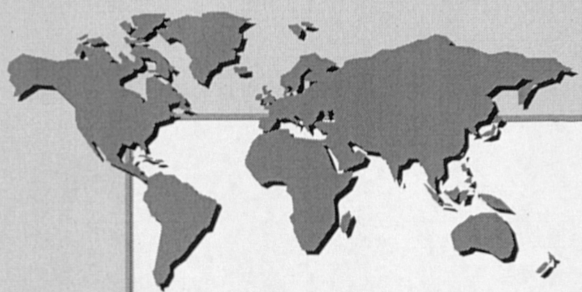
UNIVERSITY OF STIRLING



SCHOLARLY PUBLISHING IN MALAYSIA: A STUDY OF MARKETING ENVIRONMENT AND INFLUENCES ON READERSHIP BEHAVIOUR

A THESIS SUBMITTED AS FULFILMENT FOR THE Ph. D. DEGREE

BY

FIRDAUS AHMAD AZZAM

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This thesis is dedicated to
ALL BOOK LOVING PEOPLE

in particular,
Ahmad Azzam Hanafiah
&
Siti Zubaidah Hj Mohd Ali

who are writers, scholars...teachers and parents to ME!

and to
My hubby,

this is truly our work!

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MAY ALLAH BLESS US ALL!

PROLOGUE

"What have you lost?" asked wise old Nasreddin Hodja's neighbours, when they saw him looking for something in the street.

"I can't find my keys", replied Hodja, the hero of countries popular Middle Eastern folk tales.

"And where did it fall?" they asked, pitching in and looking for it, but to no avail.

"Somewhere inside my house."

"Then why are you looking for it out here?"

"Because out here there's more light."

Quoted from Preface in *Third World Guide 1991/92.*

ABSTRACT

SCHOLARLY PUBLISHING IN MALAYSIA: A STUDY OF MARKETING ENVIRONMENT AND INFLUENCES ON READERSHIP BEHAVIOUR

The role of publishing in the development of societies has been crucial, but many still tend to overlook the wider societal impact of publishing and concentrate purely on its direct economic contribution. The aim of this thesis is to draw attention to the wider impact of publishing as an instrument for the betterment of society. In particular the thesis examines the role of marketing in all its aspects in the publishing process at the international, national and industrial level (from inception to completion of publications). The study hopes to shed light on some of the environmental factors which affect publishing in general, publishing in the Malaysian context, and particularly scholarly publishing, which has its own peculiar traits. In order to have a clearer idea of the publishing scenario it is essential first to identify the symptoms; therefore it is important to examine the macro-marketing environment which constitutes the socio-political and commercial envelope in which the publishing industry resides, and then the micro-marketing environment and marketing systems which constitute the local industry level influences and internal company marketing force respectively.

Having looked at these aspects of the marketing environment, the research concentrates on the most crucial factor in the success of any business, the buyer. The importance of measuring consumer satisfaction also dictated why the researcher made use of questionnaires for lecturers and students as sources of primary data for this study. Lecturers' roles in marketing books indirectly should not be overlooked by publishers; their unique offering is the special ability to identify and satisfy students' needs, analogous to the role played by doctors in the marketing of pharmaceutical drugs. An investigation is made of consumers' profile (lecturers and students) in order to deduce their reading and buying behaviour, and further in the case of lecturers, writing proficiency. These findings may provide better understanding of the marketing ramifications emanating from the publishing process in general and scholarly publishing in particular. Although libraries are one of the primary customers for scholarly publications, the survey conducted with them was far smaller in scope than those conducted on lecturers and students since they merely act as intermediaries while the latter are the ultimate users of scholarly publications.

Scholars and publishers may co-operate happily in the writing and creating of scholarly books, but the publisher faces serious limitations upon his freedom to act purely for the betterment of scholarship. Thus, the focus of this study is how to bridge the gap between dissemination of knowledge through published means and the economics of publishing as a commercial concern. The notion of "social profit" is introduced to help deal with some of the conflicting concerns of scholarly publishers, as well as to argue against the normal argument of "social obligations" put forward by many government publishing agencies and university presses in Malaysia.

The study concludes that main factors which determine the present situation of scholarly publishing include the relative infancy of the publishing industry in Malaysia; the small market for publications, in particular scholarly publications; the emphasis on textbook production which has resulted in a dearth of books in other areas; frequent changes of language policy which have damaged publishing programmes in both English and bahasa Melayu; the poor reading habit of the population in general (notwithstanding the high literacy rate); and more distressingly for scholarly publishers, the poor reading habit of students and lecturers; the lack of understanding of the publishing process by people involved in the industry; insufficient numbers of good authors especially those who can write in bahasa Melayu; poor planning and distribution, and above all the absence of reliable and up to date information on the industry. It is hoped that this research will generate interest in this neglected, yet nevertheless important, area which is essential to the development and national well being.

An analysis of the marketing environment within the publishing business reveals the problems facing the industry, and suggests that a more appropriate system will be possible only when effective steps are taken to meet the needs of this industry and provide the needed support. This can only be realised by a detailed study to determine the long-term and short-term needs for books and other materials, and the various methods of meeting these needs. It is also important in determining how the industry can be strengthened and expanded to meet future needs.

Although government efforts have reflected the awareness of the importance of textbooks in developing and upgrading the standard of education in Malaysia, they have also resulted in some measure in discouraging scholarly publications within the publishing industry. The publishing business in Malaysia deserves greater attention because of the significant position of Malaysia in Asia and ASEAN sub-continent in particular, and the contribution of education to its economic and social development.

CONTENTS

Universities in Malaysia

1 University of Agriculture (UPM)

2 International Islamic University (UIA)

3 University of Malaya (UM)

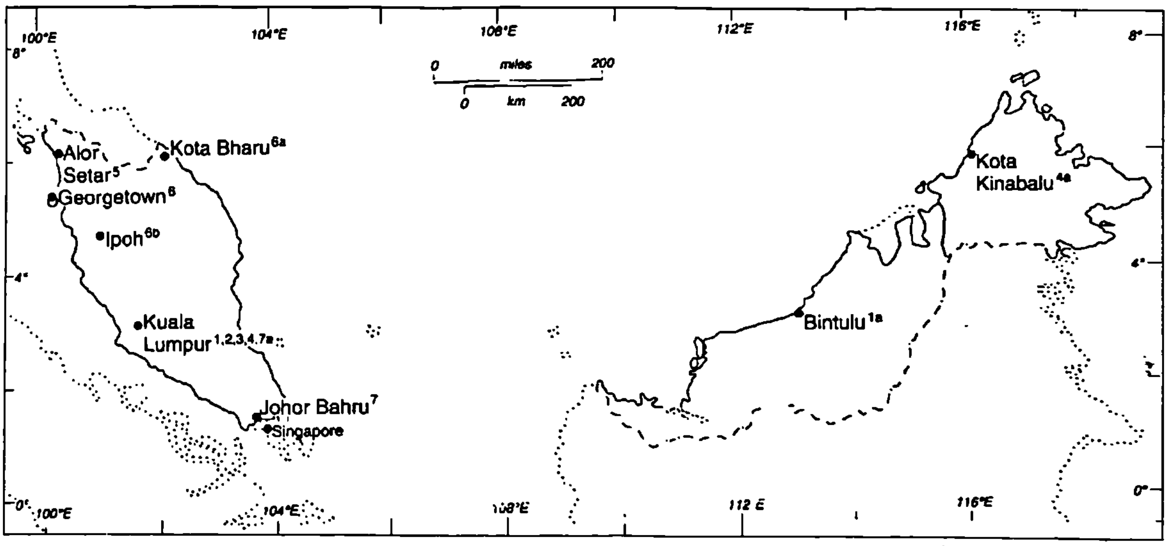
4 National University of Malaysia (UKM)

5 Northern University of Malaysia (UUM)

6 University of Science, Malaysia (USM)

7 University of Technology Malaysia (UTM)

NB: MARA Institute of Technology (ITM) is situated in Kuala Lumpur with its branches all over Malaysia while University Malaysia Sarawak is situated in Kuching, capital of Sarawak (both are not shown in the map)



The places named are the seats of the university institutions numbered above. Locations followed by a number and letter, e.g. 7a, are those of branch campuses, etc.

Malaysia (Map)

CHAPTER ONE

INTRODUCTION

1. INTRODUCTION

1.0 Introduction

The economic importance of the publishing business must be asserted, since it is often overlooked. Although books and other publications are not among the basic necessities or wants of life as described in Maslow's Theory of Hierarchy of Needs[1], neither can they be regarded as a luxury since without knowledge, what is Mankind? Man needs knowledge in order to achieve his full potential, and therefore channels must exist to disseminate this knowledge. In the past, information was transmitted primarily through word of mouth. Although this form can still be very effective, it has a limited potential to inform. Printing/Publishing, by dramatically increasing the sources of information available, has had a major impact on all aspects of life. This impact is illustrated by the fact that every major world religion values the written word in the form of a holy book. In Islam, the importance of reading is revealed in the first sentence to Mankind:

بِسْمِ ٱللَّهِ ٱلرَّحْمَٰنِ ٱلرَّحِيمِ
ٱقْرَأْ بِٱسْمِ رَبِّكَ ٱلَّذِى خَلَقَ ﴿١﴾ خَلَقَ ٱلْإِنسَٰنَ مِنْ عَلَقٍ ﴿٢﴾ ٱقْرَأْ وَرَبُّكَ
ٱلْأَكْرَمُ ﴿٣﴾ ٱلَّذِى عَلَّمَ بِٱلْقَلَمِ ﴿٤﴾ عَلَّمَ ٱلْإِنسَٰنَ مَا لَمْ يَعْلَمْ ﴿٥﴾

"Read, In the name of thy Lord who had created. Created man from clots of blood. Read, your Lord is the most bountiful One. Who by pen taught man. Taught man what he did not know..."[2]

The word "*Read*" has been repeated twice (in the first and third sentence) and in the fourth sentence the word read has been connected to "pen" in which God is not only the Creator but also teaches mankind the knowledge he did not know before. Knowledge could be gained through reading; thus pen and written materials are needed to disseminate the knowledge. However, those reading materials remain useless unless they are read by man. As for the

[1] Leon G. Schiffman & Leslie Lazar Kanuk, *Consumer Behaviour*, 5th edn, (New Jersey: Prentice-Hall International Inc.,1991), p. 109.
[2] Surah Al-'Alaq, *Al-Quran*, sentence 1 - 5.

Muslims, their main source of knowledge is the holy book Al-Qur'an and it should be read in order to gain knowledge as Al-Qur'an itself means "*The Reading*". Thus books and reading cannot be separated and together are an integral part of knowledge since knowledge which remains undisseminated is no knowledge at all.

Books as products are unique in their characteristics because in gaining profits, social obligations cannot be overlooked, in particular the dissemination of knowledge. The unique characteristics of books means that publishing should not be taken for granted (by all involved directly or indirectly with publishing). If a highly literate group with a reading habit is to emerge, the foundations must be laid early. Despite such special considerations, publishing should not be seen as intrinsically different from other endeavours.

New knowledge communicated in print should be suitable and transmitted in a way appropriate to its intended audience. Marketing is therefore important in deciding what books should be published and distributed to the audience. The application of marketing techniques in all aspects of the publishing business means that all employees should be aware of the role of marketing and not assume that the role of marketing is exclusively for the marketing department. The latter part of Chapter One discusses in detail the importance of general awareness and practice of marketing by all employees in the organisation.

This thesis also examines marketing in all aspects of the publishing process, from inception to completion. It studies the environmental factors in publishing in general, and in particular the Malaysian situation. It is hoped that this method will help to identify the symptoms of the problems afflicting scholarly publishing and aid in identifying remedies. As mentioned earlier, publishing is unique, yet similar to other businesses. In order to have a clearer picture of the publishing scenario, it is important first to understand the factors in the macro-environment that influence the marketing of publications and then examine the micro-marketing environment and marketing system in the publishing business.

Having looked at these two aspects of the environment, we examine the most crucial factor in any business, the buyer. This is the crux of any business, since without the consumer there would be no business. The concept of putting the buyer second, after profits, would not help an organisation in the long term. This also means that to put the interest of one party - the buyer - above the other - the seller is a distortion. A section in Chapter Four discusses theories of consumer behaviour in general and particularly those relating to the publishing business. Although not all theories related to marketing and consumers are discussed in detail, an attempt is made to relate these theories and concepts to the research presented in this study. The importance of the consumer also dictated why the researcher used consumer questionnaires, completed by lecturers and students, as primary sources of data for this study. Although libraries are one of the main customers for scholarly publications, the survey conducted with them was smaller in scale than those conducted on lecturers and students since the latter are the ultimate users of scholarly materials, while libraries are merely Information Retrieval Systems (intermediaries) geared to making ideas and data available.

There is a scarcity of research on scholarly publishing, although there are quite a number of academic projects completed by undergraduate and postgraduate students in and outside Malaysia[3] on the area of publishing in general. Although the number of such studies is encouraging, there is little reliable secondary source material available on the topic of marketing in publishing. This increases the importance of undergraduate and postgraduate studies; many of the studies written on the situation of the Malaysian publishing industry should not be neglected although they remain unpublished. Unfortunately little attention has hitherto been paid to their findings. Therefore, it is hoped that this research will generate interest in this neglected area of study that is important for the development of knowledge.

A wide range of questions were asked during the survey since the researcher needed to solicit views on all aspects, in particular aspects on which there is currently little information. Looking at the characteristics of students and lecturers, some information can be gathered about

[3] The researcher made an attempt to list the titles of theses/dissertations undertaken on publishing in Malaysia by students in and outside Malaysia, see Appendix 1.

the factors that influence them to read and buy scholarly books, and additionally, in the case of lecturers, to write. Scholars in academic institutions regard the dissemination of their findings through publication as being of prime importance.[4] Knowledge is advanced by individuals and groups carrying out research, but the total development of scholarly knowledge depends upon a maximum interchange of information and ideas between researchers in particular fields. Oral communication by personal discussions, seminars and lectures can be valuable but, unless it is documented, the knowledge is lost to posterity. As stressed by Archie Turnbull[5]:

> What we call a mushroom is just the flower. Below the surface of the soil, the real mushroom plant - called *mycelium* - is a spider-web network of interconnections. Scholarly exchange is just such a mycelium and personal communication is vital. It is that makes it impossible for the amateur to challenge an institutional, professional scholar, precisely because the amateur has access only to print, not to talk and exchange. This is vital to the business of the scholarly publisher. The scholarly publisher must be in direct informal contact with the cutting edge of new ideas, long before they get into print.

In America, an academic who fails to publish any research may well not be confirmed in his first appointment or may be held at an "efficiency bar" about mid-way through the career grade salary scale.[6] This has also begun to be the case with some universities in Malaysia in recent years.[7]

Lecturers' roles in marketing books indirectly should not be overlooked by publishers. The lecturer's unique offering is the special ability to identify and satisfy students' needs. An investigation is made of consumers' profile and the factors that influence their reading and buying habits. These findings may provide a better understanding of the marketing ramifications surrounding publishing in general, and scholarly publishing in particular.

However, not all scholarly authors are academics, and in the sciences, technology, medicine and law fields authors of scholarly works may be in commercial research institutions, hospitals,

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[4] P. H. Mann, *Author - Publisher Relationships in Scholarly Publishing*, Report No. 5416 (London: British Library Research and Development, 1978), p. 9.
[5] Archie Turnbull, a personal letter to the researcher, 20 April 1995.
[6] P. H. Mann, ibid., p. 11.
[7] This policy has been adopted by Northern University (UUM) for example and has resulted in increased numbers of research and publications undertaken by its lecturers.

legal practices and similar organisations. This means that there is ipso facto a bigger potential market for Scientific, Technical and Medical (STM) publications than for the Humanities. Therefore, in discussing scholarly publishers, research institutions are included among the main five types of scholarly publishers in Malaysia. In the questionnaires administered, however, only the lecturers were included because of the limitations detailed in Chapter Five under the heading Research Methodology. However, this caveat does not alter the fact that scholarly authors are virtually always people who are concerned in their day-to-day jobs with advancing the frontiers of knowledge. As many authors are academics, it is reasonable to concentrate on the position of academics in the general discussions, making special reference to non-academics only as and when the need arises.

It is important to note here that although every effort has been taken to provide information on marketing scholarly publications in Malaysia for which an extensive primary investigation has been undertaken on various aspects of buyers, due to some limitations, this study will not cover:
1) detailed statistical data and analysis of scholarly publishers, and
2) detailed statistical data and analysis of booksellers.

1.1 Definition of publishing, scholarly publishing and marketing

1.1.1 Publishing

Publishing is the business of producing copies of a book and distributing them to booksellers or to the public, in other words, "to publish" is "to make public".[8] Traditionally[9], the main function of publishing has been to deliver ideas through books produced in portable form, easily multiplied, convenient for reference and more or less durable. A publisher in general, therefore, performs three main functions:

i) editorial service, that is searching for potential manuscripts and developing and preparing them for printing (the publisher must find the scholar who wants to write a book, and then advise him about level of communication, length, use of data, etc.);

ii) production, i.e. designing the book and arranging for reproduction by the printer;

[8] Giles N. Clarke, *Inside Book Publishing* (London: Blueprint Publishing Limited, 1988) , p. 4.
[9] Modern day publishing is undergoing rapid transformations, therefore the traditional "book form" is not the only form of dissemination but is used for simplicity.

iii) sales, i.e. promotion in order to inform the target market, distribution to reach the market and selling to transfer ownership.

In order to realise the above, there are four basic players in the book industry: the publisher takes the risk, the author writes the manuscript, the printer reproduces the books, and the bookseller retails the book. It is the publisher who sets the whole publishing process in motion. Publishing is about risk and selling. If the publisher leaves it to the retailer to sell, he will soon be out of business. The retailer is just the means by which the publisher's sales manager achieves sales.

There are many types of books published; in most developing countries such as Malaysia, more emphasis is put on publishing to meet educational needs. Publishing for schools is considered both of lower risk and higher margin, attracting the majority of publishers. However this has created a void in other sectors of the industry which the government has had to fill. The high risk[10] attached to other publications, particularly scholarly books, has resulted in a lack of books written by local authors in the national language, *bahasa Melayu*, to fulfil the needs of students at the tertiary level of education.

1.1.2 Scholarly

The term **scholarly** as used within the framework of this research has a specific meaning. An analytical definition of 'scholarship' indicates the effort to discover and communicate serious general verifiable truths.[11] From this meaning it is difficult to identify the criteria used for classifying academic books produced by academic publishers. This is because the exact meaning of the concept 'scholarly' is not very clear as it can be applied to academic publications or higher education books.

[10] Scholarly publishing (including university textbooks) in some Western countries is a profitable business but that is not the case at present in Malaysia.
[11] Adapted from Shigeo Minowa, *Book Publishing in a Societal Context: Japan and the West* (Tokyo: Japan Scientific Societies Press, 1990), pp. 100 - 102 and P. H. Mann, op. cit., p. 6.

Scholarly publishing as defined by Bell[12], Graham[13] and Brice[14] can be summarised as the publishing of materials clearly related to the pursuit of knowledge, characterised by a highly specialised market, low print runs and correspondingly high prices. Other scholars such as Coser et al. also support the point of low print run and high prices as, according to him, a major feature of scholarly publishing is that money can be made on books that sell comparatively few copies. This is the reverse of trade publishing where, because of the cost involved, money can be lost on books that sell as many as 20,000 copies. Scholarly houses can earn a profit on a book that sells as few as 1,500 copies.[15]

However, whatever its application it embraces the idea of communicating knowledge and academic findings in printed books, monographs or journals as defined by Archie Turnbull that "scholarly publishing is the search for, the evaluation of, and the communication through print, of important new knowledge".[16] Brice defines a monograph as " a learned, detailed, thoroughly documented treatise covering exhaustively a small area of a field of learning".[17] According to UNESCO, a book must have a minimum of 49 pages, a cover, production of at least one copy published and made available to the public to dispense human knowledge.

These definitions are useful starting points as they strongly emphasise the scholarly and intellectual qualities of ublications with which scholarly publishing is so closely concerned. For the purpose of this study, in addition to the definition given earlier, it also includes the publishing of textbooks and reading materials to be used by students at higher learning institutions.

