard data on publishing, situation". (Gopinathan. 1995. 512) This is true even for Singapore where printing and publishing industry is rated as one of the most productive sector in Singaporean economy during the mid-eighties (Gopinathan. 1992, 80). Writing about book publishing in Singapore, Gopinathan says "An empirically grounded analysis of the prospects for the publishing industry is not yet feasible due the scarcity of data. Only some of the publishing companies are listed and thus one is dependent upon goodwill to obtain relevant figures. Use of data collected at the national level is compromised because publishing and printing data are presented as a combined figure: this not only makes it difficult to estimate size and value of the publishing output, imports and re-exports, etc. but also prevents trend analysis to see how different segments of the publishing sector have grown or shrunk. The general inaccessibility of data also makes it difficult to identify market leaders" (Gopinathan, 1992, 83).

Aware of the scarcity of data on book publishing in Southeast Asia which may be a revealing indicator that book industry in the region is not regarded as a priority nor an essential industry"(Pacheco, 1992, 86), I do not contend to present a complete picture of the flow of books within ASEAN region today. The following are scraps of information about the export and import of books in some of ASEAN member countries, with a note that the book flow can be divided into two kinds, namely one for commercial purpose and the other for non-commercial purpose.

a) The flow of Books For Commercial Purpose

i. Indonesian Export and Import of books

The gross output of local publishers in Indonesia, according to a survey done by the World Bank in 1992, is around US $150 million a year. The turnover of imported books including those purchase by all of the libraries through foreign aids, is about US $5 million a year. It is estimated that compared to the turnover of the imported books in Indonesia that of Malaysia is two times bigger, while that of Hong Kong three times and that of Taiwan four times bigger.(Arianto, 1994, 2).

The value in dollars of the Indonesian export of books printed books, encyclopedias/ dictionaries, children books ) is always below that of the imported ones, as can be seen in Table 1 below:
Table 1: International Trade in Books and Pamphlets  

<table>
<thead>
<tr>
<th>Year</th>
<th>Export</th>
<th>Import</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>0.0</td>
<td>3.1</td>
</tr>
<tr>
<td>1990</td>
<td>0.1</td>
<td>8.3</td>
</tr>
<tr>
<td>1993</td>
<td>0.6</td>
<td>14.9</td>
</tr>
</tbody>
</table>

(Source: UNESCO Statistical Year Book 1995)

As a comparison, we can look at the figure of Indonesian export and import of books as recorded by Central Bureau of Statistics, shown Table 2.

Table 2: Export/Import of various printed books /illustrated, media/other printed matters  
1985 - 1994 (US $)

<table>
<thead>
<tr>
<th>Year</th>
<th>Export</th>
<th>Import</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>232.438</td>
<td>17.287.683</td>
</tr>
<tr>
<td>1986</td>
<td>176.742</td>
<td>22.441.826</td>
</tr>
<tr>
<td>1987</td>
<td>523.537</td>
<td>13.518.901</td>
</tr>
<tr>
<td>1988</td>
<td>966.315</td>
<td>22.665.176</td>
</tr>
<tr>
<td>1989</td>
<td>1.126.784</td>
<td>21.495.085</td>
</tr>
<tr>
<td>1990</td>
<td>956.339</td>
<td>28.516.136</td>
</tr>
<tr>
<td>1991</td>
<td>1.103.737</td>
<td>26.124.694</td>
</tr>
<tr>
<td>1992</td>
<td>1.439.360</td>
<td>35.992.405</td>
</tr>
<tr>
<td>1993</td>
<td>1.835.433</td>
<td>43.552.667</td>
</tr>
<tr>
<td>1994</td>
<td>3.015.871</td>
<td>43.933.105</td>
</tr>
</tbody>
</table>


As for the export of books from Indonesia to the rest of ASEAN member countries, its figure is shown in Table 3.
Table 3: Indonesia Export Books to the Rest of ASEAN Countries
1995 - 1995

<table>
<thead>
<tr>
<th>Years</th>
<th>Countries</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Malaysia</td>
<td>Singapore</td>
<td>Brunei</td>
<td>Philippines</td>
<td>Thailand</td>
</tr>
<tr>
<td>1985</td>
<td>98,307.00</td>
<td>33,165.00</td>
<td>3,165.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1986</td>
<td>114,514.00</td>
<td>13,453.00</td>
<td>1,730.00</td>
<td>283.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1987</td>
<td>146,372.00</td>
<td>54,156.00</td>
<td>6,634.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1988</td>
<td>179,396.00</td>
<td>124,847.00</td>
<td>750.00</td>
<td>167,220.00</td>
<td>12,670.00</td>
</tr>
<tr>
<td>1989</td>
<td>63,165.00</td>
<td>441,831.00</td>
<td>2,703.00</td>
<td>34,940.00</td>
<td>24,530.00</td>
</tr>
<tr>
<td>1990</td>
<td>67,727.00</td>
<td>170,393.00</td>
<td>2,792.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1991</td>
<td>28,842.00</td>
<td>4,914.00</td>
<td>0.00</td>
<td>81,231.00</td>
<td>9,758.00</td>
</tr>
<tr>
<td>1992</td>
<td>37,974.00</td>
<td>5,759.00</td>
<td>9,907.00</td>
<td>224.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1993</td>
<td>61,841.00</td>
<td>27,303.00</td>
<td>11,181.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>1994</td>
<td>40,084.00</td>
<td>7,448.00</td>
<td>11,974.00</td>
<td>53,208.00</td>
<td>1,072.00</td>
</tr>
<tr>
<td>1995</td>
<td>120,507.00</td>
<td>35,353.00</td>
<td>687.00</td>
<td>68,954.00</td>
<td>1,322.00</td>
</tr>
</tbody>
</table>

(Source: Central Bureau of Statistics 1995.)

From the Table 3, it is clear that the export of books from Indonesia to the rest of ASEAN member countries is a small quantity, but it is increasing. If in 1985 its figure is US$ 135,287.00, in 1995 it is US$ 226,823.00.

As regards import of books from ASEAN member countries, the figure is indicated in Table 4, below.

Table 4: Import of various dictioniaries/encyclopedias 1992-1994 (in US $)

<table>
<thead>
<tr>
<th>Countries</th>
<th>Year</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1992</td>
<td>1993</td>
<td>1994</td>
</tr>
<tr>
<td>Singapore</td>
<td>237,389</td>
<td>94,151</td>
<td>87,594</td>
</tr>
<tr>
<td>Malaysia</td>
<td>49,235</td>
<td>21,944</td>
<td>0.0</td>
</tr>
</tbody>
</table>

Central Bureau of Statistics 1995)
ii. Malaysian Import and Export of Books

Speaking about how to market imported books in Malaysia, Wong Swee Peng says that like any other developing country, Malaysia still rely substantially on imported books especially in terms of tertiary books, post graduate texts, academic and professional journals. Besides there has been always a market for children books, adult fictons (paperbacks), books in Chinese, published either in Hong Kong, Taiwan and of late China. Books from Indonesia to find their way into Malaysia. (Peng, 1994, 1)

According to Wong Swee Peng, books in English from United Kingdom, United States of America, or Australia account for 70% of the total import with the rest mainly Chinese and some Indonesian. The total import of books is estimated to be around 150 million Malaysian ringgit. But the most lucrative market in Malaysia is one for the academic books. There is no import duty for books, but freight and distribution costs are escalating annually. Hence the Malaysian Book Importers Association has been regulating the prices of imported book (Peng, 1994, 1)

iii. Singaporean Import and Export of Books

As for the marketing of imported general books in Singapore, according to Charles Cher, there is a healthy market for books on a number of subjects, e.g. cookery, wine, interior decoration, health and travel. Besides, there is also a growing market with increased emphasis on pre-school books and cartoon character tie-ins, e.g. Teenage Mutant Ninja Turtles, Walt Disney Characters. On the other hand, big authors like Michener, Wilbur Smith, John Grisham, Robert Ludlum and Sidney Sheldon are still very popular. A growing market for fantasy is emerging strongly. But very popular also are self improvement books such as management, marketing, business, childcare and health series. In conclusion, Charles Cher says that Singapore’s strategic location makes imports of books easy. Imported books are easily cleared either through sea or air freight. And due to Singapore’s excellent communication in infrastructure, there is no difficulty in the matter of the delivery of books. In addition, Singapore’s efficient government and a minimum red tape facilitates the movement of books (Cher, 1994, 1, 2, 3)

b) The Flow of Books for Non-Commercial Purpose

In 1979 the National Libraries and Documentation Centre - Southeast Asia (NLDC-SEA) was set up, consisting of the National Library of Malaysia, the National Library of Singapore, the National Library of Muangthai, the National Library of the Philippines and the National Scientific Documentation Centre - the Indonesian Institute of Science (PDIN-LIPI presently called PDIN-LIPI). The consortium was established with the aim to assist the obtaining of the publications of the member countries, to provide for information on the publications through bibliographies, lists of publications received and to render mutual service among the national libraries of ASEAN member countries.

During the period between 1979-1983, there were not many persons not universities making use of the services of PDIN-LIPI as a member of NLDC-SEA. According to the report issued by PDIN-LIPI, during that period, Malaysia sent 425 requests and obtained...
58% of the answers expected, while Singapore dispatched 529 messages and got 67% of the services requested. On the other hand, during the same period, Indonesia asked for 369 documents or books to Malaysia and got 27% of the orders fulfilled, while from the 388 messages of requests sent to Singapore, 50% of them was provided for. Besides, during the period between 1980-1982, PDIN-LIPI received 19 books as gift from the National Library of Malaysia, while in return this institution donated 21 books to Malaysia. Between Singapore and Indonesia, there was also an exchange of books. Donating 230 books to the National Library of Singapore, PDIN-LIPI was given 81 books as gifts. (Taryadi, 1991, 2).

How is NLDC-SEA now? "It is not functioning, anymore.", thus said B. Sudarsono, the Head of PDII-LIPI. Why? Because, according to Sudarsono, that information cooperation did not get any operational budget. In the mean time, however, PDII-LIPI has been cooperating with other institutions, such as ISEAS (Institute of Southeast Asian Studies) and ENSIC (Environment and Sanitation Information Centre) each based in Singapore and Bangkok respectively, with a programme of exchange of scientific documents and publications.

As regards the National Library of Indonesia, occasionally there has been exchange of books between that institution and other national libraries in the world. But such all exchange of books, according to Mr. Soekarman MLS, the only most senior librarian in Indonesia, was not done under a definite programme and never happened between the National Library of Indonesia and any other National Library in the ASEAN member countries.

Those scraps of informations just now shared, though scanty and incomplete as they are, may somehow substantiate the impression that the movement of books within the ASEAN member countries is limited. Hence, on the ground of the importance of books as a means of mutual understanding and peaceful cooperation, the free flow of books among ASEAN member countries is to be encouraged and promoted. The question now is to identify factors having influences on the flow of books among ASEAN member countries.

III. Factors Influencing the Flow of Books within ASEAN Region

1. An Appropriate Atmosphere

In ASEAN there now exists an appropriate atmosphere for the realization of the principle of the free flow of books among the member nations. In 1993 ASEAN embarked on a plan to turn this region into a free trade area by 2008. The deadline was later trimmed down to 2003 and further shortened to 2000 for about 80 percent of goods produced in the region. Some 38,397 products would see their tariffs slashed to a 0 to 5 percent range (Parameswaran, 1996).

In such an atmosphere of free trade, the idea of the free flow of books among ASEAN member countries could certainly be proper.

2. Import and Export Procedures in ASEAN Member Countries

From what has been described above (II 2), one can see that there are no significant obstacles to the importation and exportation of books in some countnes in the ASEAN region. In Singapore there is no difficulty as regards the clearance of books through the Customs.
There is as a general rule no restriction of foreign imported books and publications in Singapore, as Singaporeans are encouraged to keep up with new discoveries and the latest innovation in science, technology and business disciplines. However both local and foreign printed materials will be banned if deemed “undesirable”, for example, pornographic magazines and those which interface with domestic government and politics (Lim, 1988,166).

Regarding the importation of books in Malaysia, as has been glanced at above, there is no import duty for books. This fact is an important point to be emphasized as a contributing factor to the movement of books within ASEAN region.

Concerning the import and export procedures in the Philippines, the following is some pieces of information gathered from the Philippine Commercial Office in Jakarta. In the Philippines, importation of most goods and merchandise is generally allowed. Exceptions include certain articles regulated for reasons of public health and safety, national security, international commitments and development and rationalization of local industry. Under the Comprehensive Import Supervision Scheme (CISS), the government inspects imports. Books are not included in the categories of goods which are exempt from inspection requirements, while current newspapers and periodicals are.

Imports passing through customs are required to have the following documents: declaration of import entry, commercial invoice, certificate of origin, bill of lading, irreverable domestic letter of credit or bank guarantee or warehousing bond, inward cargo manifest and other documents that may be required by the Bureau of Customs.

As for export procedures, the Philippine government has simplified procedures for all export transaction and imposed minimum customs requirements on the exportation of goods. Inspection, commodity and export clearance requirements imposed on a number of exports have been withdrawn.

How about import and export procedures in Indonesia?

Principally, there are no significant obstacles. The regulation does not cause any problem. Red tape exists, but it can be managed. However, tariffs imposed on books are still heavy. Such is the opinion of an Indonesian importer of books who has a long experience in the book trade. According to her, the importation of textbooks has to pay for import value added tax 10%, for revenue tax 2.5% (for companies having Import Identification Number) or 7.5% (for companies not having Import Identification number).

There is a lot of documents required for the handling of the importation of books, such as letter of authorization, airway bill or bill of lading, house airway bill or bill of lading, packing list, commercial invoice, certificate of insurance (for sea freight), Report of Surveyor’s inspection (for sea freight), acknowledgement of the use of the imported books, receipts of tax payments (VAT, revenue tax), receipt of duty payment, import identification number, tax obligation number.

As it is the case with Singapore or the Philippines, the Indonesian government forbids the importation of books deemed “undesirable” such as having pornographic contents or containing the teaching of communism. Such regulation applies to the exportation of books too.

As regards the export procedures, there is no hindrance for the exportation of books from Indonesia. In accordance with deregulation of export procedures, issued by the Indonesian government, 4 June 1996, small industries are allowed to export goods having values up to US $50,000 without obligation letter reporting about the export. Besides, export below the value of US $5,000 is not to be examined by the Customs. But exporters of books have to report to the District Attorney about books they are going to export the implementation of this regulation, however,
according to an experienced exporter of books in Jakarta, these last few years, has not been too rigid

All in all, the import and export procedures of books in some of the countries in ASEAN region shown above, in practice, has not been causing much hindrance to the importation and exportation of books.

3. National Book Policies in ASEAN Member Countries

The present decade, wrote Ms Pacheco in 1992, presents an opportune time for renewing the quest for a book society in Southeast Asia, as it faces the global information explosion of the 21st century. In several countries of that region, according to Pacheco, National Book Development Councils have been set up, such as in Malaysia, Singapore, Thailand, the Phillipines and Indonesia. The goal of these institutions has been to bring about a national book policy that answers the needs of the nation. (Pacheco, 1992, 85).

As far as I know, only the National Development Councils in Malaysia and Philippines that have formulated and proposed a national book policy for their respective countries, while their counterparts in other ASEAN countries have not. Undoubtedly, the government of Singapore has policies which are favourable to the book publishing, such as the policy toward language use and that of school curriculum, syllabus and textbook selection, and surely it does intervene to promote the growth of printing and publishing. (Gopinathan, 1992, 76, 77, 80.) But it has so far not yet issued a complete and comprehensive national book policy. Neither has Indonesian government. It is true that the National Book Advisory Council of Indonesia has submitted to the Ministry of Education and Culture its recommendation on a national book policy in 1981 and 1983 and several other recommendations on various aspects of book publishing such as that on the problem of book piracy (1984), that on translation (1986), that on financial problem in book publishing (1986), that on the development of libraries as channels of book distribution (1988), that on book distribution system (1988), that on the exemption of books from value added tax and many others. (BPPBN, 1988), what is lacking, however, is a clearly defined national book policy which is comprehensive as well as integrated so that through it all efforts to develop national book industry can be properly coordinated. That is the reason why Musyawarah Masyarakat Perbukuan Indonesia, shortened as MMPI (The Conference of Book Society in Indonesia), in the National Book Congress I in Jakarta, 29-31 May 1995, stressed that a national book policy conducive to the development of the book industry should be soon formulated (Taryadi, 1996, 96).

I. The National Book Policy of Malaysia

How is the national book policy of Malaysia seen in the light of the promotion of the free flow of books in ASEAN member countries? Since the free flow of books will not happen properly as expected if the book industry in the countries concerned are not in a healthy condition, it follows that a national policy which is favourable to the development of the book industry is consequently supportive to the implementation of the principle of free flow of books.

A brief look at the national book policy of Malaysia gives me an impression that it is comprehensive and integrated in nature. Besides, I think, the national book policy of Malaysia is praiseworthy for its sharp diagnosis on the existing problems of the book industry.
as well as for its well-reasoned defence for it. To illustrate, the book publishing in Malaysia (as it is in other countries of ASEAN) is not yet a lucrative industry nor is it expanding. Consequently, support as well as financial aid is needed from the government. Only in this way can the book industry be considered as one of the most vital industries for the country’s development. (pg.14)

Another point is that, in accordance with the national book policy, the Reading Project Movement has to be implemented in earnest (pg.22). As to writers, they should be given assistance to carry out research in preparing their manuscripts, while their royalties should be given tax exemption from a total of $10,000 and not just up $3,000 as in the case today. (pg.23)

As regards book distribution, it will easier and more effective if the government subsidize the costs of transportation by air, sea and land. Being tool for cultural development, books should be given special consideration in terms of costs, different from costs of transporting other goods (pg.18).

Furthermore, the national book policy of Malaysia does not fail to remind that the Copyright Act has been so loosely implemented. It also calls to attention that several Government Acts that are connected with publishing and writing, e.g., Printing Press Act do not really encourage writers to write. To enable writers to write and produce high quality manuscripts, a favourable environment should exist and they should be given the proper encouragement. (pg.8)

Finally, it is noteworthy that the national book policy of Malaysia has been published and now is available to the general public especially to all who are actively engaged in the book industry. As stressed by the Minister of Education of Malaysia, Datuka Amar Dr. Sulaiman bin Haji Daud its publications is a commendable effort, as the objective of the National Book Policy can be now widely exposed and understood by everyone.

**ii. The National Book Policy of the Philippines**

The first thing worth mentioning as regards the national book policy of the Philippines is that, first of all, it recognizes that book publishing industry has a significant role in national development, considering that books are the most effective and economical tools achieving educational growth, for imparting information, and for recording, preserving and disseminating the nation’s cultural heritage (Pacheco, 1992, 88).

Furthermore, it has the following basic purposes and objectives:

- to create conditions conducive to and ensure infrastructural facilities for development, production and distribution of books;
- to obtain priority status for the book publishing industry;
- to ensure and adequate and accessible supply of books for all segments of the population;
- to promote book readership especially among the young and neoliterates.
to promote the development of translation and of indigenous authorship among various language group of the country;

to promote the effective distribution of books through adequate, efficient and reliable postal and transport delivery services at concessional rates;

to foster the development of skills of personnel in book publishing;

to inculcate the concept of intellectual property ownership and to protect the rights of authors and publishers by strictly enforcing copyright laws and providing legal assistance to authors and publishers in suits related thereto;

to reaffirm and ensure the country's commitment to the UNESCO's principle of free flow of information and other related provisions as embodied in the Florence Agreement and in other similar international agreements (Pacheco, 1992, 89).

Besides, the national book policy of the Philippines recommends the provision of incentives for book development. Accredited bonafide book publishers shall be given the following incentives:

- Duty-free importation of paper for exclusive use in book publication;

- access to government credit facilities at such interest rates and with the same privileges as accorded to priority industries. (Pacheco, 1992, 91)

Considering what should be done by policy makers in the countries of ASEAN region, Pacheco emphasizes that, all in all, there appears to be a threefold thrust to be addressed by a national book policy, namely (1) developing book industry through a system of incentives and assistance (2) promoting readership and making books widely assessible and (3) providing better protection for the intellectual property right of authors and publishers. (Pacheco, 1992, 87).

As a conclusion of this part, it can be said that the existing book policies in Malaysia and the Philippines are conducive to the implementation of the principle of free flow of books in that they aim at laying the foundations of robust and healthy book industry. It is noteworthy that the national book policy of the Philippines even explicitly reaffirms the principle of free flow of information, hence providing a basis for the promotion of free flow of books among ASEAN member countries.

4. Copyright Laws and other Legislation in ASEAN Member Countries

Regarding the Copyright Act, whether that of Singapore, Malaysia or Indonesia, as far as I am able to comprehend, does not contain anything contrary to the principle of free flow of information among nations.

As to Act A667 of Malaysia concerning National Library (amendment, act 1987), it deserves mentioning that the function of the Director General of the National Library includes a) to promote and facilitate national and international co-operation and resource sharing among libraries and b) to cooperate with professional and other bodies at national and international level for the development
of libraries.(pg. 6 ).

In like manner, the power of the National Library Board of Singapore also includes power to establish liaison with overseas library authorities and information providers to secure maximum collaboration of all activities relevant to its function. (National Library Board Act. Act 5 of 1995, pg. 6). As to the Act of the Indonesian Government National Library, presently it is being discussed by the Parliament of the Republic of Indonesia. The National Library was established on the basis of the Presidential Decree Number 11, 1989. According to the decree, the national Library of Indonesia has functions including among others that of collecting, storing and processing books and other documents of information ( bahan Pusataka) from local as well international resources. Such function implies the supppport for the free flow of books among ASEAN member countries.

As for the Act Number 4 1990 of the Republic of Indonesia on the deposit of printed materials, there is not any clause which contradicts the principle of the free flow of information among nations. On the contrary, some if its clauses presuppose the suppon for the implementation of that principle. For example, there is a clause stating that anyone who imports any work on Indonesia in more than 10 copies for commercial purposes has the obligation to submit one copy of each title to the National Library. Similarly, any citizen whose work has been published abroad is obliged to submit one copy of that publication to the National Library of Indonesia.

As regards the Undesirable Publications Act. declared by the Singaporean Government in 1961, amended in 1969 and in 1913, as it is with Printing Presses and Publications Act.1984 (Act 301) of Malaysia they certainly can be considered as a limitation to the principle of the free flow of information among nations. Such a rule seems to be common to all of the member states of ASEAN. And viewed from the stand point of governments as the guardian of public security and morality, such legislation is understandable. Yet I agree with the comment contained in the National Book Policy of Malaysia saying that " to enable writers to write and produce high quality manuscripts, a favourable environment should exist and they should be given the proper encouragement "(pg.8). So, what is to be done is to review the formulation of the Acts so that they reflect the democratic spint which should be embraced by responsible governments as well as responsible citizens. This means a dialogue, a continuing dialogue among all members of society, especially between government officials, legislators and intellectuals of the society concerned.

