

THE ARAB BOOK MARKET

General Presentation with a Forus on Qatar

Territory

The Arab world territory includes the 22 countries of the Arab League: Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, KSA, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Somalia, Sudan, Syria, Tunisia, UAE, Yemen.

Challenges of publishing in the Arab market

On 30 June 2013, the English page of *Asharq al-Awsat* newspaper focused its “debate” feature on the publishing industry in the Arab world.

Rana Idriss, director of Dar al-Adab, a leading Lebanese publisher of Arabic quality fiction, considered that “The Arab world is facing a publishing crisis”, mainly due to the high levels of piracy (on printed and e-books) but first and foremost, to the closure of the market:

- / Syria: important market which is currently closed
- / Libya, Sudan, Iraq: “never been opened to the publishing industry”
- / Egypt: low purchasing power
- / Lebanon: very small market
- / Gulf: important market (incl. high rate of female readership) but high level of censorship

Mohamed Hashem, director of Dar Merit in Cairo, and known for his flair for discovering literary talents, diagnosed the Arab world with a “reading crisis” rather than a publishing one (or at its roots):

- / The region has the lowest reading audience in the world
- / Egypt: average print run of a new book: 1000 copies
- / Between 30% and 40% of the published books are never sold

Taken together, the accounts of both publishers summarize a crisis that has been discussed and deplored for over a decade at least. The problematic issues when it comes to the Arab publishing market have been the same over years, despite some progress made here and there. These issues are:

- / Lack of reliable figures about book production and sales
- / Insufficient readership
- / Censorship and issues related to freedom of expression
- / Difficulties of regional distribution and piracy
- / Barriers to the development of publishing structures

Lack of reliable figures about book production and sales

There is no Arab centralized system which monitors book sales in the Arab countries, like Nielsen BookScan for the English speaking world for example. The figures that circulate are always fragmentary, taken from various sources, and impossible to check; their liability depends on the authority of the speaker.

The production figures might be easier to obtain than the sales ones, thanks to pan-Arab online booksellers like neelwafurat, whose catalogue registers the majority of the newly published titles. But again, these figures are not easily accessible to the public.

Salah Chebaro, CEO of neelwafurat, estimates that the number of titles per year produced in Lebanon, Syria, Jordan, Egypt and KSA combined (which represents around 80% of the total production), is as follows:

- / 2011: 18,000 new titles, among which 2,700 in translation
- / 2012: 17,000 new titles, among which 2,400 in translation
- / 2013 (till August): 9,700 new titles, among which 1,150 in translation

Trying to validate this data with other sources is practically impossible, given the general lack of figures.

With all the mentioned reservations, we can say that the Arab world, with its population of over 362 million people in 2012 (according to the World Bank data), produces between 15,000 and 18,000 new titles per year, with print runs varying between 1,000 and 3,000 copies each (but literary fiction even in English speaking countries doesn't seem to have huge first print runs; cf. Ian Irvine p. 6). Which is the number of books produced in countries like Romania (with a population of 21.3millions in 2012), and Ukraine (population 45.6millions in 2012), and which is roughly the number of titles published yearly by Penguin Random House.

Insufficient readership

One very often repeated assertion is that "Arabs read six minutes a year on average". In January 2012, journalist Leah Caldwell tried to investigate its origine on the English website of Lebanese newspaper *al-Akhbar*: "The Arab Reader and the Myth of Six Minutes" shows that there is no statistical evidence of this number, and traces the myth back to misquotes of reports by UNESCO (2007), Next Page Foundation (2007), and the UN Arab Development Reports of 2002 and 2003. The assertion was widely relayed and used in the media with no genuine first-hand reference. It has also known some variations, like "Average Arab reads 4 pages a year", or "Arabs read an average of 6 pages a year".

At the opposite of this image, *Publishing Perspectives* posted a survey made by a Russian NGO in 2011 about readers around the world. The document places Egypt among the most reading nations, with 7:30 hours of reading per person per week, and KSA in the second most reading group, with 6:48 hours per person per week, whereas USA's average is 5:42 hours and UK's 5:18 hours.

Both extreme positions can be questioned, but far from propaganda and defensive positions, most Arab publishers agree that the reading rates are low in the Arab world. This can be partly explained by the literacy levels (average adult literacy rate by 72.9% according to UNDP's *Arab Development Challenges Report 2011*)

and the relatively low purchasing power in several Arab countries. But it has also certainly to do with the barriers to the freedom of cultural creation in many countries of the region, and the limitations of exchange between countries.