[12] J.G. Bell, 'The Proper Domain of Scholarly Publishing', *Scholarly Publishing*, 2, no. 1 (October 1970), p. 14.
[13] Gordon Graham, *From Authors ... What Publishers Do ... To Readers*, a leaflet (London: Butterworth and Company Publishers Ltd., 1992).
[14] Ashbel G. Brice, 'The Scholarly Monograph and the Hereafter', *Scholarly Publishing*, 5, no. 3, (April 1974), p. 219.
[15] Lewis A. Coser, Charles Kadushin and Walter W. Powell, *Books: The Culture and Commerce of Publishing* (Chicago: The University of Chicago Press, 1982), p. 57.
[16] Archie Turnbull, a personal letter to the researcher, 20 April 1995.
[17] Ashbel G. Brice, 'The Scholarly Monograph and the Hereafter', *Scholarly Publishing*, 5, no. 3, (April 1974), p. 219.

1.1.3 Marketing

Marketing encompasses more activities than most people think. It is practised and studied for many different purposes and therefore is defined in many ways, whether for academic, research, or applied business purposes. Marketing therefore, can be grouped into three categories: **management process, social philosophy and business orientation**. The Institute of Marketing defines marketing as a **management process** "responsible for identifying (marketing research), anticipating (planning and forecasting) and satisfying customer's requirements profitably (developing products, price structures, communications campaigns and distribution systems)."[18]

Baker describes marketing as "a process of exchange between individuals and to the benefit of the parties" [19] ; that includes the earlier definition and adds weight to the mutual value of the exchange, therefore representing the recognition of marketing as a **social philosophy**.

According to Philip Kotler, marketing is a **business orientation** in which individuals and groups obtain what they need from creating and exchanging product and value with others[20]; these roles must be constantly fulfilled by all those involved in any way with the publication of scholarly works. Traditionally, marketers considered that exchange focuses primarily on direct transfers of tangible entities between two parties. In reality, marketing exchanges are often indirect, may involve intangible and symbolic aspects, and more than two parties may participate[21], with this having increasingly become more apparent in our modern day societies.

The key element in marketing is the exchange between the customer and the supplier. Each party gives something of value to the other with the goal of satisfying their respective needs, and in the process both parties gain as in "You Win, I Win" and not " I Win , You Lose"[22]

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[18] Rick Brown, 'Marketing - A Function and A Philosophy', *Quarterly Review of Marketing*, (Spring/Summer, 1987), p. 25.
[19] Michael J. Baker, *The Macmillan Dictionary of Marketing and Advertising* (London: Macmillan, 1987), p. 120.
[20] Philip Kotler, *Marketing Management - Analysis, Planning, Implementation and Control*, 7th edn (N.J: Prentice-Hall International Editions, Englewood Cliffs, 1991), p 4.
[21] Richard P. Bagozzi, 'Marketing as Exchange' in *Marketing Classics*, ed. by Ben M. Enis & K. Cox, (Massachusetts: Allyn and Bacon, 1991), p. 33.
[22] Don Bathie, lecture notes, 20 September, 1994, M. Sc Marketing class, University of Stirling.

approach. If the exchange process only resulted in coercive or deceptive tactics where only one party gained at the expense of the other party, then it would not be considered a mutually satisfying exchange relationship.[23] In the normal buying contract, money is exchanged for a designed good or service. The customer lies at the heart of the process. But as will be shown in Chapters Two and Four, this is not the practice amongst the university presses in Malaysia where decisions to produce can be influenced by political rather than marketing considerations. Usually everything that the supplier does in the way of product, price, promotion, and distribution, i.e. the marketing mix, is adapted to market demand. Clearly the consumer lies at the very centre of business strategy, especially marketing. Thus, a section in Chapter Four is devoted to consumer behaviour and how it can be applied to the publishing industry. Chapter Two discusses the macro-marketing environment and its influence on the publishing industry.

1.2 The importance of marketing to the publishing business

The primary aim of every business from a shareholder perspective is to maximise profit/monetary gain which can be expressed in a simple equation as follows:

$$\boxed{\text{Profits} = \text{Income} - \text{Expenditure}}$$

Although profit is predominant (since it is the major shareholder objective) in most private companies, and social objectives are secondary, the same cannot be said of scholarly publishers, especially university presses, who are in business to increase social profit. Social profit can be defined as the return on a social investment; knowledge disseminated will lead to a more informed society which will work better, earn more, buy more and eventually lead to a better quality of life (in terms of wealth, health, education etc.). The social investment may include subsidies which are taken from taxpayers.

Therefore, in its simplified form:

[23] J Whyte, 'The Domain of Marketing' in *The Marketing Digest* (Oxford: Heinemann Professional Publishing, 1988) pp 53-62.

If	
Increased knowledge of population (leading to an informed and hardworking populace) + Income from price of publications	Total costs (including subsidies)

is above zero then there is a social profit, otherwise there is a social loss. Usually it requires one to quantify benefits in monetary form and to discount these by a required rate of return in order to ascertain the likely benefits of such investments; translation into a monetary format is not always desirable or possible. Governments should try to increase social profit but of course individual publishers cannot price publications at such a low price that there is a social profit to society while they go out of business.

Social profit can be increased by decreased use of tax payers' money, increased efficiency in operations and increased dissemination of knowledge. Scholarly publishers therefore can increase social profit more by increasing the availability of scholarly books, making them cheaper and more widely affordable than if they (scholarly publishers) had made high (excessive) profit as their goal.

Throughout this research, the term social obligations and social profits are used interchangeably. However, as will be clearly illustrated, although these terms refer to the same objective, the term social obligations as used by university presses and the like is sometimes used as a shield to cover up inefficiency. For example, scholarly publishers such as university presses cite social obligations as the reason why they do not aim towards a profit motive. However, they fail to realise that the use of financial management tools and the accompanying control can result in increased efficiency, lower cost and therefore lower price, which should yield increased readership, thus fulfilling their social obligations. The production of the number of titles is seen as a major measure for the fulfilment of social obligations. But how are these social obligations fulfilled when these titles are lying in warehouses collecting dust?

However the term social profit (and real social obligations) only holds true if the knowledge disseminated is greater than the total costs incurred, thus books lying in the warehouse and not disseminated would be considered a social loss.

Profit in the usual sense can be increased in two ways: either through an increase in income/sales revenue, e.g. by selling more books, or by cost reduction methods (giving lower royalties to authors or lower discounts to retailers, or increased efficiency in operations). Marketing is therefore concerned with the generation of revenue and profits through the delivery of customer-related values. This is true not only in activities such as advertising and personal selling, but also in the design of the product/service and the organisation, administration, and behaviour of the whole business. For example, while the books produced may give satisfaction to customers it is possible to lose business through the late delivery of books or a failure to reply adequately to an administrative query.

Marketing recognises a direct relationship between all aspects of the firm's attitude, behaviour and business activities: the delivery of customer-related values, the generation of sales revenues and the achievement of business objectives. While the adoption of a marketing approach to business development cannot guarantee success, failure to do so will guarantee eventual business failure.

The failure to achieve business objectives, even when the activity is based on customer-related values, is normally due to lack of expertise in implementation. For example, while the firm might recognise the need to know what customers think of a product, they may be unable to collect worthwhile information because they lack expertise in market research techniques. This thesis, therefore, is an attempt in understanding the problems faced by publishers in general, and by scholarly publishers in particular.

In publishing, like any other business, marketing has to be the driving force. The publisher has to be market oriented, **producing what the readers want and not just selling what it has produced**. The opinions of the marketing department are usually taken into consideration when making the initial decision to publish. The design, content and the appearance of the book will affect the sale. Therefore, marketing starts even before the title has been commissioned or received by the publisher; in other words - from inception to completion. The marketing people need to find out whether a particular book can be produced and sold, recommend a print run, and decide the appropriate price for the book.

It could be argued that, the market for a scholarly publication[24] is easy to identify, but to reach the intended reader and sell it to him is another matter. As Geiser[25] rightly points out:

> Scholarly marketing means focusing on specific audiences and specific ways to reach them, generally with a limited budget that demands both care and ingenuity in managing.

Though markets for scholarly books are readily identifiable, their marketing is quite complex. There is no single marketing channel that can be used for all publications and/or types (subjects) of books; an appropriate one must be understood and used for each publication. Success is dependent on the willingness of publishers to understand the environment within which they operate, to carry out necessary ground work, learning from past experiences, and understanding consumer behaviour. In other words, a proper management of marketing activities must deal with two broad sets of variables: those relating to the marketing mix and those that make up the marketing environment.[26] Hence, this research also attempts to investigate the marketing ramifications in scholarly publishing in Malaysia using these two broad sets of variables. Presently, it can be stated that scholarly publishing in Malaysia is confronted by enormous language, organisational and marketing difficulties, all of which need to be understood and addressed within the context of existing government regulations before any notable progress can be made.

Scholarly publishers in Malaysia can be considered small publishers who tend to be very specific in the choice of books they publish and, with less resources and correspondingly a small margin of error, must work hard at choosing and marketing their titles carefully, and at

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[24] Scholarly publishing is defined in section 1.1.2.
[25] Elizabeth Geiser et. al, *The Business of Book Publishing* (Colorado: Westview Press, 1985), p. 187.
[26] Philip Kotler, op. cit., p. 128.

developing authors and backlist. Indeed, niche publishing "allows small companies to concentrate their marketing efforts on a usually readily identifiable audience and, if they continue to commission and produce the right titles, a strong market base can be built up".[27] They can offer a more personal service to authors than larger organisations, but they might lose clients to bigger concerns as they cannot compete with the strength of big/conglomerate/multinational publishers.

The success of book publishing, like any other commodity, needs a clear perception of the product and buyer, and intelligent marketing to bring them together. Therefore marketing techniques deployed by other consumer-goods industries are also applicable to the marketing of scholarly publications, although the channels may vary. It usually takes a significant length of time to produce a book from manuscript to bound copy (in the West generally from 6 to 12 months but it can take up to five years for scholarly books in Malaysia) and then these lie collecting dust and sell very slowly[28]. Most small/scholarly publishers' cash is tied up in stock. The turnover of a publisher's stock of all books typically takes more than a year (although some will inevitably finish up as remainder stock). Already there arise two critical problems: estimating demand and cash flow.[29] The marketing department can help publishers lessen the risk associated with these two areas.

Therefore, it can be said that the success for scholarly/small publishers depends very much on their ability to acquire potentially saleable titles and to market them creatively and effectively within limited budgets. In the case of Malaysian scholarly publications, the competition from the 'established and renowned' western/multinational publishers makes it harder to acquire marketable manuscripts. In addition, the merit given by universities to lecturers who co-operate with international publishers is higher than to those who publish with locals even their own presses. This discourages good author-lecturers from sending manuscripts to local publishers.

[27] Clare J. Benfield, 'Marketing Activities for the Small, Independent Book Publisher' (unpublished MBA dissertation, University of Stirling, 1993), p. 57.
[28] Abdul Manaf Saad, 'Authorship and Readership of Scholarly Publications Among Malaysian Scholars: A Survey Report', A Working Paper presented at Developing ASEAN's Scholarly Publishing: A Regional Conference, Kuala Lumpur, 27 - 29 August 1990.
[29] Clare, op. cit., p. 58.

Furthermore, these publishers might lose out due to a small print run and a 'name' that is not well known. Thus, another reason for utilising marketing techniques is to help deal with competition.

Having explored the importance of marketing in the publishing business, certain questions need to be answered, such as: who is responsible for marketing implementation? and should marketing be viewed as a function or philosophy? Most publishing industry employees do not have clear views about the relationship between marketing and their own responsibility towards the implementation of corporate objectives. If marketing is to be applied in publishing, all areas in the enterprise from finance to production must take the responsibility for creating and increasing customers' satisfaction. Marketing should be viewed as both a function and philosophy. It should not be the sole responsibility of any specialised unit within the business or organisation but should encompass the whole business and represent the values of the organisation.

1.3 Scholarly publishing in the publishing business

1.3.1 Macro Viewpoint: A General View of Scholarly Publishing and the Communication of Knowledge

This section explores scholarly publishing from two perspectives. First, it examines scholarly publishing from a general or "macro" viewpoint, and secondly, from a viewpoint more specific to the Malaysian environment.

The "macro" viewpoint believes "publishing is an integral part of the intellectual and cultural system of any country"[30] and is affected by many "social, economical and political elements and by both national and international conditions and trends"[31]. It is thus an important element in the social structure that enables communication to be made between scholars who have common interests, as affirmed by Hawes:

[30] Philip G. Altbach, 'Publishing and the Intellectual System', *The Annals of the American Academy of Political and Social Sciences*, 421 (September 1975), p.2.
[31] Philip G. Altbach, ibid., p.3.

> Most typically, the university press book is written by a scholar to communicate information and ideas in his professional field. It conveys new knowledge or new interpretations, pre-eminently the results of his research. Its audience includes anyone who needs to know what the scholar has discovered. But it will typically seem difficult to understand or unimportant to anyone without some background in the author's subject.[32]

From the above, although it relates specifically to university presses, the functional aspect of scholarly publishers as conveyors of information in book form from one scholar to another is revealed. The expertise of a publisher is manifested by his ability to select appropriate manuscripts of high quality and to disseminate the scholarly knowledge amongst the maximum number of potential readers. The function of "publishing" a book must include the processes of selection, copy editing, pricing, production, marketing and distribution, many of which can be capital-intensive ventures. It is at this point the economics of publishing meet the demands of communication of knowledge, and specific marketing knowledge is required to facilitate profitable operation.

Few authors of scholarly books are dependent solely upon the income from books for survival, but most publishers must be sustained by the books they publish otherwise they go out of business. The well-known phrase "publish or perish", which is normally used in connection with academic careers is, in fact, just as appropriate for academic publishers who must publish (profitably) or perish. Social tradition generally favours that dissemination be economically self-supporting. No satisfactory system of general subsidy for scholarly publishing has yet been devised even in the UK and USA.[33] Although some funding bodies sponsor research, they are reluctant to subsidise the publication of these results.[34]

Generally, authors as scholars are primarily concerned with the dissemination of information and, for them, publication in book form is a traditionally convenient way of doing this. The scholar-author may be quite happy to receive his royalty cheque from time to time but making money is not the main object of the exercise, though the prestige gained by a scholar through

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[32] Ashbel G. Brice, 'The Scholarly Monograph and the Hereafter', *Scholarly Publishing*, 5 no. 3 (April 1974), p. 219.
[33] P. H. Mann, ibid, p. 7.
[34] P. H. Mann, op. cit, p. 7.

book publication undoubtedly helps his professional advancement and therefore his future income. Particularly in America, the contracts of academics without "tenure" can be terminated if they do not publish books at regular intervals. For the publisher, though he may be interested in the conveyance of knowledge from a researcher to colleagues around the world, the economics of publishing can never be ignored.

Black[35] states plainly that the scholarly publisher in both commercial and university environments must generate enough funds through the sale of his books to pay for the production of the next set of books. However, if the books published are not fast-selling, worsened by a poor state of the economy, then the scholarly publisher, in particular, is likely to suffer from "cash flow" problems. Put very simply, the money he gets from the books he publishes is little and trickles in too slowly to finance new books. In such circumstances, the publisher cannot ignore the economic pressures which bear upon him and has an extremely difficult task in trying to decide what books should be published because of their intrinsic value to scholarship (though they may lose money) and which books to publish for monetary rather than scholarly gains. As Bowen, referring to the American university presses, says: "a university publisher must operate in scale sufficient for survival."[36] Bell puts it more strongly: "a book that would bankrupt a scholarly publisher does not fall within the proper domain of scholarly publishing."[37]

The problem must now be apparent that whilst scholars and publishers may co-operate happily in the writing and creation of scholarly books, the publisher has serious limitations upon his freedom to act purely for the good of scholarship. Thus, the focus of this study is how to bridge the gap of dissemination of knowledge through published books and the economic needs of publishers in making them available to potential buyers (money, buyer behaviour, market factors, etc.). The study bases its findings on scholarly publishing (particularly from the consumers' perspective) in Malaysia.

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[35] Michael H Black, 'National and International Publishing in Relation to the Dissemination of Information in All Disciplines', *Aslib Proceedings* , 26 no. 11(November 1974), p. 421.
[36] Caroll G. Bowen, 'Considerations of Scale in Scholarly Publishing', *Scholarly Publishing*, 4, no. 2 (January 1973), p.123.
[37] J.G. Bell, op. cit., p. 14.

1.3.2 The Malaysian Situation

Within the Malaysian situation, publishing scholarly books is a high risk business that tends to be non-profit making, with those involved at best breaking even. The publishing industry in Malaysia averaged about 3,568 book titles annually over the period 1988-1992 of which approximately 26% were school textbooks (ranging from 18.3% to 32.2% of total titles per year) and 8.4% (ranging from 2.4% to 13.5% of total titles per year) of these could be categorised as scholarly/academic books (from table 1.3.2). These figures seem to contradict those widely reported[38] that over 60% were school books, 25-30% were general books (which include literary and creative works) and about 10% scholarly books. In an attempt to verify the reliability of the figures compiled, the researcher cross-referenced these with UNESCO figures. According to the UNESCO Statistical Yearbook for 1992 & 1993, there were 4,370 titles published in Malaysia in 1990 of which 1,409 were school textbooks (32.2%), and in 1991 there were 3,682 book titles of which 672 were school text books (18.3%), while for 1992 there were 3607 titles published of which 669 school textbooks (18.5%)[39]. These tended to support the figures compiled by the researcher. However it must be stressed that the originator of the UNESCO figures is also the National Library, although the researcher did not rely on figures quoted by library staff and carefully audited individual records to compile the figures.[40] The researcher in view of her experience in Malaysia, is of the opinion that the UNESCO and compiled figures provide a more reliable estimate of the breakdown by class for the number of titles. The previously quoted figures seem more reasonable for the number of copies published rather than for the number of titles, since school textbooks regularly have print runs in excess of 10, 000[41] while scholarly textbooks rarely exceed a print run of 2,000 copies. In view of the

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[38] See Shaari Abdullah, 'Marketing, Sales and Distribution Workshop DBP-UNESCO-AMEC', unpublished Report, 1993 (pp. 8, 27 and 31) in which he states that over 60% were school books, and Hassan Ahmad also stated this figure for school books including textbook written strictly according to the government curriculum, as well as all kinds of supplementary reading materials for school children, mostly examination-biased that tend to encourage parrot-learning and memorisation reading, such as "revision course", question-and-answer model books etc.; see Hassan Ahmad, 'Publication Programmes for the Enhancement of Reading Materials in the National Language in Malaysia' in *Bahasa , Sastera dan Buku* (Language, Literature and Books), (Kuala Lumpur: DBP, 1988), pp. 425 - 426. Asiah Daud in her dissertation reported that textbook publishing took up about 80% of the entire publishing business, see Asiah Daud, 'Publishing of Adult Non-Fiction in Malaysia: A Case Study of Dewan Bahasa dan Pustaka', (unpublished M. Phil dissertation, University of Stirling, 1987).

[39] See table 1.3.2.

[40] Prior to the classification scheme drawn up by the researcher there was no official breakdown of titles by school textbook, general and academic in Malaysia.

[41] Using UNESCO data, the average print run for school textbooks was calculated to be 8972 copies (6029000 copies / 672 titles; figures for 1991), UNESCO Yearbook, 1994, pp 7.77 - 7.78.

situation detailed above, many commercial publishers in Malaysia merely publish school textbooks[42], which sell in large quantities[43], and general publications and place the responsibility for publishing other types of publications on government institutions. This situation became more complicated when bahasa Melayu was made the compulsory teaching language for the tertiary education level from 1983. The use of bahasa Melayu at primary and secondary levels had been implemented in the 1960s and 1970s respectively.[44]

Hasrom Haron quoted the size of the publishing industry between M$ 300 million to $450 million of which the book publishing industry represented around M$250 million[45] (some other sources quoted book sales in Malaysia to be in the region of M$300 to $450m for 1991)[46] of which M$70 million came from textbooks (1991). This represents approximately M$19 per capita (for the book industry) i.e. 0.31% of per capita income (taking into account the book trade deficit). With the population of about 19m and the literacy rate of just above 88%, book publishing does not play a significant role in overall balance of trade. Table 1.3.1 shows the international trade of books and periodicals in Malaysia for selected years; the overall balance of trade was US $ - 47.9 million for year 1991.