Finally, special mention has to be made of a regulation issued by the Indonesian government in 1959, prohibiting the import of books written in Indonesian national language or regional languages. As a consequence of that regulation, books, magazines and newspapers in Malaysian language have not been imported. Initially, the regulation was mean to protect the Indonesian printing companies from unfair competition with the Dutch printing enterprises which have always been given orders to print thousand copies of school textbooks from the Dutch publishers having the monopoly of the publication of textbooks in the early 1950's. Although the situation has been changing, the Indonesian printing companies were thought to be still in need of protection against Singaporean printing companies which generally were able to offer cheaper price. There was a feeling of apprehension that the withdrawal of the 1959 regulation would cause the influx of school textbooks printed by foreign printers in Singapore into Indonesia rather than books of literature from Malaysia, Singapore or Brunei Darussalam ( Rosidi,1978, 76, 77 )

In the mean time, opening the International Book Fair 11, in the Convention Hall, Senayan, Jakarta, 2 May 1984, the late Dr. Nazerho Notosusanto, the Minister of Educalion and Culture at that time, said, that books in Malaysian language were allowed to be imported on the ground of their use of Malaysian language as different from Indonesian language. Besides, according to the Minister, the export/ import of books between the two countries would be of help to the efforts of lacking the

From the ministerial statement mentioned above, it can be concluded that it is not necessary to withdraw the 1959 regulation. What changes is only its interpretation, meaning that the Malaysian language is recognized as different from the Indonesian. However, the problem is that it is not always easy to distinguish those two languages. To illustrate, an Indonesian, who does not know who is Baha Zein, would most likely guess that a poem "Teluk Cirebon" bearing that name, is a poem in Indonesian language written by an Indonesian poet. And many other modern Malaysian authors such as Usman Awang, Keris Mas and Latiff Mohidin in many of their works make use of Malaysian language which is very often difficult to distinguish from Indonesian language. (Taryadi, 1991, 115).

Now, the situation is completely different. Even if that regulation remain, it would not make sense any longer. For now textbooks from foreign publishers are going to be welcome. On 29 June 1995, an agreement between the Indonesian Government and World Bank was signed concerning the loan for the Book Development and Reading Interest Project which is responsible for among others providing textbooks for Junior High Schools. Those school textbooks are going to be selected from book publishers, be it government, private, local or foreign one. What counts is that the books concerned meet the quality standards set by the government. Such being the case, the 1959 regulation, withdrawn or not, would not make any difference at all.

5. Existing Condition of the Book Publishing and the Book Trade in ASEAN Member Countries.

The promotion of the free flow of books among ASEAN member countries will certainly be of no avail, if the book publishing in each member country of ASEAN is not in a good condition. Besides, the kind of market (internal, international or partly internal and partly international market) which the book publishing is oriented to, is also relevant to the movement of books among the member countries.

Consider, for an example, the book publishing in the Phillipines. As reported by Esther Pacheco, there is at present a fast growing local publishing efforts in general trade book publishing which includes mainly dictionaries, anthologies, culture and travel books, cook books, how-to-books, and art and coffee-table books. All of these are inner-directed as they are focussed for Filipino readers. This explains, writes Pacheco, why most Philippine books find no foreign market. (Pacheco, 1995, 507).

Such a situation is common to most of the countries in the ASEAN region. Certainly, Indonesian book publishing is mostly oriented to internal market. If there is a small quantity of export of books to Malaysia, Singapore and Brunei Darussalam, it is because there are book consumers in those countries who happen to have interest in some of Indonesian books on literature and religion (Moslem) and happen to know Malay.

At present, some Indonesian publishers begin to deliberately think of the potential market for their books in Malaysia, Singapore and Brunei Darussalam. The Indonesian Publishers Association itself considers the participation in the Malaysian Book Fair in Kuala Lumpur as a good opportunity to study the Malaysian market for books from Indonesia. According to an exporter of books to Malaysia, he used to supply 80 copies of fiction in Indonesian to all libraries in East Malaysia.

To enhance the promotion of the free flow of books among ASEAN member countries, it
seems to be necessary to identify the real existing needs for such exchange of books in commercial terms. For, the main activator of the flow of books must be the book trade itself. Book importer does not need any instruction not goading to import books which he is sure will be best selling.

Eleven years ago, preparing a paper for Pertemuan Sasterawan Nusanlara IV (the fourth Meeting of Nusantara Writers) on 9-12 December 1985 in Bandar Sri Begawan, I tried to gather information about the importation of books in Malay from Malaysia, Singapore and Brunei Darussalam. That time I could not find an Indonesian book importer who was enthusiastic for the idea of importing such books. And that finding was in accord with what been written on that matter by HB Jassin and Abdul Hadi, both noted Indonesian men of letters and by Yahya Ismail a well-known Malaysian writer (Taryadi, 1991, 108, 109)

Now, how is the Indonesian market for books in Malay? These past two years, in Jakarta, there has been operating a bookshop, selling books from Malaysia, called The Gallery of Malaysian Books. (Arianto, 1994, 4). However, compared to the situation in 1985 I have been describing above, it seems that the Indonesian market for Malay books at present has not been expanding much. While, regarding the import of books from the Philippines and Thailand, Arianto reports that he could not find them in Indonesia (Arianto, 1994, 1).

The only ASEAN country member of which the book publishing is ready to export books to the rest of ASEAN member countries, is Singapore With its facility in English, global outlook, and excellent telecommunication infrastructure. As reported by Gopinathan, Singapore has invested heavily in becoming a global node in the international network of satellite and cable communications while at the same time significantly upgrading Singapore-based capacity in printing and telecommunications (Gopinathan, 1992, 80, 84).

6. **The Recent Development of the Internet**

In looking at the factors which might be influencing the flow of books between ASEAN member countries, one should not overlook the recent development of the Internet, the use of which is now becoming more wide-spread.

Internet is a kind of gigantic book, containing all kinds of information the access of which can be obtained by the Internet’s users through the use of a PC and a phone. Physically, it is a world-wide network of computers located at numerous establishments, such as research institutes, libraries, private companies, state enterprises and the likes. Through the Internet, those computers are connected one with the other, each providing information specific to its own field. (Julianto, 1995, 76)

The Internet has a facility called World-Wide Web (WWW) which is a network of documents of information, located in the computers connected through the Internet. A user of the Internet, while opening a document, can enter into another one by just clicking the mouse. Anybody may publish a document in the WWW conveying information about this company, employees or the kinds of services rendered The page allocated to a company using the internet is called Home Page (Julianto, 1995, 77).

In the WWW, book publishers can advertise their titles complete with their synopsis and their front covers. Presently, there are publishers who directly offer their books for sale and people can order them through the Internet. As to electronic publishers, by the use of the Internet, their product can not only reach much wider public, but also become more interactive, meaning that it is possible
for the users to give direct comments to their publications. Moreover, an information obtained through
the internet can be enriched by being connected with other more detailed information by the use of
a facility called the hypertext (Juliarto, 1995, 79).

The recent development of the Internet has made it possible for the *cybernauts* (the users of
the Internet) to visit the *Internet Book Fair* (IBF). IBF is a meeting place for online publishers. Due
to the capacity of the hypertext, IBF page is connected to a quite a lot of pages of information related
to books, such as lists of books, their front covers and their synopsis, publishers present at ISF, book
publishers association, book trade and book sellers etc. Apart from providing pages for book
publishers, the IBF is especially designed to render services to book lovers. Service for book lovers
is available through mailing list. Subscribers of the mailing list will periodically get information about
books through *electronic mail*. Besides, the ISF also provides guidance to visit the participating
publishers. There visitors can find Publishers Index, Book Sellers, Book Fairs, and Book Festivals
(Juliarto, 1996, 85, 86).

Furthermore, the IBF also provides for a *Road Map To Book*, through which visitors are led
to Write Page (Newsletter on Books), Publishers Weekly, (Bulletin on Bestsellers), *Internet Book
Information Centre* this is not only a place where book lovers can meet with each other. There
publishers can meet authors too. *Write Page* provides information relevant to the writing profession.
As to publishers, there is an online discussion forum available in the page provided for by the Internet
Publishers Marketing Association. Moreover, they can study various aspects related to book marketing
in the Internet. (Juliarto, 1996, 85, 86.).

IV. Who are Responsible for the Promotion of the Free Flow of Books?

Considering that the aims and the scope of the the efforts to make the flow of books
unhampered within ASEAN region are beyond the competencies of individual enterprises, the
responsibility for such endeavours rests on the shoulders of the governments of ASEAN member
countries.

In a situation such as it is now, where movement of books among ASEAN member countries
has not yet been showing, a commercial appeal, it is the task of governments to do things which could
not be done by individual publishers or book traders, such as creating a conductive climate as well
as a good foundation for the implementation of the principle free flow of information, or establishing
a cooperation between countries in ASEAN region to organize common programmes aiming to raise
mutual interest to the cultural heritage of their respective countries. Besides, such responsibility
derives from the supposition that books serve international understanding and peacefull cooperation,
hence support the aims of ASEAN as expressed in the Declaration of ASEAN Concord.

As to book societies, meaning all those engaged in the book- related professions, they, for
their part, have the obligation-to ensure that their products meet the high quality standards so that
they will be worthy as intellectual work and interesting as trade commodity as well.

V. Measures to Promote the Free Flow of Books within ASEAN Region.

What has been put forward so far, indicates that there seems a lot of measures to be taken in
order to promote the free flow of books within ASEAN region. Some of those measures are as follows:
I. To enhance the flow of books for commercial purpose, it is necessary to explore the market in the countries of destination through a network of reliable informants.

2. The existence of a consortium of national libraries within ASEAN region, such as NLDC-SEA should be relived again with a new sense of mission in relation with the challenges the ASEAN member countries have to face in the coming twenty first century.

3. The policy makers in the countries of ASEAN region should implement a comprehensive and integrated book policy especially addressing the efforts to develop book industry through a system of incentives and assistance, to promote readership and making books widely accessible and to provide better protection of copyright of authors and publishers.

4. Booksocieties and book professionals within ASEAN region are encouraged to cooperate with their counterparts in each member countries of ASEAN with the aim to train human resources in book professions and to organize common programmes such as copublication and translation of works belonging to the cultural heritage of Southeast Asia.

5. It is advisable for national libraries of ASEAN member countries to establish a programme of exchange of books of which the topic deal with something related to their own respective countries, and to cooperate in exploring the possibilities to use the Internet for promoting the free flow of books within the region.

VI Conclusions and Recommendations.

1. Conclusions.

a) Moving towards an information-rich society in the coming twenty first century, ASEAN member countries have to develop their capacity to provide books as means of knowledge education for their people.

b) Promoting the free flow of books does not mean only publicizing that the movement of books should be unhampered, but also making efforts to ensure provision of high quality books, worthy to be exported or imported and implementation of regulations supportive to book trade.

c) The promotion of the free flow of books among ASEAN member countries is based on the principles embodied in the Charter of the Book the implementation of which enhances the endeavors to realize the aims expressed in the Declaration of ASEAN Concord.

d) The movement of books within ASEAN region is limited, but the era of free trade area in accordance with AFTA and APEC agreements provides a proper climate for the free flow of books within ASEAN region.

e) The existing national book policies legislation and other regulations prevailing in ASEAN member countries are principally not against the principle of the free flow of books. Some of them implies and even explicitly support the implementation of...
such principle. However, a certain legislation, namely Acts on "Undesirable Publications", the practice of which are common to ASEAN member states, imposes a certain limitation on the principle of the free flow of information. From the point of view of governments as the guardian of public order and morality, such regulation is understandable. But the formulation of such responsibility and concern should in accord with the democratic spirit, where a favorable climate for free expression of ideas is to be encouraged.

f) The main obstacle to the free flow of books among ASEAN member countries arises from the fact that the book publishing industry in most of the countries in the region is still feeble and not yet well-developed, except that of Singapore which is thriving and having capacity to export books due to its facility in English, global outlook and excellent telecommunication infrastructures.

g) Mention has to be made of the "Know Your Neighbour" Translation Publication Programme of the Toyota Foundation and the Asia-Pacific Copublication Programme of ACCU, Tokyo, as a helpful assistance for enhancing the exchange of original works of creative authors of the nations in region, including those of the member countries of ASEAN.

h) Recent development of the Internet offers opportunities to be explored for the promotion of the free flow of books within ASEAN region.

i) Considering that the aims and the scope of the efforts to make the flow of books unhampered within ASEAN region are beyond the aims and scope of individual enterprises, the responsibility for such endeavours rest on the governments of ASEAN member countries. Book societies and professionals, for their part, have the obligation to ensure the quality of books as intellectual product as well as trade commodity.

j) Governments in the ASEAN region should facilitate the efforts to develop the book industry in their own respective countries through a system of incentives and assistance to promote readership and to eradicate book piracy.

2. Recommendations.

To enhance the healthy development and consumption of books within ASEAN region, a conditio sine qua non for the implementation of the principle of the free flow of books, it is advisable that this conference recommends:

a) the establishment of an association of Southeast Asian book societies/book professionals with the aims among others to train human resources in book-related profession and to organize common programme of translation and copublication of works belonging to the cultural heritage of Southeast Asian nations.

b) the reviving of the NLDC-SEA with a new sense of mission, namely that of providing information for the nations within the region in view of the challenges they have to face in the coming 21st century.
c) the establishing of a programme among national libraries of the ASEAN member countries to exchange books and publications written on their own respective countries

d) the inclusion of books in the cultural mission groups used to be sent abroad as a means of mutual understanding between nations.

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Jakarta 14 June 1996
Synopsis

Moving towards an information-rich society around the year 2000, ASEAN member countries have to develop their capacities to provide books for their people, since books are effective vehicle for knowledge. As a means of international understanding and peaceful cooperation, books serve the aims of ASEAN, hence their flow within the region is to be promoted, with a foundation on the principles agreed upon in the 1972 Charter of the Book.

In most of ASEAN member countries, the book publishing industry has not been well developed and the flow of books within ASEAN region is limited. Most of the existing export/import procedures, book policies, legislation and other government regulations in ASEAN member countries are not against the principle of the free flow of books. Some of them presuppose if not explicitly support its implementation. The "Undesirable Publications" Act imposes a limitation of the principle of the free flow of ideas. Viewed from the standpoint of governments as the guardian of public order and morality, such regulation is understandable, but it is advisable to reformulate it in accordance with democratic spirit.

The *conditio sine qua non* for the free flow of books is the healthy book publishing industry and book trade in each of the ASEAN member countries. So it is the responsibility of governments to ensure the development of a robust book industry able to produce high quality books, worthy as intellectual products and interesting as trade commodities. In view of such task, the policy makers in ASEAN member countries should implement a comprehensive and integrated book policy to develop book industry through a system of incentives and assistance, to promote readership and making books widely accessible and to provide better protection of copyright of authors and publishers.

As for recommendation, this paper proposes the setting up of an association of Southeast Asian book societies/professionals; the reviving the NLDC-SEA; the establishing of a programme of book exchange among national libraries; and the inclusion of books in the cultural mission group of each of the ASEAN member countries.
Role of Libraries in Promoting Reading Habit: The Case of the Library of Dewan Bahasa dan Pustaka Brunei

Paper presented at
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by
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Perpustakaan
Dewan Bahasa dan Pustaka
Negara Brunei Darussalam
Role of libraries in promoting reading habit: the case of the library of Dewan Bahasa dan Pustaka Brunei

Introduction

Brunei Darussalam has an area of 5765 square kilometres which makes it the second smallest nation in ASEAN after Singapore. But in term of population, Brunei has the least number with an estimate of only 300,900 for the year 1996. The size of both area and population do reflect socio-economic development of the country. This is particularly true in the field of education and various other related activities.

Background information

If one mentions reading, the first thing occurs in ones mind would be literacy and education. The level of education of the people should reflect the reading habit of the population. This may be true in developed countries. But in most developing countries, of which Brunei Darussalam is one of them, it is a different picture. Being educated is one thing, but to read is another. Most people would not consider reading as a leisure not to mention a must in their life. For most, reading is only required for certain purposes such as to pass examinations for students. The phenomenon is true for people from all walks of life.
Literacy rate for Brunei today stands at just over 90%. If one takes into account the statistical loans in libraries around the country, the story is different. Though not satisfactory from librarians’ perspective, the library and information technology is gaining attention from all sides. Twenty years ago one hardly heard of senior government officer mentioned anything about reading, today as reading campaign is regarded as a must, there are more activities and programmes organised either directly or indirectly to promote reading and book buying among the public.

Dewan Bahasa dan Pustaka Library (DBP Library)

The library was established in 1962 under the Secretariat Circular no. 36/1962, Section 4 (1-d-ii) with the following objectives:

• to promote and encourage the use of books and other library materials and information therefrom by the establishment of lending and reference libraries as well as mobile library services;
• to acquire a comprehensive collection of books and other library materials on or about the State of Brunei regardless of where or when published;
• to collect and to preserve all books and non-books materials received;
• to make books and other library materials available for reference and for loan subject to proper safeguards against loss or damage;
• to compile current national and historical bibliographies;
• to publish a compiled bibliography of newly acquired library holdings periodically for the information of the general public.
For the last 34 years, the library has seen a remarkable development in its services for the people of Brunei Darussalam. In 1965 a new building was constructed to house a permanent library and two years later, the construction was completed. The new building enabled the library to provide better and wider services. In 1968, Adult Library, Reference Library and Children’s Library opened their doors, but lending services did not begin until 1 September 1971. The Mobile Library Service was launched in 1970 to serve out-of-town inhabitants. 1975 saw the opening of two district libraries, then known as branch libraries, namely Belait and Tutong respectively. Further branches were opened in Seria town in 1976 and for Temburong district in 1978. The first library activity for children aged between 5 and 12 was held in April 1976. The activity was called “Mari Bercerita” (Story telling session) and this was the to become, from 1980, as an annual competition.

As a developing country, Brunei Darussalam has always put its younger generation especially children at the forefront of every development programme. The emphasis is more on the education of the future generation. Likewise, the library also puts emphasis on the group.

Reading habit campaigns

From the beginning, promotion of reading habit has always been the priority of the institution. Various activities either directly or indirectly related to books and reading have been carried out by the library. These activities have been more intense during the
The activities include:

- storytelling sessions
- indoor games (educational games)
- let’s draw
- read session
- Jawi writing competition
- book illustrations competition
- school holiday clubs
- end of the year gatherings
- courses
- exhibitions
- talks and lectures
- bookfairs

Storytelling sessions

Children are the main target group whereby library staff or the children themselves will tell stories from books or from unpublished sources. The sessions are usually held during weekends and school terms holidays and are open to all children.
Educational games

Similar to storytelling sessions, educational games are provided for during the weekend and school holidays. The games include scrabble, geosafari (a multidimensional games using cards, words, pictures) traditional games such as congkak and pasang.

Reading sessions

In this programme, participants are limited to registered members only. The number may be around 20 or 30 children who will be required to read as many book as they can for the period of a week. To ensure they do read the particular titles, a test of retold the story will be supervised by library staff. They are asked some questions from these stories (the staff should have read all the titles prior to the session)

School holiday clubs

Various clubs have been organised, but the most attractive is “the stamp club”. For a year, members of this club will be given some form of guidance on how to select themes, organise and manage their collections. An officer from the Department of Postal Services is invited to facilitate the activity. Visits to the Department services give members a first hand experience on the works of the Department. These include the production processes of the stamps and the philatelic bureau of the Department.
Exhibitions

All sections of the library hold their weekly and monthly exhibitions of library materials. Be it new books, books on different subjects or some other materials from the library collections.

Bookfairs

A library cannot get away from books, as most of the stock are in this form. So involving in bookfairs is wise enough. Book trade and industry in Brunei is not as big as in other Asean countries. Book publication is very small with less than 200 titles per annum including pamphlets. The fairs are staged on small scale but big enough for reading public in Brunei. Some publishers and distributors from neighbouring countries are also invited to take part.

Talks and lectures

Talks and lectures on reading, literary matters and library and information technology are also held regularly. Well-known local authors will be glad to give talks voluntarily to share their experience to invited groups such as secondary school students. During the talk, audience will be shown the works that already appeared on the market or highlighted from the library collection.
Storytelling Competition

This competition is held annually with the following objectives:

- to promote reading habit amongst children;
- to train children in public speaking;
- to increase children’s understanding of what they have read

After 15 years, this project is beginning to get public attention and acceptance. This year will be the third time that the competition is recorded by RTB (Radio Television Brunei) for public viewing. Teachers and parents alike are now showing more enthusiastic supports. Some schools even stage their own school level competition and only send the winners to represent their respective institutions. This has enabled the organiser to eliminate preliminary selections.

Recommendations for further actions

There are other ways to promote and encourage people to read more. What has been done is not enough, emphasis should be on on-going projects. Reading is not like ordinary business whereby one can get result overnight. Today’s effort can only be evaluated after 15 or 20 years. Some of the projects have already shown fruitful results as the case of the storytelling competition. Had it not been envisaged 15 year-ago, it would not be recognised by the public as it is today.
The following recommendations could be implemented with some modifications according to local requirements:

- Opening of more full-time branches. A number of major population centres have been identified to qualify for full-time branches. As more housing resettlements and new satellite towns are open, provisions for social services which should include a library and information centre should be taken into account.

- Providing more library materials which should be supplemented with non-book and electronic materials. Younger generations are more familiar with the later and they should not be deprived of their getting any information in the format they are used to.

- Highlight library collection by holding more exhibitions and related activities. The library has a very good collection but most are under use as public are not aware of what the library has. These exhibitions should be done on the regular basis and should be more professional in nature.

- Closer ties must be maintained at all times with similar interest groups. These may be government institutions, NGOs or other international organisations.

- Setting up of single library resource for common use. All libraries and information centres should cooperate together in providing services to every citizen. The system can be implemented through resource sharing and fast document delivery.
Conclusions

Compared with other ASEAN countries, Brunei Darussalam is not alone in the promotion of reading habit. It seems that all the seven nations are making great efforts, though the scales may be different, to encourage and cultivate reading habit for their respective population. For some countries such as Indonesia, Malaysia and the Philippines whose geographical features may hinder some of the projects and programmes as compared to smaller nations such as Singapore and Brunei Darussalam.

Other aspects to be taken into account include different level of development between rural and town areas. Population in urban areas may not have any difficulty in gaining access to reading materials, but it is a different case for rural folks. Language barriers is another matter. Though in most cases there is one single national language, countries like Indonesia, the Philippines and Singapore have other languages which have equal rights. This would reflect publications and distributions of reading materials.

All ASEAN member countries have their own government-supported and various other NGOs programmes as shown by the most important parties:
Brunei Darussalam

- Dewan Bahasa dan Pustaka (Library section)
- Reading and Literacy Association
- Persatuan Perpustakaan Kebangsaan Negara Brunei Darussalam

Indonesia

- National Library of Indonesia
- National Book Development Advisory Council

Malaysia

- Perpustakaan Negara Malaysia (Reading Promotion Division)
- National Book Policy
- Kuala Lumpur Bookfair (annual)
- National Reading Month (August)

Philippines

- Children’s Literature Association of the Philippines
- Philippine Board on Books for Young People
- Philippine Librarians Association
- Reading Association of the Philippines
- Philippine Society for Reading and Literacy
- National Book Development Council of Singapore
- Society for Reading and Literacy
- National Book Development Council of Singapore
- National Reading Month
- National Library of Singapore
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Perkembangan-perkembangan bersejarah perpustakaan Dewan Bahasa dan Pustaka

ACCESSING ASEAN PUBLICATIONS: ISSUES AND CHALLENGES


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ACCESSING ASEAN PUBLICATIONS:
ISSUES AND CHALLENGES

BY
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1. INTRODUCTION

ASEAN as a regional grouping was founded in Bangkok in 1967. The last 29 years have seen ASEAN grow from strength to strength, proving that political, economic, social and cultural differences can be resolved in the spirit of “consensus, equality and mutual benefit” — the ‘tenets’ within which ASEAN operates. Recent reports of its continued political and economic growth bear testimony to the success of regional cooperation and shown the world that unity can exist within diversity.