At the 1999 Beirut International Book Fair, Dar al-Jadid, a very selective Lebanese publisher, placed in its stand a real-size tomb, and wrote on the tombstone: “The Arab reader, until proven otherwise”. 12 years later, Rasha al-Ameer, director of Dar al-Jadid, considered that in the meantime, thanks to the technological progress and new media, reading and writing had gained in liberty in the Arab world, but that reading remained insufficient in countries still dominated by official discourses and ideologies.

Censorship and issues related to freedom of expression

Censorship of books and other cultural products is a common practice in the Arab world. Governments allege political, religious and moral reasons to censor written material. The censorship is known to be the strictest in KSA, and the less active in Lebanon, the other Arab countries ranging between those two extremes. A study published by RAND in 2009 about the *Barriers to the Broad Dissemination of Creative Works in the Arab World* reports that 90% of the 350 Dar al-Saqi titles were forbidden access to the 2008 Riyadh international book fair, and 230 new books out of 560 were banned from the 2007 Kuwait book exhibition. A leading Lebanese publisher gave me a significant example in an interview in August 2013 – that of a multi-volume history book about the Arabian Peninsula in the British Archives, which mainly covers the years after WWI: there is no country in GCC in which all the volumes were allowed; each country has banned the volume concerning its territory, and allowed the others. In many countries, books must be submitted to the censorship authority before being printed, and the permission to print can often be conditioned by demanded changes in the contents. In Egypt, a law imposing to submit books to the censorship authority exists since the 1970s, but it was never enforced. In Lebanon, publishers don’t submit books to the censorship before printing, but printed books can be banned if their contents seem politically sensitive or threatening to raise sectarian issues.

The overthrow of dictatorships in several Arab countries has arisen the hope of overcoming censorship. For example, enthusiastic accounts came from Tunisia and Egypt after the Revolutions, in 2011, celebrating the return on the bookshelves of books that had been banned under the previous regimes. But one year later, debates and protests started again when the post-revolution governments started to impose their own limitations on the freedom of expression. The decrease of political censorship threatened to be counterbalanced by an increase of religious censorship, and in the current, unstable, situation, the struggle for freedom of expression in all its forms is still on-going.

The existence of different regulations means that publishers have to overcome different sets of criteria to introduce their books in the different countries – supposing that the criteria are clearly set, which is rarely the case. Of course, as in other places at other times, banned literature can be sought-after literature, a ban can increase the sales, and books banned in one country will be bought by the nationals of that country in other ones. But censorship seems to have a particular impact on creativity in some sectors, for example when it comes to children’s literature. With a population of over 28 million people, KSA is one of the important markets in the Middle-East. Out of obvious commercial reasons, most Arab publishers of children’s literature

will exclude from their books any themes, images, or references that could ban their entry in KSA, even if these contents are allowed – or even relevant – in their own countries.

Difficulties of regional distribution and piracy

Like the censorship criteria, the commercial laws regulating the import of books vary from one country to another, making it difficult for any publisher to effectively reach the whole Arab market. In the absence of any panarab distribution structure, publishers must separately find different distribution channels in every country they wish to send their books to. In addition to this, the bookstore networks are deficient in several countries, according to the previously mentioned RAND report: the number of bookshops is relatively low, and those existing often lack a sufficiently wide offer. The number of bookshops in Gulf Cooperation Council (GCC) according to BQFP's sales department is as follows:

Country	Population in 2012 (WB data)	Bookshops
Bahrain	1.31 million	5 bookshops
KSA	28.28 million	3 big bookshop chains (Jarir (also available in UAE, Qatar and Kuwait), Obeikan and Tuhama) and more than 100 small bookshops or small selling points in hypermarkets and malls
Kuwait	3.25 million	7 bookshops
Oman	3.31 million	3 bookshops
Qatar	2.05 million	5 bookshops (WH Smith is the most recent one)
UAE	9.2 million	3 big bookshop chains (Kinokunya, Borders and Majroudy's) and another 50 to 60 small bookshops

(It must be noted that native Arabic speakers are only a part of the population living in GCC, which attracts a large number of foreign workers; so the bookshops offer foreign language books as much as – and often much more than – Arabic books).

In this context, Arab book fairs are an important channel for publishers to be present in the different Arab countries and collect direct orders from local bookstores, as explain a number of publishers interviewed in August 2013. According to BQFP's sales department, the importance of book-fairs for sales to individuals in GCC lies both in the scarcity of local bookstores and in the censorship: the books can get to the fair without passing through the censor, which is not the case when they are imported by bookstores. So for the time of the fair, a much larger offer than usual is available to readers.