[42] The influx of fly-by-night publishers who invested in publishing all kind of supplementary reading materials for exam-oriented learning tended to encourage parrot learning and memorisation reading which is a common phenomenon in many developing countries. This scenario led the researcher to investigate the method of learning in the higher learning institutions; the findings are shown in Chapter Six.
[43] The school textbook print runs range from as few as 10,000 to as many as 100,000 copies and supplementary reading materials for the school, from 5,000 to 15,000; scholarly books from 500 to 2,000 copies (on average 750 copies), and general books from 3,000 to 5,000 copies. Except in the case of school textbooks, it takes two to three years to sell out the first edition of general books, while academic books require an even longer period.
[44] Detailed discussion of government policies regarding the national language is in Chapter Two of the thesis.
[45] Hasrom Haron, 'Memorandum Industri Perbukuan Negara', a memorandum presented to the Ministry of Domestic Trade and Consumer Affairs, 1993, p. 10.
[46] It is hard to isolate the exact figure for book publishing in Malaysia as the industry is aggregated with the printing industry which recorded a turnover of $M1.24 bn in 1991, see Shaari Abdullah, op. cit., p. 13.

Table 1.3.1 International Trade of Books and Periodicals in Malaysia (in US $ million)

Books & Pamphlets	1980	1985	1990	1991
Export	2.2	4.1	9.70	11.6
Import	20.8	30.4	46.2	48.4
Balance	(18.6)	(26.3)	(36.5)	(36.8)
Newspapers/ Periodicals	1980	1985	1990	1991
Export	0.8	0.9	1.7	1.7
Import	4.9	11.5	13.2	12.8
Balance	(4.1)	(10.6)	(11.5)	(11.1)
Overall	(22.6)	(36.9)	(48.0)	(47.9)
Exchange Rate (M$/US $)	2.177	2.483	2.705	2.75

Note: Figures in brackets are deficits
SOURCE: *UNESCO Statistical Year Book, 1992 and 1993*

It has been quoted in a report that for 1990, the value of books imported was M$296,190 which was a mere 0.0007% of total imports and the value of M$111,166 for exports was only 0.0003% of total exports.[47] This figure however seems small and can be tested by taking the rough estimation for one course with a high ratio of imported books (e.g. Medical). Assuming 2700 students studying Medicine in all higher learning institutions and a mean expenditure of M$300[48] per student per year (with the assumption that all books are imported) the total for imported books easily exceeds M$810,000 (which is approximately £202,500). Figures derived from UNESCO Yearbook showed that the value of imports was US $ 48.7 million (1991) and US $ 46.2 million (1990). In order to ascertain the more reliable figure the researcher contacted the Malaysian Book Association (see table A3.1 in Appendix 3) which reaffirmed the UNESCO figures for 1991 figure with minimal differences. Such inaccurate reporting of figures is common for the publishing industry in Malaysia.

Malaysia at present runs a trade deficit in books since the home industry cannot supply all needs. Therefore, Dewan Bahasa dan Pustaka (DBP)[49] as the language and literary agency, became responsible for publishing not only school textbooks and other categories of publications but also university textbooks. DBP had started publishing scholarly books in 1965 but at this time it was difficult to get authors to write university textbooks in bahasa Melayu;

[47] See Yusoff Taib, 'Marketing Sales and Distribution with Special Reference to Dewan Bahasa dan Pustaka', Unpublished Report, 1993, p. 25. Shaari Abdullah quoted M$20 million of imports annually, op. cit., p. 34.
[48] Refer to Chapter Six on the amount of expenditure among students.
[49] DBP is discussed in detail in Chapters Four and Eight.

DBP therefore translated a number of English books to meet this demand. Books translated by DBP have mainly been textbooks that can be used by universities throughout Malaysia. In other words, basic textbooks were given priority publishing programmes;[50] see table 1.3.2 of the number of books published in Malaysia from 1988 to 1992.

Table 1.3.2 **Number of books published in Malaysia 1988 - 1992**

Year	School Textbooks	General	**Academic/Scholarly**	TOTAL
1988	865	1690	399	2954
1989	943	1866	416	3225
1990	1409	2547	414	4370
1991	772*	2643	267	3682
1992	669	2852	86	3607

SOURCE: Own compilation from unpublished resources at the National Library
N.B. * The number of titles quoted by UNESCO Yearbook 1993 states the figure as 672 contradicts data collected by the researcher from the National Library which states the figure as 772 titles for 1991.

The demand to publish is also supported by governmental policies which link career promotions to research and publications. Therefore, scholarly publishing seems assured of continued support. There is also a perceived need among faculty staff for improved marketing of Malaysian scholarly publications, even though their own buying patterns do not fully support this as will be shown later in this thesis. In addition, the establishment of publishing courses at two[51] institutions further compels the need for more academic publications in view of their assumed objectives.

PEPET (Committee of Higher Learning Publishers)[52] has organised several seminars, workshops and conferences relating to various aspects of scholarly publishing, with the aim specifically to enhance the knowledge of members on publishing activities but these have met with limited achievement. The problems facing higher learning publishers include shortage of

[50] Abdul Manaf Saad and Hasrom Haron, 'Financial Management and Marketing of Scholarly Books in Malaysia', a paper presented at the Seminar on Financial Management and Marketing for ASEAN Publishers of Scholarly and Trade Books at the Regional English Language Centre, Singapore, 27 - 29 August, 1991, p. 2.

[51] MARA Institute of Technology started to offer an undergraduate degree in Publishing in 1989, while University of Malaya started its Postgraduate Diploma in Publishing course in 1991 and a Masters program in 1995.

[52] The role play by PEPET is discussed in Chapter Two.

skilled staff and inefficiency in marketing their products as noted by Abdul Manaf Saad and Hasrom Haron: "Malaysian University Presses are small and weak in organisational structure. They lack qualified personnel especially in marketing department."[53]

Having studied the shortcomings of scholarly publishing, two proposals were outlined by PEPET in an effort to overcome these problems. First, the setting up of a single Malaysian University Press to co-ordinate and carry out publishing activities for all university presses. Second, the setting up of a Book Council for ASEAN (Association of South East Asian Nations) to facilitate co-ordination and co-operation among member countries. However, up to now, no action been taken by the authorities concerned.

There are several factors that affect the scholarly and secondary school textbook publishing industry, viz.: educational policies, language priorities and curricular orientations. In the past, these factors heavily influenced the structure and orientation of the textbook publishing industry in Malaysia.[54] Government rulings regarding education and textbooks significantly increased the textbook production business in Malaysia. In most cases, government efforts have reflected its awareness of the importance of textbooks in developing the standard of education in Malaysia, but they have also resulted in some measures discouraging scholarly publication within the publishing industry. Primarily, the problems that beset the publishing industry revolve around the establishment of the education institution. The cost of decolonising the educational system led to a specific emphasis on the textbooks used, since they are often the first representation of a new educational reality. This process also implied a need to de-colonise the publishing organisations involved in the textbook business, which placed emphasis on foreign books, expertise, printing capacity and technology. Although great efforts have been undertaken not only by government, but also by the private sector to improve the quality and quantity of textbooks, the publishing industry needs to give greater attention to quality primarily because of the role of education in Malaysia's development.

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[53]Abdul Manaf Saad and Hasrom Haron, 'Financial Management and Marketing of Scholarly Books in Malaysia', op. cit., pp. 2 - 3.

[54] Hassan Ahmad, op. cit, p. 424.

A brief analysis of the present situation suggests that the existing problems facing the publishing business, including scholarly publishing, in Malaysia can be grouped into **macro** and **micro environment** problems: the 'age' of the publishing industry itself, the emphasis on publishing books to meet the demand of education growth, government policies on the national language which lead to the urgent need to publish more books in bahasa Melayu, poor reading habit (notwithstanding the high literacy rate), lack of 'recognition' of publishing as an 'industry' by the government, lack of 'understanding' of the publishing system by people involved in the business, lack of good authors, poor planning and distribution, and above all, absence of reliable market information. These problems are discussed in detail in Chapters Two, Three and Four. A more appropriate approach will only be possible when effective steps are taken to rank the needs of this industry and give the support needed in complete harmony with local interests and requirements.

1.4 Research Objectives

An analysis of the marketing environment within the publishing business reveals the problems facing the industry, and suggests that a more appropriate system can only be realised by a detailed study to determine the long-term and short-term needs for books and other materials, and the various methods of meeting these needs. It is also important in determining how the industry can be strengthened and expanded to meet future needs. In addition, the publishing business in Malaysia deserves greater attention because of the significant position of Malaysia in Asia and ASEAN sub-continent in particular, and the contribution of education to its economic and social development.

This research, therefore, attempts to achieve the objectives as expanded below:

1) To examine the marketing opportunities and potential for the industry;

2) To gain an understanding of marketing aspects in scholarly publications and determine their problems, from getting the right author to write the manuscript, to selling the book to the target readers;

3) To explore the marketing ramifications involved in the publishing industry;

4) To suggest ways of improving buyer perception of books and ultimately to change buyer behaviour;

5) To relate the experiences of the publishing industry in some selected countries and suggest how Malaysian publishers can learn from their strategies and experiences;

6) To develop a marketing strategy which can be applied to the Malaysian scholarly publishing industry;

7) To acquire data on Malaysian scholars as prospective originators and consumers of scholarly publications such as books, journals and proceedings for use in their teaching, research and consultation activities;

8) To ascertain the scholars' views on library facilities and services, professional reading, authorship of scholarly publications, peer review system, technological advancement in the use of computers in the production of, and access (searches) to, scholarly publications;

9) To develop a data bank of indicators on scholars with regards to their scholarly publishing activities which can be used to formulate recommendations to relevant authorities on how to develop and strengthen scholarly (university and scientific) publishers in Malaysia, and

10) To investigate the flow of information about textbook adoptions at universities.

CHAPTER TWO

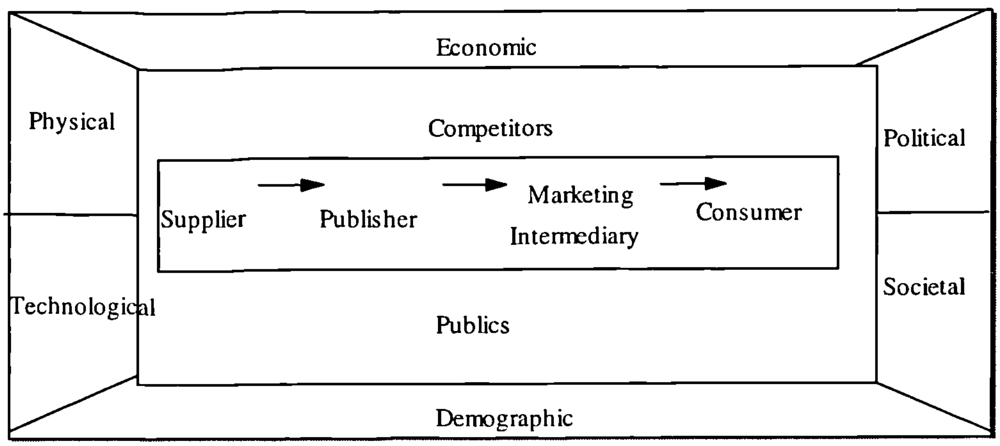
MACRO-MARKETING ENVIRONMENT

2. MACRO-MARKETING ENVIRONMENT

2.0 Introduction

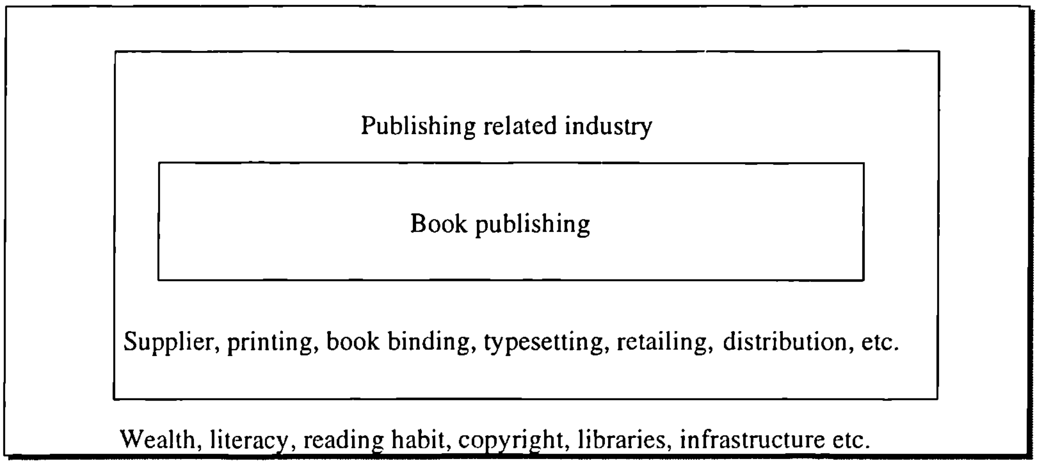
For a publisher, changes in the marketing environment create uncertainties which can manifest themselves either as threats or opportunities. The extent to which threats are countered and opportunities are grasped depends on the individual characteristics of the publisher in terms of its endemic strengths and weaknesses. Before analysing the strengths and weaknesses of scholarly publishers, attention is first given to the macro-marketing environment: political, cultural, technological and economic elements which appear as threats and opportunities. Although marketers cannot control or predict with certainty the future environment, they must try to anticipate likely scenarios, for example, how consumer preferences may have been influenced by historical perspectives and government policy. Cultural aspects, although not discussed in detail until Chapter Four, are also be identified and studied in relation to consumer reading and book buying characteristics. These macro and micro-marketing environments are illustrated in figure 2.0.1 while figure 2.0.2 refers to macro and micro-marketing environment in the publishing industry.

Figure 2.0.1 Major factors and actors in a publisher's marketing environment



SOURCE: Adaptated from Philip Kotler, *Marketing Management*, p. 129

Fig 2.0.2 Marketing environment in publishing industry



SOURCE: Adapted from Shigeo Minowa, *Book Publishing in a Societal Context*, p. 77

2.1 Forces in the Publisher's Macro-marketing Environment: Political

Business decisions are strongly affected by developments in the political environment. In this section, therefore, several aspects related to politics - historical perspectives, government policies on language and education, the copyright act and its enforcement, and roles played by various organisations including the Ministry of Education - will be discussed in as far as they affect the development of publishing.

2.1.1 Historical Perspectives

Historical Development of Publishing in Malaysia

Malaysia sits astride the Nusantara, the Southeast Asian archipelago covering a total area of 329,758 sq. km (of which Sabah and Sarawak cover 124,449 sq. km).[57] Most people live in Peninsular Malaysia (80.4%)[58] while the rest are in Sabah and Sarawak. The Malaysian system of administration is a hybrid based on several countries, particularly the UK, with the legal system inherited from the old colonial master. Malaysia became independent in 1957. The total population of Malaysia in 1993 was estimated at 19.239 millions [59] comprised of three principal racial groups: Malays (58.5%), Chinese (13.1%) and Indians (9.8%)[60], as well as the

[57] *The Far East and Australasia 1995: Twenty-Sixth Edition* (London: Europa Publications Limited, 1995), p. 542.
[58] Ibid.
[59] Ibid.
[60] Ibid.

indigenous races of Sarawak and Sabah.[61] The three principal socio-cultural groups (Malays, Chinese and Indians) have their origin within the colonial policy of 'divide and rule' which segregated them according to assumed economic potentials. The Malays[62] were traditionally involved in both farming in the padi fields, and also authorship of various works of literature. The Chinese were mostly involved in commercial activities and currently own most printing industries and publishing firms; the Chinese in fact dominate the Malaysian Book Publishers Association (MABOPA).[63] Thus Malays are the writers, Chinese own publishing companies[64], and Indians operate the retail outlets.

The printed word in Malaysia has had a short history, and very little evidence is available to give an accurate picture of the development of the publishing industry. Researchers reviewing the present situation of indigenous publishing are hampered by lack of relevant facts and data pertaining to the local book industry.[65]

In the 13th century, by the time the Islamic dynasty began to spread to Malacca and then throughout the Malay Archipelago, books on Islamic teachings were already in existence. These were written in 'Jawi' script (Arabic Alphabet) which became the main writing system for the Malay language. Six centuries later, with colonial influence, the Romanised or 'Rumi' script based on the Latin alphabet replaced the 'Jawi' script. During pre-independence days, Jawi script was taught in the Malay schools, but was replaced by Romanised script in the 1970s. As a result, few among the younger generation (below 40s) are able to write using Jawi script. This coupled with the shortage of typesetters, typists etc. has limited its impact on the publishing scene at present. This has hampered the development of bahasa Melayu as a language and understanding of Islam as a religion, as neither can be separated from the Jawi script. And although the government has made Islamic study at schools levels in Jawi

[61] *Whitaker's Almanac* (London: J. Whitaker & Sons Limited, 1995), p. 948.
[62] Malay and other indigenous races are categorised as bumiputera (sons of soil).
[63] The 1990 breakdown of MABOPA showed 101 members, the Bumiputera Publishers Association (IKATAN) had 37 of which only 13 were also members of MABOPA.
[64] *Whitaker's Almanac*, ibid., p. 1215.
[65] There have been a few studies on publishing history but with little reliable statistics, see appendix 1.

compulsory since the late 1980s in order to promote the script in the future, its impact is still far from sufficient.

The religious faculty were the intellectuals of the Malay community during the early period, and were actively involved in writing and interpreting holy books. These activities contributed to the development of the printing industry since there was a need to provide literature for Islamic adherents and converts. Other contributions[66] to the development of the printing industry came from secular historians who wrote accounts of the founding and development of the Malaccan Kingdom and sought the means of making them available to the general public.

West Malaysia (Semenanjung Tanah Melayu) was under Portuguese rule from 1511 - 1641, under Dutch rule 1641 - 1795 and ruled by the British from 1795 onwards. Under the British rule, publishing took shape in the 19th century, the period when the British consolidated their control over the Straits of Malacca. The earliest publishing activities started in 1806 in Penang[67] with the *Prince of Wales Gazette*. By the middle of the 19th century, there were books and articles about the Malay states in various journals, such as *Asiatic Researcher, Calcutta Review, Singapore Review* and *Straits Magazine.* However, these were all published in Hong Kong, London and Calcutta[68], in spite of the existence of a publishing company in Penang.

During the latter half of the nineteenth century, publishing in bahasa Melayu began to flourish under the influence of secular and religious historians. This renaissance was, however, restricted mainly to Singapore where a small elite group of literate Malays, Jawi Peranakan, Arabs, as well as some Malay-speaking Chinese, formed the readership, while the rest, being involved in subsistence farming, had neither the time nor money for such luxuries.

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66 Historical writings such as *Bustanul Salatin, Misa Melayu* and *Tuhfat al-Nafis.*
67 Constance M. Turnbull, *The Straits Settlements 1826 - 1867: Indian Presidency to Crown Colony* (London: Athlone Press, 1972), p. 130.
68 Khoo Kay Kim, *Persejarahan Malaysia* (Malaysian History), (Kuala Lumpur: DBP), p. 3.

The Publishing Companies: Initial Problems (1890 - 1960)

The beginnings of the Malaysian book publishing industry were directly linked to the printing industry, particularly when presses also had links with retail book-shops. Book-shops were established only in major cities, which created difficulties for buyers outwith these areas, and limited the target market. Increased literacy amongst Malays during this period acted as a catalyst but unfortunately was not fully utilised. By 1894, at least a quarter of the 23,060 Singaporean Malays were erudite in bahasa Melayu while rates for Penang and Malacca and other states were slightly lower.[69]

Prior to the Second World War, there were few indigenous publishers engaged in book publishing; most were new to publishing and lacked adequate expertise and resources including capital, editors, illustrators, cover-designers, translators, proof-readers, and typographers. Book production in bahasa Melayu presented further technical difficulties through inconsistencies in spelling and terminology. This was particularly acute for translations from other languages. As a result, publishing on a large-scale basis had not yet been regarded as adequately profitable, and was seen as fraught with high risks. The necessary entrepreneurial spirit had not yet emerged at this early period.