To ensure ASEAN’s continued success as it approaches the 21st century, all countries within ASEAN and all parties/agencies within each country must play their role to the best of their ability — and not least, libraries. The need for published and unpublished data for their various programmes and projects will be more urgent as ASEAN countries become more developed and economic competition within ASEAN and between ASEAN and other regions becomes more intense. The sharing of information among ASEAN countries too will become more urgent as ASEAN’s political, social and cultural integration becomes more tangible. It is in these spheres of activities that libraries can play a role.

As information centres, libraries are in the position to contribute effectively to this multifaceted growth and development of ASEAN. But the effectiveness of this role lies in the libraries’ ability to capitalise on what they do best, which are essentially in 3 areas - collection development, bibliographic control and information technology.

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3 Exactly how diverse ASEAN is has been described in Chap. 4 of ‘From strength to strength: ASEAN functional cooperation; retrospect and prospect.’ Jakarta, ASEAN Secretariat, 1993.
However, the question that begs to be asked is - are the libraries in the region able to meet the challenges of ASEAN in the 21st century? Can we truly function as information centres as we claim to be? Can we perform our role as information centres from a position of strength with the capability to provide information that can meet regional needs?

Not from what have been discussed at the last Congress of Southeast Asian Librarians in May 1996 (CONSAL X). Issues that kept cropping up in working papers and at discussions were (i) the lack of information about Southeast Asia emanating from Southeast Asia and (ii) the need to develop regional information networking. With regard to (i), publications from Southeast Asian countries are too few and far in between and many that are available are difficult to access. With regard to (ii), there is a need to develop indigenous knowledge databases at the national level as well as regional for information-sharing. These issues seem to be the current concern of not only Southeast Asian librarians but also of custodians of Southeast Asian collections in libraries overseas. In fact, as a result of all the deliberations, one of the three action plans that CONSAL X endorsed at the end of the Congress was the setting up of a regional bibliographical network called SEANet. This endorsement reflects the willingness on the part of Southeast Asian librarians to forge greater regional cooperation in information-sharing. These issues however are not new issues. The difficulty of getting information and acquiring materials on Southeast Asia has long been a problem. The late Professor John M. Echols listed 17 problems encountered in the acquisition of Southeast Asian materials while more recently Ch’ng Kim See (in her paper presented at CONSAL X) spoke of almost as many issues that hamper effective information-sharing through networking. In between, throughout the 1980’s and 1990’s, many others from USA, UK, Australia and others have highlighted the problems.

Our paper this morning will not belabour these issues but will instead focus on one aspect - Accessing ASEAN publications: issues and challenges. In a way, we are going back to basic issues in information-sharing because in discussing access to publications, we shall be focussing on 3 requisites to accessing publications - namely collection development, bibliographical control and using technology to facilitate access. In order for us to understand the issues better and with greater depth, my colleague and I administered questionnaires to lecturers/researchers who use ASEAN materials for their work in Malaysia and Singapore, interviewed librarians in-charge of ASEAN collections at libraries in Malaysia and Singapore as well as undertook a fairly comprehensive review of the literature.

Due to constraints of time and post-CONSAL workload, the survey was confined to Malaysia and Singapore. Information on other ASEAN countries were obtained from the literature. We hope however to extend the survey to other ASEAN countries in the immediate future.

2. COLLECTION DEVELOPMENT

2.1. Responses From Librarians

2.1.1. Legislation

In general, the National Libraries of ASEAN countries acquire locally published materials (print and non-print) via legislation — the Legal Depository Act or its equivalent.

In some countries, the privilege is extended to other libraries, such as university libraries. In the countries governed by the Act, failure to deposit the copies required would incur a penalty, the severity of which varies. In Singapore, a penalty of S$5,000 is imposed on recalcitrant publishers. Despite this provision however, there has been no enforcement of the Act.¹

2.1.2. Acquisitions Policy

Most libraries in ASEAN have some form of an acquisition policy,

(i) comprehensive coverage of local titles
(ii) only titles in English are acquired from foreign sources
(iii) selective on the basis of subject or geographical areas
(iv) tend to collect Southeast Asian materials, rather than ASEAN per se.
(v) must be of a certain academic level
(vi) strive for comprehensiveness in monographic materials such as postgraduate theses/dissertations, government publications, conference reports, monographic, etc.
(vi) selective policy for journals.

2.1.3. Acquisitions Sources

Most libraries acquire via:

(i) Local suppliers
(ii) National Library of Australia Regional Office in Jakarta
(iii) Exchange programmes with ASEAN and non-ASEAN countries
(iv) Field trips
(v) Personal contact with counterparts
(vi) Resident/visiting research fellows who use/visit libraries.

¹ Verified by the Law Librarian, University of Malaya.
2.1.4. Reasons for Developing Southeast Asian/ASEAN collections

(i) for teaching and research
(ii) to develop regional collections
(iii) to develop local collections

2.1.5. Problems in Acquisitions

The problems can be summarised as

(i) lack of acquisition tools, such as BIP
(ii) irregularity of publications
(iii) local suppliers reluctant to go to countries of origin to acquire materials
(iv) exchange mechanisms unsatisfactory because only duplicate titles are exchanged.
(v) political issues affect acquisition in that although titles are available, they are inaccessible because they have been banned.
(vi) inability to understand vernacular scripts/languages.

2.2. Responses From Researchers/Lecturers

2.2.1. Use of Asean Publications for Research/Teaching

The majority of those involved in research/teaching do refer to ASEAN publications for their work.

2.2.2. ASEAN Countries Relevant to Research/Teaching

The majority of the users in Malaysia and Singapore are particularly interested in Singapore, Indonesia and Malaysia, followed by Vietnam and then Brunei and Philippines. The responses suggest a parochial approach to research.

2.2.3. Difficulty in Obtaining/Sources of Supply

The majority have no problems obtaining the publications and they obtain them from their institutional libraries. Some do make use of other local libraries. Very few obtain them from foreign libraries.

2.2.4. Problems of Access

For the few who find it difficult to obtain ASEAN publications, the reasons are given as:

(i) not available in institutional, local and foreign libraries
(ii) inadequate bibliographical access via published listings and electronic databases
(iii) difficult to obtain latest statistical information, official statements, government publication, etc.
2.2.5. Accessing Records of Collections
The majority of users do access the bibliographic records of ASEAN and non-ASEAN libraries, mainly through their institutional libraries or independently through INTERNET.

Others depend on personal contact when visiting countries or on conference trips.

2.2.6. Borrowing Publications From Other ASEAN/Non-ASEAN Libraries
The majority of users do not borrow from other ASEAN or Non-ASEAN libraries. Their main source is the institutional library.

2.3. Issues and Challenges

Although the respondents interviewed are from Malaysia and Singapore, the literature reviewed suggest the same is true of other ASEAN countries. Feedback from CONSAL X have also been taken into consideration as added information.

With regards to acquisitions, the findings indicate certain weaknesses in the acquisitions systems and procedures, namely:

(i) The acquisition of ASEAN materials is not a priority, the priority being local publications.
(ii) There is no systematic method of acquiring ASEAN materials.
(iii) There is no evaluation measures applied to collection development of ASEAN materials.
(iv) The parties involved in the collection development systems (librarians, publishers, booksuppliers) have no common objectives, namely a commercial relationship.

If the acquisition systems and procedures at the country level are weak, what chance is there for regional efforts?

However, confident in the belief that a commitment to ASEAN's growth would provide the incentive, we would like to suggest, with the lessons learnt from our local experiences, the following:

(a) That publishers and representatives from national publishing agencies, booksellers and librarians from each ASEAN country meet and discuss the possibility of developing a national database that contains information on books published in the country and about the country.
The information should include titles, prices, names of agencies that stock the titles, etc.

The software used should take into account the possibility of networking with the other ASEAN countries so as to form an ASEAN Books-In-Publication Database. It would help if a brief description of the item could be included and a bonus if the CIP details could be provided. However, the CIP must adhere to international standards.

This regional database would be invaluable to librarians. For example, in the case of prices, librarians from the ASEAN countries would know the price quoted for the region and compare prices with their counterparts. The outrageous prices that Malaysian librarians used to pay for their materials which come via Singapore is a case in point.

(b) Another cooperative venture that would benefit ASEAN is the establishment of a Regional Clearinghouse for Translations and Copyright.

Each country could translate at least 10 titles a year from the vernacular to English and in this way provide a ready supply of a minimum of 70 titles a year for the ASEAN market. The Clearinghouse should also arrange for the 70 titles to have copyright and in so doing, facilitate access to the ASEAN publications.

(c) Although now and then libraries do undertake some evaluation of their collections, collection evaluation is not a common practice in the ASEAN region. Now that some library acquisition softwares are Conspectus-based, ASEAN countries should look into adopting a similar system as a tool for evaluating institutional, national and regional collections. It allows for a systematic development and evaluation of collections and apart from being an economical measure, would help to foster regional cooperation. The RLG Conspectus methodology was initiated by USA and adopted/adapted by United Kingdom and Australia and other countries over the last two decades. Not all librarians are enamoured by the RLG Conspectus. The literature provides both the pros and cons of implementing CONSPECTUS but the principles inherent in the methodology is worth discussing at the national and ASEAN level.

(d) When all systems are in place - the collection developed systematically, all bibliographical standards imposed and adhered to, the technology infrastructure installed, the databases operating - it is time to test regional cooperation by borrowing
an item. The weakness in libraries sometimes is that, despite excellent technology and systems, loans can be hampered by unnecessary library bureaucracy.

In the interest of ASEAN research and scholarship, there should be a Document Delivery Clearinghouse to provide for intra-ASEAN Inter-library loans, problem-free with minimal charges.

This Clearinghouse should be responsible for ensuring the all loans are entertained with speed and accuracy.

Another service that can be handled by the Clearinghouse is to supply photocopies or microprints, at a reasonable price.

An excellent loan and document delivery system should be the hallmark of the ASEAN Document Delivery Clearinghouse

3. BIBLIOGRAPHIC CONTROL

The interviews with the librarians reveal that the bibliographic control of ASEAN publications is fraught with problems. Coupled with problems pertaining to acquisitions, other problems which affect the effective bibliographic control of these materials are those faced by librarians themselves in the provision of bibliographic records. Top on the list is the problem of cataloguing publications in the indigenous languages.

3.1. Language Problems

Specific language skills are required and in the absence of such skills, librarians are unable to process the materials. This contributes to the lack of bibliographic control which in turn hampers access. In Australia, to overcome this, a language recognition module was developed in the Library and Information Studies undergraduate course at the University of Canberra. This module is designed to help in the recognition of foreign languages and non-Roman scripts. It is envisaged that this will assist cataloguers in recognising the type of languages the publications are written in and hence help them to make decisions as to how to handle them accordingly or pass them on to appropriate persons who are able to handle them. A committee should be established by ASEAN-COCI to look into this issue and devise a similar model. It would certainly be a great help to ASEAN cataloguers to be able to at least recognise the script and the language-type.
3.2. Lack of Cataloguing-In-Publications (CIP)

Response on questionnaires sent to librarians to highlight problems faced in cataloguing ASEAN materials indicate the lack of CIPs in ASEAN publications. CIPs will assist librarians in speeding up processing of publications. It is recommended that the national bibliographic agencies in each of the ASEAN countries should provide high quality bibliographic records as CIPs for their national imprints. This will facilitate ease of cataloguing for other librarians.

3.3. Standardization and Standards

One of the problems faced by librarians with regards to cataloguing is the absence of standardization of name and subject headings for ASEAN materials.

In the light of the need for standardization in this aspect, we would like to propose that an ASEAN Regional Bibliographic Committee be established to develop bibliographic standards and guidelines for the cataloguing of ASEAN publications by various libraries/agencies within ASEAN. It is suggested that there should be representation from both the national bibliographic agencies as well as major academic libraries from each country in ASEAN. This committee is to discuss cataloguing policies, standardization and standards:

(a) Cataloguing and reference tools
   To recommend the tools to be used by the various cataloguing agencies.

(b) AACR2 policies and interpretations
   To decide on the use of AACR2 options by libraries.

(c) Name and subject headings policy
   To provide name and subject headings authority.

(d) Standards for change and input
   To provide minimum standards for bibliographic record creation.

(e) Guidelines for change and input

(f) Standards for non-Roman language entries

(g) Provision of training in cataloguing for participating libraries.
If libraries and cataloguing agencies within ASEAN conform to the standards and guidelines as proposed by this Committee, exchange of information in the region will be greatly enhanced.

As a consequence of all this, we would like to suggest that a regional bibliographic database be developed for ASEAN. It should be a decentralised system, networking a host of national bibliographic databases.

It is also recommended that to facilitate access of information on ASEAN materials, the computerised systems of libraries within ASEAN should adhere to international standards like Z39.50 which allows a librarian accessing a database on one computer platform to search on OPAC hosted on another computer with a totally different database structure.

4. IT AND NETWORKING

This issue has been discussed so frequently and at great length at previous conferences, including library networking for Southeast Asia.

At CONSAL X in May 1996, four papers were presented representing various aspects of IT in Southeast Asia,

(i) the telecommunication infrastructure (Abdul Rahim)\(^6\)
(ii) the development of a specific database (Kamariah)\(^7\)
(iii) the development of a regional database (Ch'ng)\(^8\), and
(iv) Internet in Southeast Asia (Lim)\(^9\).


The creation and development of SEANet suggested at CONSAL X is of particular interest. The proposal to develop the ASEAN Bibliographic Database must complement SEANet.

What needs to be said here however is that too much emphasis has been placed on the technical aspects of IT that libraries tend to forget that IT is merely the means to an end. Regionally, IT would certainly facilitate networking. There is no way that manual systems can integrate ASEAN into one cooperative region. Having said that however, librarians must realise that the IT infrastructure is to facilitate the creation and development of the various databases proposed.

5. SUMMARY OF PROPOSALS

5.1. ASEAN Books-in-Publication Database

To be developed by the publishers and booksellers, listing titles of books and journals, audio visual, etc. prices, description of book, names of agents/suppliers, etc.

5.2. ASEAN Regional Bibliographic Database

Contains bibliographic details of books, journals, audio-visual, etc. in libraries' holdings. Covers precise information on what each library has acquired or where to locate an item.

5.3. ASEAN Conspectus

Indicates generally the nature of the libraries' collections and collection development policies. It can show the strength of each library's collection on the basis of subject area or geographical area.

5.4. ASEAN Document Delivery Clearinghouse

A regional inter-library loan agency, including document supply (e.g. photocopy, microprints, etc.)

5.5. Regional Clearinghouse for Translations and Copyright

An agency for the translation of selected titles, from vernacular to English, for the ASEAN market.
6. CONCLUSION

The ASEAN libraries have discussed regional cooperation for many years and except for the National Libraries, other libraries have not been involved in cooperative projects with their ASEAN counterparts. All libraries in the country should be mobilised in order to facilitate regional cooperation. The National Libraries cannot be shouldering the responsibility alone.

If the same environment persists, none of what has been proposed today and the last few days can materialise.

Whether or not these proposals can materialise ultimately depends on the political will of ASEAN-COCI members. The priority of ASEAN-COCI should be to establish two committees,

(i) one committee to discuss which of the proposals mooted at this conference is practical and ‘realisable’, and

(ii) another committee (the Regional Bibliographic Committee) to discuss and decide on the bibliographic standards.

These Committees should then plan the strategies and mobilise the libraries concerned. The Regional Bibliographic Committee should be able to start on their tasks immediately. ASEAN-COCI need not undertake too many projects—a even one will suffice but at least ensure that this Project will be operating in 5 years.

I would suggest that the ASEAN Regional Bibliographic Database be given priority in tandem with SEANet because of the complementary nature of the projects.

Mrs. Tan and I wish ASEAN-COCI well and hope that whatever we have highlighted today has been useful.
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BOOKS FOR ALL:
ASEAN CONFERENCE ON BOOK DEVELOPMENT
12 - 15 AUGUST, 1996.
KUALA LUMPUR

Asean Book Scene: Singapore
by
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Abstract

This paper examines the historical and contemporary contexts for publishing and book development in Singapore. It provides a review of the impact of multilingualism on publishing, how investments in the new communication infrastructure and technologies and library development is likely to influence the pattern of publishing and reading habits. It records the steady if slow growth in the number of titles published and activities to promote books and reading.
Introduction

Singapore is multi-racial, multi-lingual, multi-religious, in short a multi-ethnic society. Its population of 3 million is made up of Chinese (77.5 %), Malays (14.2%), Indians (7.1%), and others (2.4%). Each of the three major racial groups has a sizeable “home” population with a distinguished cultural tradition, and each “home” country is likely to have a powerful voice in shaping the Asian future. This paper examines the achievements and future prospects of publishing in a country that is trying to weld a plural society into a credible nation-state, secure in its own identity and thus able to withstand the pulls of “home” nations. The heritage of British colonialism, educational and cultural policies, technological changes, economic conditions, and social developments are examined so that their effects on publishing are clarified.

The Publishing Environment: Historical and Social Context

The publishing environment in Singapore is marked by a number of unique factors. English is now the major medium of instruction and a second language is compulsory for all pupils at all levels of the school system. Multilingualism, and equal treatment of the various languages are official government policies. Chinese, Malay and Tamil are languages of the indigenous population, and language and literature and some moral education texts are published in these three languages. The fourth language, English, is the heritage of British colonialism; a vast majority of the textbooks in other subjects are in English. Thus, the publishing industry must reach a clientele that has widely divergent language competencies which should help it in seeking regional and international markets. While this is true, it also means that the domestic market is small and segmented.

Prewar educational and economic policies with their non-indigenous orientation inhibited the growth of Singapore-centered publishing enterprises (though there was no shortage of newspaper or printing presses). It also led to major British publishing houses like Macmillan and Oxford University Press establishing branches early in Singapore. It was postwar expansion of educational facilities, the introduction of new common syllabi to achieve new educational objectives, and the popularization of reading that led to gains in literacy in the four languages and which in turn stimulated development of publishing enterprises.

The population of Singapore is unique in many ways. First, the median age of the population is a young 31.4 years. More than 95% of the age group 6-16 are in educational institutions. The high percentage of youths in schools and educational institutions creates a broad educational market for the publishing industry. Second, there is a very high level of literacy on the island, estimated in 1994 to be 91.3%.
The number of bilingual Singaporeans increased from 37% in 1980 to 45% in 1990. The trend is towards a greater use of English as the main home language. Third, the per capita indigenous Gross National Product is $28,820. Even allowing for some disparities in income distribution, most Singaporeans can afford books and do not begrudge the cost of books, especially school texts and supplementary materials. Finally, the island has excellent transport and communication facilities which has led to book outlets being available all over the island. Times Bookshops for instance, has 18 outlets and MPH 8 outlets.

Singapore's multi-ethnic character and government policies of multilingualism and equal treatment is responsible for the existence of publishers serving each major segment of the multilingual market. Not surprisingly, English and Chinese-medium publishers are the largest in number, with few Malay and Tamil publishers. Very few of the total number of publishers publish in more than one language and a number of these publishers are diversifying away from textbooks and/or incorporating multi-media elements. The youthful character of the population and the sustained investment (and belief) in education in the last forty five years has meant the inevitable dominance of textbook publishing, even though the activities of the Curriculum Development Institute of Singapore (CDIS) have transformed the nature of textbook publishing. However, it must be remembered that the school market is a segmented one. Of the total number of literate persons, about half are still monolingual. It is a situation that at one and the same time imposes constraints to publishing development while offering unique opportunities for multilingual publishing to those in a position to take advantage.

Singapore shifted rapidly from an entrepot-based economy to an export-oriented industrialization strategy in the seventies and a rapid transformation has occurred in the economy. Since the value of Singapore's external trade is three times its GDP Singapore relies on an open economy; more significantly, Singapore has sought to seize regional opportunities in investment and joint manufacturing and infrastructural development. Among the other economic strategies that Singapore has used in the face of economic globalisation is the promotion of Singapore as an international and regional communications and media hub and a regional gateway for the service sector. Earlier high levels of investment in communications technology has enabled Singapore to benefit from new communication modes like the Internet, video-conferencing and satellite data transmission. Rapid economic growth in Asean and East Asia and rising levels of literacy have also attracted large publishing companies into Singapore.

Policies and their consequences for publishing

1. The official policy toward language use is that of multilingualism and equal treatment for all languages. In education, bilingualism is emphasized and in the Singapore context this means English and the pupil's mother tongue. Further, in order to promote greater political and social cohesion, curriculum, syllabus and examination requirements are common to all schools. Equally important to publishing is the fact that policy formulation, implementation
guidelines, etc. come from a single all-powerful source, the Ministry of Education. There is only one official syllabus for any given subject and every school is required to use it. Textbook selection is closely tied to the prescribed syllabus and the Ministry operates a recommended textbook system. Schools do not generally use materials from outside the list, thus reducing the incentive to publish alternative courses. Supplementary and assessment materials fall outside the list but is a rapidly growing market given that parents are anxious to ensure high academic achievement for their children.

2. Though Singapore has a free market economy the government does intervene to promote growth and diversification in significant sectors. Printing and publishing is one such sector and both the Trade Development Board and the Economic Development Board have schemes to promote publishing and printing. The EDB’s Local Enterprises Finance scheme, the setting up of a Overseas Print Marketing Consortium to penetrate the Japanese market and media-centered industrial park are among some initiatives.

3 Singapore, given its small size and degree of modernization is probably best placed in Asean to exploit developments in globalisation and information technology. New entrants to the publishing scene in Singapore include **Pearson Professional**, **Reed Elsevier**, **International Thompson** and **Springer Verlag**. Access to satellite technology has enabled Time to print its 250,000 copies of **Time** and 70,000 copies of **Fortune** from Singapore. **Asia Online** is an example of electronic publishing which provides data services to many different kinds of clients. Launched by the Singapore Press Holdings which owns Times Publishing and Times Bookshops it is a good example of exploiting newer publishing opportunities.

**Singapore’s Publishers : A Profile**

A vast majority of books at the primary and lower secondary levels are almost all locally authored, printed and published. At the upper secondary and tertiary levels, and especially in the area of science and technology, commerce, management, and in such areas of the social sciences as sociology, political science, etc., a majority of the books are imported. Like indigenous publishers, the branches of overseas publishing houses like Oxford, Longman and Heinemann have tended to concentrate on textbook publishing to which they bring undoubted expertise and financial resources. The solid backlist of titles published in the metropolis that once gave them an advantage is less significant now. The dominant emphasis on English in the school system has provided considerable opportunities for English language publishers. There are at present 79 members of the Singapore Book Publishers Association, the major body representing English language publishers. The newly formed Publishers Association (Singapore) has 14 members.
Outside the fold of the two associations are about thirty booksellers of Chinese books some of whom also publish some books in Chinese. Similarly about 6 printers also occasionally publish books in Chinese. In similar fashion 8 booksellers selling books in Malay, publish some books in Malay while two booksellers of Tamil books publish some occasional titles in Tamil.

The descriptions above mask some interesting recent developments amongst Singapore publishers. One is the transformation of Federal Publications, an early indigenous publisher of textbooks into a major publisher, largely as a result of the growth of the Straits Times Press, now listed with other interests as the Singapore Press Holdings. This group has publishing and book agency interests in South East Asia, has considerable printing capacity, has bought into overseas imprints, is active in copublishing and thus considerable regional and international interests. Federal publishes about 150 new titles yearly, largely educational, and has an active backlist of about 1,000 titles. Times Academic Press has a more focussed publishing programme and does about 90 titles a year. Pan Pacific, on the other hand, has an entirely different history. It started as a bookseller (it still is) and used that advantage to move into English language textbook publishing. It was able to successfully tender for CDIS projects and thus became a major textbook publisher. It publishes in both English and Chinese and has about 2,000 titles in print. It is listed on the Singapore Stock Exchange.