In a presentation at the ADIBF in 2009, Bachar Chebaro, at that time General Manager of Arab Scientific Publishers and secretary general of the Arab Publishers Association, and now CEO of the recently founded Difaf Publishing, addressed this distribution problem, describing that “in place of an international distribution system, there exists a network to pirate bestselling books and academic texts, bringing these titles to other parts of the Arab world”. It must also be underlined that piracy doesn't only concern “other” markets; pirate editions of a printed book can often be found on the original market the book was published in, like it is

frequently the case in Egypt for example (figures about the extent of piracy are not available). And the development of online piracy doesn't seem to be less threatening than the piracy of print books, as noted at the March 2013 conference of the Arab publishers association.

Several Arabic websites offer a free download of books that are still in print and not free of rights. Here are some figures from the only one which is relatively "transparent" and presents indications about the volume of frequentation and downloads. It covers only a small part of the market but gives an idea about the frequency of downloads per genre of books (August 2013).

Figures from one website of free download of books: <http://www.aljlees.com/>

Genres	Books available	Total downloads	Average downloads p. title
Qur'an and Hadîth	227	1,489,822	6563
Books for iPhone and iPad	30	65,718	2190
Islamic ideology and fiqh	650	3,542,162	5449
Politics and essays	366	2,071,703	5660
Memoirs	98	676,633	6904
Children's books	67	399,700	5966
Novels and short stories	294	1,436,221	4885
Literature and Arabic language	325	1,834,379	5644
Computer	177	1,341,571	7579
History and Geography	104	658,212	6329
Law	129	906,187	7025
Medicine (vulg.) and Psychology	161	1,284,203	7976
Genealogy (of Arab tribes)	20	197,703	9885
Women, make-up, cooking	82	834,727	10180
Business, Economy and Human development	136	856,683	6299
Science	84	797,000	9488
Foreign language (mainly books about Islam)	59	255,256	4326

Of course, these figures don't necessarily mean that people read as many titles: when it is totally free, people tend to download more titles than they would read, sometimes to read them later, sometimes just to have them in case they are needed; but this doesn't mean that they would have paid, even a very small amount, to buy them.

Barriers to the development of publishing structures

In this difficult market, publishers find it hard to develop their structure and grow. Given the low purchasing power and the concurrence of pirated books, the selling prices of books have to remain relatively low. An Arab publisher will multiply the production costs of a book by 6 or 7 to determine its selling price, while the selling price equals 8 or 10 times the production costs for a foreign book. Subsequently, the margins of profit remain limited and don't allow the publisher to invest in the development of his company.

At the same time, the constraint of keeping the production costs very low result in a reduction of the editorial expenses: Arab publishing houses in general lack good editors, both because they can't afford salaries of qualified editors and because the publishing tradition doesn't include substantial editing of books (this second reason might be linked to the first one, but isn't totally explained by it). It is rarely considered the publisher's role to work on the submitted text and improve it in order to get the best result possible; publishers are often mere intermediaries between authors and printers. This mode of functioning limits the quantity of high quality literary production and impacts negatively foreign rights sales.

PUBLISHING IN QATAR AND BQFP

Bloomsbury Qatar Foundation Publishing(BQFP) is one of the two private publishers in Qatar; the other one is *Dar al-Thaqâfah*, which publishes mainly history titles related to the region and academic books. In the public sector, different organisms publish books, such as the Ministry of Culture, the Childhood Cultural Center, and Qatar Museums' Authority (MoC and QMA usually copublish their books with private publishers in GCC or elsewhere).

Qatar has accessed and enforced the Bern Convention on Intellectual Property in 2000. And even if the country is not a center of piracy, cases of piracy can be found, sometimes not even for commercial reasons: the MoC might distribute an Arabic book gratis with an issue of a cultural magazine, without the permission of the rights holders.

The average book prices in Qatar and in GCC in general are as follows:

- / Fiction PB: \$10-15
- / Non-fiction PB: \$10-20
- / Non-fiction HB: \$15-30
- / Illustrated children books: \$5-10
- / Children's encyclopedias: \$20-40

BQFP is owned by Qatar Foundation and managed by Bloomsbury Publishing Plc. Launched in April 2010 and headquartered in Doha, BQFP aims to publish books of excellence and originality in Arabic and English including fiction and non-fiction for adults and for children. As Qatar's leading publishing house, BQFP aims to promote the love of reading and writing, and to help establish a vibrant literary culture in Qatar and the Middle East through reading events, book groups and other initiatives. BQFP also wants to cultivate new literary talent by organizing creative writing workshops.

BQFP has published more than 140 titles to date, distributed as follows:

- / Arabic adults' books (fiction and non-fiction): 41 titles
- / Arabic YA books (fiction): 4 titles
- / Arabic children's books (illustrated and chapter books): 53 titles
- / English adults' books (fiction and non-fiction): 23 titles
- / English children's books: 6 titles
- / English Academic books: 16 titles

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