By 1957, there were only about 60 publishers operating in Malaya but the number increased thereafter, following the implementation of the National Curriculum in 1961 which emphasised more school textbooks with local background.

2.1.2 Government Policies on Language and Education and their Impact on the Publishing Business

For more than 13 centuries, bahasa Melayu was widely used in the many Malay maritime kingdoms of Peninsular and Insular Southeast Asia and is still one of the major spoken languages of the world (see table 3.1.1). The earliest usage seems to have been around the 7th century, when the Kerajaan Melayu (Malay Dynasty) in Sumatera proclaimed Malay as the official language. Later, towards the end of the century, when another Malay-Buddhist dynasty

69 Khoo Kay Kim, ibid, p. 51.

of Srivijaya emerged, bahasa Melayu was once again proclaimed as the official language of communication, trade and knowledge.[70] It is believed that during this period, the language began to spread to other parts of Southeast Asia.

For centuries, this region had been an important centre for international trade, and bahasa Melayu became a lingua franca for both commercial links and day to day activities among the populace. Merchants from various parts of the world traded in valuable merchandise, and during these contacts, new business terminology was acquired by the indigenous people who integrated them into their own vocabulary - a prerequisite for improved communication and trade. In this early period of development, the Malay language adopted terms from such diverse sources as Sanskrit, Chinese, Portuguese, Dutch, English and in particular Arabic, integrating and assimilating the words and phrases as necessity dictated. Modern bahasa Melayu can be divided into five different styles of languages, some of which owe their origin to these early days: standard, trade/bazaar, court, traditional literary and modern literary.[71]

The establishment of a formal educational system during the first half of the twentieth century brought advances in literacy. The teaching of the three **R's** (reading, writing and arithmetic) however, did not significantly nourish the fledgling publishing industry, especially scholarly publishing since the 3R's did not instil a high enough level of literacy to increase the market size. In addition, the adoption of English as the official language of administration and education meant that the fruits of increased literacy were not evenly spread. Bahasa Melayu became confined to the home and as a medium of instruction in primary schools. Over time this had a detrimental effect on the development of the language which came to be thought of as socially inferior and functionally deficient in terminology and lexical specialisation.[72]

At this time, primary education was available in four languages, namely English, Malay, Chinese, and Tamil, in somewhat parallel schooling systems, each serving different purposes.

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[70] Ismail Hussein, *Sejarah Pertumbuhan Bahasa Kebangsaan Kita* (Historical Growth of Our National Language) (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1984), p. vii.
[71] *Whitaker's Almanac* (London: J. Whitaker & Sons Limited, 1995), p. 1119.
[72] Nik Safiah Karim, *Bahasa Malaysia Syntax: Some Aspects of Its Standardisation* (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1978), p.9.

The demand for English speakers by the civil service and commercial organisations meant that English institutions had both higher economic and social value.[73] Malay medium schools, predominantly in rural areas, were the only form of compulsory education at elementary level for Malays (perhaps also for political reasons), while the Chinese and Tamil schools had an alien orientation which served the needs of a transient immigrant population: they were actually foreign models literally transplanted into Malaysia.[74] The only secondary-level education available in the urban areas was English-orientated, although Chinese schools also provided some secondary education. Hence, Malays and Indians had no schooling beyond primary level other than in Islamic religious schools for Muslims. The British then set up a Malay Translation Bureau in 1923 as part of the Department of Education in Kuala Lumpur. The Bureau was later attached to the prestigious Sultan Idris Teachers Training College in Tanjung Malim, Perak, where most of the later writers were trained. At this time, Malay textbooks were few, unlike books in the other languages, especially English, which were imported from England, Hong Kong and India. The first books published were the Malay School Series comprising textbooks for the training college itself and for primary schools, followed by the Malay Home Library Series, comprising well-known classics, children's stories, and books for more intellectual adults.

The government supported the indigenous publishing industry from the onset through guaranteed purchase of books translated from English.[75] The Bureau was later upgraded to a publishing organisation called Dewan Bahasa dan Pustaka (DBP) which has had a profound effect on publishing in the national lingua ever since. The objectives of the DBP were to:

i) Develop and enrich the national language.

ii) Promote literary talent, particularly in bahasa Melayu.

iii) Print or publish or assist in the printing or publication of materials in the national and other languages.

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[73] Salleh A., *Rationale and Philosophy of Education in Malaysia*, a paper presented at ASEAN Development Education Project (ADEP) (Kuala Lumpur, 1981), pp. 20 - 35.

[74] Salleh A., ibid, pp.20 - 35.

[75] Mahfudz H. A. Hamid, 'Current Problems in Malaysian Publishing and Printing: The Role of Government and Government-Sponsored Bodies', *Perpustakaan*, 1 - 2 (1966 - 67), p. 161.

iv) Establish standard spelling and pronunciation, and devise appropriate technical terms in bahasa Melayu.[76]

The desirability of setting up a language and literacy agency had been voiced by Malay intellectuals and numerous organised Malay bodies since the early 1950s.[77] In 1952, Kesatuan Persekutuan Guru-guru Melayu Semenanjung (Federation of Peninsular Malay Teachers Association) pressurised the government into up-grading the Malay Translation Bureau in order to make it a comprehensive language agency, similar to that of the Balai Pustaka (The Hall of Reading) in Indonesia.[78]

Besides DBP, there were a few other indigenous publishers at that time including Marican and Sons, Anthonian Press, Abbas Bandung, Saudara Sinaran Berhad, Pustaka Antara, Pustaka Melayu Baru, and Malaya Press. These publishers, besides publishing educational books, also undertook the publication of religious material, literary works (novels, anthologies of short stories, and poems) and some translations of foreign works.

Oxford University Press (OUP) was the first (1956) and the largest multinational publisher to set up in Malaysia (Malaya), having established a foothold through its close co-operation with the University of Malaya. Between 1954 and 1969, OUP assisted directly in the publishing programme of the University of Malaya Press through its representative on the University Publication Committee.[79] In 1969, OUP opened a new subsidiary company, *Fajar Bakti*, to concentrate on the production of school textbooks in the national language.

During the 1960s, other multinational publishers including *Longman, Macmillan, Far Eastern Publications, Heinemann Educational Books, McGraw-Hill, Preston,* and *Eastern Universities*

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[76] *Dewan Bahasa dan Pustaka Ordinance, 1959* (Kuala Lumpur, 1959), p. 1.

[77] The post-war period (Second World War) up to independence increased nationalistic sentiments amongst Malay intellectuals with the establishment of Angkatan Sasterawan 1950 (Generation of 1950 writers) and Lembaga Bahasa Melayu (Malay Language Institute).

[78] *Bahasa dan Sastera Nusantara: Sejarah dan Masa Depannya* (Language and Literature of the Archipelago: History and Its Future), (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1984), p. 11.

[79] Edward Lim, 'Problems of Publishing Journals in Malaysia' in *Scholarly Publishing in Southeast Asia*, ed. by Beda Lim (Kuala Lumpur, Association of Southeast Asian Institutions of Higher Learning, 1975), p. 58.

Press set up branches. They produced both English educational books and books in the national language, both original works and translations. The presence of these publishing firms in the country encouraged many indigenous publishers to improve the quality of their production. The introduction of new management techniques and professional standards in publishing encouraged competition, and the employment and training of local workers gradually transferred publishing techniques into the hands of the locals.[80]

Most multinational publishers were attracted to the publication of educational materials such as textbooks, teachers' guides, workbooks, examination guides for use in the English schools, as well as in the Malay, Chinese and Tamil languages. They also imported books from their parent companies for local distribution. Their powerful capital base, expertise in production, marketing, distribution and sales network as well as rights to successful textbooks have dominated the Malaysian publishing scene ever since. Such domination has undoubtedly hampered the growth and chances of the indigenous publishers, many of which can still only be categorised as small publishers.[81]

The new educational policy in 1957 provided the perfect opportunity for new entrants into the market. The demand for new textbooks which reflected local cultural demands could not be easily met by local publishers which had little expertise in textbook production and limited resources to devote to large scale restructuring of operations. This position greatly benefited the branches of multinational publishers who produced more local textbooks, as well as general books.

Between 1955 and 1969, books in indigenous languages, especially bahasa Melayu, improved considerably. The creation of Dewan Bahasa dan Pustaka allowed thousands of scientific and technical words to be translated into bahasa Melayu, and the writing and translation of many textbooks for the national schools, further developed the production of books in bahasa Melayu.

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[80] Sanusi Mahmud, 'Publishing for Schools in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1984), p.31.

[81] Yunus, 'Current Problems in Malaysian Publishing and Printing: The Role of the Private Sector', *Perpustakaan* (Library), 1 - 2 (Kuala Lumpur, 1966 - 67), pp. 164 - 169.

Although the emphasis on bahasa Melayu resulted in tremendous numbers of books being published in the language, there were serious problems such as inconsistencies in spelling and terminology which discouraged some academics from writing.[82] Some committee members who were in charge of selecting publications to publish have been too particular[83] even about small aspects of linguistics and terminology which further distract writers from writing. DBP has shown interest in standardising and simplifying these problems by organising many workshops and seminars regarding this matter.

The latest action initiated by DBP, with the co-operation of USM, aims to provide information on the language to the scholars on the World-Wide Web (WWW)[84]. Such a development may support the creation of a national information highway help to achieve Malaysia's aspiration of being a major information hub in the ASEAN region. Bahasa Melayu is not only the language of Malaysia, Indonesia and Brunei but it is also spoken in some other countries in ASEAN: Singapore, southern Thailand and southern Philippines. Unfortunately, there has been little research undertaken on linguistics and the development of language processing systems and tools, although in 1967 an agreement was reached with Indonesia to co-ordinate the spelling systems of bahasa Melayu and bahasa Indonesia and to increase their mutual intelligibility.[85] This arrangement has not been put to effective use, and differences still exist between the two strands of the language. Therefore, the Computer-Aided Translation Unit at USM, in a joint effort with DBP, aims to set up a Language Information Centre for bahasa Melayu on the Internet should be welcomed. The centre will primarily have various on-line monolingual and bilingual dictionary databases leading to the ultimate aim of having a general lexical database that contains all information about all words in bahasa Melayu, fully automated machine

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[82] During a Symposium of Publication of Scholarly Books in Bahasa Malaysia on the 28th of October, 1981, two-thirds of respondents admitted that they were facing such problems even though they had been continuously tackled by the government and various government agencies through the publications of standardised terminologies and spelling.

[83] Amir Hussin, 'Perlaksanaan dan Kemampuan Bahasa Melayu sebagai Bahasa Pengantar dalam Semua Bidang' (The Implementation of bahasa Melayu as a Medium of Instruction in all Subjects), Seminar Perlaksanaan Bahasa Malaysia, 4 & 5 Februari 1983, USM, p. 11.

[84] Zaharin Yusoff, 'Towards a Language Information Centre for Malay', unpublished seminar paper presented at MT Summit , 10 - 13 July 1995, Luxembourg.

[85] *Whitaker's Almanac*, op. cit., p. 1119.

translation systems, spell-checkers, rootword extractors, grammar checkers and etc. With the establishment of this centre, users of various levels world-wide will not only have access via the Internet to language databases in bahasa Melayu but also to a multitude of language processing tools.

As the population of Malaysia consisted of various races, there were also other languages other than bahasa Melayu and English being used. The Chinese used nine distinct dialects of Chinese such as Hakka, Foochow, Cantonese and Tiewchiu, while Indians used one of seven languages.[86]

The compulsory usage of bahasa Melayu in all schools since 1971, with English being relegated to the status of a second language (bilingual system), resulted in a decline in the standard of English[87]and restricted Malaysia's impact in the wider world. This has prompted the government to undertake measures to improve the teaching of English at all levels and to permit the use of English as medium of instruction at higher institutions starting very soon.[88] English is still the dominant/elite language in commerce/courts. The impact of English can be clearly seen by looking at figures for newspaper distribution. The most widely distributed and respected English daily is *New Straits Times* with a weekday circulation of 200,000 copies and 242,000 for the weekend edition; *Malay Mail* (in English language) sells 70,000 while *Berita Harian* and *Utusan Malaysia* both in bahasa Melayu sell 250,000 and 240,000 copies respectively.[89]

86 *Whitaker's Almanac*, p. 1119.

87 The ineffective implementation of the bilingual policy in schools has contributed to the lack of linguistic ability which reduces the appeal of books.

88 Announcement made by the Prime Minister regarding this matter was taken with mixed feeling from various parties. During his visit to London (14/3/95) he announced that the bill to ammend the University and University College Act might be tabled in parliament very soon, perhaps April and would be implemented in the coming session (1995).

89 George Thomas Kurian, *Encyclopedia of the Third World* (London: Facts on File,1992), 4th ed., p. 1217.

The Publishing Companies (1960-1995)

A few local publishers like *Malaya Press, Anthonian Stores* and *Sinaran Brothers* established themselves at the same time as the multinational publishers, but most of them were small and financially handicapped. When the national educational policy was widely implemented in the 1960s, many more indigenous publishing houses emerged such as *Penerbit Karyawan, Penerbitan Titiwangsa, Penerbitan Gunung Tahan, Penerbitan Maha, Penerbitan Utara, Penerbitan Pustaka Murni, Penerbitan Setia Murni, Penerbitan Gelora* and *Pustaka Muda.* The national language campaign conducted during this period greatly widened the scope for Malay books and attracted indigenous publishers. However, multinational publishers also benefited considerably and still dominated the industry.

The 1970s were the most important years for textbook development in Malaysia, especially with the adoption of the national language (bahasa Melayu). The national language began to replace English as the medium of instruction in all schools, and tremendous changes in the curriculum were initiated. Table 2.1.1 shows the distribution of book titles published by languages from 1966 and 1992 while table 2.1.2 shows the distribution by categories of language. As up to date data on number of titles published are not available an attempt was made to nowcast[90] titles for the period of 1993 to 1995. Providing the historical trend has continued over the last three years the 1995 figure for the number of titles is expected to be in the region of 5000 titles, see figure 2.1.1.

[90] Nowcasting is a term used to refer to the use of forecasting techniques to estimate the present situation in the event that current data is not available. For a detail explanation of the model used, see appendix 2.

TABLE 2.1.1 **NUMBER OF TITLES PUBLISHED IN MALAYSIA 1966 - 1992**

Year	B.Melayu	English	Chinese	Tamil	Others	No. of Titles	No. of serials only
1966	314	83	134	15	17	563	
1967	341	136	na	2	4	*483	
1968	374	213	2	11	49	649	
1969	396	544	129	44	71	1184	
1970	483	239	96	15	41	874	
1971	593	480	43	5	81	1202	
1972	516	524	40	15	130	1225(1325)	
1973	469	417	70	15	111	1082	
1974	553	512	24	7	141	1237	
1975	613	640	68	4	120	1445	
1976	681	464	31	11	85	1272	
1977	643	547	24	30	97	1341	
1978	624	467	49	51	137	1328	
1979	991	792	98	44	112	2037	
1980	1118	550	177	8	95	1948	
1981	1654	548	85	12	57	2356	
1982	1699	919	96	23	64	2801	
1983	1997	1067	282	17	171	3534	
1984	2582	1072	147	9	165	3975	
1985	1458	876	129	30	61	2554	
1986	1943	966	163	14	311	3397	
1987	1931	788	75	27	167	2988	
1988	1985	861	4	3	151	3004	
1989	1908	893	341	4	202	3348	187
1990	2498	1074	734	18	254	4578	173
1991	1607	989	324	4	190	3748	123
1992	1760	1009	658	30	298	3695	104

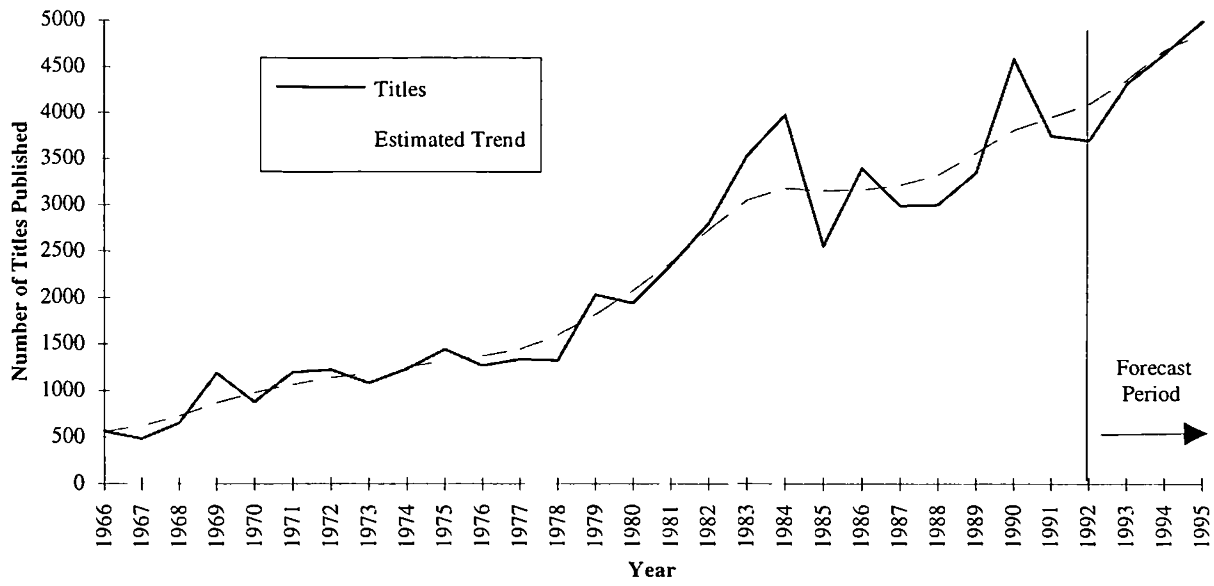
SOURCE: Own compilation from unpublished documents from various sources, mainly from the National Library. NB: i) Figures for the number of serials from 1966 to 1988 are not available. ii) * Titles for 1967 not including Chinese. (iii) Figure in bracket is from additional source. iv) na = not available.

TABLE 2.1.2 **NUMBER OF ALL TITLES PUBLISHED BY CATEGORIES AND LANGUAGES, 1988 - 1992**

Language	Category	1988	1989	1990	1991	1992
B. Melayu	School Textbooks	725	568	803	567	397
	General	1018	997	1285	1445	1281
	Academic/Scholarly	219	275	323	203	82
English	School Textbooks	135	182	161	107	141
	General	559	550	759	820	759
	Academic/Scholarly	151	118	78	62	2
Chinese	School Textbooks	1	170	402	83	99
	General	1	162	315	237	556
	Academic/Scholarly	0	7	7	1	0
Tamil	School Textbooks	0	2	5	1	4
	General	1	2	13	3	26
	Academic/Scholarly	0	0	0	0	0
Unknown/others	School Textbooks	4	21	38	14	28
	General	111	155	175	138	230
	Academic/Scholarly	29	16	6	1	2
TOTAL	School Textbooks	865	943	1409	772	669
	General	1690	1866	2547	2643	2852
	Academic/Scholarly	399	416	414	267	86
	TOTAL	2954	3225	4370	3682	3607

SOURCE: Unpublished sources from the National Library

Figure 2.1.1 **Number of titles and estimated trend published; 1966 - 1995**



Note: See table A2.1 in Appendix 2 for detail results.

Apart from these indigenous and multinational publishers, there are also eight university presses (although ITM is considered as a technology institution, in this survey it is regarded as a university) that established themselves in the 1980s, and engaged in scholarly publishing both in Malay and English, in addition to research institutes and learned societies. These presses have similar handicaps to other publishers including lack of proper trained personnel, competent writers, finance, distribution channels, and sales techniques, and experience in the book trade. At present their publishing output is not very encouraging, as will be described in Chapter Four. Suggestions have been made to establish a joint university press to help alleviate some basic problems.

Today, most English language scholarly books for tertiary institutions are imported. Locally-published books dominate only the primary and secondary levels. Authors are encouraged to write scholarly publications in the national language, and strides in this area will become more evident in the years ahead.