The Institute of South-East Asian Studies has in recent years emerged as the major publisher of academic books. It currently has about 250 titles in its catalogue and publishes about 40 new titles annually. Its success has been due to careful attention to manuscript quality and editing on one hand, and sustained efforts at the marketing of its books. A concentration on titles close to the Institute’s academic interests, the development of a comprehensive mailing list and careful marketing arrangements overseas have all resulted in an exemplary academic publisher. World Scientific’s growth has also been in the academic domain but science-based. A decade of effort has resulted in the emergence of a large number of World Scientific journals. World Scientific’s growth can be attributed not only to exceptional entrepreneurial skills but also to the ability to take advantage of Singapore’s excellent communications infrastructure. Scientific journal publishing requires rapid-turnaround time and accurate editing and World Scientific delivers. It has about 3,500 titles in print and publishes about 360 titles annually. Finally, Hoefer Communications, publisher of Insight Guides which has well deserved world renown for its guide books. Hoefer evolved from a one-man operation in 1969 and now has about 140 Insight Guide titles in print. Here again we find successful Singapore publishing for a specialized niche market. Like World Scientific, Hoefer Communications (Pte) Ltd has been able to use global resources to publish effectively from Singapore.

The situation with the Chinese -language publisher is considerably different, though some parallels suggest themselves. Some are of indigenous origin and some originated from Hong Kong, China (largely from Shanghai), and Taiwan. Development of Chinese publishing with a Singapore orientation and for the Singapore market was a postwar phenomenon occasioned by the new syllabi that
were introduced. Unlike English medium publishers, whose textbook market grew with the expansion in the use of English, after early gains in the sixties and seventies, the Chinese language textbook market has shrunk. The generally lower price at which general books have to be published makes that market a small one. Though businesses are usually family owned, undercapitalized and often combine the functions of publishing of both texts and stationery as well as book-selling, a number of publishers with roots in Chinese medium publishing and bookselling have been successful in English language textbook publishing, as noted earlier. Where imports are concerned historical tradition and political reality dictate the sources. Most publishers’ representatives import from either China or Taiwan; some like the World Book Co. imports from both sources. Much of the printing of Chinese general books is done in Singapore and Hong Kong. Chinese cultural attitudes, which place a high value on education and scholarship, are reflected in the fact that the books have to retail at low prices, often printed on newsprint and marketed on a consignment basis. It is the message not the medium that matters and production standards (by western yardsticks) are poor.

Malay and Tamil-medium publishers are small, certainly less capitalized than the Chinese and suffer from the smallness of the market. Malay publishing, however, has an interesting history. There was some local publishing in Malay before the war, aimed at the Malay-medium schools consisting largely of Malay classics and religious literature. However, it was again postwar developments that led to more publishing houses being established. The number of Malay language publishers has risen from 4 in the mid-seventies to 8. An interesting fact is that these publishers also publish fiction and nonfiction other than textbooks.

The increased use of the romanized script for Malay has had the effect of providing the better capitalized English-medium publishers with opportunities to publish in Malay and thus to become bilingual publishers. While this is to be regarded as a welcome step in that knowledge of and experience on the part of any one publisher in different languages is of value in a plural society, the fact is that this had been unfortunately at the expenses of the Malay publishers.

Although Tamil-medium schools have disappeared the bilingualism policy ensures that there will be some 20,000 pupils of Indian ethnic origin learning Tamil as a second language any given year. At least two locally established publishers produce readers for the Tamil-medium market. Through the efforts of the CDIS which helped develop curriculum materials in Tamil as a Second Language it has become possible now to publish such texts in Singapore.

The distribution of publishing between language media in Singapore reflects the plurality of the society as well as political exigencies. The three indigenous languages - Chinese, Malay and Tamil are represented by publishing firms in rough accordance with population distribution. English, a heritage of the colonial experience, is over-represented, but stands for an industrial, technologically sophisticated future. The increased use of English in a variety of domains has eroded the role of the mother tongues and it has become a major communication medium.
The Publishing Environment: Contemporary Situation

In the mid eighties when Singapore suffered a shock recession a government appointed committee was asked to review the status and future prospects of the Singapore economy. This committee, amongst other conclusions, rated the printing and publishing industry as one of the most productive at that stage. We have already noted several national features such as the rise in literacy, robust economic growth in the last two decades, the widespread use of English, a government commitment to modernize and globalize the economy and historical links with major European publishing centers as major factors contributing to the growth in publishing. In addition, we need to note that Singapore has invested heavily in becoming a global node in the international network of satellite and cable communications while at the same time significantly upgrading Singapore-based capacity in printing and telecommunications.

In the last two decades, there has been substantial growth. From a total of 165 establishments comprising the publishing and printing industry in 1970 the number increased to 390 in 1995; in 1995 the industry’s turnover was $2,500 million. The publishing industry had about 100 establishments, employs 4,500 workers with a turnover of $960 million.

Table 1: Book Production in the Official Languages 1963-1995

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<tbody>
<tr>
<td>English</td>
<td>133  (49.4%)</td>
<td>381  (56.4%)</td>
<td>1371 (65.7%)</td>
<td>2168 (77.0%)</td>
<td>2608</td>
</tr>
<tr>
<td>Chinese</td>
<td>43   (16.0%)</td>
<td>201  (29.7%)</td>
<td>587  (27.7%)</td>
<td>551  (19.5%)</td>
<td>891</td>
</tr>
<tr>
<td>Malay</td>
<td>90</td>
<td>52</td>
<td>103</td>
<td>35</td>
<td>66</td>
</tr>
<tr>
<td>Tamil</td>
<td>3</td>
<td>3</td>
<td>11</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Bilingual/Trilingual</td>
<td>-</td>
<td>38</td>
<td>16</td>
<td>18</td>
<td>102</td>
</tr>
</tbody>
</table>

In 1995 total trade in printed matter reached $1,350 million. Domestic export of printed matter reached $705 million. Singapore’s top export market for print was the United States, Australia and the UK.

As the table above indicates there has been a steady expansion in the number of books titles and periodicals published in Singapore. Book production statistics (under estimated, as only titles deposited at the National Library are counted), force some significant conclusions which have a bearing on how well the publishing industry is serving the needs of Singapore. One such conclusion is that there has been steady rise in the number of publications made available nationally. In the six-year
period 1989-95, there was an increase of 898 titles. It is likely that by the end of the decade the total would top 5,000 titles and more than 50% are likely to be English with Chinese publications contributing about a thousand titles. There is really no market for Malay or Tamil - language publications. Though the number of textbook titles is not available, it must be noted that textbook publishing accounts for about 80 percent of publishing activity. It must also be remembered that the 3,711 titles include pamphlets and other printed materials. In parallel with the printing sector, the bulk of sales of publications are to the domestic market. Out of the $120 million value of domestic exports in 1984 industry experts estimated that only 30 per cent pertained to publishing, of which probably only 1 per cent was indigenous.

Contemporary Issues

In the early nineties there was a general air of optimism but the present weakness in the retail sector has also had an impact on publishers. Among the difficulties mentioned by publishers are the segmented nature of the domestic market, the easy availability of cheap English language imports, the inroads being made by the electronic media, a tight labour market that has both pushed up salaries and created difficulties in recruiting qualified manpower, barriers that prevent an Asean regional market from emerging, the costs of upgrading equipment and staff to take advantage of new technologies, the price and other controls imposed by CDIS which seriously limit publishing decisions by publishers.

Singapore has in the last five years had some success in attracting newer overseas publishers to Singapore. *Time Life, Thompson, Springer Verlag*, are some examples; these are well capitalized companies, in some ways representing the non-traditional face of contemporary publishing. They have little or no interest in school textbook publishing for instance. Will they arrive in significant numbers to significantly alter Singapore publishing?

As Singapore approaches the millennium it appears to be at a crossroads. There is increasing recognition of the importance of knowledge based industries in the new global economy and indeed in the importance of creativity and innovation if Singapore is to maintain its competitive edge. There is pressure on an already good education system to upgrade and innovate. The technological revolution is so rapid and so pervasive that publishers rooted to a traditional view of publishing just cannot cope with the changes and yet being unable to cope will surely mean disaster. Some brave publishers are probing the technology terrain but a comprehensive plan of action assisted by government is going to be needed for success in the new environment. If such help is not forthcoming then a new era of multinational dominance might begin again. Does this matter in the new global village? It does if publishing is seen not just as a commercial enterprise but as a mirror of a society’s historical and creative achievements. Only indigenous publishers rooted in the culture can play that role and speak to the vision.
Manpower Development

In general, training for book development in Singapore suffers from a lack of concerted action. There are training opportunities in printing and librarianship but nothing systematic in publishing management, marketing or bookselling. The number of ad hoc courses made available by the Singapore Book Publishers Association and the National Book Development Council are clearly inadequate. The NBDCS has sought to meet some of the gaps with courses on editing (5 since April 1994) and workshops on permission clearance and work scheduling. Since 1992 the Council has conducted jointly with Temasek Polytechnic a course on Library and Informational Studies. In 1995 the Council initiated with the Temasek Polytechnic the development of a course on publishing and editing to be offered by the Polytechnic in 1997. The 600 hr. part-time course will be spread over 2 yrs. and include modules on editing, design and production, electronic publishing and marketing and promotion.

Promoting the Book: Writing, Reading and Selling the book

Singapore’s commitment to reading promotion via library development is strong and well resourced. On July 3 1996 the government announced that over a billion dollars would be spent over the next 8 years to enhance the role libraries will play in the development of Singapore as a “renaissance city”. This commitment was based on the recommendations of the Library 2000 report which sees librarians as a key resource in the development of an advanced information infrastructure to be staffed by libraries who were not only competent in their traditional roles but who could also cope with the new information technologies. The government’s strategy is to have a three-tier library system, regional, community and children’s libraries, the last named in void decks in Housing and Development Board apartment blocks. 3 new regional libraries, 10 community libraries and a 100 children’s libraries are planned. Library collections are to be significantly expanded to include videos, computers, databases, CD ROMs and access to the Internet.

Singapore has recognised the need to promote the craft of writing by actively encouraging writers. Since 1976 the NBDCS has been administering the NBDCS Book Awards to give recognition to excellence in writing. Book Awards are given to writers in all four official languages and in five categories, fiction, non-fiction, poetry, drama and children’s and young peoples books.

Since 1992 the Council has also been administering the Singapore Literature Prize sponsored by the SNP Corporation. The prize is worth $510,000 for unpublished works in English in the fiction and poetry categories. Singapore Press Holdings and the National Arts Council launched an annual Short Story Writing Competition in 1992 for writers in all four languages with a first prize of $5,000.

While a number of elements have contributed to the development of reading and book consciousness in Singapore the annual festival of Books and Book Fair, jointly organized by the Council and the Publishers Association, has been a major contributing factor. No similar fair in Asia can claim a heritage of 27 years. The fair has always been an international multilingual retail fair, and it has sought not just
to ensure a surplus but also to project reading the book as a celebration of life itself. The fair attracts over three quarters of a million visitors annually and participants sell over S$5 million worth of books. For a decade now publishers have timed the publication of their books to coincide with the fair. Readings and book signings at the fair have introduced new authors to the reading public. Special book exhibits have showcased Singapore’s publications built around themes like creative writing, nostalgia and heritage. Sales of fiction titles at the fair have become a proxy for a best seller list. The fair committee has also annually provided a stand to Asean publishers’ associations to foster regionalism and held seminars for publishers to expose them to publishing and marketing opportunities in Asean and the Indian Ocean region.

Conclusion Reflections

Publishing in Singapore has come a long way since the efforts to indigenize it began in the fifties. The dominance of the older multinationals has been broken. Most importantly the socio-economic growth of Singapore in the last four decades has given rise to excellent infrastructure, library development, rising biliteracy and ability to purchase books. There is renewed interest in and a commitment to authorship. A number of major indigenous publishers are beginning to shape the nature of publishing in Singapore. Though markets remain small for Chinese, Malay and Tamil publications the number of titles published continues to increase. Thus there are grounds for optimism.

Yet there are also grounds for concern. The new publishing environment is increasingly going to be driven by technology. A globalising economy and increasing signs of a global culture will place tremendous pressure on indigenous publishers and publishing in languages other than English. While technology can be of great use initial difficulties in obtaining skilled manpower, training and high costs in a depressed retail market can put publishers off. Survival in this new market is going to need more not less government involvement.
Electronic Publishing and Digital Books
Presentation to ASEAN Conference on Book Development,
Kuala Lumpur, Malaysia, 14 August 96
By: William Claxton, Managing Director
iMedia (S) Pte Ltd.

Brief Biography:

William Claxton is the Managing Director of iMedia (Singapore) Pte Ltd, an electronic publishing service bureau that helps
ink-on-paper publishers move into digital media. To support projects ranging from CD-ROM production to website
development, iMedia is a developer and VAR for Adobe Acrobat, an industry-standard for paperless publishing. Using
Acrobat, iMedia has created a multimedia electronic publishing tool called infoShip. Among other clients and projects, it is
worth noting that iMedia has consulted to National Archives of Singapore, and Television Corporation of Singapore on
library automation.

Synopsis:

Electronic publishing is in the midst of a revolution driven by the broad adoption of portable document technology, such as
Adobe’s Acrobat. Book and magazine publishers are relying on Acrobat for proofing and archiving. They are
experimenting with electronic publication of these works in portable document format, using CD-ROM and internet as the
means of delivery. Acrobat is being embraced as a medium of exchange for documents of all types, because it brings
together the textual and visual components of a document into a single portable format. Extensions of this technology trend
will address multimedia presentation and data-driven or ‘on-demand’ publishing requirements.

As we look around the ASEAN library scene, we can see that various efforts at bringing librarianship
into the next century are in full swing. Catalog integration, unifying the treatment of book and non-book
materials, is being pursued in many libraries. Decentralization of libraries, bringing the collections to
the people, is underway too. Catalogs are being digitized, and like the one at National Library of
Malaysia, being made available via computer terminals. Most notably, the catalog of collections in
Singapore and Malaysia are now accessible via Internet.

But digitization of collections has not made significant progress. Even in the US and Europe, so-called
‘Digital Library’ projects are usually not focused on migration of content to digital formats. The reasons
behind the reluctance of librarians to undertake large-scale digitization include concern over standards as
well as legal issues. So access to digital books is still largely a future potential.
The lack of standards for digital publications is perhaps the major challenge, especially for current and future acquisitions. If one uses imaging technology, the results are less than satisfactory:

- Images are stored as bitmaps, so they cannot be scaled to different screen resolutions.
- When zoomed for closer inspection, the text will appear aliased or 'posterized'.
- The images themselves don't contain text, which must be stored separately.
- Solutions for scanning, OCR of the text, proofing & correction are not integrated.
- There is no equivalent means to store scanned documents with those created electronically, that is, no integration for storage of new works and retrospective conversions from paper.
- Most solutions don't support double-byte character sets (for Korean, Chinese & Japanese).
- Distribution is complicated by lack of standards for image format.
- No support is available for highlighting, annotation, encryption, bibliographic tagging, digital watermark and/or digital signature.

The inadequacy of imaging solutions in the face of migration to a world of digital delivery hasn't been unnoticed by print publishers. While they all create their publications in electronic format, these organizations face a number of challenges to the usefulness of their page layouts for any purpose other than print production. Proofing of documents and archiving of finished publications both require means of digital storage, transmission and viewing, that should not depend on the page layout application. Fortunately, the desktop publishing industry has arrived at a solution in the form of what are known as 'portable documents.'

An important technology trend for publishers, and in the future for librarians, the evolution of portable documents is exemplified by Acrobat from US software-giant Adobe Systems. Acrobat is a file format (also referred to as the Portable Document Format or ‘PDF’) which captures a faithful rendition of pages created in literally any software application. It accomplishes this through emulation of a printer, and it is as easy to create an Acrobat file as printing. One simply executes File/Print, and selects the Acrobat printer device for output, instead of the laser printer for example.

In addition to printing to Acrobat, one can convert files in PostScript format to PDF. But perhaps the most exciting adaptation of this technology is the capture of paper documents into PDF. Using Adobe’s Capture product, paper books and periodicals can easily be scanned into the same powerful PDF file format. This can be done using a single application which works on one document at a time, or in batch mode, and performs image processing, OCR and automatic indexing.

Adobe supports the deployment of Acrobat technology with a product family, including Exchange for viewing and annotating documents, Capture for scanning and OCR, and Catalog for building freetext indexes to entire archives of PDF documents. This has ensured that Acrobat is used by most leading print publishers and design houses, many of the largest multinational corporations, and an increasing number of government agencies in the USA and throughout the world.

In Singapore, the National Computer Board is widely expected to standardize on Acrobat as a medium of exchange between ministries of Government. There will be central registry of documents, with each original and PDF document sharing a common part number. When one ministry wants to access...
documents from another ministry, they will send an email mentioning the part number, and the electronic reply will include a copy of the document in PDF.

The beauty of this scheme is that the ability to read an Acrobat document is nearly ubiquitous. Acrobat readers are free, can be bundled with a CD-ROM or other information products, and can be downloaded easily from any number of Internet sites. Once a document is in PDF, it is no longer necessary to use the original applications or the fonts, in order to view the document.

What's more, Netscape and Microsoft are licensees of Acrobat technology, which ensures that both Netscape Navigator and Microsoft Explorer are capable of directly reading PDF documents. Today, this is still supported with a 'plug-in' which must first be downloaded and installed, but the next release of Netscape Navigator will build-in this capability, making it totally transparent to the user.

A quick inspection of actual PDF documents highlights the obvious advantages of Acrobat over traditional imaging solutions. A PDF document includes both text and image in a single format. Images are optionally compressed in JPEG image format, and can later be separately extracted for republication. Text is selectable, and can be copied out to other applications. Search results are highlighted on the page; Acrobat knows where the words sit no matter what their font or type size. Zooming into the document for details shows no bitmap artifacts; letters are well-formed at any display resolution, screen size, or zoom ratio.

As an alternative to HTML for publishing the content of books and periodicals, Acrobat overcomes many of the perceived limits of web publishing. First, one doesn’t need to translate into a special format like HTML, one simply prints to Acrobat. Second, the publisher controls the look-and-feel of the electronic document, which can faithfully render anything done in print. HTML does not allow the publisher to select a specific font, or even to overlay text and graphics. Third, Acrobat has inbuilt capability for meta-information, such as bibliographic tags, digital signature and the like. And finally, Acrobat is a stable standard compared to the many dialects of HTML now in common use.

About the only limitation of Acrobat is that it cannot be modified once it is created. Changes in a publication need to be reprinted to Acrobat. However, being software generated, Acrobat documents can be created 'on-demand' with dynamic data. And any PDF file can be distributed in a workgroup, with each author adding their own comments as annotations to the document. Some applications, like Lotus Notes, have leveraged on this feature to support workgroup solutions involving document circulation, private and public notations, etc. Publishers are using the annotation fields to permanently store digital watermarks and other trademark-related information indelibly.

Our company, iMedia, is one of the early adopters of portable document technology. We use Acrobat for proofing and archiving, and for electronic publishing. We have converted entire books and magazines into portable document format, for distribution on CD-ROM and on internet websites. As a value-added reseller of Acrobat products, we help our clients deploy Acrobat solutions.

But we are most proud of our work as a developer of electronic publishing tools that leverage on Acrobat’s inherent capabilities. Our flagship product is 'infoShip' an application we developed to simplify the creation of digital books. With infoShip, anyone trained in desktop publishing can create
Rich hypermedia documents that are fully indexed, and easily distributed via CD-ROM or internet. They do this by following a simple series of steps, automated by infoShip:

- sourcing pages in Acrobat, and multimedia elements such as video clips
- organizing the content into a set of sections, like a book
- laying out the multimedia elements, for example, to overlay video onto static images
- adding links within the document, such as from a table of contents, links to other documents, or even links to documents on internet websites
- cataloguing the articles, providing bibliographic references used for search retrieval
- binding and automatic indexing
- previewing the publication
- packaging for distribution (and ensuring compatibility to Windows or Macintosh)

The resulting publications are cost-effective, can be easily serialized due to the short production cycle, are fully interactive and searchable. infoShip has already received an award as one of the best multimedia authoring tools, and has been widely embraced in the education market. We believe that infoShip is just one of the ways in which portable document technology will ensure that print publications can be brought to life with multimedia. These publications deliver the depth of print, and the impact of television!

So where does this leave the library community? We foresee that the evolution of portable document technology will lead to the creation of virtual libraries, where one can use a rich bibliographic database to locate desired works in a variety of digital formats, select one of the book works which is virtualized with turning pages, and see the pictures come to life with multimedia. Aside from the delivery constraints of bandwidth access and a portable display, no sacrifice need be made in terms of navigation, pagination, image quality or textual retrieval. And a great deal will have been gained in terms of direct access to cross-referenced works on a related topic, perhaps by simply clicking onto a footnote.

Although it will be up to publishers to provide Acrobat files to accompany their print accessions, librarians can only stipulate such a requirement once they’ve explored the integration of their digitized catalog records with direct access to the digital book. My understanding is that many National Libraries in ASEAN still rekey the MARC bibliographic data when populating their own electronic databases, rather than import the electronic records provided by publishers and other library sources. This must change for libraries to be in the position to demand electronic submission.

To pilot the mechanism for delivery of non-multimedia works, we would suggest using internet access. It would appear that, in a low-bandwidth environment, the best method for integrating content with bibliographic retrieval would be to allow users to drill-down from catalog bibliographies to a synopsis, to a review, before diving into the full content. This could be easily piloted with older works, for which copyright is not an issue, but the project would need to use of Acrobat Capture to convert from a paper book to a digitized format.

A digital book pilot project in Singapore was spearheaded by our company, and involves retrospective conversion of works originally published by the National Archives. One title already completed is
"Kampong Days," a 150-page book with lots of black and white photos. This title was brought to life in infoShip format with songs from the village, and even some films which were converted to video clips. The entire publication was rendered in sepia tone to add an historical feel. It was delivered on CD-ROM with a budget of less than US$ 10k, and produced in about 2 weeks.

This is just the start. A National Heritage Series of 10-12 titles for CD-ROM release is being discussed with the National Library, the National Computer Board and the Ministry of Education. All are supportive, and we are currently seeking a co-publisher or corporate sponsor.

Portable document technology not only simplifies creation of digital books like ‘Kampong Days,’ it can also ensure the delivery of ASEAN-related works to audiences throughout the region and indeed the world. To catch this technology wave of portable documents, libraries must begin to address several issues, including:

- continued integration of book and non-book materials with unified bibliographic control
- continued experimentation with delivery of catalog records via computer, especially internet
- extension of the delivery of catalog records to include synopsis, review and full content
- use of Acrobat for internal documents, in-house publications and the like
- use of Acrobat for conversion of copyright-free books into digital format
- delivery of documents in Acrobat via in-house networks, and the internet
- coordination with other standards-setting bodies, such as the national body for IT policy
- formulation of new accession standards that create incentives for electronic editions

Publishers already acknowledge Adobe’s ability to promote standards, such as PostScript and ATM (used for font management). Now publishers will want to move beyond the phase of technology evaluation, and embrace Acrobat’s features as a standard for digital proofing and archiving. They will want to explore the workflow automation capabilities of an increasing number of third-party applications built on Acrobat. Some of these include charging mechanisms, and are used for delivery of high-value controlled-circulation documents like technical journals.

Obviously, Acrobat is going to be the basis for a new generation of electronic publishing applications. With double-byte support just introduced, it is going to be playing a role in the publication of Korean, Chinese and Japanese documents in digital form. Whatever one’s role in the creation, sales, distribution and consumption of documents, it would be worth considering whether this technology can be applied to an information delivery problem you may face.