Although the indigenous publishing industry has not fully developed, there are signs that the future is bright, providing governmental support is available. The formation of various interest groups and associations, prominent among them are the Malaysian Book Publishers Association (MABOPA), Malaysian Booksellers Association (MBSA), Federation of National Writers' Association of Malaysia (GAPENA), the Malaysian Translators Association (PPM), National Book Development Council (MKBK), and Malaysian Higher Learning Publication Committee (PEPET), could prove a catalyst towards the development of the industry.

2.1.3 Copyright Act and its Enforcement

For as long as man has put pen to paper theft of intellectual property has existed, robbing individuals of the right to profit by the suggest fruits of their labour. There was no copyright law before the invention of the printing press nor was there a copyright law in the first two-and-a half centuries after the invention of the printing press.[91] It is estimated that book piracy cost British publishers in Malaysia alone £4 million in lost sales during 1986.[92] Piracy may be rampant because of the high royalties (10 - 20%) demanded on reprints and translation rights as well as large advances (£300 - £500).[93] These figures are likely to price books outside the

[91] 'Copyright and Digital Library' in *Communications of the ACM*, April 95 Vol 38 no. 3 , p. 16.
[92] Firdaus Ahmad Azzam, 'Piracy and Legislative Copyright Problems' (unpublished M. Phil dissertation, University of Stirling, 1991), p. 96.
[93] A survey of the piracy of British copyright works in eight territories, compiled by the Publishers

reach of many would-be buyers, especially students, who like their counterparts in other countries, have a large appetite for such material but lack financial means. Seizures of materials resulting from book piracy during the period 1/12/87 to 31/8/90 totalled approximately M$184,000 with the vast majority being seized in the Federal District of Kuala Lumpur (M$87,000) and Johore Bharu (M$82,000). These represent only the tip of the iceberg and actually indicate the lack of enforcement by authorities given the total estimate of US$32 million.[94] The same survey estimated that 1.4 million pirate books (approximately £15 million worth) were circulating in Singapore, Malaysia, Thailand, Indonesia and Hong Kong each year, with Singapore assuming the role of world piracy capital. Such large copyright infringements mainly occur in developing countries where the low purchasing power of the population provides fertile ground.

Piracy does not affect only the creators of intellectual property, or the distributors, but all the elements in the chain from inception to completion. Authors and publishers are the most visible sufferers through lost revenue, but this may not be the only damage inflicted. Potential authors may be hindered from writing manuscripts due to the diminished rewards, which act as a barrier to entry and may force many publishers to go out of business. Most publishers use the cash-flow from a few successful titles to finance the many which fail; pirates have no such factors to counter, they merely pick and choose successful titles. The same publisher may also produce pirate copies in addition to the declared quantity. In addition, countries with lax copyright laws may be subject to an unofficial embargo by publishers from other countries who refuse to allow reprints in that country.

Moving further up the chain, the distributors and outlets also suffer since they must make a profit in order to survive but their costs are high not just for stock but also for premises and overheads. Pirates usually have a lower cost base and sell mostly from the "back of the lorry". Ultimately the consumers also suffer since all other participants in the chain try to recoup their losses by passing on some of their costs to the consumer. This is in turn prices out many

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Association and the International Federation of Phonogram and Videogram Producers on behalf of the UK Anti-Piracy Group, 1986.

[94] Firdaus Ahmad Azzam , op. cit., p. 95.

consumers who then turn to the black market to meet their needs and thus the vicious circle continues. Malaysia's Copyright Act is considered to be one of the best in Asia, but unfortunately the authorities have not taken this responsibility seriously. Although they may be unaware of it, they also suffer from copyright infringement through lost taxes, both on the sale price of publications, and corporate profits of publishers and retailers. This in turn reduces the level of subsidies available to the arts and has a detrimental effect on society.

Malaysia adhered to the Berne Convention in 1990 which aims to protect intellectual property. Although much has been done to remedy what was wrong before, much still remains to be done. In particular, criminal penalties need to be strengthened to be commensurate with the severity of the damage, authorities must be equipped with greater resources and given greater jurisdictions to search and seize, not just stocks, but also profits made from clandestine activities. The Copyright Act 1987 (amended 1991) provides extensive protection against a variety of infringements, but its implementation is to say the least patchy. At times it can be difficult to prove that an infringement has occurred since pirate publishers sell pirate and legal copies through the same outlets. Perhaps the Enforcement Department within the Ministry of Home Affairs should be given more funds from the seized illegal profits to improve their effectiveness. The public should be taught to appreciate intellectual property better and this should begin at all levels, as those who are supposed to protect the intellectual property seem to infringe the law. In a survey undertaken amongst ITM students,[95] around 24% of students owned up to using photocopy machines to copy books, citing costs as the main reason for doing so. The ready availability of photocopy machines in all higher learning institutions in Malaysia encourages the infringement of the Copyright Act through the misuse of such facilities,[96] which is aggravated by the ignorance and selfishness of individuals.[97] Although complete non-

[95] Firdaus Ahmad Azzam, pp 75 - 81.

[96] It is a common thing to ask people at the photocopy shop to reproduce a whole book with the cost being favourable compared to buying the book.

[97] During interviews with the lecturers, some lecturers justified infringing the Copyright Act by arguing that they could not afford to buy all their books as their salary was low compared to the price of books. As a solution, they themselves photocopy the books and even let students borrow their personal copy to photocopy.

infringement is neither possible or desirable (since limited leakage can have positive affects as a form of marketing, as in the software industry[98]) rampant piracy is highly dangerous. Eradication of piracy and its related problems largely depends on the ability of governmental authorities to enforce the Copyright Act. Enforcement subsequently depends on society's understanding of the evils of piracy and its willingness and commitment to preserve the culture of literary creation through decisive vigilance in responding favourably to enforcement programmes. If the copyright legislation and enforcement are weak, the future of a clean publishing environment is likely to remain bleak.

2.1.4 Role of Ministry of Education (MKBK), PEPET, MABOPA, MBIA, MBA, IKATAN and GAPENA

MKBK (National Book Development Council)

As far back as 1966, UNESCO (at a meeting in Tokyo, Japan) urged all countries in Asia-Pacific to establish a body for the development of books and to inculcate the reading habit among the society. The National Book Development Council (MKBK) was established in 1968 under the Ministry of Education with this in mind. However, several problems have hindered the functioning of the body, especially a lack of funds which have resulted in its inability to carry out its activities. At present, MKBK receives its funding from the government from time to time, contributions from several associations, government agencies, personal donations, and from its activities such as the annual National Book Fair.

MKBK was established to achieve several objectives including advising the Minister of Education regarding the development and usage of books, to promote the reading habit, to encourage the development of professionalism in book publishing and to conduct research in marketing and production of books. Its membership is open to government agencies and representatives of professional bodies involved in book development, businesses and those who are acknowledged to contribute to the development of books, including voluntary agencies.

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98 William S. Strong, 'Copyright in the New World of Electronic Publishing',a paper presented at the workshop Electronic Publishing Issues II at the Association of American University Presses (AAUP) Annual Meeting, Washington, D.C., 17 June, 1994

Organising the Book Fair is perhaps the most successful activity of MKBK besides the National Book Awards ceremony which is held annually. Even though MKBK has been in existence for nearly 30 years, the body lacks information on book publishing business[99] and operates only as an ad-hoc committee under the Ministry of Education. And with only two staff seconded[100] to its secretariat, one cannot expect much from MKBK.

Regarding the Book Fair, to its credit it has been successful in promoting a reading habit among the public and marketing books for publishers. MKBK has organised the Malaysian Book Fair (with the co-operation of several associations including MABOPA, MBSA and MBIA) since 1982. During the fair, the public are encouraged to buy books from both local and international exhibitors. They are also exposed to different types of promotions encouraging reading habit amongst all levels of society. Although they need to pay fees to participate in the fair, publishers and booksellers benefit by enjoying substantial income[101] from the fair and this is reflected in the number of stalls. Table 2.1.3 details the number of participants, stalls, titles exhibited and amount of sales during the National Book Fair from 1982-1993.

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99 During the interview with the secretariat, the researcher was faced with scarcity of data on book publishing in particular figures on scholarly publishing.

100 There were only two staff at the time when the researcher was undertaking the present survey.

101 Questionnaires distributed by MKBK and ITM were not able to reveal detailed figures as most publishers were reluctant to declare profits.

Table 2.1.3 **Number of Book Fair participants, stalls, titles exhibited, visitors and amount of sales collected**

Year	No. of Participants	No. of Stalls	No. of Titles	No. of Visitors	Amount of Sales (M$)
1982	100 (50)	129 (123)	25,000	45,000 (40,000)	150,000
1983	55	137	30,000	(70,000)	(511,000)
1984	54	194 (189)	38,000	125,000	1.15 m
1985	100	270	15,000	250,000	2.4 m
1986	80	295	60,000	190,000	738,897
1987	75	179 (244)	45,000	160,000 (60,000)	542,474 (540,000)
1988	120	254	50,000	133,135(200,000)	346,490
1989	97	270	50,000	220,922(220,000)	(1.5 m)
1990	94	278 (278)	50,000	300,000	2.95m
1991	105	319	66,000	350,000	2.5 m
1992	104	289	41,000	545,481	3.0 m
1993	107	296	43,367	334,297	2 m

SOURCE: A Report on Book Fair 1983 - 1993 by ITM and MKBK. Note that the figures in brackets are from an additional source[102]

PEPET (Higher Learning Institutions Publishers' Committee)

In view of the problems faced by scholarly publishers, an effort was made to remedy the effects through the establishment of PEPET. The supervisory committee of PEPET consists of the heads of all university scholarly publishing departments, heads of four leading research bodies, and DBP with the following objectives:

i) to develop and enhance scholarly publishing in Malaysia, particularly among the university presses and research institutes;

ii) to co-ordinate the efforts of and increase co-operation among the university presses, DBP and research institutes;

iii) to seek solutions to problems pertaining to all aspects of scholarly publishing - policy, finance, structure, organisation and staffing, editing, production, promotion, and marketing; and

iv) to create an information network among members to reduce duplication and the wastage of resources, time, and funds.

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[102]Source available from Lim Bee Ling, 'Satu Dekad Pesta Buku' (A Decade of Malaysian Book Fair) (unpublished BA Hons dissertation, University of Malaya, 1991/92.

The enormity of the shortcomings and their effect on scholarly publishing in Malaysia forced PEPET (in 1993) to propose to the Ministry of Education the establishment of a central Malaysian Scholarly Press dedicated to scholarly publishing to address the needs of higher learning and tertiary education in bahasa Melayu. PEPET believed a stable and sound scholarly publishing programme could prove a reliable means to disseminate scholarly research works and findings, and subsequently improve scholarship in Malaysia. Further progress and development will be retarded if the scholarly publishing infrastructure remains weak, under-developed and not adequately funded. At present there is no news regarding the matter.

MABOPA (Malaysian Book Publishers Association)

In addition to MKBK, MABOPA was established in 1967 following the recommendations of UNESCO and was officially registered on 14 January 1969. The main objectives of MABOPA are to unite all publishers in the country in order to work together towards the development of book publishing and consequently inculcate a reading habit amongst the populace.

In the early part of its establishment, the society was relatively inactive due to the small number of registered membership: see table 2.1.4 for the membership of MABOPA from 1967 to 1993. The membership of MABOPA does not reveal the real number of publishers (not all publishers join MABOPA) as there were 107 publishers registered with the National Library and allocated ISBN numbers in 1991 with only 105 were members of MABOPA (same as in 1990). In addition there are some publishers who publish books without ISBN numbers. In an attempt to get the number of publishers existing in Malaysia, the researcher used another source. Publishers' International ISBN Directory 1992/93 - which showed that there were 850 publishers based on the ISBN system whether were actively publishing or had recently published. This figure seems to be much higher than the figure from MABOPA. This is due to the fact that some of the publishers listed in the directory are not "real" publishers in any sense of the word but those who have published some publications and asked for a ISBN. For example, the researcher during her time at ITM had published three publications, as part of the course project with her students in which the students were divided into two groups/publishers, and these two "publishers" were listed in the directory. Some other publishers include banks, private and government agencies which published a *prospectus*, *report or commercial* publication.

Table 2.1.4 **Membership of MABOPA from 1967 -1993**

Year	Membership	Year	Membership
1967	17	1987	72
1968	18	1988	76
1968	18	1989	93
1984	55	1990	101
1985	64	1991	104
1986	68	1993	105

SOURCE: Own compilation from various sources

MABOPA has been actively involved in the development of book publishing for the benefit of both publishers and the public. In 1990, for example, MABOPA successfully lobbied the Minister of Education to lift the ban[103] on the use of work books by schools, and sale or promotion of school work books in schools. The association also, jointly with other bodies, encouraged the government to equip all secondary school libraries and public libraries in order to promote the reading habit, helped standardise spelling in bahasa Melayu for school textbooks, and persuaded the government to amend the Copyright Act in 1991 to comply with the Berne Convention. It is still working to get the government to acknowledge publishing as a separate industry and give some privileges such as exempting royalties from tax, reducing taxes on raw materials and allowing publishers to obtain credit from banks on favourable terms.

Although a lot of activities have been undertaken by MABOPA, its achievements have not been encouraging in light of its objectives for several reasons including leadership problems, small members contributing less than larger publishers and insufficient commitment from all its members[104]. Furthermore, as the industry itself is not vigorous and clear, issues raised by MABOPA have not been fully supported by some of its members as they are at the same time

[103]In 1989, Ministry of Education had circulated a memo to all schools to ban suppliers of school work books from promoting these books directly to schools. This is due to the fact that there were cases where teachers were 'persuaded' to buy work books which are considered by the Ministry of Education as not qualified books. MABOPA therefore sent a memorandum to the Ministry of Education regarding this matter and outlined several actions to be taken by them to control the quality of these work books.
[104] Rabiatul Adawiah, 'MABOPA' (unpublished B.A. Hons dissertation, University of Malaya, 1992/93).

members of other associations, e.g. MBSA (Malaysian Booksellers Association) and MBIA (Malaysian Book Importers Association) which have at times conflicting interests. For example, the memorandum on Trade Fair Practices in 1991 by MABOPA intended to help improve efficiency in book publishing and book selling, failed to get support from the two other bodies. Such problems have been summed up by Clive Bradley (British Publisher's Association Chief Executive) who says that running a membership organisation is 'exceptionally difficult': "Your resources are tiny in proportion to the problems you have to deal with. The normal rules of management go out of the window. Members do not join an association to do what they are told; instead, they all expect you to do what they tell you, and if that happens to conflict with what another member thinks, then that's your problem."[105]

MBIA (Malaysian Book Importers Association) and MBA (Malaysian Booksellers Association)

If MABOPA was established to aid the development of book publishing, it is also the case for MBIA and MBA besides protecting the interests of their memberships. Like publishers, book importers and booksellers face problems in the book trade. Some of the problems faced by the booksellers are discussed in Chapter Four (under distribution section). According to K. Arul[106], one of the problems facing book importers in Malaysia is that the agencies appointed by international publishers tend to be located mostly in Singapore. Singapore agents enjoy lucrative business while Malaysian importers hold few foreign agencies and these are not allowed to re-export and thus cannot be export-oriented. As exports are one of the criteria for recognition by Ministry of Trade, it is important for book importers to increase their representation of overseas publishers in Malaysia and the region. In an attempt to verify the claim made by the book importers the researcher reviewed the list of agencies[107] appointed by UK publishers, some of which are listed in table A4.1 in Appendix 4 (those engaged in scholarly publications). It was found that for each representative appointed in Malaysia, there

105 Alison Baverstock, *Are Books Different* (London: Kogan Page, 1993), pp. 82-83.
106 K. Arul, 'Towards a Vigorous Book Industry - An Agenda for the Nation: MBIA's perspective', 10th Book Industry Convention, Kuching, Malaysia, 28 -31 May 1993.
107 See *Directory of Publishing United Kingdom, Commonwealth and Overseas 1994* (London: Cassell & The Publishers Association, 1995).

were four agencies in Singapore. This is not a healthy situation for the book industry in Malaysia as the volume of books imported into Malaysia (see table A3.1 in Appendix 3) whether directly from other countries or via Singapore is very large. Yet, according to K. Arul[108], when Singapore agents present their sales to their principals, they state all their sales in Malaysia and Singapore are their Singapore sales. This claim however was provided without any evidence as neither MBIA nor MABOPA have the figures on sales into Malaysia through Singapore. The researcher had tried to present some data based on import and export to Malaysia, between and within ASEAN and the world, see discussion in Chapter Three under section 3.8 and detailed figures in Appendix 7. Although these data by no means accurate or comprehensive, it is however supported the claim made by MBIA earlier.

IKATAN (Bumiputera Publishers Association)

Generally, most Bumiputera publishers are small with paid up capital of less than M$150,000 and some even less than $50,000[109]. In the field of publishing and book selling, Bumiputera publishers control less than 20% of the whole business and only 10% of the printing industry. Out of the 150 booksellers in Klang Valley, for example, only 30% belong to Bumiputeras and they are not able to compete with the likes of Times Book Centre, Bookazine, MPH and Anthonian[110]. MABOPA was established to help publishers, but since it is dominated by large publishers, it was perceived to provide little benefits to small publishers; therefore an initiative was taken to set up another association to represent small publishers. The first attempt to establish this association in 1984 failed but the idea was kept alive by a group of determined Bumiputera publishers keen to establish the association. Finally, in 1989, the association was officially established and by 1991, 37 publishers had joined the association with 13 members belonging to MABOPA as well.

The main objective of IKATAN other than to represent Bumiputera publishers, is to encourage the participation of Bumiputeras in publishing. As revealed earlier, Bumiputeras were normally

108 K. Arul, op.cit., p. 5.
109 Exchange rate for 1990 was M $ 2.7504/US $ 1.
110 Baharuddin Zainal, 'Towards a Vigorous Book Industry', paper presented at Book Industry Convention, Kuching, Sarawak, 28 - 31 May, 1993.

writers while the Chinese were publishers, IKATAN hopes to stem this tide and increase the number of Bumiputera publishers and at the same time to increase the skills of its members. One of its remarkable achievements is the setting up of a consortium, *Dasar Padu* with shareholders coming from its members. The consortium jointly replies to calls for tender by the government which would otherwise be outside the financial risk bearing capability of an individual bumiputera publisher.

GAPENA (The Malaysian Writers Association)

If MABOPA was established for the benefit of publishers, GAPENA was established to protect writers in every aspect. However, the researcher's investigation on GAPENA[111] showed that the association is lacking in its approach towards the rights of writers, especially with regards to protecting them from unfair publishing practices. The situation has not been improved[112] during the research period. This might be due to the fact that the association puts more emphasis on promoting writers and literature by holding writing contests and a one-off annual come-together rather than protecting the writers in 'the real sense'.

Summary of the Role of Trade Associations in Publishing

Although a few publishing associations have been established, their influence has been minimal due to their lack of power. For example, MABOPA failed to get the support from its membership and MBSA regarding its memorandum on Book Fair Trade Practice, while PEPET failed to receive a response from the government regarding its memorandum on the establishment of a joint Malaysian University Press.[113] In contrast in the UK, similar associations, e.g. Booksellers Association (BA) and Publishers Association (PA) (despite their conflicting views) are just two of the many professional bodies which extensively monitor the book trade. For example, although Dillons is opposed to the continuance of the Net Book

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111 Firdaus Ahmad Azzam, 'GAPENA and Its Role in Protecting the Writers and Preserving the Culture and Literary Creation' (unpublished B.A Hons dissertation, University of Malaya, 1986).
112 Interview with A Samad Said, 8 February 1991.
113 The memorandum was forwarded in 1991 and at present, no news has been heard on this matter.

Agreement (NBA)[114] it still belongs to the BA as without membership it could not obtain Book Tokens.[115]

2.2 Technological Environment

Publishers must be aware of new developments in technology and their possible effects because technology can and does affect marketing activities in many different ways.[116] New technology in the publishing world such as the use of databases, CD-ROMs and desktop publishing have enabled publishers to enlarge the market of their traditional publications.[117] Many scholarly publishers in Malaysia have databases (see Chapter Eight), and although these databases store information on important variables, they cannot be classified as "intelligent databases" as publishers do not have the know-how to extract the information intelligently. Consequently, these resources are wasted since they end-up "under targeting" or "over targeting" the market. Initial set-up costs of complex databases are high and by "under targeting" these costs are not adequately recouped and consequently marketing cost per successful sale is high. Over targeting also results in high marketing costs per successful sale, since effort needs to be made and costs incurred in contacting people who are not a part of the target market. Publishers could easily detect their target audience (especially market for scholarly publications) through intelligent 'databanks' by screening data such as their client's personal details - position, address (business and private), job, interests (research), children, salary, age, telephone, memberships, e-mail, and credit ratings (which are used by Mastercard, for example) to identify the needs of their clients and help market their products and products from other publishers more efficiently. Many publishers are small and lack capital and expertise to exploit databases and other marketing tools successfully. They might then end up choosing sub-optimal solutions where the database is neither sophisticated enough (due to cost of system) nor complex enough (lack of resources to construct and maintain the database). Such problems lead to mail shots which tend to over target or under target the market. A better solution may be a central database financed collectively and administered by independent

114 See glossary for the definition of NBA.

115 Alison Baverstock, *op. cit.*, p. 18.

116 Sally Dibb et al, *Marketing: Concepts and Strategies* (Boston: Houghton Mifflin Co., 1994), p. 42.

117 Although some technological advancements like photocopy machine could easily hurt the publishers through its creative destruction.

bodies/societies such as IKATAN or PEPET with cost being recouped by a database subscription. Scholarly publishers could co-operate with other publishers to pool their data on a central databank with common protocols and access tools. This would be much cheaper for the publishers, more sophisticated, better able to identify target market and provide a better user interface. This would ultimately result in lower marketing cost per successful sale (make unsuccessful titles into successful titles, increase profits and lower the price of books). Another example is card schemes, which could be introduced to customers, which give tokens/discounts for each publication bought to increase loyalty towards such publications and encourage the buying habit; at present no such schemes are in operation in Malaysia. Information from card schemes could provide invaluable information for databases such as buyer characteristics, subject profile, card scheme take up rate etc.

Local publishers could also get themselves involved in the use of CD-ROMs in most of the higher institutions' libraries by advertising their publications, and effectively compete with international publishers who are already exploiting such opportunities. IMPACT (Information Market Policy Actions), presented at the 1994 Frankfurt Book Fair, for example, is a European Community programme which aims to support professional suppliers and business users of information services in order to overcome existing obstacles, such as by increasing user friendliness and improving information literacy.[118] Other technologies such as the Internet, EDI and CD-ROMs are now available and are increasingly used in the West. Such technologies increase the efficiency of publishing and the accessibility of scholarly books. Internet for example is a flexible medium to enable people of differing interests and expertise to trade knowledge, and is being adopted in increasing numbers outside of the academic sector, as well as within it. Its flexibility is perhaps its prime attribute, enabling it to be applied in many diverse new functions. For example, some Internet services convert a range of reports, proceedings and newsletters into electronic form, within about a week of the time in which the original source is published, and some services provide users with 330,000,000 articles, abstracts and citations.[119] Internet services are inexpensive, with very modest rates charged,

[118] 'IMPACT - Developing the Information Market', *Eur-op News*, 3 no. 4 (1994), p. 11.
[119] *The Economist*, 29 April 1995.

particularly for use by individuals. Apparently such services are successful, as, "although it is still early, they are reaching a new market of individuals who would not have subscribed to the printed versions."[120] Furthermore, other Internet services (e.g. CIF- crystallographic information files) have been set up to promote the publication of material, making use of the Internet system to complete referencing efficiently, revision, and typesetting. EDI (Electronic Data Interchange) involves the paperless transmission of data between computer systems and can markedly increase the accuracy and efficiency of publishing as a business[121]. It has been successfully used by the Book Industry Communication (BIC) and EUnet GB together to provide a variety of orders, acknowledgements, invoices, bibliographic information and sales data.[122] It is only a matter of time before such advances are more widely available in Malaysia. This could inspire local publishers to establish co-operation network not only within Malaysia but towards supra-national regional bodies (within ASEAN and Asia). The situation of scholarly publishing in the ASEAN region as will be explored in a later chapter reveals the importance of having such technology.

Although the use of CD-ROMs in Malaysia is quite new to both students and academics, local publishers could start looking at this method as a new market to explore. The use of CD-ROM's could greatly help and encourage academics to write and read. This is also the case with desktop publishing where its advantages should be known to the academics so they can write more efficiently and thus benefit both publishers and the writers themselves. The influence of such technology on writing and reading habits was investigated in this survey and the results are discussed in the findings (see Chapter Seven).

Technology results in two outputs, product innovation, where new products are created, and process innovation, where new ways are found to increase efficiency in production. Product innovation in the publishing industry may mean the creation of on-line journals and books, while process innovation may result in new distribution channels such as the Internet. Such

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120 Kurt Paulus, 'Publishing and the Internet', review of a ALPSP seminar, 27 October, 1994, *European Science Editing*, 54, 1995, pp.17 - 18.
121 'What is EDI?', *BIC News* (London International Book Fair Issue, 1995).
122 'A New Internet Service for the UK Book Industry', *Eunet and BIC*, 1995 .

developments may result in profound changes to the face of publishing as we know it, may be within a generation most retail outlets in their present form may not exist, with books being sold directly to the consumer by publishers through on-line connections. The publisher's computer would take the order, debit the account and forward the book to the customer's home address. However, outlets retailing scholarly publications may survive since they cater for a small, specialised market which is not profitable enough for other entrants (in Malaysia). Such modern outlets have already a foothold in the West; for example a book shop in the UK already uses this technology to allow customers to browse the books and buy using a modem connection over the telephone line.[123] The number of American publishers registered on the Internet are increasing.

Already in the West, Internet is used by researchers/scholars to exchange views, co-author article from different locations, etc. Soon this will come to the developing countries, such as Malaysia. **What will this mean?**

Scholars- will be able to access bibliographic databases throughout the world and easily download articles for reference. An example of such a database is the one available by NSF (National Science Foundation) via Internet or Bitnet, e-mail or ftp (file transfer protocol) allowing scholars access to such vast amounts of information.

Publishers - perhaps the publications of tomorrow may not be in book form; a new marketing channel may possibly open up with the "information super highway" of the future with publishers taking orders directly from customers, cutting out retailers to the benefit of themselves and customers. New marketing channels may inform scholars of publications via internet, publishers may be able to exchange views with scholars and receive manuscripts over the internet. For example, old articles from the *Economist* were available for reviewing in WWW. This acts as a marketing advertising tool.

Retailers - will have to offer something extra to survive; for example solutions may involve being innovative and offering advice on accessing databases, acting as agencies for on-line services or outlets for book-clubs as book shops as we know now may be made redundant.

123 See *Publishing News*, March 1995, p.13.

Although some people might doubt that such things will happen, time will probably prove them wrong. A similar situation happened with the introduction of printing press. Many argued that printing would not replace scribes as the aesthetic quality of printed material was not pleasing to the eyes. The use of scribes however meant that each book had to be painstakingly copied word for word. This both escalated costs and limited the quantity of reproduction. With limited availability of books, the number of the literate also remained small consisting of the very rich. In time, the quality of reproduction improved as well as the costs, making books more affordable for people of lesser wealth. The technology of the scribes became outdated and was superseded by new printing industries which in time increased in professionalism. Nowadays, there are many who argue a similar fallacy that the new technology will not replace the traditional form of printed matter; there will not be mass electronic journals and no mass electronic marketing of books over the internet. They have only to look over the last 10 years at how much technology has affected the publishing industry. Desktop publishing has revolutionised typesetting, editing, image processing, designing etc., and placed the ability to publish in the hands of small departments. One has only to extrapolate this trend for the next 20 years to know what is possible. True technology does not come in a smooth pattern but in spurt of inventiveness. Between the development of paper, 4,000 years ago in Egypt, and the printing press there was a long period. However with modern technology, the cycle time has become shorter and perhaps digital publishing will become a reality in the foreseeable future, even in Malaysia (see discussion earlier on the establishment of the Language Information Centre for bahasa Melayu at USM).

2.3 Economic

The economic environment consists of factors that affect consumer purchasing power and spending patterns. Markets require purchasing power as well as people. Total purchasing power depends on current income, prices, savings, and credit. Marketers therefore should be aware of major trends in income and of changing consumer spending patterns.

Malaysia has averaged annual economic growth of nearly 9 % since 1989, and is expected to grow at 7.9% in 1995[124]while its GDP per capita at PPP prices (adjusted for purchasing power) was US$ 8,050 in 1992, current income per capita estimates the figure around US$ 3,230 (1995, unadjusted for purchasing power), and the government hopes to increase this to US$ 16,000 by 2,020[125]. The corresponding figure for the USA was $23,150.[126] Although the literacy rate can be considered high by global standards, the market for books is relatively small because of a small population with a low purchasing power and poor reading habit. The situation is more acute at the level of scholarly publishing since few people can be considered as highly literate, and a high price coupled with a poor buying habit has created significant problems for the industry.

2.3.1 Buying Pattern: A Comparison of UK and Malaysia using the Publishing Industry Size

An attempt was made to estimate the expenditure on reading material per person in Malaysia using a mean guessestimate for the Malaysian publishing industry. The publishing industry was reported to be in the region of M$300 million to M$450 million in 1991, using the mean it can be considered to be around M$375 million in value and with a population of 18.333 million in 1991 the industry represents about M$20.5 per person (approximately £5 at the 1991 exchange rate). The publishing industry is not a significant player in the economy since it accounts for only 0.3% of the total economy as measured by the GNP. The size of the publishing industry cannot be used directly to estimate expenditure on all reading material per capita since Malaysia is a net importer of books. Therefore after taking this into consideration, expenditure on all forms of reading materials may be in the region of M$ 27.64 per person i.e. about 0.44% of personal income (net trade balance on books & newspapers was US$ -47.9 million in 1991 and the exchange rate was M$2.75/US$, see table 1.3.1 in Chapter One).

124 *The Economist*, 23 - 29 July, 1994.
125 The *Economist*, 29 April 1995, p. 7.
126 Derived from *Le Monde: Edition Speciale: Bilan Economique et Social 1993* (The World: Special Edition: Social and Economic Balancesheet 1993), p. 136.

Regarding expenditure on books one may be able to derive this by using an estimate for the book publishing industry. The Malaysian book industry recorded a turnover of M$ 250 million in 1991 according to Hasrom Haron, therefore the total expenditure on books was likely to be in the region of M$351.2 million in 1991 (net trade balance on books was US$ -36.8 million in 1991, see table 1.3.1 in Chapter 1) i.e. M$19.16 per capita which represented approximately 0.307%[127] of personal income. The estimate for UK book publishing market was US$3,570 million (1993) i.e. representing 0.379%[128]of personal income, while the Americans spent 0.353% and the Germans 0.487% of their income. Direct comparisons of absolute values may not provide an accurate guide to book buying behaviour since purchasing power is rarely taken into consideration e.g. books in Malaysia rarely cost more than M$20 (about £5) while in the UK it is uncommon to find books below £5 (excluding popular books etc). However using standardised percentages for income per capita, as above, it may be safely implied that the British spend a greater amount of their income on buying books and are a more book loving people than Malaysians; it is common to find people in the UK reading books, newspapers, magazines in trains and buses, while this is the not the case in Malaysia (Malaysia produced only 1.21 book copies per capita compared to 4.73 for China and 11.91 for Russia in 1990, but this is better than the 0.21 copies per capita produced by Brunei, see table A5.1 in Appendix 5).

Malaysia's expenditure per capita on books does not fully reflect the stage of economic development and as such the figures seem a little disappointing, although it must be stated that this does not mean that Malaysians are terrible book buyers as widely quoted. Countries such as Malaysia, which are expanding rapidly and in the group of the middle income countries (where basic necessities of life are covered) should spend a larger part of their income/GNP on books than either countries where the income is too low even to provide basic necessities or where the GNP is high and book reading needs to compete with other leisure activities and luxuries.

[127] Hasrom Haron quoted the figure as 0.33% (for the year 1992), see Hasrom Haron, "Peranan Penerbit dalam Industri Perbukuan yang Cergas" (The Role of Publishers in an Active Publishing Industry), Seminar Paper presented at 10th Book Industry Convention at Sarawak, 29 May. 1993, p. 3 while Shaari Abdullah quoted the figure as 0.31% (or M$22 per year for the year 1992), see Shaari Abdullah. op. cit., p. 13.

[128] Frank Fishwick, 'World Book Market' in *The Bookseller*, 21 October 1994, p.17.

Inaccurate comparisons like this are common in the publishing industry; for example, it was reported that Americans spend nearly 44% more per head on books than the British but according to Frank Fishwick, one should consider three things when comparing the UK and USA figures: (i) the over valuation of sterling against the US $, (ii) the higher living standards in the USA and (iii) the much lower provisions of public libraries (the first two of these were taken into account in the analysis above); in addition definitions of books differ in both countries.[129] In summary, although definitions differ and direct comparisons are both dangerous and problematic, one can safely conclude that Malaysians spend less on books (and other reading material) than other countries in a similar situation, and considering the importance of education in the economic development of the country, the government needs to take effective steps to remedy the situation.

2.3.2 Determinants of Publishing Industry Size

This research attempted to quantify book buying patterns by collecting information on the purchasing habit of students and lecturers which will hopefully provide a basis for market segmentation of scholarly publications. In addition, an attempt was made to determine the factors which influence the size of the publishing industry in developing countries by using the available but limited data. The regression model used calculated the number of titles as a surrogate for the size of the industry with GNP and number of daily newspaper circulated as explanatory variables. Other variables such as the population size, the number of national and public libraries, membership of libraries and number of literate people, were also tried in the model but dropped since they could not adequately explain the underlying variation. The reasons could be that for the number of libraries, only figures for the number of national and public libraries were available and not all libraries, and this was the same for the membership figures. Moreover not all of the population can read and write with a large percentage being illiterate in most developing countries and thus not part of the target market. It was expected that the addition of the number of literates would add to the explanatory power of the model but

[129] See Frank Fishwick, *The Bookseller*, ibid., p. 17.

this was not the case. It is possible that so called literates are either not fully literate or not in the market to buy books due to reasons such as poverty and therefore, the number of daily newspapers in circulation was used as a surrogate variable to represent the amount of actual literate people in the market to buy books, since most people literate and wealthy enough to buy newspapers will possibly have the habit to buy books and be in the market to buy books.

The intercept term, the point at which the regression line cuts the y axis when all explanatory variables are equal to 0, was also set to 0 since it was not significant. The resultant model had an R^2 of 77.9%[130] i.e. the two explanatory variables explain over three quarters of the underlying variation in the sample data, see table 2.3.1.

Table 2.3.1 **Result of Regression of number of titles vs. GNP and number of daily newspapers**

		Parameter Estimates		
Variable	Parameter Estimate	Standard Error	T for Ho: Parameter = 0	Prob > |T|
NEWSPAPER(in 000s)	1.313824	0.19296744	6.809	0.0001
GNP (in bn)	23.968564	7.68593083	3.118	0.0036

Model: F Value = 61.662, Prob > F = 0.0001; R^2 = 0.7789

The model showed that an increase of 1000 in the number of daily newspapers sold resulted in an increase of approximately 1.3 titles being published after controlling for the GNP. While an increase in GNP of 1 billion dollars resulted in approximately 24 more titles published by the country after controlling for the circulation of daily newspaper; see table 2.8 for a list of countries used to construct the model. The model predicted 4280 titles for Malaysia while the actual titles were 4728 in 1990. Thus the model provides an adequate explanation of the actual data for Malaysia. The model also predicted well for Uruguay, Bangladesh, China, Iran, Thailand, Turkey, Greece, Italy, Madagascar and Zimbabwe. The model grossly over-estimated the number of titles for 12 countries (Algeria, Kuwait, India, El-Salvador, Chile, Columbia, Costa Rica, Equador, Peru, Philippines and Romania). Most of these countries were South

130 Please note with no intercept term, the R^2 is redefined.

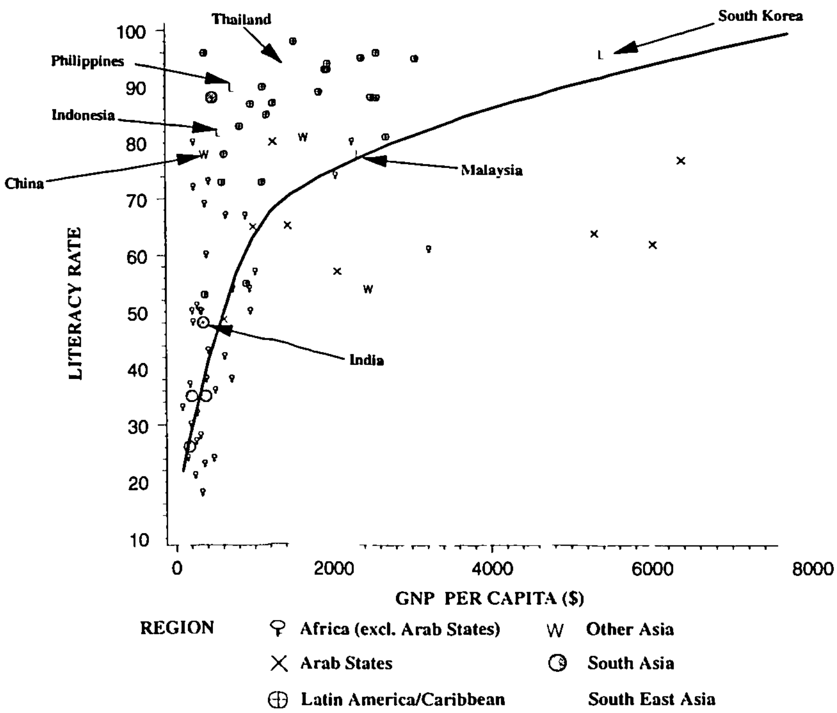
American, two were Arab countries while the rest were Asian, and one was European. In the case of Malta, Portugal, Former Yugoslavia, South Korea, the model grossly underestimated the number of titles. With the exception of South Korea, all these countries were European. South Korea had highly pronounced underestimation, thus supporting the view that South Korea has a well established publishing industry in relation to the size of the country.

Table 2.3.2 **Regression of Number of Titles vs. GNP and Number of Daily Newspapers**

Country	GNP (bn)	Daily Newspapers (000's)	All titles	Predicted Title
Algeria	51.52	1274	494	2909
Botswana	2.65	18	158	87
Gambia	0.22	2	21	8
Kenya	8.89	350	348	673
Madagascar	2.58	50	154	128
Mauritius	2.42	80	75	163
Nigeria	29.31	1700	1466	2936
Tunisia	11.47	300	293	669
Zimbabwe	6.00	206	349	415
Costa Rica	5.72	314	244	550
El Salvador	5.78	457	15	739
Chile	25.56	6000	1966	8496
Colombia	40.90	2000	1481	3608
Ecuador	10.35	920	717	1457
Guyana	0.29	80	46	112
Peru	25.0	1700	41	2833
Uruguay	7.93	720	1143	1136
Venezuela	49.46	2800	3175	4864
Bangladesh	23.12	700	1209	1474
China	421.45	39000	73923	61341
India	289.47	19804	13937	32957
Indonesia	100.41	5144	1518	9165
Iran	133.79	1500	5018	5177
S. Korea	231.08	1200	39930	7115
Kuwait	34.63	450	793	1421
Malaysia	41.55	2500	4578	4280
Nepal	3.22	150	122	274
Philippines	44.88	3400	1112	5543
Sri Lanka	7.99	550	2455	914
Thailand	79.64	4000	7783	7164
Turkey	91.44	4000	6291	7447
Greece	60.74	1400	3255	3295
Italy	971.60	6093	25068	31293
Malta	2.35	54	460	127
Portugal	48.25	390	6150	1669
Romania	38.05	3601	2178	5643
Former Yugos.	72.86	2281	9797	4743

Figure 2.3.1 shows clearly the relationship between wealth and literacy. The relationship takes a log form since the literacy rate has an upper bound of 100%. Malaysia fits the model well and the relationship suggests that to a large degree wealth is a strong determinant of the Malaysia literacy rate. It is not always clear which is the cause and which is the effect in such relationships: does wealth create a more well off society which is better able to educate itself, or does a more educated society work harder and produce more wealth. It is rather the individual characteristics of each nation which determine the connection; for instance some of the Arab countries became rich first with the discovery of oil and only later did the literacy rate increase. But it may be true to say that education has been the driving force of the recent economic boom in Malaysia since the literacy rate of the country started to increase rapidly after independence due to the introduction of the post independence education system during the 1960s while only recently has there been an economic upturn. Usually it is the mixture of both, an increase in one part of the equation fuelling an increase in the second.