For further information, or to obtain a PDF copy of this document, send mail to:
info@aimedia.com.sg

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BACKGROUND

Brunei Darussalam is the sixth member of the Association of Southeast Asian Nations (ASEAN) and joined ASEAN on 7 January 1984 after gaining its full independence on 1 January 1984. Brunei Darussalam is ruled by His Majesty Sultan Haji Hassanal Bolkiah Mu’izzaddin Waddaulah, Sultan and Yang Di-Pertuan Negara Brunei Darussalam, the 29th ruler.

Brunei Darussalam is located 443 km north of the equator, with a land area of 5765 m. sq. It faces the South China Sea on Borneo's north-western coast and shares a common border with the east Malaysian state of Sarawak. It has a climate which is characterised by uniformly high temperatures and precipitation throughout the year. Administratively the country is divided in 4 districts namely Brunei/Muara, Belait, Tutong and Temburong. The capital of Brunei Darussalam is Bandar Seri Begawan.

As one of the oldest kingdoms in the world, Brunei Darussalam has its own customs and unique cultural heritage and early records indicated that by 518 A.D. Brunei Darussalam had already established contacts with other countries in the region. Islam came to Brunei Darussalam in the 14th century and since then she has remained an Islamic nation.

In 1906 she accepted the appointment of a British Resident, a representative of the British Government. In 1959 Brunei Darussalam saw the promulgation of a written constitution which among others made Bahasa Melayu as the official language. Since its independence, Brunei Darussalam has experienced fast economic growth and development. Brunei Darussalam is rich in natural resources from its crude oil which was discovered in Seria in 1929 and natural gas to its rich virgin forest covering 70% of the total area. Economically, she is dependent on the production of its petroleum industries, however through the National Development Plan the government has taken measures to diversify the economy by encouraging development in other fields.
Demography

In 1996 Brunei Darussalam has a population of nearly 300,000 people. The largest racial group is Malays (70%), followed by Chinese (17%), other indigenous people (5%) and others (8%). About 46% are below the age of 20 years. Brunei Darussalam's prosperity enables the people to enjoy one of the highest living standards in the world.

Education

The first Malay vernacular school was opened in 1914. Since then in keeping to the need of the growing population for a high level of education, the Government has always been given top priority to education.

Education is provided free for citizens from the age of 5. Eligible students may progress to the lower secondary level, upper secondary level and beyond to technical or university education. At present there are no fewer than 300 government educational institutions throughout the country ranging from pre-schools to a university. Universiti Brunei Darussalam the highest educational institution was formed in October 1985. Today it has 1,300 students in 6 faculties namely Islamic Studies, Science, Arts and Social Science, Management and Administrative Studies, Institute of Education and Academy of Brunei Studies. The government continues to award scholarships to qualified Brunei Citizens for courses not available locally to pursue courses in the United Kingdom, Malaysia and Australia.

The Ministry of Education in its new educational policy requires students in the country to attend 13 years of schooling. Children will start their 1st year of schooling in the pre-school level for 1 year, primary level for 6 years, lower secondary level for 2 years, upper secondary/vocational education for 2 years. Vocational and technical institutions provide graduates in the skills/craft training. The new education policy aims at producing well-educated Bruneians.

Brunei Darussalam adopts the dwibahasa system of education (bilingualism). Under this system, the Bahasa Melayu is the medium of instruction for all subjects, except the English language for classes up to Primary 4 onwards. English is the medium of instruction in schools for core subjects such as Mathematics, Science and Economics. Other subjects will continue to be taught in Bahasa Melayu.

The emphasis on the Bahasa Melayu is to ensure that students do not lose their Bruneian values, norms, customs and traditions.
Literacy Rate

Since the early times Brunei Darussalam as a Malay state already had a written culture and when Antonio Pigafetta reached Brunei on 15 July 1521 he recorded in the Magellan’s Voyage that among the peoples, they already know how to read and write. Early writings were in Bahasa Melayu written in the Jawi script which was adopted when Islam came to Brunei.

Today Bruneians enjoy free education for all and this has a significant impact on the literacy rate. In 1947 census the literacy rate was 26%, in 1960 it was 47.9%, in 1971 it was 69.4%, in 1981 it was 80.3% and in 1991 it was 89.2%. Malay and English are widely spoken and written.

Reading Habits

The interest in reading was evident in the 1950s. To meet this demand the Information Department Reading Rooms were established in Kuala Belait in 1953, in Brunei Town (now Bandar Seri Begawan) in 1954. By 1956 some 14,000 people used the facilities in Kuala Belait while 21,500 used those in Bandar Brunei. Two more reading rooms were opened in Bangar in 1957 and in Tutong in 1958. By 1975 they were handed over to Dewan Bahasa dan Pustaka Brunei as Branch Libraries.

Early records indicated that on 27 June 1955 a Belait Lending Library was opened to the public.

The Dewan Bahasa dan Pustaka Brunei began its public library services in 1971 as one of its aims was to propagate the use of Bahasa Melayu. It provides free public library services nationwide to all levels of society. Today it has 4 purpose built and modern branch libraries, one branch library, 70 mobile stops, 11 bulk loan centres with a total collection of about 500,000 volumes, a registered membership of 3,400 and lends some 123,000 books annually. It is manned by 15 professional librarians and 121 non-professionals and support staff.

The Dewan Bahasa dan Pustaka Brunei library services reported an increase in book loans for the first 6 months of this year totalling 41,294 volumes as compared to the same period last year.

Although no survey has been done to study the reading habits of the Bruneian public statistics available from the booksellers and libraries the reading culture has yet to be develop in Brunei Darussalam. Like all other countries the blame is put on the
intervention of the electronic media in every household which has made reading for pleasure as a secondary activity.

Bookshops and Book Buying Habit

Today there are 21 modern bookshops that are strategically located, well stocked with a wide range of subjects and are attractively displayed. The shops are well manned with helpful and knowledgeable staff. Dewan Bahasa dan Pustaka Brunei operates a small bookshop on its premises.

Over the first 6 months period of this year, a preliminary survey carried out by local booksellers indicated a monthly average sale of B$10,000 of books and magazines with the sales of newspapers and popular magazines making up a large portion of the sales. All booksellers agreed that they suffer periods of ups and downs where sales are concerned but reported an increase in book sales in January at the beginning of the school year, school holidays and during examinations period. Sales will fall during festivities i.e during Puasa and Hari Raya Aidil Fitri and Lunar New Year. Sale of popular magazines continues to be good throughout the year.

The booksellers are optimistic that if the present trend continues the book buying habit will increase steadily. Most professionals read and use books heavily in connection with their official assignments and for pleasure and still continue to buy books from overseas as the nature of their work make them frequent travellers.

OVERVIEW OF PUBLISHING AND BOOK DEVELOPMENT

One cannot begin to talk about publishing and book development without studying the literary output of the country. Brunei Darussalam has a long written culture as can be seen from the number old hand-written manuscripts that are recorded. However because of prevailing factors, so over many hundred of years Brunei Darussalam was unable to produce writers as we can see today. Dewan Bahasa dan Pustaka Brunei has taken serious measures to ensure and encourage writing and has had regular dailogue sessions with writers and would be writers including sessions for women writers. We are proud to have a small but prolific number of women writers who has represented Brunei Darussalam overseas.

Early Manuscripts

Brunei is rich in its manuscripts and amongst the earliest ones are Hikayat Seri Rama, Maharaja Rawana, Hikayat Dang Rokam, Syair Nasihat, Dang Pandang Larangan, Dang Emas and various religious books but perhaps the most well known
are the Syair Awang Semaun and Syair Rakis. Syair Rakis was written in 1845 by a well known noble Pengiran Shabandar Pengiran Md. Salleh.

Early Printing

Before the introduction of printing in Brunei Darussalam most of the printing was done overseas. The first State of Brunei Annual Report 1906 was printed by the Federated Malay States Government Printing Office in Kuala Lumpur while the map of the state of Brunei was compiled for the first time in 1914.

Since the 50s, the number of local printing houses have increased from 5 in 1972, 10 in 1985 to a total of 20 today.

Early Literary Works

A brief study of the historical development of novels in Brunei Darussalam conducted by A. Kamis Hj Tuah stated that in 1951 two books by H.M. Salleh entitled Pengiran Bendahara Menjadi Sultan was published by Persama Press, Pulau Pinang and Tunangan Pemimpin Bangsa was published by Sentosa Store, Malay Press, Kuala Pilah, Negeri Sembilan. Both these early Bruneian novels were written in the jawi script and published in the Malay States (now Peninsular Malaysia). These novels were written in the mid-40s but were only published in 1951. The delay was due to the difficulty in getting a local publisher, the limited local market situation and the discouraging attitude of the public towards local novels. This was further aggravated by the lack of local printing facilities and the high costs of printing. In the same year Yura Halim’s book Mahkota Berdarah written in the jawi script was published only after he agreed to abide to the censorship regulations imposed by the authorities. In 1958 Yura Halim’s books Sejarah Brunei and Adat Istiadat Diraja Brunei written in the jawi script were published. From this early start it showed clearly the local writers’ desire to have their works published. Although at that time there were many obstacles but it did not dampen their spirits to explore possibilities outside the country. After the publications of H.M. Salleh and Yura Halim in the 1950s no other local writers have had their works published because the educational system then was not able to groom young writers. In 1968 a novel Garis Cerah Di Ufuk Senja by Mohd. Salleh Abdul Latif was published by the Biro Kesusasteraan Borneo in Kuching, Sarawak.

A significant development in creative writing in Brunei Darussalam were those written by Almarhum Sultan Haji Omar ‘Ali Saifuddien who had written a few works namely Rampaian Laila Syair (1966), Syair Asli Rajang Hari (1967), Syair Nasihat, Syair Rajang Jenaka, Syair Perlembagaan Negeri Brunei and Syair Kenangan.
History of publishing

Early publishing in Brunei Darussalam began in a small way when the first commercial printing house the Brunei Press was started in Kuala Belait in 1953. It published and started the first newspaper Borneo Bulletin and continued to be a significant publisher/printer for the government until the establishment of the Brunei Government Printing Department in late 1975.

On 16 September 1961 a Lembaga Bahasa was established which was later as Dewan Bahasa dan Pustaka Brunei with the main of propagating the Bahasa Melayu and literature through publications. In meeting this aim, in 1963 Dewan Bahasa dan Pustaka Brunei made history by publishing two childrens books ABC and Asas Kira-Kira Bagi Darjah Permulaan followed by Rangkaian Melati in 1964. In the following years it only managed to publish one title annually and it was only in 1967 that it succeeded in publishing 6 more childrens titles. On 1 June 1966 it published Bahana, while Beriga and Mekar were published in 1967. Its first novel was Gegaran Semusim by Mohd. Salleh Abdul Latif published in 1981.

In its efforts to meet this new demand it upgraded its publishing capabilities by creating a Publications Division headed by a professional in 1980 and with the support of other Divisions namely the Editing and Artist it forged ahead with a more organised publishing programme.


Development of newspapers

The first weekly newspaper published in Brunei Darussalam was the Borneo Bulletin which was published by the Brunei Press on 7 November 1953 and since September 1990 it became a daily English newspaper with a circulation of 32,000 copies. It has a readership of 84,000 for its daily paper and 95,000 for its weekend paper. The company also publishes a weekly Malay paper Media Permata with a readership of 64,000.

In 1953 the Brunei Petroleum Company (now Brunei Shell) published its own newspaper Salam. It is still published to this day.

The Information Department publishes a weekly Malay newspaper Pelita Brunei with a circulation of about 40,000 copies. Pelita Brunei was first published on 15 February 1956 in stencils form twice a month and contained only 3 to 4 pages. It took the form of a printed newspaper in February 1959. Today it contains about 20 pages featuring local news, current affairs, religious features, government announcements and sports. Since October 1985 it also publishes a fortnightly English Brunei Darussalam Newsletter with a circulation of 14,000 copies. Both papers are distributed free.
A few more newspapers appeared after this, however they were short-lived. Among them were the Berita Brunei/Berita Borneo a Malay weekly (in jawi and runi) was published in Kuala Belait on 14 March 1957 and continued to be published until 18 December 1958. Malaysia (in jawi) was published by Budaya Press, Bandar Brunei in April 1958. Its last issue was 27 September 1958. Suara Bakti a weekly was published by Perpustakaan Caesar di Bandar Brunei on 20 October 1961. Its last issue was 22 December 1961.

After a few years the appearance of the Bintang Harian/Daily Star was a welcome sight and was a popular paper. Bintang Harian/Daily Star a bilingual paper was published in Bandar Brunei on 27 March 1966 and its last issue was 9 January 1971.

Legal Deposit Legislation, Copyright and Censorship

The Preservation of Books Act was passed on 18 January 1967, an Act to make provision relating to the deposit and preservation of books printed and published in Brunei and to provide for matters connected therewith. This empowers the Brunei Museums to record the receipt and preservation of 3 copies of all local imprints.

Brunei Darussalam has no Copyright Law but like any other ASEAN member countries she is seriously looking into the issue.

The Undesirable Publications Law was passed in 1984, an Act to prevent the importation, distribution or reproduction of undesirable publications and for purposes connected therewith. It gives power to prohibit the importation, sale or circulation of publications printed or published outside or within Brunei Darussalam that would be contrary to the public interest.

Publishing Today

The number of publishers is still small in number but growing at a steady pace. The more reputable publishers are the various government agencies such as the Dewan Bahasa dan Pustaka Brunei, the Curriculum Development Department, the Brunei Museums, the Information Department, the Universiti Brunei Darussalam, Brunei Darussalam History Centre, and Pusat Dakwah Islamiah. These agencies now employ professionally trained personnel to handle their publications from editing to page layout, illustration and design, typesetting to proofreading. This has cut down the cost of printing substantially.

From its humble beginnings Dewan Bahasa dan Pustaka Brunei is today an active publishing agency having published over 400 titles. Because of its expertise in publishing, it also coordinates publications for other government ministries and departments besides its own. On average it now publishes some 15-20 new titles annually.
Today it publishes childrens books, general books and books on language and literature. In addition it publishes 3 journals Bahasa, Beriga and Pangcura and 3 magazines Bahana, Juara, and Mekar.

Commercial publishing houses number less than 10 but pay an important role in the total scenario.

Translations

Dewan Bahasa dan Pustaka Brunei is the one of the leading translating agencies has translated about 47 titles of books from Malay to English and vice versa between the period of 1990 to 1995. The subject covers mainly general and literary works either for publication by Dewan Bahasa dan Pustaka Brunei, or other agencies. Beginning last year Dewan Bahasa dan Pustaka Brunei published 3 bilingual books namely Selera Serikandi I, When the River Flows and 14 childrens titles. There are plans to translate Bruneian literary works into other languages. Dewan Bahasa dan Pustaka Brunei will take this initiative.

Copublications

The Curriculum Development Department has ventured into a copublication programme with four reputable foreign educational publishers to co-publish school text-books for primary and secondary use. The originator of the book will be the publisher while the copyright of the books will be held by both parties and printing will be handled by the publisher concerned. The published text-books will be made available on sale in the bookshops approved by the Brunei Ministry of Education.

National output

According to the legal deposit records, 5,670 titles of local imprints deposited under the Preservation of Books Enactment was received by the Brunei Museums in 1995 while between 1966 to 1987 some 39,475 titles were recorded.

The normal print run of popular general titles is 3,000 copies, children’s titles is between 2,000 to 3,000 copies. Text books and childrens reference titles is between 10,000 to 30,000 copies.
MANPOWER DEVELOPMENT

Manpower development is crucial if we are to seriously develop the book industry. In Brunei Darussalam, as the industry has only begun in a small way, the related agencies have been sending personnel overseas to gain the necessary training and skills.

Professional Organisations

Brunei Darussalam does not yet have a professional organisation i.e a Book Development Council or a similar body at the national level to look into the development and use of books in the country with the aim of promoting the reading culture. However, Dewan Bahasa dan Pustaka Brunei has always taken a leading role in matters pertaining to the book development and trade in the country and works closely with the Ministry of Education and the local booksellers and distributors.

Training Courses

Training courses in bookselling, the book trade and related subjects has been organised regularly by Dewan Bahasa dan Pustaka Brunei and conducted by foreign experts. Initially these courses were organised for its appointed agents but participation from other book related government agencies were also invited. Such topics as Bookshop Practice, Effective and Creative Selling for Sales Excellence, Promotion of Reading Habits had been held.

Those involved in the printing and publishing fields receive their professional training and qualifications in printing, book publishing and production in the United Kingdom. These personnel can be found mainly in the Government Printing Department, The Information Department and the Dewan Bahasa dan Pustaka Brunei, while apprenticeship in printing and publishing receive their training on-the-job at the local printing and publishing houses.

BOOK TRADE

Brunei Darussalam has not developed a book trade to a level comparable to other ASEAN member countries. We do not have an Publishers Association or Book Importers and Distributors Association which could help develop the book trade.

Marketing and Distribution of Books

Physically, there are no problems in the marketing and distribution of books within the country. There are excellent transportation networks, mainly roads and waterways and
modern telecommunication systems to support the book trade. The export of books is not yet developed for it to be considered as an export commodity however foreign libraries do subscribe and purchase Bruneian titles and most major libraries offer books on an exchange of materials programme with libraries overseas.

The Meeting of ASEAN National Library Directors on the Library Networking and Interchange of Materials among ASEAN Libraries which met in Manila on 3-4 July 1989 sponsored by ASEAN Committee on Culture and Information agreed to promote and facilitate regional cooperation within ASEAN and to facilitate resource sharing and access to publications available within the region. It was agreed to exchange national bibliographies or other appropriate publications on a regular basis including government publications and the national libraries are to act as focal point for this purpose. On 25 November 1992, a Meeting of Director-Generals of ASEAN National Libraries held at Perpustakaan Negara Malaysia to discuss the future of NLDC-SEA Consortium and the formation of the ASEAN National Library Group with the aim of furthering the promoting regional cooperation and undertaking regional projects. The name of the group was subsequently changed to the National Libraries Group-Southeast Asia (NLG-SEA) at the 2nd Meeting held at the National Library of Thailand on 7 May 1993.

The establishment of Majlis Bahasa Brunei Indonesia Malaysia (MABBIM) in 1972 with the main aim of standardising the Malay spelling means that Malay titles published in either Brunei Darussalam, Indonesia or Malaysia are more easily read with the adoption of a common spelling system.

The Dewan Bahasa dan Pustaka Brunei has appointed 7 agents to market and distribute its publications locally and overseas.

Import and export procedures

The importation and export procedures are strictly governed by the Royal Customs and Excise Department and are subject to existing official rules and procedures. So far there has been a free and steady flow of imported books and reading materials from other countries however the cost of freight and postal charges to other countries are quite high compared to other ASEAN countries.

Customs Duties

Duties on imported goods may be specific however there are no duties for books and educational materials.
Importation of Printed and Reading Materials

Brunei Darussalam like any other developing countries still rely substantially on imported books. This is especially true for professional, scientific and academic books. This phenomena is perpetuated by the fact that our own market is too small for publishers to publish profitably, although there has always been a market for general books and novels. The other contributing factor is the public attitude that considers books published locally to be of lower standard and quality. Books in the English language are imported from the United Kingdom, Australia and the United States while books in Malay are imported from Malaysia and Indonesia. Books on Islam are imported from Egypt and Pakistan. Libraries make up a substantial portion of the market for imported books.

The bookshops carry about 95% of imported books and only 5% of locally published books. Most of the imported books are in paperbacks. Prices of imported books is higher than the invoiced price due to high cost of freight and transportation charges.

Booksellers and book importers are free to import books and reading materials from any part of the world but these are subject to censorship and must adhere to the existing laws governing the distribution and sales of publications as stated under the Undesirable Publications Law of Brunei Darussalam.

PROGRAMMES AND PROJECTS PROMOTING THE BOOK INDUSTRY

The book industry cannot exist in isolation without the supported of various bodies. In Brunei Darussalam we are fortunate as to be able to work closely together and establish contacts and networking among institutions to meet this cause.

Book fairs

Many book fairs have been held in the past and they have always been well received by the public. Book fairs at both the international and local levels with the aim of inculcating the reading habit had been organised by the Dewan Bahasa dan Pustaka Brunei to mark the Silver Jubilee of His Majesty’s Accession to the Throne in 1992, the 10th Anniversary of the National Day in 1995, while the Ministry of Religious Affairs to mark Sambutan Nuzul Al-Quran 1411/1991 and local non-government organisations such as the Reading and Literacy Association. These book fairs are well received by the public and are usually held during the school holidays. While smaller book exhibitions are regularly held by all colleges and schools in conjunction with Parents Day and their readathon projects and get the full support of the local booksellers who put up book exhibitions and provide book prizes.

The Dewan Bahasa dan Pustaka Brunei has represented Brunei Darussalam publishers at several books fairs and festivals in the ASEAN region. This is a opportunity for Brunei
Darussalam publications to be promoted outside the country. It distributes annotated catalogues and various listings and posters for promotional purposes and gives discounts during books launches, and exhibitions.

Dewan Bahasa dan Pustaka Brunei also has a regular radio and television programme for book promotional purposes.

Writing Workshops and Seminars

Various government agencies including Dewan Bahasa dan Pustaka Brunei organises regular writing workshops and seminars for potential young budding writers and mature writers with the aim of enhancing their writing skills. Among the workshop and seminars that had been held were Bengkel Penulis Muda, Bengkel Penulisan Rencana, Bengkel Menulis Buku Bergambar/Cerita Bergambar, Bengkel Penulisan Kreatif, Bengkel Sastera Kanak-Kanak, Bengkel Penyuntingan, Bengkel Penulisan Kanak-Kanak and Bengkel Kritikan Sastera.

Other language and literary activities

Besides Dewan Bahasa dan Pustaka Brunei, the Radio Television Brunei is also puts up the dramatisation of local published works, the reading of syairs and poetry, and Malam Tradisi Budaya where lanang, badewa, alai bubu, diangdangan, anding, ompong, yadan, dundang, labai and dong dong oma, the various traditional media/literary forms were performed by practicing experts.

Other activities included those under the Majlis Bahasa Brunei Indonesia Malaysia (MABBIM) and Majlis Sastera Asia Tenggara (MASTERA). MASTERA was formed last year.

Literary Awards and Competitions

Dewan Bahasa dan Pustaka Brunei was the earliest agency to recognise the importance of providing literary awards for excellence in literary writing and had been conducting various literary writing competitions since 1962 with Peraduan Mengarang Sempena Bulan Bahasa. It has conducted over 30 such competitions and the more recent ones had been to mark the Independence Day (1983), the Silver Jubilee of Dewan Bahasa dan Pustaka (1987), 30 years of Bahasa Melayu in the Constitution (1989) and the Silver Jubilee Celebration in conjunction with His Majesty accession to the Throne (1993). The awards are in the form of cash prize of between B$15,000 and B$300.00. For young writers it organises an annual Peraduan Mengarang Majalah Mekar. Now other agencies such as the Ministry of Religious Affairs, the QAF Holdings have also provided literary awards in conjunction with specific events. Winning entries automatically get their works published.
Since 1986 Brunei Darussalam’s writers have also given due regional recognition and nominated to receive the annual S.E.A Write Award. A leading Bangkok hotel in association with several world-renowned authors have given the inspiration and impetus leading to the creation of the S.E.A Write Award in 1979. Today the award is organized in collaboration with the Jim Thompson Foundation and other agencies and are given to outstanding creative writers from Southeast Asia as an appreciation and to honour them towards the promotion of literary activities in the region. Annually a cash prize of Baht 35,000 is awarded. This award has been gaining increasing prestige and recognition within and outside the region.