Figure 2.3.1 **GNP per capita and adult literacy in selected countries, 1990**



NB: The line shown is derived by the method of least squares
Y = -0.32 + 0.1458 LN (X); Std error of estimate, s = 0.18; Coefficient of determination, R^2 = 40.83%; Number of countries, n = 37 (See detailed figures in table A6.1 of Appendix 6).

2.3.3 Population

Besides the population size which is small compared to some other countries (although this can not be taken as the main reason why the book industry has severe problems), there are some other factors which contribute to the relatively small market for books in Malaysia. As such, in this survey, the researcher attempted to investigate the various factors which influence the purchasing of books amongst students and lecturers as the main market for scholarly publications.

Population estimates suggest that the number of people living in Malaysia by year 2000 will be around 21.485 million and 24.363 million by 2010[131] (see table 3.0.1). Theoretically, towards the end of the 21st century, population of Malaysia will stabilise at around 40 million, see table 2.3.3. The youth population (15 - 24 years old) will be at 19.0% by the year 2000; this is a good indicator for the future market size for scholarly books, in addition an increasing number of these young people will decide to enter higher education.

Table 2.3.3 **Percentage growth of population in Malaysia, 1990 - 2025**

Year	% Growth
1990 - 1995	2.02
1995 - 2000	1.68
2000 - 2005	1.34
2005 - 2010	1.19
2010 - 2015	1.18
2015 - 2020	1.10
2020 - 2025	0.98

SOURCE: *Encyclopaedia of the Third World 1992*, p. 1197

[131] *Encyclopaedia of the Third World 1992*, p. 1197

The enrolment of students into higher learning institutions increased between 1980 and 1990, and is expected to increase further as the economy and population increase. Table 2.3.4 shows the number of students enrolled in higher learning institutions from 1980 to 1990.

Table 2.3.4 **Enrolment of Students at Malaysian Higher Learning Institutions** ***(Universities & Equivalent Institutions)*** **1980 - 1990.**

Year	Total No.	No. of Male	No. of Female	% of Male	% of Female
1980	57,650 (26,287)	35,451 (17,182)	22,199 (9,105)	61 (65)	39 (35)
1985	93,249 (43,295)	51,781 (26,559)	41,468 (17,066)	56 (61)	44 (39)
1987	119,591 (53,768)	68,825 (36,702)	50,766 (19,376)	58 (64)	42 (36)
1988	120,714 (57,668)	71,144 (38,292)	49,570 (21,669)	59 (62)	41 (38)
1989	109,345 (53,476)	63,335 (31,807)	46,010 (23,834)	58 (55)	42 (45)
1990	121,412 (57,059)	67,042 (30,773)	54,370 (26,286)	55 (54)	45 (46)[132]

Source: UNESCO Statistical Yearbook 1993, p. 3-262. Figures in brackets are the number of students in universities and equivalent institutions.

The table demonstrates clearly the rapid growth of students in the higher education sector in Malaysia. The growth in university enrolment was 117% (111% for students studying at all Higher Learning Institution), composed of 79% increase in male and 189% in female enrolment. Women enrolment share increased from 39% to 45% for all institutions and from 35% to 46% for university enrolment which indicates the emphasis on educating women in Malaysia. Government policy, and a change of beliefs amongst the populace, that increased educational attainment is the key to a better future, has produced a 117% in higher education enrolment while the corresponding increase in the population eligible to enter university was an estimated 18%.[133] Table 2.3.5 shows the number of students and lecturers at all eight higher learning institutions in Malaysia for 1993. Of all institutions in table 2.3.5, ITM has the highest

[132] The figure for percentage of total students which are female (1990) reported in the UNESCO Statistical Yearbook is 45%, this is believed to be a misprint since 26,286/57,059 expressed as a percentage is 46%.

[133] The number of people eligible to enter higher education were estimated by dividing the number of students studying in higher learning institutions (57,650 for 1980 and 121,412 for 1990) by the Gross Enrolment ratios for the respective years (4.1% for 1980 and 7.3% for 1990).

number of students and lecturers. However ITM is not regarded as a university as its offers mainly diploma courses, a few degree courses, and professional courses for working professionals. Therefore, with the exception of ITM, UM is the largest institution.

Table 2.3.5 **Number of lecturers and students at higher institutions in Malaysia in 1993**

University	No. of lecturers	No of students
	All courses	All courses
UIA	635	6486
UKM	1393	11404
UM	1881	15720
UTM	1273	10484
UPM	3724	11586
ITM	2463	28111(*4095*)
USM	1098	10155 (*3072*)
UUM	232	5823

SOURCE: *The World of Learning 1995*, pp. 1000 - 1004; figures in italic are part time students.

Table 2.3.6 shows the growth in the third level enrolment ratios between 1980 and 1990 for a number of selected countries. One needs to consider both the growth in enrolment at the third level and the growth in the eligible population, since a growing young population could increase the number of students entering higher education without a corresponding increase in enrolment ratio; this is why it is important to look at the third level enrolment ratios. Brunei, with an increase of 529%, has by far the largest percentage growth and this can be explained by the fact that the higher education sector in Brunei is still in its infancy and as such subject to large annual increases; Brunei opened its first university in 1985.[134] Other large increases are for South Korea, Canada, Pakistan, Indonesia and Singapore. Enrolment rates are forecast to continue rising in most developing countries therefore the market for scholarly books is likely to continue to expand along with increases in population size and enrolment rates; the wealth of the populace is also expected to increase.

134 *Encyclopedia of the Third World* (Oxford: Facts on File, Inc., 1987)

Table 2.3.6 **Third Level Enrolment ratios 1980 & 1990 Selected Countries (expressed in %)**

Country	Gross Enrolment Ratio (circa 1980)	Gross Enrolment Ratio (circa 1990)
Malaysia	4.1-'80	7.3 -'90 (7)
Singapore	7.9 - '80	(19)
Thailand	12.7-'80	16.3 -'89 (16)
Indonesia	3.8-'80	9.5 -'91 (10)
Philippines	24.2	27.8 -'91 (28)
Brunei	0.7-'80	4.4 - '90
India	5.2-'80	6.7 - '87 (5)
Pakistan	1.8-'80	2.6 - '90
Japan	30.5-'80	31.3 - '91 (29)
US	55.6-'80	76.2 - '91
UK	19.1-'80	27.8 - '90
Canada	41.0-'80	71.2 - '91
South Korea	14.7-'80	39.9 - '91 (37)
China	1.2-'80	1.6 - '91 (2)
Taiwan +	-	(27)

SOURCE: *UNESCO Statistical Yearbook*, p. 3 - 263 & pp. 3-17 to 3-71 for the stated reference year, while figures in bracket are derived from *Science & Technology Indicators of Indonesia 1993*, p. 145 refer to the year 1989 and are for enrolment rates as a percentage of the 20-24 year old population.
+ Taiwan does not provide data to UNESCO since it is a not signatory to the United Nations Charter.

CHAPTER THREE

SCHOLARLY PUBLISHING IN SOME SELECTED COUNTRIES

Southeast Asia (Map)

3. SCHOLARLY PUBLISHING IN SOME SELECTED COUNTRIES

3.0 Introduction

This chapter explores the role of scholarly publishing in both the developed and developing world, because scholarly publishing plays an important role specifically in the educational development of all nations. This role becomes more crucial for developing nations as will be expounded in this chapter. Philip G. Altbach and Gail P. Kelly correctly point out the difficulties that domestic scholarly publishers in developing countries encounter when they claim that the foreign books undercut their own publications and actually hinder the emergence of domestic textbooks.[135] Developing countries such as Malaysia are hungry for books. This has provided a golden opportunity for Western publishers to move in. In addition, even Western governments have exploited this opportunity (using book aid programmes). By dumping their excess stocks thus directly contributing to the underdevelopment of the indigenous industries.

This problem of dumping is also pronounced within the ASEAN[136] nations: Indonesia, Philippines, Thailand, Singapore, Brunei, Malaysia and Vietnam[137], all of which, with the exception of Singapore, are among the developing countries. Free enterprise is the common philosophy of six of the seven members (the exception being Vietnam which is still Communist); this is likely eventually to expand from seven to ten members: Cambodia, Laos and Myanmar. The ASEAN region, with a combined population of about 328.14 million people in 1992 (excluding Vietnam), represents a market larger in population than the USA and Canada combined (283.25 million)[138]. ASEAN's economic development has been growing fast

[135] Philip G. Altbach and Gail P. Kelly quoted in Per I. Gedin, 'Multinationals and Third World Publishing', *Publishing and Development in the Third World*, ed. by Philip G. Altbach and Gail P. Kelly (Kent: Hans Zell Publishers, 1992), p.45.
[136] ASEAN (Association of Southeast Asian Nations) was formed on 8 August 1967 mainly to accelerate the economic growth, social progress and cultural development of the region through co-operation, and to strengthen the foundation for a prosperous and peaceful community of Southeast Asian nations.
[137] Vietnam formally joined ASEAN at the end of July 1995.
[138] Derived from *Le Monde: Edition Speciale: Bilan Economique et Social 1993* (The World: Special Edition: Social and Economic Balancesheet 1993).

at an average rate of about 4.9 percent per annum (excluding Brunei, and Vietnam which was not a member) over the period of 1985 - 1992.[139] In spite of the recent world-wide economic slowdown, these "emerging" economies remain amongst the fastest-growing in the world. This has fuelled a growth in the publishing industry. At times the growth in the economy encourages (a cause) a simultaneous growth in education i.e. as people get richer they are in a better financial position to send their children to school; however, in the case of other economies an increase in the knowledge of the population through better education influences the economy (an effect) as these better-educated people eventually work in the economy. It is not possible to come out with a general rule as to which is the "cause" and which is the "effect" since this depends on the individual characteristics of the country or region. For instance, in the Arab world, the discovery of oil led to an increase in the wealth of the people which eventually allowed the people to afford education, while for the most part in the ASEAN region a recognition by government (and the people) that education was the key to economic success encouraged the people to educate themselves. The link is generally related to whether a country has natural resources or must rely on its human resources. Generally the relationship, once started, is mutual, with one fuelling the other. Therefore the recent economic growth in the region has benefited the publishing industry considerably, and providing the economic success of the region continues, the industry should continue to grow.

Since this research is about Malaysian scholarly books and directly related to ASEAN scholarly books, we may be able to appreciate the issues better if we have some idea of the economic and publishing status and situation of the ASEAN region. Also, the existing situation in India will be explored principally because it is the largest publisher among Third World[140] countries (excluding China).

There is a lamentable inadequacy in the flow of books between developing and developed countries which some popular phrases often describes as "the free flow of books" and "books for all" (see Appendix 7). In practice publishers in developed countries freely export their

[139] *Le Monde*, ibid.
[140] The term third world is used as a shorthand for the low per capita income nations of Africa, Asia and Latin America. Clearly, not all of the nations in these regions can be classified as Third World.

books to the developing nations, whereas this is not the same for publishers from developing countries.[141] This might be due to the fact that languages spoken in developing countries have a local impact, their writers are not well known, the country itself is still not advanced and respected for its intellectuality, with some still having the mentality of "the West is best".

The disproportionately small flow of books out of developing nations has become one of the most important problems plaguing international communication towards world peace and understanding[142] as an educated population are able to contemplate, reason and question rather than follow blindly. This disadvantageous position has made it difficult for the South to keep its book publication programmes viable: it has also deprived the developed world of a proper understanding of foreign books.[143]

The causes for the unbalanced flow of scholarly books as described above are many and varied. The underlying cause is assumed to be the availability of a growing market (e.g. richer and more literate) which needs books to satisfy its hunger for information and knowledge, while the absence of a developed home industry (e.g. lack of expertise) has made it easy for developed countries to fill the gap; this also ensures that local publishers will never challenge the multinationals because a position of strength leads to strength, and weakness to weakness. How can developing countries publishers compete with developed countries publishers who can recoup their fixed costs in their domestic market and have only to use non domestic revenues towards variable costs, while the locals must recover all costs from revenues earned purely in their local market? In addition the dumping of books (excess stock) allows foreigners to recoup losses while there is no such possibility for the locals. ASEAN publishers have to face problems which publishers of other regions face, but in addition they have to address special problems such as financing scholarly books of small print runs, publishing in indigenous languages, penetrating the untapped home markets, getting suitable authors, developing scholarly authorship, and using existing printing technology to the full and procuring needed

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[141] Esther M. Pacheco, 'Editor's Preface', *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers, 1986).
[142] Esther M. Pacheco, ibid.
[143] Esther M. Pacheco, ibid.

scholarly manuscripts.[144] As emphasised by Philip G. Altbach, "Scholarly publishing is, in general, less well established in the Third World than in the West and therefore requires special help."[145] However, this help must come from within the Third World itself with planned efforts to improve its market and develop a talent pool of authors.

Since there appears to be no official immediate "remedy" for this imbalance, this research attempts in later chapters to propose some modest solutions based on a proper understanding of the problem of marketing scholarly publications and the experience and ideas of practitioners within the scholarly book trade. This could mean modifying tested strategies of a few successful publishers, that is, those publishers that have managed to disseminate their books in and out of the developing countries. It also means seeking to understand the specific problems of publishers who have not been able to go beyond their local markets, and why some scholarly books with potential for international markets do not transcend their local origins. Table 3.7.1 clearly shows this imbalance, the number of titles published in the developing world represented only 26.4% of the world total while these countries were home to 78.0% of the World's population. An attempt to solve these problems will assist ASEAN publishers to enter the international mainstream and compete effectively. The situation of each member country will be examined individually to understand how they presently function and the degree to which these problems afflict them. As mentioned earlier, scholarly publishing in Singapore is also discussed; although it does not fall within the category of developing country its historical connection with Malaysia makes this examination indispensable. The Indonesian experience is examined in more detail than the others (Singapore, Philippines, Thailand and Brunei) because of its similarity in several aspects with Malaysia, particularly the Malay language. An examination of the Indian situation is also carried out.

When comparing the size of publishing industry in any country, one usually looks at the size of the market, i.e. number of copies sold and number of titles produced, but such inter-country comparison may not provide an accurate view of the state of the publishing industry. A large

[144] N. T. S. Chopra, 'ASEAN Scholarly Books: Problems and Prospects', *Disseminating Asia's Scholarly Books*, ed. by Esther M. Pacheco (Norway: International Association of Scholarly Publishers, 1986), p. 79
[145] Philip G. Altbach quoted in N. T. S. Chopra, ibid., p. 80.

country may produce a lot of titles but on a per capita basis may rank below a small country which produces fewer titles. Tables A5.1 and A5.2 in Appendix 5 summarise this by controlling for the population and the wealth of the country.

India, a country widely quoted to be the largest publisher (excluding China) among the Third World, ranked low when taking into consideration its large population. It produced only 16.85 titles per million people while Sweden (although not in the third world a small country of 8.5 million of people,) produced 1405.84 titles per million inhabitants. Indonesia had the lowest number of titles per million people, thereby suggesting that there is a problem in the supply of books. Out of the six countries for which data were available for number of copies published, the Russian Federation had the highest number of copies produced per capita, with Brunei the lowest. This measure of demand seems to suggest that the people of Brunei have a poor buying habit (although Brunei imports a lot of publications). Of course the number of titles written and the number of copies produced are related to each other to some extent; if a country produces few titles, customers have limited choice and consequently may be deterred from buying and vice-versa, a country where few copies are bought by customers, may deter publishers from putting out titles.

Indonesia ranked the lowest for the number of titles, the number of book titles and the number of textbook titles given the size of its population. India also faired badly. Malaysia ranked lower in number of titles than expected given its population, while it ranked much higher for the number of textbooks produced considering its population, due to the fact that a large number of publishers are in the educational school textbook market (see discussion in Chapter Two on textbook production). The Philippines also produces fewer titles than expected for a country of similar size.

Of course it is not always fair to compare two countries just on the basis of population since there are other factors which are equally important. One of the factors is purchasing power of the populace. In order to determine the effect of wealth the figures were standardised for GNP in billions of dollars. After considering the wealth of the country, Brunei had the lowest number of titles (all titles and book titles) per million dollars of GNP although it was slightly better than Indonesia in terms of the number of textbook titles. China which has a large population but is relatively poor, performed better when controlled for its wealth. Indonesia again ranked lower than expected, again suggesting an inefficient publishing industry while India did considerably better. Malaysia produced a reasonably high number of book titles and all types of publications considering its wealth but an even higher than expected number of school textbooks, thus suggesting that a combination of purchasing power and reading habit control the Malaysian publishing scene. The low number of copies per capita suggests that Malaysians do not read a lot of books i.e. are not heavy readers. A survey on reading habit undertaken in 1982 showed that people read and spent more on other types of reading materials such as newspapers and magazines rather than books.[146]

[146]Atan Long, et. al, *A Survey of the Reading Habits and the Interests of Malaysian People* (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1984), pp. viii -x. Take note that the figure was reported differently in the executive summary compared to the analysis.

Population Forecasts

A larger population also acts as a larger market (providing literacy rates remain constant), so population forecasts allow one to estimate likely future impacts on the publishing industry. Table 3.0.1 presents population growth expectations for selected developing countries. In most of these countries the populations are likely to stabilise sometime during the 21st century as the people become more educated, urbanise, and more women go out to work. Growth in population will not alone lead to better prospects for the publishing industry, simultaneous growth in per capita income and increased education will also provide a stimulus. As most of these countries (with the exception of Brunei and Singapore which are already well-off) haul themselves out of poverty tremendous change will be initiated in all industrial sectors. Women are likely to be at the leading edge of this change. As women become more lettered, they will exercise their new-found freedom in many areas, particularly education and politics. Such changes will be particularly striking in the case of India. The changes will be especially acute in the higher education sector where new graduates will need to be turned out for the growing economy, so the prospects for scholarly publishers will be especially rosy providing they keep pace with new developments.

Table 3.0.1 **Projected Populations in Selected Countries**

	Brunei	India	Indonesia	Malaysia	Philippines	Singapore	Thailand	
1993	0.276	896.567	194.617	19.239	66.543	2.798	56.868	Base
1994	0.284	915.305	197.575	19.628	68.053	2.825	57.636	Projection
1995	0.292	934.435	200.578	20.024	69.598	2.852	58.414	Projection
1996	0.300	952.376	203.266	20.360	71.018	2.875	59.185	Projection
1997	0.308	970.662	205.990	20.702	72.467	2.898	59.966	Projection
1998	0.317	989.299	208.750	21.068	73.945	2.921	60.758	Projection
1999	0.326	1.008.284	211.547	21.422	75.453	2.944	61.560	Projection
2000	0.335	1.042.530	180.763	21.485	75.224	2.967	63.441	Projection*
2010	-	1.225.305	214.410	24.363	87.206	3.134	71.594	Projection*
2020	0.582	1.373.725	234.275	27.178	93.788	3.239	78.086	Projection

SOURCE: Calculated by the researcher based on growth rates stated in Encyclopaedia of Third World; projection figure * for 2000 and 2010 were from Encyclopaedia of Third World, while figures for Brunei are calculated based on figures from UNESCO Statistical Year Book 1994.