Another literary award that is given to our local writers is The ASEAN Award for Culture, Communication and Literary Works organized and fully sponsored by the ASEAN Committee on Culture and ASEAN Information and held every 3 years to ASEAN artists and media professionals in recognition for their distinguished achievements in their chosen fields of endeavor in either culture, communications or literary works. The last Award was held in Brunei Darussalam on 9 October 1993. The prize includes a cash prize of US$1,500.00 a certificate and a trophy.

**Libraries and Reading Promotion**

Reading promotions are regularly held in schools to promote the reading habit and love for books. The Ministry of Education has embarked on the Reading and Language Acquisition Programme (RELA) to encourage positive reading amongst primary school children. Other academic libraries too have their own reading promotion programmes.

The Dewan Bahasa dan Pustaka Brunei which provides public library services nationwide conducts regular story telling sessions, children’s theatre and other book-oriented activities to promote reading and awareness and use of the library. Putting this as its primary aim, in 1983 it introduced two reading campaigns namely the Taman Batuturan Bergerak and the Gerakan Budaya Membaca. These are in the form of a travelling group of trained and dedicated children and youths who reach out to children in the kampungs by putting up a 1 1/2 hour’s show consisting of comic sketches, theatre, quizzes and a mini-book exhibition to promote the love of reading amongst the children who are non-library users. We work closely and get full support from the villagers and the local school. Presentations take place by using minimal facilities which may be in an open space, in the village or school hall. It also organises an annual Perkampungan Kanak-Kanak.

The Dewan Bahasa dan Pustaka Brunei introduced the Peraduan Bijak Bercerita in 1980. From 1983 its name was changed to Peraduan Mari Bercerita (Story telling competition) amongst the children between the ages of 8 to 12 years old to promote the importance of libraries and reading amongst children. It has been held annually since 1985. Today it receives wide publicity in the media and the standard has improved over the years. It also conducts storytelling, reading promotion and puppet seminars and workshop for teachers and parents.
Participation of Non Government Organisations and the Private Sector

Persatuan Asterawani (Writers Association)

Persatuan Angkatan Sasterawan dan Saterawani (Asterawani), a language and literary body was established in June 1962 under the leadership of A. Ahmad Husain. It celebrated its Silver Jubilee on 5 July 1987. It provides a forum for local writers to meet and to enhance the use of Bahasa Melayu through its literary and cultural activities and conducts various competitions like debates, novel, short stories, poetry, drama script to promote Malay literature. Asterawani has always worked closely with Dewan Bahasa dan Pustaka Brunei in literary activities. It publishes Karya.

The Library Association

The Library Association was formed on 11 March 1985 and provides a forum for librarians to meet and enhance their professionalism with the aim of upgrading the skill of librarians so that they are able to provide an efficient library service. It conducts various workshops and organises study visits to libraries for its members. It works closely with Dewan Bahasa dan Pustaka Brunei. It publishes Wadah Perpustakaan.

The Reading and Literacy Association

The Reading and Literacy Association which was officially launched on 17 November 1993 by the Honourable Minister of Education aims at providing a forum for librarians, publishers, educationists, and booksellers to meet to discuss matters related to the promotion reading and literacy. It works closely with schools in organising readathon projects and workshops. It will host the IRA/IDAC Seminar in June 1997. It publishes Berita PPL.

The Private Sector

Recently we can see the active involvement of various private sectors in promoting reading and the book industry by supporting through sponsorships of prizes for various writing and related activities.
APPLICATION OF INFORMATION TECHNOLOGY IN PRINTING AND PUBLISHING

Brunei Darussalam is no different from other ASEAN countries where the application of new technology in printing is concerned. Progress has been on-going although at a much slower pace compared to many other industries. Before this the printing process was largely mechanical. The recent developments in printing technology include greater automation, leading to complete integration of the production processes with a strong focus on computer-to-plate systems, incremental press speeds and higher registration accuracy, as well as the continuing in-roads made in the digital process.

Recently, a local company started offering colour separation facilities, a facility which before this had to be done in Singapore. These constant upgrading of printing facilities will improve efficiency and cut costs.

CONCLUSION

At the current pace of development, we are confident that we will be able to progress positively towards developing a book industry and trade in Brunei Darussalam. However in the meantime we need to address the following concerns:

1. More active interaction between writers and publishers.
2. Booksellers to be trained in the trade and to actively promote reading.
3. Booksellers need to apply the use of the new technologies in the trade.
4. The need to publish more local titles.
5. The need to promote reading as a long-life activity.
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STRATEGIC ALLIANCES AND NETWORKING IN ASEAN

by

Ms Karina A. Bolasco

Introduction

Lying between the two large nations of India and China, and covering an enormous area, Southeast Asia from the beginning of time, has been one of the world’s great geographic crossroads. Countries and cultures have met here, mixing and blending religions, languages, arts and traditions, creating new unique ones. A rich variety of people whose forbears were from the northern region crossed the mountains and traveled down the rivers, settling in the fertile valleys or sailing on to other islands. This vibrant mingling of people and culture accounts for Southeast Asia’s complex history.

Over centuries, people of Southeast Asia traded among themselves and with India, China, and the Muslim territories. Knowledge of their gold and spices brought European explorers rushing, setting up colonies and dominating what once were independent kingdoms of Southeast Asia. The experience of colonization, while it did enrich some aspects of Asian life, was for the most part debilitating, and traumatic. In due time, the aspiration for independence spread throughout Southeast Asia. While nationalism did not emerge, grow and triumph at the same time, it often followed a similar pattern. As desire for political freedom intensified, the Southeast Asians’ interest in their cultural heritage and in their history grew passionate. And pride in their past, in turn, further stoked the hankering for independence.

The story of colonization and the national struggles for independence is actually the story of how great ideas and memories move from place to place, stirring in others the warmth and ardor for such thoughts and concepts and an undying commitment to the spirit of these ideals. Concepts as freedom, justice, and prosperity suddenly became real, but absent, and therefore were drawn into the eye of people’s dreams. The path of great ideas is like the path of a storm. Wherever it passes, it wreaks ferment and restiveness. The leaders of our national struggles were mostly educated in the West, read the books of the European Enlightenment, and found in these same colonizers’ books the inspiration and power of ideas for liberation. They and their countrymen and women went back to their religion, tradition, and cultural heritage to sustain the fight for freedom and independence. Even in countries, like the Philippines, where the colonizers kept the people ignorant and uneducated, the few good men who could afford education in Madrid or Barcelona, came back restless and extremely uncomfortable with the pervasive inequalities. They exposed these realities in newspapers, propaganda sheets or flyers, or even in misalettes and prayerbooks. Jose Rizal wrote two novels, two books: Noli Me Tangere (Touch Me Not) and El Filibusterismo (The Filibuster) which roused other leaders to join the fight to drive away the colonizers.

It is important to note, as we recall the stories of the fight for independence in this region of the world, that wisely ideas and memories and the collective imagination were kept in books. Indeed books are the best keepers, and as the great ones are written and published, as they travel freely throughout the world, so shall the spirit and form of glorious ideas.
The ASEAN

In the 70's, one World History book said that "the annual revenue of the two largest corporations in the United States exceeds Southeast Asia's combined gross national product (the money value of all goods and services produced in the region)." That is farthest from the truth now. The fastest growing economies are those in Asia today, and some of those, in our region. Proof of the determination in ASEAN to push economic cooperation was the consensus to form the ASEAN Free Trade Area (AFTA) during the 1992 Singapore Summit.

ASEAN member countries: Brunei, Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam established a common market or customs union which operates much like the European Economic Council (EEC), or more recently, the North American Free Trade Area (NAFTA). In a common market, there is one common tariff wall on goods from nonmember countries and no tariff on goods produced and sold within the combined countries' borders. AFTA regulations require that all tariffs on trade within the region be reduced to no more than 5% by the year 2008. Both the EEC (now called the European Union) and the Closer Economic Relations (CER) formed by Australia and New Zealand have forged links with AFTA.

ASEAN was established to promote economic, cultural, and social cooperation among member nations. Although it works to make Southeast Asia a region of peace and stability, it is not a military alliance.

Members cooperate in such fields as population control, prevention of drug abuse, and scientific research. Teachers, students, and artists of member nations travel to member countries on exchange-visit programmes. Other activities include joint health and nutrition programmes, mutual assistance during natural disasters, transport projects, and programmes for women and the youth. ASEAN also promotes tourism within the region and advocates Southeast Asian studies in the universities of member nations. ASEAN acts as a group in some of their dealings with other countries and organizations.

Established in August 1967 with the signing of the ASEAN Declaration, or Bangkok Declaration, by the foreign ministers of Indonesia, Malaysia, Philippines, Singapore, and Thailand, (Brunei became a member in 1984, Vietnam in 1992) ASEAN initially set out to do the following:

1) pursue cooperation among member nations in agriculture, industry, and trade;
2) accelerate economic growth and social progress in the region; and
3) promote peace and stability in the region.

The decade of the 70s saw increased cooperation among ASEAN members. Several important agreements were reached at the first summit meeting of leaders in 1976. One was to share basic products during shortages and gradually remove trade restrictions. They also agreed to build an industrial project in each country. Established, too, were the organization's central Secretariat and a Council to settle disputes between members.
An emergency grain reserve agreement was signed in 1979. 50,000 metric tons of rice was made available to any member country that needed it at three days’ notice. In 1986, the Agricultural Development Planning Centre was set up to conduct research and training and plan food production for the region. The ASEAN Industrial Co-complementation Programme was launched in 1981 to encourage member nations to manufacture complimentary products for exchange among themselves, for example, in the car industry.

Summit meetings, which bring together the heads of government of ASEAN member nations, represent the highest authority of ASEAN. At the fourth summit in Singapore in 1992, ASEAN agreed to hold summit meetings once every 4 years.

It is the foreign ministers of member nations who meet yearly to consider projects recommended by the organization’s various committees. Such annual meetings are followed by post-ministerial conferences where ASEAN ministers get to meet their “dialogue partners,” right now India and South Korea.

Scholars and watchers of international events find ASEAN effectively "[fostering] closer political and cultural relations among its members, [speaking] with one voice on international issues affecting the region and somewhat [succeeding] in forging cultural links among peoples of the region. Its major achievement however has been in the political field, having reduced tension and conflict among its members and in playing a key role in the resolution of the Cambodian conflict."2

In the area of culture and the arts, there are ongoing programs handled by national desks. There are workshops on fiction, poetry, or the essay, or festivals and conferences on theater, film, dance, and music. Publications like books, not only of proceedings, but also of actual output of participant artists from member nations have been put out and distributed to key cultural offices and libraries of member nations. There is, however, little awareness of these books, and those who happen to see copies in some offices and are interested have nowhere to go to secure copies for themselves or their institutions. They are told to write the ASEAN office at the Department of Foreign Affairs to request copies for free, indeed a very arbitrary way of distributing the books, considering that good money is spent to produce these books. I am aware of exchange visits only in the sense that as one member country hosts a conference, workshop, or festival, then all the participants from other countries are also treated to a cultural tour of the host country, or whatever form of it is possible in the 3-4 days of the workshop.

Much yet needs to be done in the cultural arena before we can say cultural links are truly forged. Member nations must know and understand each other accurately. For unlike Japan or China, most nations in Southeast Asia do not share a common history or culture. There are many distinct groups of people with their own culture in most of our countries. And together, they make up the ethnic mosaic of Southeast Asia. Ironically, in fact, the bonds or links of our countries to our Western colonizers seem to be stronger and much more in place even as the colonizers are physically no longer here. There is an urgency to recognize that the bonds are here, not only in our minds but also in our flesh, and to rise above these whole and spirited.
The ASEAN Book Front

Nothing much or significant is happening on the ASEAN book front in terms of regional trade in books and rights (co-publication, translation, reprint, or adaptation), or paper for books, for that matter. There are hardly exchanges in human resource training for the book industry and no technology transfers.

Generally, Southeast Asia buys books in English originated in Western countries like the United States of America and the United Kingdom, either directly from these West-based publishers, [as in the case of the Philippines which imported as much as US$ 380M, last 1994, or in Singapore’s case US$250M for 1995] or from its designated distributors in the region, [as in the case of Vietnam which bought US$375,000 worth of books (science, technology, and children’s books)].

All of us are buying more books from the West than from each other, and this should not be totally surprising as the writing and publication of books is taking place there in much greater volumes, at a much faster pace, with massive access to superior technology, and with the support of wide-reaching, glossy promotion schemes including movie, video, and television the last.

Even our national libraries are buying more books from the West than from Asia, much less Southeast Asia, much, much less from their respective countries’ publishers. Despite CONSAL (Congress of Southeast Asia Librarians) which has in place a regional library exchange network for buying books, swapping catalogs, and exchanging information, collections of books of other ASEAN countries in the national libraries are insignificant and token, most of them government or state university publications.

Not cheaper.

Press and De La Salle University Press sell to ASEAN libraries an average of 0-8 titles a year; Books for Pleasure sells, mainly to Filipino overseas workers in Singapore and Malaysia, about US$25,000 dollars worth of pulp romances through its nine (9) dealers in Singapore and Hongkong; Claretian sells about US$25,000 a year of religious books through its fifteen (15) dealers and US$1,000 worth to libraries in ASEAN.

About two years ago, when the world reeled from a pulp shortage and paper prices shot through the ceiling, we did not run to China, Indonesia or Malaysia for possibly cheaper paper as shipping costs would definitely be lower. We stayed with our traditional suppliers in the West at great costs, trebling the prices of books.

Negligible, too, is the sale and/or purchase of translation, reprint, or adaptation rights. Solidaridad (Solidarity), a literary publisher, and Books for Pleasure, both of the Philippines, have had 25 titles and 30 titles translated to Bahasa and Indonesian, respectively. Solidarity
philippine languages: Cebuano and Iloko. There have also been sporadic co-publication ventures of scholarly books in the social sciences or of travel and history books, between philippine publishers and those in Singapore.

Seldom are there training courses or workshops for human resource development in the publishing industry, in areas like book writing, marketing, design, and editing. The most visible in this part of the world are those organized and conducted by UNESCO ACCU for Asia and the Pacific countries.

Why isn’t there significant attention to books and the publishing industry on the ASEAN front? Because even on the home front, books are nowhere in the scheme of things. In each country, not a sizeable mass believe the Charter of the Book when it says that “a sound publishing industry is essential to national development.” Not even leaders and bureaucrats fully realize the connection. Despite book councils or boards, we still bewail the unpopularity of books and reading in every book conference. That a nation without books has no soul is just not as urgent or pressing as a nation without food or jobs for its people.

The ASEAP

A critical mass did believe in books enough to organize publishers in the region and consolidate efforts towards helping and pushing the book industry. This was in 1973 and the Association of Southeast Asian Publishers (ASEAP) was formed. Mr. M. Radinwardi of Indonesia headed it and Mr. R. Narayan Menon was Secretary-General. Its very first project was organizing an International Seminar on the Economics of Book Production, Publishing, and Distribution held at the Admiral Hotel in Manila (Nov. 25-30, 1974) and hosted by the Philippine Educational Publishers Association (PEPA). ASEAP was composed of representatives from the member nations’ national book councils, except those from the Philippines who were from the private sector as there was no Book Board yet then. The seminar was well attended but ASEAP failed to sustain the impetus it set in motion. The Association was revived during the 1981 Manila Book Fair. Manuel Valdehuesa became the new Secretary-General and the secretariat was moved to Manila.

ASEAP, funded by membership dues, agreed among other things, to:

1. To allot a booth, free of charge, to ASEAP in any Bookfair in the region;
2. To display prominently all ASEAN/ASEAP publications in one section of selected bookstores in the different member countries;
3. To plan, organize, and hold international training workshops for the various stages in the book publishing industry: writing, editing, design and illustration, cover design, printing, distribution, and marketing.
4. To set up and actively maintain a library exchange network in the region.
5. To encourage the translation of the best works of each country into other ASEAN languages.
When Manny Valdehuesa was appointed to the UNESCO in Pakistan, ASEAP crumbled.

Hassan Ahmad’s paper (He was then Director of Dewan Bahasa Dan Pustaka) on “Publishing in a Developing Economy” at the 1974 International Seminar in Manila clarified that problems in the region like “high illiteracy rates, poor reading consciousness among the population, both rural and urban, the ever escalating costs of producing books..., poor buying power of the people due to poor economic growth... were essentially external to the bookmaking profession, and yet were the very same conditions to make or break the book publishing industry.”

Twenty-two years after, there have been qualitative changes. Literacy rates are higher (Philippines’ literacy rate is 97% as of 1994). The purchasing capacity of the market has gone up as the quality of life has improved especially for countries like Singapore, Malaysia, and Indonesia. Costs of producing books should soon go down as a result of tax-free incentives for paper and other materials imported for book production as provided by book development acts. Only reading consciousness has remained consistently low. Even where governments subsidize the publication of books widely distributed almost free of charge, people are still not reading the books. Where market sectors with disposable incomes have grown in most countries in the region, it does not follow that these people buy and read books. They’re buying branded clothes, eating in the finest restaurants, and traveling. In the Philippines, not even 1% of this so called class AB is reading books. Higher literacy rates don’t mean anything for us if people who can read don’t read. On the other hand, through the years, we’ve seen a fiercely loyal market for books, true book lovers and readers, who even if not enjoying spare income, scrimp on other things like clothes and food, just to be able to buy and read the books they’ve waited for.

Revaluing Book Policies

Each of our book policies must be revaluated. There is something we’re not doing right here if we cannot expand the ranks of book lovers or readers in this region. Let me put forth some observations which may help us reconsider.

1. While it is true that textbooks are essential to a nation’s progress as they democratize education, it will certainly not be healthy if all of us were just textbook publishers. And this is the situation right now in the region. 50%-90% of the books we produce are textbooks. Lest I be misinterpreted, let me underscore that textbooks are important. In fact, in many parts of our respective countries, a child’s first experience with a book is with a textbook. This first experience decides for the child whether or not he or she will like books, or love books even. This also determines for the large part what the child’s attitude will be towards learning and education. And singularly for this reason, textbooks must be well written, innovative, attractive, interesting, and enjoyable. What is so double-edged about textbook publishing is that offhand, publishers may be in it because they are truly concerned with the socio-cultural contribution of their products. But then again, it is mighty painless to be socially conscious when you know that the market there is
“captive” in every sense of the word, and that, that is where the money is. Along the way, it is so easy for some textbook publishers to slide down, cringe from the enormous responsibility, and lose sight of the social goal.

Textbooks will never be sufficient; tradebooks of literary and artistic quality are a necessary supplement in nurturing the love for books and reading. A child who cherishes his textbooks will want to move on to other books, and we have to be ready for that. As the child finds more and more books to love, she learns the habit and will reach a point where she saves part of her allowance to buy a book. We know for sure she will be a lifelong reader. When we’ve done that, we’ve succeeded as publishers. Building a generation of readers is building a sure market for our books. As a business, in the long run, book publishing will become viable and hopefully, even lucrative.

2. That some private publishers may turn crass and opportunist is not an argument for nationalizing the textbook industry. Elias U. Lema, Tanzanian coordinator for the Canadian Organization for Development through Education, (CODE) reports in an article in the Belagio Publishing Network Newsletter (July 1991 issue) that “10 years of World Bank support to education in Africa has not tackled the root cause of book paucity and underdeveloped publishing infrastructures.” In the same way, in the Philippines, the National Book Industry Development Act signed into law last year, now requires the privatization of textbooks for the public schools. Our experience would show that education is too important to be playing politics. Under the Marcos dictatorship, the textbooks were used as mouthpiece for the New Society. In their pages, Ferdinand and Imelda would be exalted as mythical (read: god and goddess) and soon after the 1986 EDSA Revolution, the Aquino government had to spend huge sums to de-Marcosify the textbooks.

In a free market, at least, if left to its own dynamics, the best textbooks will prevail as consumers or users eventually wisen up.

3. Neither should the publishing of other books, those for general reading or higher learning, be handled by government for the reason that no private publisher would take on such a risky business venture. Normally, when this happens, the tendency is for book publishing not to be managed as a business enterprise. The subsidies are there, and the government agency need not make money. Preachy, unimaginative books on health and nutrition, or on ecology, or on people’s rights end up being distributed for free to those perceived as needing them, and yet the books are still not read. The government or nongovernment agency gives up, exasperated.

In the hands of an entrepreneur or a corporation, an investment must soon yield a reasonable profit. A private book publisher will therefore exercise utmost care in choosing to publish a manuscript that market studies or surveys have shown to be interesting reading for the general public, package it attractively and competently, and make sure they distribute it to all commercial outlets available and sell in the shortest time possible. This way the investment is recouped fast. Without this sense of urgency, or the business drive, a government agency will never succeed. And they should not be quick to dismiss this urgency bit by saying so self-righteously that anyway they are not out to make a profit. They must remember, however, that they are out to make those people read their books, otherwise all those trees had been cut for nothing.
As Philip Altback, director of the Bellagio Publishing Network Research, says “Governments must recognize publishing as a strategic industry, and provide support while at the same time taking care not to dominate the industry.”

I suspect that this business of government or agencies distributing books free of charge has somehow subliminally taught people to expect books to be donated all the time. Books must be seen as respectable commodities deserving of one’s hard-earned money.

4. Throughout the region, the tradebook industry must become more vigorous. We cannot sell textbooks all year round. We cannot fill up our stores or our bookfairs with textbooks. And yet we rage against the dominant presence of US or UK books in our shelves or racks, whether these be in stores, libraries, or our homes. There must be a wide range of interesting titles out there for general reading. This is the only way we can lessen our dependence on Western books. We want to read about the lives of our own great people and their great ideas. We want to know indigenous, organic remedies to common diseases, our ways of courtship and marriage; we want to understand the way we are. And even this, the West is doing for us. The West is writing and publishing the books which retrieve or document, tell, analyze and explain implications of our very own political, economic, socio-cultural, and historical events, taking place among our people in this very region. What’s left for us to do is buy their books. Clearly, we are losing the fight by default. Still, we are regarded as markets, and they are the producers.

This is most urgent in the Philippines today. When textbooks were in the hands of government, some leaders in the publishing business thought tradebook publishing would finally become significant. But that was not the case. Now, that textbooks will be back in the hands of private publishers, I fear this will ring the knell for tradebooks. I hope some textbook publishers will finally see the wisdom of diverting some of the profits from textbooks to starting a tradebook division.

5. Our education and language policies will have to be assessed, too. In my country, I have heard often of criticism of our curricula as militating against books and reading. The Departments of Education and concerned educators everywhere in this region must seriously look into this because all the hardwork of publishers will not make a dent if the educational system is not only behind them, but, in fact, unwittingly and continually deadening in children any feel or sensitivity towards books.

For the longest time, all opposition to the use of English as the medium of instruction in Philippine schools, where it is most tenaciously pursued especially in private schools, has been labelled as foaming at the mouth. Our bureaucrats and majority of the educators themselves consider fluency in English an asset, and that while the rest of Asia is learning it, we are already proficient in it. They say this is one reason why overseas Filipinos are preferred domestic helpers. The happy development, however, is that English has been Filipinized. It has been nativized and appropriated for our uses. While this alarms educators even more, who continue to lament the deterioration of English teaching today, the public and mass media see nothing wrong with it. All of us have done that in this part of the world.
What Can We Do Together?

As I went through the papers delivered at that first ASEAP international conference on book publishing in 1974, it was as if time had stood still for the constraints we are up against now are exactly the same issues discussed in those papers. While there may have been small victories, and small steps forward, essentially the same “madness” sneers at us. The late Pacifico Aprieto, who before moving to the government textbook board was Director of the University of the Philippines Press, quoted Chester Kerr of Yale University Press in his paper on the economics of publishing:

“We publish the smallest editions at the greatest cost, and on these we place the highest price, and then we try to market them to people who can least afford them. This is madness.”

While Kerr was actually describing scholarly publishing, to a large extent, it still is an apt account of the publishing that we do in these parts of the world. We are confining book subjects or topics to the traditional: only the pure and the sublime merit the pages of books. Anything mundane or more down-to-earth (read: popular) does not seem to be worthy of publication. Anything like that would smack of commercialism; that would make the book as “low” as cinema, television, and radio. No wonder only few read books. This is not to say that we must go the way of the other mass media, while we do want the book to be a mass medium. Book publishing is always a tough balancing act. It is not just a business the way selling shoes or soap is. It carries with it an enormous responsibility to culture and society. But to do that effectively and on a long-term, it must succeed as a business.

How far should the book go to become a viable business enterprise? This is a hot issue in the West, except perhaps in the US where people seem to be comfortable where they are (writers as superstars getting million dollar advances even before manuscripts are written). But in our part of the world, we still have to learn to "popularize" the book.

We might as well be together in facing up to these problems. We are close geographically, and in that there is power. And though we may have been distanced in hearts and minds from one another by our Western colonizers, there are countless similarities that bind us together.

Let us revive the Association of Southeast Asian Publishers, call it by another name perhaps. but learn from its past organizational weaknesses. The new Association must have a permanent Secretariat, here in Kuala Lumpur, maybe, and a stable source of funds over and above membership dues.

So that we may maximize our strategic closeness and network among one another more effectively, I propose the following as areas we can further study or steps we can immediately take:
1. Regional Data Bank

At the Association’s permanent Secretariat, a data bank on the region’s book publishers should be started. We can enrich the initial list of publishers in our countries that’s already been put together here by the Organizers. Data from the country situationers can also be right away encoded.

We are not really starting from zero here as the UNESCO has book statistics for all over the world. We can review these, update, or even question their traditional sources. I am certain the UNESCO Statistical Division will appreciate assistance in this form. Also, the CODE’s Information Network data-base project in Asia and Africa is being enlarged.

Our data bank should one day be exhaustive and be the definitive source of information on anything that has to do with book publishing in the region.

2. Access to Paper and Other Printing Materials (Machinery, ink, glue)

As we see AFTA operationalize, we should make representations there to set in place mechanisms for tax-free flow of paper within the region. Paper does not have to travel that distance all the way from Scandinavia, Finland, or Canada. Eventually, there has to be a desk at the Association which can match paper requirements in one country with supply from another, with a view to strengthening paper manufacturing capabilities in every country towards self-reliance. Where due to limitations in raw materials, one country cannot be sufficient in newsprint, they can buy from another that may be wanting in foildcote, or in quality ink or glue.

3. Building Authorship/Writing Capabilities

As was stressed earlier in this paper, it truly seems ludicrous that even our very own stories, our own heartaches are being written and told by foreigners, especially writers from the West. Apparently, the best books, gauging from worldwide sales figures, on Sun-Tzu’s art of war for business, or on Zen and Buddhism, on Yoga, tai-chi or the power of the mind over body are those from the West.

We must build up the confidence and nourish the talent of our very own writers. Language should never be a barrier as there are always competent translators. There must be writing grants available, funded by government or corporate sponsorships, for any writer or group of writers intending to write on an aspect of life in the region that affects all member nations, i.e., religions, films, rock and roll, courtship and dating practices, cuisine, architecture, fashion, etc.

We should stock up on information and skills so that, for a change, we can originate quickly and efficiently books from this part of the world. Only we can best speak for ourselves.
4. Co-Publication, Translation, Reprint Rights

Once we have our wonderful books of top-notch quality not only writing-and-design-wise but also printing-wise, we must work hard at popularizing these. One way of ensuring an extensive worldwide reach in a shorter time is to sell co-publication, reprint, or translation rights to interested parties. There should be a clearing house or a Rights Bureau at the Association where publishers from other parts of the world can inquire or buy rights to titles originated by publishers in Southeast Asia. Or where member nations can easily negotiate for rights to titles of co-members. Royalty rates and terms of payment should be standardized, perhaps by subject categories (as there are books which entail bigger investments for research: data gathering, interviews, surveys, etc.). Contracts and forms should likewise be standardized and made available anytime. The Rights Bureau can be hooked up to the Internet so postings of new titles can be really up-to-date. They should also be visible at world bookfairs like Frankfurt, Bologna, ABA, etc.

The issue of rights is always two-way. As we work on our scholarship to develop in other areas and not only in the social sciences and humanities, we will still be needing all those technical books from the West. Although we fully recognize and respect intellectual property rights (violations of which are at the other end of the spectrum), as developing countries we must ask for democratized payment terms for rights to reprint such books if buying them for our schools would be prohibitive. I am aware of US publishers doing Asian editions, often in Singapore, a wise business move. The Asian editions, however, are still exorbitant for other countries. With GATT, such special concessions from the West may no longer be coming. In a sense, this may be better. This will force us to do our own technical books, which may turn out clumsy in the beginning, as is the nature of all endeavors. But this alone will allow us to chart our own destinies as nations. Technical fields are not really universal and neutral – the nuances in language will reveal whose interests are spoken for.

5. Book Distribution

A federation of book dealers in Southeast Asia can be a parallel organization to the publishers’ association. It may be good to keep such a group independent from the publishers as they, too, have specific interests to protect. But as should be expected, the two organizations should be in constant dialogue. The first item on its agenda should be a bookshop map of Southeast Asia where all outlets for books are plotted, from Burma down to Bali or Sulu. [In this time and age, bookshops are just sacred. My longtime wish is to see a bookshop map of the world.]

More energetically, we should pursue the “bookfair and bookstore” schemes of the old ASEAP. At every country’s bookfair, a booth should be allocated, free of charge, to the association to allow its member publishers to exhibit and sell their books. Likewise, major bookstores in every country should have a prominent section for Southeast Asia’s books.

Free flow of books among member nations should always be a priority at all costs. Procedures for tax-free movement of books should not be tedious or cumbersome.
The Association should also make arrangements for their books to be on exhibit and sale at the world's bigger book fairs like Frankfurt or Bologna. By sharing shipping and exhibition costs, expenses may become more bearable at the publisher's level.

Attractive, current consolidated catalogs, including a CD Rom version, for the association's titles should be regularly available. Again, costs can be shared by all participating publishers.

All Southeast Asian Libraries, through CONSAL, must be made aware of all the titles being published in the region. They can be linked up to the secretariat's databank and orders posted through the internet. Orders can then be consolidated by publisher. A commission for the secretariat is possible as another source of money for the association. Our books cannot be donated, maybe swapped, but better sold. Why do we always think only the books from the West should be bought?

Our national libraries should be the firmest and most constant believers in our books. They also provide free access to books in places where people cannot afford to buy books.

Through the Department or Ministries of Foreign Affairs, all our embassies everywhere should start and keep a small library where at least the country's best titles are maintained to serve our respective citizens abroad whose homesickness may be eased a bit by books on and coming from their own country. Again, these books should be purchased.

6. Human Resource Training for Books

There are a number of professionals involved in book publishing: writer, editor, designer/illustrator, photographer, color separator, printer, sales and marketing, and advertisers. Right now, there are a few universities in some countries, like in Singapore or Vietnam where some of these skills are being honed in university courses. There should be more universities in more member countries offering school-based courses for the various skills needed in book publishing. Representations by publishers or the association at the associations of academic institutions on the tertiary level should be arranged and facilitated. Scholarships may be also considered provided these are funded by the publishers.

Short-term courses or workshops may also be planned and member countries can take turns hosting these. These could be self-liquidating projects as fees to be charged can cover resource persons/facilitators' fare and fees.

An extension could be an apprenticeship program where practicum credits for students in other courses, like literature, mass communication, or marketing, may be earned by working part time in a publishing house. This could go beyond a country so that a University of the Philippines student may apprentice in a Singaporean or Malaysian publishing house. Some kind of exchange program could be thought out -- an incipient way of encouraging the young to consider careers in book publishing.
7. Research on the booktrade should be encouraged and logistically supported. This could be possible through networking with Asian universities and colleges. It could be suggested as a field of study for those doing graduate courses.

8. Regional Awards/Contests

There's nothing like psychic rewards in this business. If we can’t make money, at least let’s have the fame and glory. Yearly awards for the best books in various categories should be instituted. A group of independent professionals and experts in the different fields throughout the region can be invited yearly to look at the year’s produce and single out the best not only in content but also in form.

All libraries and other cultural institutions should then make it a point that copies of the winning books are on their shelves. Winners can be widely publicized in the publishing industry’s newsletters, journals, and even in mainstream dailies and magazines on a worldwide scale. This is one way of elevating standards in book publishing.

Conclusion

As we come close to the end of talking, as typical of publishers, we realize we have again a mountain of work before us. Often it feels like we are ants minutely and painstakingly eroding the mountain. We wonder if at all in our lifetimes we will see it at least halfway flattened that we may see the other side, the bright horizon.

The legendary benefits of working collectively, closely and wisely, are not lost on us. We know we will learn to identify layers of the mountain, or points thereof, which when torn down will bring with them the huge rocks, or trigger an avalanche. We might even learn to mine the mountain, or discover a way of going around it to the other side.

As book publishers, we are truly a special group of people. [We must believe this to keep our sanity.] We are the educators’ natural allies [although often they don’t realize it]. Our publishing programs are really reading-promotion programs. We are committed to books and reading, which many times we begin to think is a lost cause.

May we therefore persevere. May our tribe increase a hundredfold. And may we be propelled once more by the impetus of working together.

I would like to end with a quote from Shigeo Minowa, founder of the University of Tokyo Press, a softspoken man who always manages to say something that still surprises me despite my 16 years in book publishing, and I quote:

"Publishing development can be realized only by the passionate endeavors of those within."
Notes


4. All data on ASEAP organized in 1973 were culled from seminar papers delivered at the Admiral Hotel from Nov. 26-30, 1974 and from talks and interviews with Mr. Felicito Abiva, Esther Pacheco and Louie Reyes, key figures and pioneers in the Philippine book industry and in ASEAP.

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Finland’s ISO 9000 ‘pilot’ awarded its wings

In brief

With this article, we return to Finland to report on the fate of the ISO 9001 implementation programme at Keski-Uusimaa, the newspaper publisher featured in the May/June 1993 edition of ISO 9000 News. Keski-Uusimaa had been chosen by the country’s newspaper industry to carry out an ISO 9000 pilot project to provide feedback for an industry-wide programme backed by the Finnish Government. The pilot project, which began in January 1992, has been a success—all Keski-Uusimaa achieving ISO 9001 certification by SFS (Finnish Standards Association) in October 1993.

We make no excuses for returning at length to Keski-Uusimaa. We feel that the following interview with two of the company’s directors contains some very interesting insights into aspects of ISO 9000 implementation such as the human factor, the use of consultants, the involvement of non-production services (such as marketing), and the measures carried out to ensure that the quality system is not allowed to degrade once registration has been achieved. And we also like the frank manner in which the two directors talk about their ISO 9000 experiences; instead of blowing their trumpets about the firm’s success, they give a down-to-earth account of the pilot project and its aftermath which should be of practical help to companies implementing ISO 9000 in other sectors and other countries.

ISO 9000 News would like to thank IFRA, the International Association for Newspaper and Media Technology, for giving us its kind permission to reproduce an edited version of the following interview, which originally appeared in the January 1994 edition of its excellent monthly publication, Newspaper Technology.

ISO 9000 has not increased our overheads

In 1993, Keski-Uusimaa Oy celebrated not only its 75th anniversary, but also its certification as a company complying with the ISO 9001 quality standard. Keski-Uusimaa can thus claim to be the first newspaper publishing house to reach this achievement in the Nordic countries, if not in Europe. Newspaper publishing interest in ISO 9000 was first taken in 1988 by The Nordic Newspapers’ Technical Association (NATS). Then in 1991, the Technical Committee of the Finnish Newspaper Publishers’ Association (FNPA) decided to initiate a pilot project jointly funded by the association itself and by the Finnish Government. Keski-Uusimaa volunteered and was selected as the test site.

The firm’s ISO 9001 certificate bears the date of 18 October 1993, although the ISO standard had been applied at the company for close to one year. Newspaper Technology (NT) reviewed with Tuomo Purola, Vice-President Marketing, and Seppo Vanhatalo, Technical Director, the company’s ISO 9000 experience. Both firmly believe that the implementation of the ISO 9001 standard has considerably strengthened the company at a time when Finland’s economy is facing a particularly difficult situation with little improvement in sight.

Tuomo Purola, Vice-President Marketing, of Keski-Uusimaa: “ISO 9001 has done miracles for us. It shows who really delivers, what works and, preventively, where problems may develop.”

Seppo Vanhatalo, Keski-Uusimaa’s Technical Director: “Introducing a quality system means working on people’s attitudes. And this takes time. Two years are probably a minimum.”

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The January/February 1993 edition of ISO 9000 News included an article on the special report prepared by IFRA for newspaper publishers and suppliers of newspaper technology on the application of ISO 9000 in the industry sector.
Inconsistency

Tuomo Purola: I concur in that our main reason for volunteering for the ISO 9000 pilot project was the inconsistency of our product quality at the time. We had no way of quantifying this inconsistency and much less of correcting it. It was just an intuitive feeling. On the other hand, we knew that we had to become more clever if we wanted to survive.

Internal audits are indispensable.
Otherwise, any system becomes corrupted.

Already at that time, we felt that the economic boom was running out and that a recessionary situation was indeed developing. We noticed a gradual reduction in the number of subscribers and in the advertising volume, as well as a marked resistance to rate increases. We therefore had to find a way to make our products at less cost.

We looked at the ISO 9000 quality project as a way to cut the number and the incidence of expensive mistakes, errors, blunders and other "fumbling bugs". We decided that "getting it right the first time" would be our primary source of immediate savings. Granted, this would entail more preventive analytical work, but we were convinced that at the end of the day we would benefit.

We also felt that the introduction of formal working procedures, such as prompted by ISO 9000, would improve the employees' morale. Having more time on their hands, they immediately displayed interest in the project. This gave us hope that, in the process, all of them would become even more conscious of the importance of service in our type of company and business.

Six years ago, we might have not volunteered so quickly. The situation was too easy then. It really is the end of the "good times" that spurred our interest in the ISO 9000 project.

The procedures were recorded in manuals, which ensures a permanent level of information, very useful for new employees, of course, but not only for them. These procedures, however, need not be cast in concrete, nor do they need to be read every day! It suffices if those concerned record their contents "between the ears".

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A Macintosh network with Claris software is used to keep handbooks, procedures and other ISO 9001 related documents current at Keski-Uusimaa. Altogether, 394 documents constitute the firm's quality system. Gathered in three handbooks, they are kept up-to-date by a full-time ISO 9001 quality project secretary. The quality system covers 15 defined activities.

The ISO 9000 certification simply ensures that the way we actually work is in compliance with the procedures we ourselves defined and recorded in the ISO 9000 manuals. The periodical ISO 9000 certification, as well as our own regular controls, ensure that no discrepancy develops, either on the shopfloor or in the offices, or in the market-place. This being said, in...
Internal audits are indispensable. Otherwise, any system becomes corrupted. Each of our 15 activities defined according to ISO 9001, which encompass all aspects of Keski-Uusimaa’s operations, is controlled at least once a year according to a plan set up one year in advance. In addition, we control each month three areas selected either at random, or on the basis of indications that a particular problem is developing. The checks are made by our president’s secretary.

Checking other persons’ activities is a sensitive type of work. It is therefore important that the controller be considered by all as independent. For this reason, at Keski-Uusimaa, we have her report directly to the president. Checking is also not a policeman’s activity, but rather a support and clarification activity. The whole checking operation planned for the month takes a maximum of three man-days. This time is reduced as everybody gradually devotes more time to doing preventive analysis and correction than was the case beforehand.

We were satisfied with the staff's results, but much less with the information we received from them on their own customers. It certainly was “all in their heads”, but we had nothing in a company database, no customer history, and whenever the representatives fluctuated, no record of their activities was left within the company. Another example: when communicating among ourselves, we had no fixed format. We were using all kinds of informal notes which led to numerous misunderstandings. In yet another area, we had no policy for rebates.

Very significant improvements for the company were made by establishing procedures in areas that may seem minute, but are essential to our image. For instance, when the telephone rings in another office and nobody is there to answer it directly, someone jumps in and answers. But he also assures the customer that the customer is called back if necessary. Also, standard letter formats are stored on the Mac network. In this way, no important aspect is left out when corresponding with customers. Besides, these letters are accessible to all for information purposes.

We now conduct advertising customer surveys four to five times a year. This compares with the two we had done in the previous five years. These surveys, with their 30% returns, already show that our company’s image is improving, especially in the areas of follow-through and attention given to customers’ wishes.

To sum up the major effects of the ISO 9000 standards on the marketing department, I would say that most of the recurring problems of old are now solved at the implementation level. They do not reach the managers’ desks anymore.

**NT: ISO 9001 is commonly (and wrongly) considered as applicable only to the production activities. How did the ISO 9001 project influence other activities, such as those of the marketing department at Keski-Uusimaa?**

**Marketing**

T. Purula: We run three advertising offices... with a total of seven people. In addition, we employ five representatives and one advertising agent, which brings the total marketing staff to 13 persons.

We started the ISO 9001 project in the marketing department by asking each employee to describe in writing how he was discharging his tasks. We found out that for each function, there were at least five ways of going about it. We also found out that, because there existed no formalized way of recording their exact wishes and requirements, customers were not infrequently surprised by the way their own advertisements actually looked when they appeared in the newspaper.

We collated all the actual procedure descriptions ourselves, as well as each employee’s suggestion for “ideal working procedures” in the future. Now that these procedures have been agreed upon and are recorded in the manuals, we observe that conversations among our employees focus on the problems themselves, and not on how each individual views them.

We now have a marketing data bank allowing us to spot area- and representative-by-representative, the advertising customers who, for one reason or another, may have been neglected and should be given urgent attention.

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Fourth edition of ISO 9000 Compendium now available

The fourth edition of the ISO 9000 Compendium contains the complete collection of International Standards in the ISO 9000 "family".

"Family" is the preferred term to describe the complete output of ISO Technical Committee 176, Quality management and quality assurance, which not only includes the ISO 9000 core series, but also documents such as the guidelines on quality audits and supporting technologies.

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The ISO 9000 Compendium (A4 format) is published in separate English (506 pages, ISBN 92-67-10197-8) and French (522 pages, ISBN 92-67-20197-2) and is available from ISO member bodies, or the ISO Central Secretariat, at a cost of CHF 280 (price group XM). The recommended discount for ISO 9000 Forum members is 25%.

Training bodies

A brand new publication from the ISO 9000 Forum Library is the Directory of quality training bodies, which is being distributed free to Forum members (40 pages, bilingual English and French, ISBN 92-67-01081-6, price for non-members, CHF 34 - price group D).

Along with the growth of third-party assessment and registration activities, ISO 9000-related education and training programmes are becoming more and more numerous worldwide. Some of these cover training for internal auditors in companies in the process of introducing ISO 9000 quality systems.

Other programmes offer courses leading to formal registration of lead auditors to be employed by quality system registration bodies and carry out external audits. Still others concern courses on ISO 9000 aimed at raising awareness of business executives and company employees in general.

At present, there is no ISO mechanism for granting recognition to the quality training bodies, or governing certificates delivered by quality training bodies for lead auditors, internal auditors or quality specialists.

Although the courses provided by quality training bodies are not given on behalf of ISO itself, the need has been recognized for ISO to play a role in disseminating information on the quality training programmes in operation in ISO member countries.

The Directory of quality training bodies is intended to contribute to meeting that demand. It is issued on an information basis from input provided by ISO member bodies. The listing of courses and organizations does not imply endorsement of any kind on the part of ISO itself.

As in the case of the Directory of quality system registration bodies initiated by the ISO 9000 Forum, feedback from users of the Directory of quality training bodies will be used to improve future editions.

(continued on page 14)

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(continued on page 14)
Finnish Press launched
industry-wide
ISO 9000 programme

This article is partly based on a presentation made to IFRA (the International Association for Newspaper and Media Technology), at its conference on quality management in Geneva (CH) in October 1992, by Mr. Orvar Monni*. Mr. Monni is a consultant who was retained by the Scandinavian Technical Council of Newspapers (NATS) to write a Handbook on Quality Control in newspaper production, and called in by the Finnish Newspaper Publishers Association to supervise its pilot project on implementing ISO 9001. He was recently interviewed by ISO 9000 News to provide an update on the Finnish programme.

Finnish newspapers, with the backing of the country’s Government, are carrying out a programme for implementing ISO 9000 throughout the industry. A pilot project at a daily newspaper has already produced encouraging results and is expected to lead shortly to its applying for ISO 9001 registration.

The Laatu-92 (Quality-92) programme has been launched by the Technology Division of the Finnish Newspaper Publishers Association. The aim of the programme is to develop practical guidelines for implementing ISO 9000 in the country’s newspaper industry. Although the ISO 9000 series has been translated into Finnish, the need for a further “translation” into terms the newspaper industry could understand. In addition, quality management concepts were not well understood in all quarters.

When launching the programme, the Association considered it very important to develop guidelines that were as practical as possible, and that in order to do so, a case study was required. It therefore decided to run a pilot project of ISO 9000 implementation at Keski-Uusimaa Oy**, a medium-sized company situated at Hyrylä, about 30 km north of the Finnish capital of Helsinki.

The programme is jointly financed by the Association, Keski-Uusimaa, and by the Ministry of Industry of the Finnish Government. The total cost of the programme is estimated at FIM 500,000, excluding salaries.

The pilot project began in January 1992. Based on feedback from it, the Association will produce a comprehensive documentation on quality. This will not only include recommendations for implementing ISO 9000 in the newspaper industry, but will also act as a guide to quality systems in general, particularly on how to use quality management as a tool to improve the organization in all its facets — not just product quality.

The Laatu-92 programme is being managed by a committee of representatives of 15 Finnish newspapers. This committee closely monitors the pioneering work done at Keski-Uusimaa, participates in interpreting the ISO 9001 standards for implementation in the industry, and organizes conferences on the programme, and on quality management in general.

ISO 9001 has been found to be a complete, watertight management method for resolving various quality and productivity problems.

Each week, the Keski-Uusimaa company prints approximately two million newspaper copies, including its own daily (of the same name) and smaller local newspapers, as well as newspapers for other publishers.
The programme and pilot project receive support from two consultancies, Qualitec Oy, which is experienced in the development of total quality management systems, and Insinnoontumisto Printplan Ks, a specialist in newspaper technology, and means to achieve quality in production.

The company chosen for the pilot project, Keski-Uusimaa, publishes a daily newspaper, now in its 75th year, with a current circulation of approximately 25,000 copies, and a total number of pages of about 800,000 annually. It also publishes a number of local newspapers and, in addition, prints newspapers for other publishers. The total number of newspapers printed weekly is approximately two million copies, divided into 50 separate editions. The company’s turnover in 1992 was FIM 80 million.

Quality documentation at Keski-Uusimaa is maintained in electronic form, which facilitates updating and distribution throughout the company.

The daily newspaper has an editorial staff of 30, while a further 20 journalists work on a number of smaller local newspapers: there are ten people employed in sales, and about 100 in the production departments. The production technology used is modern, and includes reception by telecommunication of pages already made up, using Postscript software.

The production processes are quite complex since the actual manufacturing of either the company’s own newspapers, or those of its customers, starts from different points in the total quality chain to produce a newspaper. For example, one customer may provide only the raw material of manuscripts and illustrations, Keski-Uusimaa therefore takes charge of his product at the beginning of the chain of processes. Another customer may provide ready-made plates and only require that Keski-Uusimaa takes charge of the final process of printing the newspaper from these.

A smooth production flow, constantly monitored through a smooth flow of status information, is therefore one of the principal benefits that Keski-Uusimaa wished to achieve with a quality system based on ISO 9001.

Why quality?

According to the company’s technical director, Mr. Seppo Vahatalo, Keski-Uusimaa’s objectives in participating in the project are to become more competitive through reducing costs attributable to poor quality. The company understands that high quality, both technical and editorial, of its newspapers is important to readers and advertisers alike. A guarantee of high quality also supports the marketing of its printing services to other publishers.

Achieving high quality requires a quality system to ensure efficient working methods in sales, administrative and editorial departments, as well as in technical production aspects. The quality system is expected to result in good planning, well-maintained internal information systems, and trouble-free allocation of both human and material resources. The company also expects the establishment of a quality system to lead to improved staff training and more effective work practices. The combination of the above results should show up in increased productivity and a better service to all customers.

Why ISO 9000 quality?

In Keski-Uusimaa’s view, the language and the requirements of the ISO 9000 series did not initially seem to fit the needs of a newspaper. Despite this, it felt that ISO 9000 represents a reasonably simple and straightforward method for covering the most essential features of a well-run quality system. The ISO 9004 guidelines (Quality management and quality system elements) were found to be helpful to the company’s management in planning the system, in deciding what it should include, and in indicating how it should be audited.

The chosen quality model of ISO 9001 has proved to be a complete, watertight management method for resolving various quality and productivity problems, and for providing assurance both to the company and to its customers that the planned systems and product quality are being achieved.

The company has developed a quality system based on ISO 9001 that covers all the company’s activities, functions, processes and personnel. The quality control of the manufacturing processes is thus only a part of the total system, which also includes, for example, the marketing of advertisements, the editorial processes, the personnel policy, and so on.

To develop the quality system, the method employed has been to study the various activities, processes and functions, find solutions to any problems encountered, level out individual differences in working practices, and select the best way of tackling any particular task – which then becomes part of the quality system. In the company’s view, the methodology has developed nothing either special, or new, but has allowed the best working practices to be identified and “fixed” as the procedure to be followed.

One of the most useful exercises has been in getting all employees,
Whatever their function, to describe what they actually do. This has brought to light many variations in performing tasks and allowed a selection of the one most suited to assuring quality in that particular context.

It was realized from the outset that documenting the quality system was one of the most important jobs because it provided the base for daily operation of the system. Keski-Uusimaa has built its documentation, in parallel with developing the system, by hierarchy and functions (see diagram). This documentation is in two tiers for each unit functioning within the company. The tiers comprise the following levels: the quality manual - operating procedures, work instructions, and the fourth category - forms, files, statistics and documents. The Handbook of Quality Control in newspaper production, mentioned above. Each level is divided horizontally by operating unit, e.g., marketing and sales, editorial, purchasing, and so on.

The software used is a simple filing programme, Claris Filemaker Pro. Staff find that this takes the drudgery out of documentation and what is most appreciated, the quality directives can be updated easily and distributed automatically.

Getting employees to describe how they actually perform a task has brought to light many varying approaches. This has allowed Keski-Uusimaa to choose the best one, “fix” it by writing appropriate work instructions, and incorporate it in the company’s quality system.

The greatest efforts had to be made in convincing the editorial departments, which feared a threat to journalistic and creative freedom.

By the end of this year, it is also planned to publish a large handbook on how to develop a quality system, and one or two pocket books explaining the concepts and benefits of quality systems based on ISO 9000. The latter are intended to inform and assist company owners and top management.

The Finnish Newspaper Publishers’ Association has also supported an ISO 9000 project at a newspaper distribution company, and the results and lessons from this will be included in the Lauta-92 documentation. Most companies in the Finnish newspaper industry are awaiting the results of the overall programme, although two or three already have ISO 9000-based projects at varying stages of preparation. In connected developments, some 3-5 commercial printing or graphics reproduction firms are working on quality systems for ISO 9000 registration, while several paper manufacturers and one printer of self-adhesive labels have already achieved registration.

Why ISO 9000 raised journalists’ hackles

The top management at Keski-Uusimaa has put its full weight behind the project. In general, the company personnel has taken to the project well and, having understood the meaning, necessity and methods, invested itself in the implementation.

The greatest efforts have had to be made in convincing the editorial departments, which were suspicious of the very idea of a quality standard, fearing that it might be a threat to journalistic and creative freedom. Having been told that ISO 9001 sets no upper level on how well they work, but rather puts the emphasis on such aspects as advance planning, working conditions and a well-managed flow of information in the organization, most journalists have slowly come to terms with the project.

Keski-Uusimaa is expected to apply this month or next for assessment and registration to ISO 9001.

A Finnish-language version of the NATS process quality handbook has already been published under the Lauta-92 programme. As noted above, it forms part of the quality system documentation of Keski-Uusimaa and is now available for the industry as a whole.

Swedish daily applies ISO 9001

by Roine Lundin*

The Swedish daily newspaper, Svenska Dagbladet, is implementing a quality management system based on ISO 9001 within its editorial department, as a first step, although the project may be widened later.

Mr. Bengt Erlandsson, who is in charge of the project, said that the initial aim was not to achieve certification of the quality system, but to develop a quality manual for the editorial department to improve its internal functioning.

Looking at the quality parameters of the newspaper as a whole, several areas have been identified where a well-documented quality system and a smooth-running flow of information would be particularly beneficial. These include quality control of text transmitted by cable from the main office to the printing plant, located several kilometres away, colour control during printing, and meeting deadlines.

For home delivery in urban areas, it is important that the newspaper is ready at the right moment. Too late, and most of the family will have already left home; too early and the printing ink will not have dried sufficiently, leading to smearing.

* Roine Lundin is Editor of Måndags Standard, which is published by the Swedish Standards Institution (SIS), Box 3295, 103 68 Stockholm, Sweden. Tel. +46 8 613 52 60. Fax +46 8 10 84 64.
ISO 9000 quality standards in 24 questions...

There are still a few misconceptions about the significance, scope and implementation of ISO 9000 quality standards. ISO 9000 News has interviewed J. E. Ware, Managing Director, BSI Quality Assurance, and Chairman of ISO/CASCO (Committee on conformity assessment). For years, Mr. Ware has worked with the many international, regional and national technical committees which formulated and developed the quality assurance and management concepts. This question and answer session can obviously not cover the whole gamut of ISO 9000 standards. More information is available from the ISO Central Secretariat in Geneva or from any one of the member bodies in the ISO worldwide set up.

The concept

Q. Can we first define the notion of quality?

A. - In simple terms, (Quality) is the ability to meet all the expectations of the purchaser of goods or services. There is a more technical definition in the International Standard ISO 8402 (Quality. Terminology): “The quality of a product or service is the features and characteristics of a product or service that bear on its ability to satisfy stated or implied needs.”

Q. Are ISO 9000 quality standards applicable irrespective of the product’s final technical characteristics?

A. - Yes, but this is really a matter of perspective. To take an extreme case, quality requirements will obviously not be the same for a rubber band used in an office than for a seal which, if it fails, might endanger the safety of air travellers. The ISO 9000 quality requirements at assessment time will thus be different for the office supply item than for an aircraft or automotive seal. Stated or implied needs are the key words in the official definition.

Q. - What do these ‘key words’ really cover?

A. - Needs are variable factors. They depend on criteria specific to each product or service such as usability, safety, availability, reliability, maintainability, economics and environmental aspects. They are usually listed in contractual agreements between supplier and customer. In other circumstances, these needs may be implied. They must then be identified and defined to draw up a specific quality standard.

The implementation

Q. - What is the role of ISO 9000 standards?

A. - These standards set the basic rules for quality systems - from concept to implementation - whatever the product or service. They are a set of ‘good practice’ rules for manufacturing a product or delivering a service. They should ensure that a supplier has
the capability to produce the required goods or services, showing him how to proceed to make sure that what he delivers fully meets customer expectations.

Q. What activities are they concerned with?

A. The primary standard deals with manufactured products. Subsidiary standards provide guidelines relating to primary standards, to service industries and specialized products such as software. Guidelines are also prepared for auditing procedures and competence of auditors.

"Quality is never an accident; it is always the result of an intelligent effort."

John Ruskin

Q. A substantial number of product-related standards already exist throughout the world in a wide variety of countries and industries. Are ISO 9000 standards scheduled to supplant them?

A. No. Most of these technical standards are applied to well-identified end products. They set the requirements for these products in terms of performance, size, safety, etc. It should be remembered that ISO 9000 describes how to go about making sure that a given supplier has the capability of meeting these specific standards and delivering a good quality product or service. It does not guarantee however that this supplier really delivers a product adequate for a precise purpose.

Q. Can you explain this difference?

A. Quality cannot be evaluated in a vacuum. It must relate to a standard specification. Requirements for a chemical product or process differ widely from those for a refrigerator or for the services of a hotel, a bank or an airline company.

ISO 9000 standards are of a practical nature to trade or industry, they are not just academic rules. The end product is therefore taken into consideration in ISO 8402 assessments, but it may nevertheless still be necessary to review it separately for its functionality, which depends on its final use in a given environment. Product or service specific standards may then be required for testing the final product.

A distinct must therefore be made between assessing a company's ISO 9000-based quality system and standards, and certifying the final product itself.

Q. How is this achieved?

A. The ISO 9000 series standards enumerate the basic rules governing quality systems. The manner in which these quality systems are implemented must however be adapted to the actual production for which a registration is sought. For instance, ISO 9000 rules state - irrespective of the product manufactured - that testing equipment must be regularly calibrated. This is the general rule. When a company is assessed to determine whether it meets ISO 9000 standards for a given final product, it is no longer enough to confirm that testing equipment is regularly calibrated and how. To come back to our rubber band vs. aviation seal analogy, the test operations take a different dimension. Then becomes necessary to review what testing equipment is used, whether it is appropriate for this type of product, what calibration procedure is being used in regard to the product, etc. This explains why ISO 9000 assessment teams always include people who are familiar with a particular business or product line.

Q. Are ISO 9000 standards compulsory?

A. Companies using ISO 9000 do so on a voluntary basis.

Nobody is compelled to use the ISO 9000 standards, except in those cases where governments or regulatory authorities impose them for public security reasons, or where they are called up in contractual terms. But it could also be argued that as soon as there is a demand for them from the market, they virtually become unavoidable. And this type of demand is obviously growing worldwide at a rapid pace...

The ISO 9000 standards are not a goal by themselves. They could be looked at as a first step in the direction of the ultimate Total Quality Concept already prevailing in certain countries.

Q. What ISO 9000 standards exist?

A. There are five basic standards in the series, from ISO 9000 to ISO 9004. To avoid misunderstandings and misinterpretations, ISO 8402, which I mentioned earlier, gives precise and detailed definitions of essential terms used in the quality area.

The ISO 9000 standard

Q. What does the first standard in the series involve?

A. ISO 9000 is sometimes described as the road map to the system. It is true that the ISO 9000 “guidelines for selection and use of quality management and assurance standards” help in obtaining an understanding of what the ISO 9000 series really is about, for both supplier and customer. ISO 9000 elaborates on the general philosophy of quality systems standards, their characteristics, the existing types, where and when they are best used, and describes what elements quality assurance models should incorporate. It also deals with demonstration and documentation requirements, pre-contract assessment and contract preparation.
The ISO 9004 standard

If ISO 9000 is the road map to the quality systems, ISO 9004 is the set of (building blocks) which makes it possible to customize quality standards and make them conform to real life situations. ISO 9004 is the basic element in the building up process of a quality system suited to specific situations. It is the tool for internal quality management purposes.

A chemical company may, for instance, decide to put in place its 9000 quality system. It will look through all the elements in ISO 9004, and decide which ones it will retain and which ones it can do without. The company must be sure however that it takes everything it needs for incorporation into its own quality management specifications. Another chemical company will probably come to about the same choice. A watchmaker will come up with a different list, and so will a garage or a hotel.

ISO 9000 is the road map to the quality systems, ISO 9004 is the set of building blocks which makes it possible to customize quality standards and make them conform to real life situations. ISO 9004 is the basic element in the building up process of a quality system suited to specific situations. It is the tool for internal quality management purposes.

"Quality is free. It’s not a gift, but it is free. What costs money are the unquality things – all the actions that involve not doing jobs right the first time."

Philip B. Crosby

Q. - What does ISO 9004 include?

A. - It’s a comprehensive basket of quality objectives from which everyone picks what his activities require. No one needs all of the list in ISO 9004, because requirements or production processes are not the same from one company, or industry, to another. There is of course always a minimal list of topics which must be part of any system to deserve the quality label.

Topics covered in ISO 9004 cover 20 different chapters, all very much detailed. They include risks, cost and benefits, management responsibility, quality system principles, system documentation and auditing, economics, quality in marketing, quality in specification and design, in procurement, quality in production, control production, product verification, control of measuring and test equipment, nonconformity, corrective action, handling and post-production action, quality documentation and records, personnel, product safety and liability and statistical methods.

Q. - This is quite a comprehensive programme.

A. - Yes. Again, not everything in these 20 chapters applies to every product or service situation. But where they pertain, there is no doubt that these are universally recognized quality requirements.

Once an ISO quality management and quality assurance system has been customized, it can then be assessed by a customer or by an independent body. One of the elements the assessor looks at is of course whether the basic – and indispensable – quality elements are present in this system.

The ISO 9001 to 9003 standards

Q. - What do the other standards – 9001 to 9003 – correspond to?

A. - These three ISO models – 9001, 9002 and 9003 quality assurance systems – the basic requirements for a supplier’s quality management system. They are the standards against which the quality management system will be assessed.

ISO 9001 covers the areas of design and development, production, installation and servicing of products or services.

ISO 9002 is limited to quality management in production and installation. Both include contract review, document control, purchasing, process control, handling, storage, packaging and delivery, training and internal quality audits.

ISO 9003 covers quality assurance obligations of the supplier in the areas of final inspection and testing.

Assessment and registration procedures

Q. - Who is normally responsible for checking that a supplier conforms to quality standards?

A. - Obviously, the primary responsibility is with the customer. However, to avoid multiple assessments, there is a growing trend to entrust this function to specialized organizations. These may be member bodies of ISO or other ISO-recognized third party bodies such as independent companies recognized by national standards organizations in each country.

Q. - What are the steps to obtain registration?

A. - Eight major steps may be identified (see page 7). They are indispensable to reach the certification stage.

Q. - Are the staff of these registration bodies also assessed for their qualifications?

A. - Definitely. They have to meet very severe rules set out in the relevant ISO standards (the 10 000 series) auditing quality systems. As I said before, the assessing teams must always include persons specialized in the industry or service being assessed.

Q. - What about propriety information?

A. - Confidentiality is a very critical problem particularly as auditors visit the plant and have access to confidential information. Published information only gives two details: to which ISO 9000 standard a company is registered.

A guide to registrations

ISO/CASCO, the ISO committee on conformity assessment, is convoked every five years. The ISO 9000 series itself is assured of a reasonable stability because we feel that a manufacturer should be able to amortize his outlay in getting ISO registration before changes are introduced.

Q. - Are ISO 9000 standards regularly revised?

A. - All ISO standards are reviewed in principle every five years. The ISO 9000 series itself is assured of a reasonable stability because we feel that a manufacturer should be able to amortize his outlay in getting ISO registration before changes are introduced.

One thing is certain, however. Too much is at stake for the evolution of the industry and services sectors worldwide to stop the momentum given by the ISO 9000 series. Over the coming years, our specialized committees will no doubt bring improvements to our existing quality management and assurance standards, and perhaps even open new paths.

Eight steps to ISO 9000 certification:

1. Evaluation of existing quality procedures against the requirements of the ISO 9000 standards
2. Identification of corrective action needed to conform with ISO 9000 series standards
3. Preparation of a quality assurance programme
4. Definition, documentation and implementation of new procedures
5. Preparation of a quality manual
6. Pre-assessment meeting with registrar to analyse quality manual
7. Actual assessment visit
8. Certification

ISO in brief:

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies, from some 90 countries. It promotes the development of standardization and related activities to facilitate the international exchange of goods and services, and develop intellectual, scientific, technological and economic cooperation.

Budget: Approx. 94 million CHF per annum.

Personnel: The Central Secretariat in Geneva totals 146 full-time staff from 27 countries.

Structure: Consists of some 173 technical committees, 631 subcommittees, 1 830 working groups and 18 ad hoc study groups. These represent the viewpoints of manufacturers, vendors and users, engineering professions, testing laboratories, public services, governments, consumer groups and research organizations in each of the 90 member countries.

International standards: 8 114 International standards and technical reports have been published by ISO representing 68 560 pages of technical text in one language. (Status: November 1991). They include information processing, graphic industry and photography (19 800 pages), mechanical engineering (17 000), basic chemicals (5 200) and non-metallic materials (4 700).

International relations: Some 450 international organizations are in liaison with ISO technical committees and sub-committees.
BOOKS FOR ALL: ASEAN CONFERENCE ON BOOK DEVELOPMENT,
13 - 15 AUGUST 1996, KUALA LUMPUR

RESOLUTIONS

Recognizing that book development and the free flow of information will contribute significantly to socio-cultural, economic and political development, and to the promotion of peace, goodwill and harmony in the ASEAN region, this Conference adopts the following resolutions relating to the PUBLICATION, PROMOTION, DISTRIBUTION of books (both conventional and digitized format) and HUMAN RESOURCES DEVELOPMENT amongst the book community.

1. PUBLICATION

ASEAN authors, translators and publishers must collaborate in the production of high quality books at affordable prices focusing on ASEAN culture, economy, history, etc. Collaboration is essential in the following areas:

(a) Publications with an ASEAN focus and content such as ASEAN encyclopedia/compendium and books
(b) Work towards achieving international quality standards in book production (e.g. ISO 9000) and marketing with a view to providing quality books at affordable prices.

(c) Application of new technology such as multimedia to disseminate the rich cultural traditions of ASEAN.

(d) Publication of ASEAN children’s books in multimedia and other appropriate formats.

(e) Establishment of a National Coordinating Centre in each country to function as a clearing house for negotiating rights for translation of indigenous works.

(f) Translation of outstanding publications into English and other indigenous ASEAN languages.

(g) Greater efforts be made to co-publish suitable materials from ASEAN member countries.

(h) Accord protection of intellectual property rights to authors particularly in the electronic media.

2. PROMOTION AND USE OF PUBLICATIONS

Acknowledging that reading plays an important role both in the intellectual development of the individual and in promoting the book industry, ASEAN publishers and librarians undertake to collaborate in the
following promotional activities:

(a) Greater use of the full range of the new information technology including INTERNET

(b) Including specialised book exhibitions relevant to the theme in all ASEAN trade fairs and conferences to promote ASEAN publications

(c) Concerted efforts to bid for the adoption of ASEAN as the theme for the Frankfurt Book Fair in the year 2001

(d) Collaborative participation in regional and international book trade fairs in the form of ASEAN book stands

(e) Organisation of ASEAN BOOK TRADE FAIR on a rotational basis amongst ASEAN countries

(f) Greater sharing of successful experiences by the ASEAN Book Development Councils and libraries on the promotion and marketing of ASEAN publications

(g) Establishment of ASEAN BOOK DEPOSITORY in the National Libraries of member countries to encourage the free flow of information

(h) Compilation of a catalogue "ASEAN Books in Publication"

(i) Creation of regional databases on ASEAN publications
(j) Encourage ASEAN Embassies to showcase the best of their respective publications

(k) Promotion of activities, campaigns and programmes to inculcate the reading habit

3. DISTRIBUTION AND MARKETING

The free flow of publications amongst ASEAN member countries can be enhanced and facilitated through the following activities:

(a) Elimination of all duties/tariffs on the import/export of publications emanating from member countries

(b) Formation of strategic business alliances amongst ASEAN publishing houses to take advantage of the opportunities presented by the globalization of businesses

(c) Removal of all regulations that prohibit the entry of books published in the indigenous languages of ASEAN countries

(d) Standardization of all customs classification codes pertaining to the import/export of books so that trade figures will have a common statistical base

(e) Encourage and support market research on publishing that will benefit the book community
(f) Establishment of a consortia amongst publishers, libraries and distributors of the book industry to facilitate and coordinate the free flow of publications within the region

(g) Collaborative publication of directories of ASEAN publishers, booksellers, libraries and other related book industry professionals and agencies

(h) Establishment of standards for commercial exchange of electronic publications via digital media

4. HUMAN RESOURCES DEVELOPMENT

Recognising the need for the upgrading of skills, competencies and professionalism amongst the book community, the following will be undertaken:

(a) Promote greater professional development in the book industry through regionally coordinated conferences, forums, training courses and exchange programmes

(b) Accord recognition to individuals and publishing houses for outstanding publications

(c) Encourage the institutionalisation of training courses on publishing at ASEAN universities and colleges
PRESEVATION OF BOOKS ACT

An Act to make provision relating to the deposit and pres-
servation of copies of books printed and published in
Brunei and to provide for matters connected therewith:

Commencement: 18th January 1967

1. This Act may be cited as the Preservation of Books
Short title
Act.

2. In this Act, unless the context otherwise requires —
Interpre-
tation
“books” includes every part or division of a book,
report, pamphlet, periodical, newspaper, sheet of
letterpress, sheet of music, map, plan, chart or
table separately published, but shall not include
any second or subsequent edition of a book unless
such edition contains additions or alterations
either in the letterpress or in the maps, prints or
other engravings belonging thereto;
“the Director” means the Director of Museums.

3. (1) The publisher of every book published in Brunei
Delivery of
copies of
books pub-
lished in
Brunei
(whether for sale or otherwise) shall, within one month after
the publication, deliver, at his own expense, 3 copies of the
book to the Director.

(2) The copies required to be delivered under this
section shall be copies of the whole book with all maps and
illustrations belonging thereto, and in relation to the copies
required to be delivered under subsection (1), shall be
finished and coloured in the same manner as the best copies
of the book are published and shall be bound, sewed or
stitched together, and on the best paper on which the book
in printed.

B.I.R.O. 11951
(5) If a publisher fails to deliver any book required by this section to be delivered he shall be guilty of an offense: Penalty, a fine of $6,000 and the value of the book or books he so fails to deliver; and the said value shall be paid to the institution or institutions to whom the book or books ought to have been delivered.

4. (1) The Director shall keep or cause to be kept a catalogue of all books delivered under section 3; and the catalogue shall contain such particulars of the books so delivered as may be prescribed.

(2) The Director shall as soon as is practicable after each quarter of the year publish or cause to be published the particulars entered in the catalogue in the quarter immediately preceding the date of publication; and the Director shall supply to any person making an application in that behalf a copy of that publication.

Regulations. 5. His Majesty the Sultan and Yang Di-Pertuan in Council may make regulations—

(a) to provide for the use of the books delivered pursuant to section 3(1):

(b) to provide for the fees to be imposed in respect of any publication supplied under section 3 by the Director and the conditions under which the payment of such fees may be waived;

(c) to prescribe anything required to be prescribed under this Act; and

(d) for excluding any class of books from the operation of the whole or any part of this Act.

6. The obligations imposed upon a publisher by this Act shall be in addition to and not in substitution for any other obligations relating to the delivery of books published in
Preservation of Books

7. This Act shall apply to books printed by the Government Printer for or on behalf of the Brunei Government and to books printed by any department of Government.