Indonesia (Map)
Indonesia
Andaman Sea
THAILAND
South China Sea
BRUNEI
PHILIPPINES
Banda Aceh
MALAYSIA
Natuna Besar Is.
Medan
Pematangsiantar
MALAYSIA
SINGAPORE
Celebes Sea
Pacific Ocean
Sumatra
Tarakan
Manado
Pekanbaru
Borneo
Gorontalo
Halmahera I.
PAPUA NEW GUINEA
0° Equator
Pontianak
Samarinda
Molucca Sea
Sorong
Padang
Jambi
Balikpapan
Palu
Sulawesi
Jayapura
Pangkalpinang
Palangkaraya
Ceram
Nabire
Irian Jaya
Palembang
Banjarmasin
Palopo
Kaimana
Bengkulu
Java Sea
Parepare
Kendari
Ambon
New Guinea
Telukbetung
Jakarta
Ujungpandang
Banda Sea
N
Semarang
Tanahmerah
Bandung
Surabaya
Lesser Sunda Is.
Ruteng
Yogyakarta
Malang
Dili
Java
Raba
Timor
Arafura Sea
Merauke
Bali
10°S
Sumba I.
Kupang
Timor Sea
Indian Ocean
Gulf of Carpentaria
0 300 Miles
0 300 Kilometers
AUSTRALIA
100° E
110° E
120° E
130° E
140° E

3.1 Publishing in Indonesia

3.1.1 Background

The population of Indonesia was estimated as 194.617 million[147] in 1993 (growing at 2% per annum over the period of 1980-1993) with literacy rate of 81.6% for 1990 (the number of illiterate people decreased by 30.8% over the period 1980-1990).[148] Indonesia had 49 public institutions of higher education and over 900 private institutions of higher education[149] according to a 1993 report. An estimate using UNESCO data suggests there were approximately 1.8 million students[150] studying at all ISCED (International Standard Classification of Education) level five (first degree) and above in 1990. About 1 in 10 of the country's 20 - 24 year olds are studying at university which is a higher ratio than Malaysia, China and India[151] (see table 2.3.6 in Chapter Two). The number of students studying at higher education is likely to continue growing since by the year 2,000, the 15 - 24 year olds will make up 19.9% of the total population.[152]

3.1.2 Publishing Situation

There were six university presses (all attached to state universities) and a further twenty-six university presses were in the process of being established at the time a report by Dr Sri Edi-Swasono was prepared.[153] The first university press, that of the University of Indonesia, was established in 1969[154], with the help of the Ford Foundation and has the best library, with a total collection of about 250,000 volumes.[155] The others, are at Hasanuddin University, Semarang Teachers' College, Bandung Institute of Technology, Airlangga University and Gadjah Mada University which all began their activities at the end of 1971 and were founded with the assistance of the Dutch government.[156] Before the appearance of these university

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[147] *UNESCO World Education Report 1993*, p. 118.
[148] *UNESCO World Education Report 1993*, p. 122.
[149] *UNESCO World Education Report 1993*, p. 73.
[150] *UNESCO Yearbook 1994*, p. 3-326.
[151] *Science & Technology Indicators of Indonesia 1993* (Indonesia: Science and Technology for Industrial Development, 1993), p. 75.
[152] George Thomas Kurian, *Encyclopedia of the Third World* (London: Facts on File,1992) 4th ed., p. 842.
[153] Pauline Khng, 'Academic Publishing in the Countries of ASEAN', *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers (IASP), 1986), p. 85.
[154] Sri-Edi Swasono, 'The Indonesian Case: The Presence of the University Press in the Publishing World', *Academic Publishing in ASEAN*, ed. by S. Gopinathan (Singapore: Festival Books Singapore Ltd, 1986), p. 27.
[155] Moto Sekino, *Disseminating Asia's Scholarly Books*, p. 50.
[156] Sri-Edi Swasono, *Academic Publishing in ASEAN*, p. 27.

presses, the need for textbooks for internal use was met by independent groups, at the faculty and university level, mostly in the form of published mimeographed lecture notes. This 'emergency' situation (with much copyright infringement) succeeded in supporting the educational system for approximately 10 years.[157] It gradually disappeared with the appearance of more formal campus publishers and bookstores.

The university presses were established to meet urgent needs, and therefore serve several functions. They receive orders to print or publish for their parent university, publish books on their own initiative and seek printing and publishing orders from outside sources, whether government agencies or private institutions. They are responsible to the rector of the university, directly or indirectly; while the press's director is usually a member of the university leadership.[158] There are also university presses which form business units which are structurally autonomous but functionally owned by their respective institutions and carry out institutional duties and have to pay taxes as ordinary businesses.[159] Not all employees of university presses are government employees, but at some other university presses, this may virtually be the case. At the University of Indonesia press for example, only the director and manager are government employees, while fifty others are non-government employees receiving salaries according to the (higher) private business scale.[160] The press does not receive any allocation from a government budget, and its main asset has been the good name of the university.

The university presses are generally not profit-oriented but are expected at least to break-even, although some of the presses directly or indirectly receive or make use of subsidies, since they are much less efficient than university presses in the West. In addition, there are 13 learned societies (1984 figure), of which the oldest is the Institute of Indonesian Culture, founded in 1778[161],which publish works from time to time.

[157] Sri-Edi Swasono, *Academic Publishing in ASEAN*, p. 28.
[158] Sri-Edi Swasono, *Academic Publishing in ASEAN*, p. 29.
[159] Ibid.
[160] Ibid.
[161] George Thomas Kurian, *Encyclopedia of the Third World* (London: Facts on File,1992), 4th ed., p. 859.

Books are generally published in bahasa Indonesia, and in this respect there is possibility of co-operation between Indonesia and Malaysia (Brunei and Singapore too) for a larger market (see table 3.1.1 for a list of major languages in the world)[162] as they share a common language[163] in spite of the minor differences in vocabulary (although much bigger than differences between British English and American English). Co-operation in language policy at an early stage of development together with free movement of books would certainly have been advantageous to the scholarly publishing industries of both countries, unfortunately a mixture of national pride and trade protectionism meant that this opportunity was missed. This point of view has also been stressed by Sri-Swasono as she felt that the co-operation has not so far been realised.[164]

Indonesia has 25 languages with some 250 dialects belonging to three language families: Malayo-Polynesian, North Halmaheran and Papuan; the main dialects are Sumatran, Javanese, Borneon and Loinang.[165] Javanese is spoken by 40 - 50% of the total population, Sundamese by 15%, Madurese by 5 - 10% and Malay by 5 - 10%.[166] The official language is bahasa Indonesia, derived from trade Malay/Melayu or Malay pasar and is used as the lingua franca. Bahasa Indonesia differs from standard Malay by its large vocabulary of borrowed words from European languages, Arabic and Sanskrit.[167] Considerable efforts have been undertaken to standardise its orthography and in 1974 the Institute of National Language was established for this purpose.[168] However, standard or literary bahasa Indonesia is being displaced in government and educational institutions by colloquial Indonesian. Most Indonesians are bi or tri-lingual and English is officially the second language even though Indonesia is an ex-Dutch colony. Bahasa Indonesia (together with bahasa Melayu) is one of the major languages of the world and occupies a central position in the Southeast Asian region. It has influenced many

[162] Although English ranks second in the league of major languages, from the perspective of scholarly publishing it is the world lingua franca.
[163] Indonesia lifted its ban on importing books in its language in 1985.
[164] Sri-Edi Swasono, *Academic Publishing in ASEAN*, p. 31
[165] George Thomas Kurian, *Encyclopaedia of the Third World*,(London: Facts on File, 1992) 4th ed., p. 843.
[166] Ibid.
[167] Ibid.
[168] Ibid.

other languages such as Tagalog (Filipino), see table 3.1.1 of the position of bahasa Melayu/Indonesia in the world.

Table 3.1.1 **The world's major languages, 1990.**

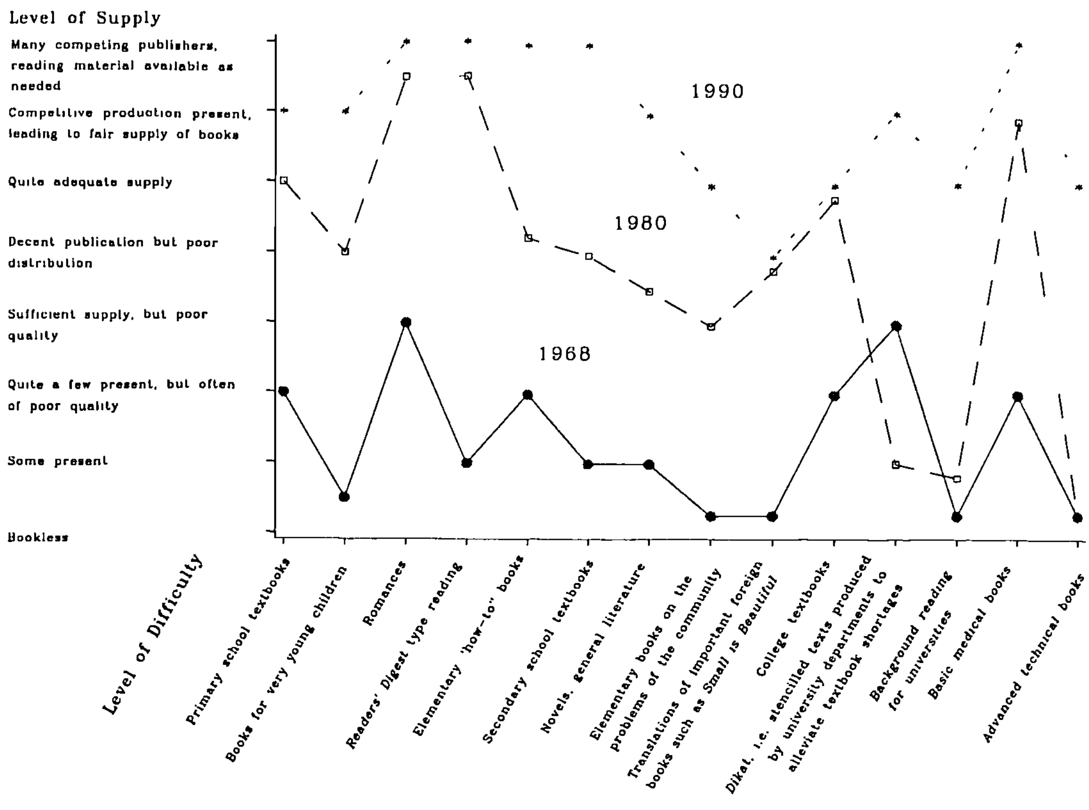
Language	Estimated number of speakers (millions)	Percent of world population
Chinese	1077.5	20.9
English	593.9	11.5
Hindustani	412.3	8.0
Spanish	311.4	6.0
Russian	285.1	5.5
Arabic	206.4	4.0
Bengali	177.6	3.4
Portuguese	161.1	3.1
French	131.4	2.5
Japanese	122.3	2.4
Malay-Indonesian	113.3	2.2
German	89.1	1.7

SOURCE: *World Education Report, 1993,* p. 27

From 1981 to 1986, on average 6,500 titles were published each year in Indonesia, including translations, of which the university presses accounted for only 2.5 percent.[169] The ability to supply scholarly and other types of books is shown in figure 3.1.1, where the abscissa show the kinds of books available, arranged in order of difficulty, from a school primer to an advanced technical book; while the ordinates reflect a quantitative evaluation, ranging from no books at all, to a few, and to a sufficient number. Normally, the easiest and most popular types of books - closest to zero on the abscissa - will be the first to be published because they will have the largest market, while the most advanced will be the last to tempt publishers, since they depend on a small readership and require "intelligent" authors. The graph of a book-rich country would be a straight line across the top, showing that the overall demand for books of all types has been met.[170]

[169] Pauline Khng, p. 85.
[170] Ivan Kats, 'The Story of the Obor Foundation', *LOGOS*, vol.2, issue 3, 1991, p. 132.

Fig 3.1.1 **Book Supply in Indonesia in 1968, 1980 and 1990**



SOURCE: *LOGOS*, vol. 2/3, 1991

The importance of a sufficiently large "pool of knowledge" is one of the main concerns of a country as it improves the country's ability to successfully home-produce technology. Statistics on the number of articles published/scholarly publications provide an indication to the extent a country is advanced in terms of its research activities. Figure 3.1.2 presents the number of articles[171] in research journals by writers from Indonesia, Malaysia, Thailand, Singapore, South Korea and Brazil. A comparison of scholarly articles (in the field of science and technology only, but these are the most important in terms of a country's international technological competitiveness) published by Indonesian researchers and those from Malaysia and Thailand revealed that Malaysian and Thai researchers published about three times as many science articles according to the SCI (Science Citations Index)[172] as Indonesian writers. However Singaporean researchers published over twice as many as Malaysian researchers in 1986 (or a

[171] Number of articles were counted as "fractional counts" in which an article with author addresses in several countries was allocated fractional to each country (1/N articles were counted for each of N authors).
[172] The largest data base for research literature is the Science Citations Index (SCI), maintained by the Institute for Scientific Information in the United States.

multiple of 12 if controlling for the population). In addition Singapore published three times as many articles in 1986 as in 1980 while publication levels for Indonesia, Malaysia and Thailand remained stagnant.

Regarding the pattern of distribution across fields of science, clinical medicine and biology related articles accounted for the majority of publications in Indonesia, Malaysia and Thailand whereas in Singapore and South Korea, engineering and technology fields were more prevalent (see figure 3.1.3 for the distribution of articles by subject field). In general, clinical medicine accounted for the biggest share of scientific papers. Table 3.1.2 shows clearly the growth in clinical medicine, from 28.6% (1973 - 1978) to 32.5% (1981 - 1986) while biomedical research maintained its importance.

Table 3.1.2 **Percentage distribution of world scientific papers 1973 - 78, 79 - 84 and 81 - 86**

	1973 - 1978	1979 -1984	1981 - 1986
Clinical Medicine	28.63	30.12	32.50
Biomedical	15.56	16.08	16.58
Biology	8.75	8.79	9.26
Chemistry	16.70	16.08	14.26
Physics	13.37	13.93	13.40
Earth & Space	4.30	4.47	4.68
Engineering & Technology	9.76	8.16	6.93
Mathematics	2.93	2.37	2.40

SOURCE: Daniel Archibugi & Mario Pianta, *The Technological Specialisation of Advanced Countries* (Dordrecht, The Netherlands: Kluwer Academic Publishers, 1992), p. 92.

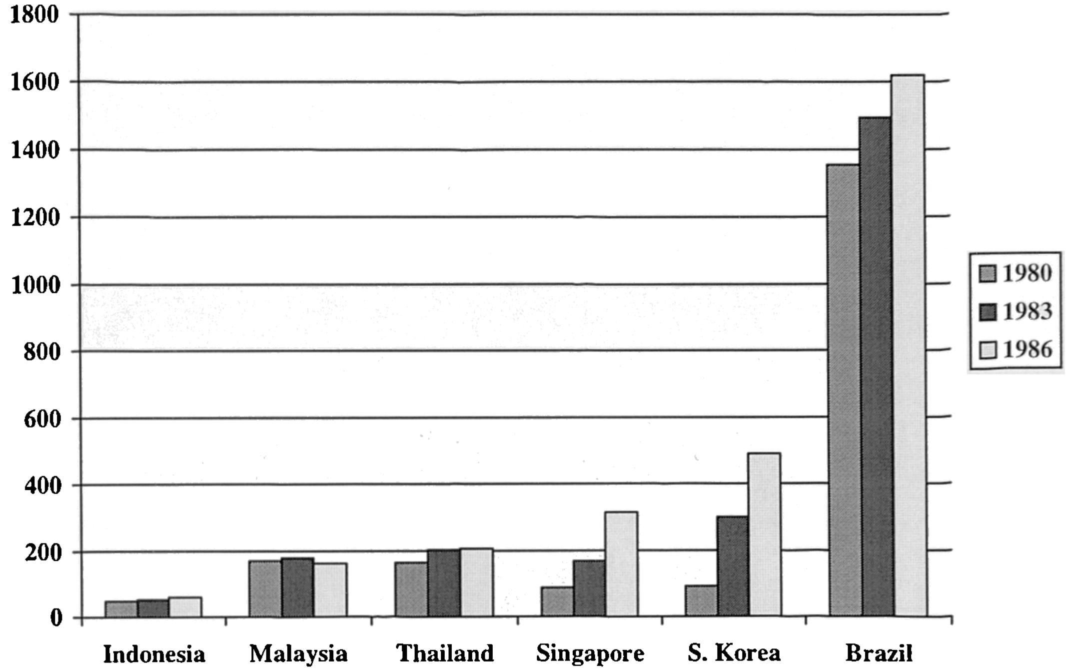
Co-authored[173] works play an important role in modern research:[174] i) they serve the classic role of integrating researchers from one country with another; ii) reflect the flow of research results into the country and iii) serve as a catalyst for researchers within the country to collaborate with another. Indonesian authors were more likely to co-author articles with foreign authors than other countries, with the exception of Thailand, see figure 3.1.4. Researchers from ASEAN

[173] A co-authored article is defined as a work authored by researchers from either different institutions within the same country or of different nationality.

[174] *Science and Technology Indicators 1993* (Indonesia: Science and Technology for Industrial Development, 1993), p. 90.

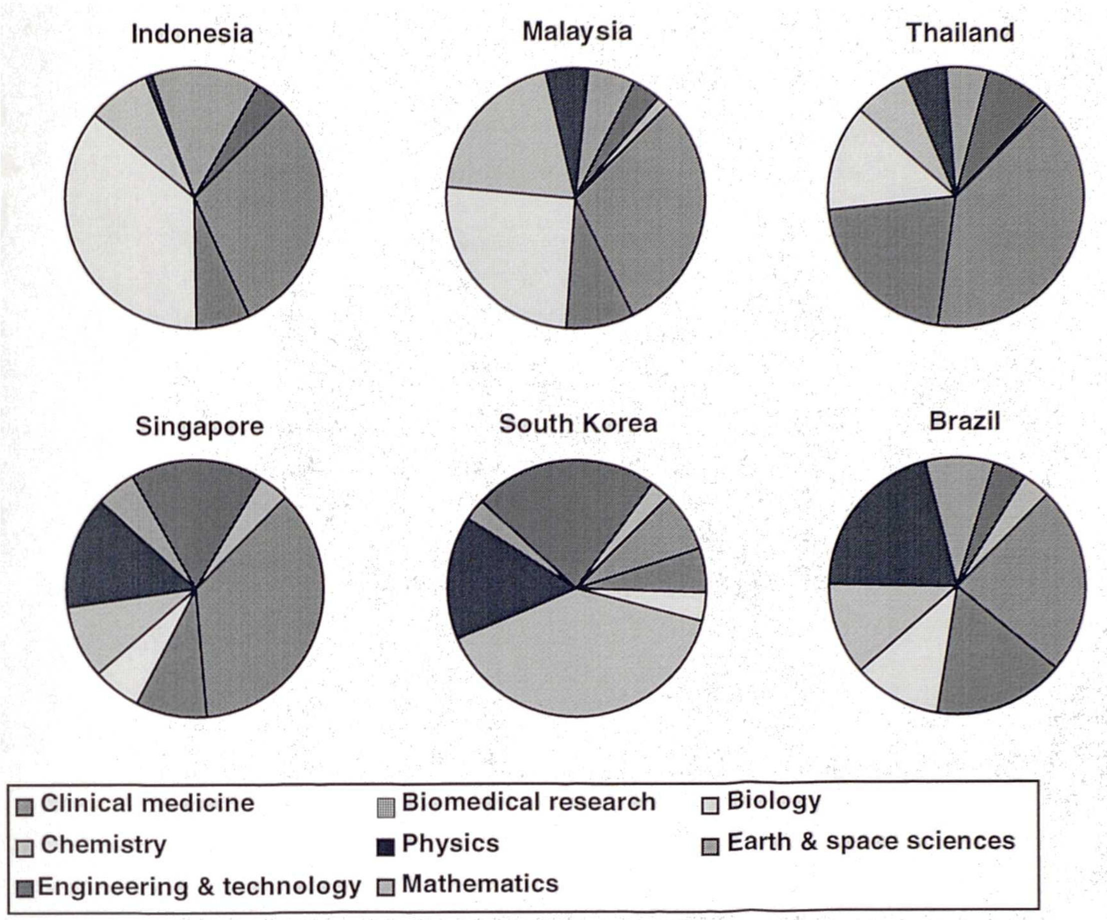
countries were more likely to co-author an article with their counterparts from Western Europe or North America rather than those from other ASEAN countries (see table A8.2 of Appendix 8), and showed that research link and collaboration are still weak at the ASEAN level.

Figure 3.1.2 **Articles in Research Journals by Residents of Indonesia and Selected Other Countries, 1980, 1983 and 1986.**



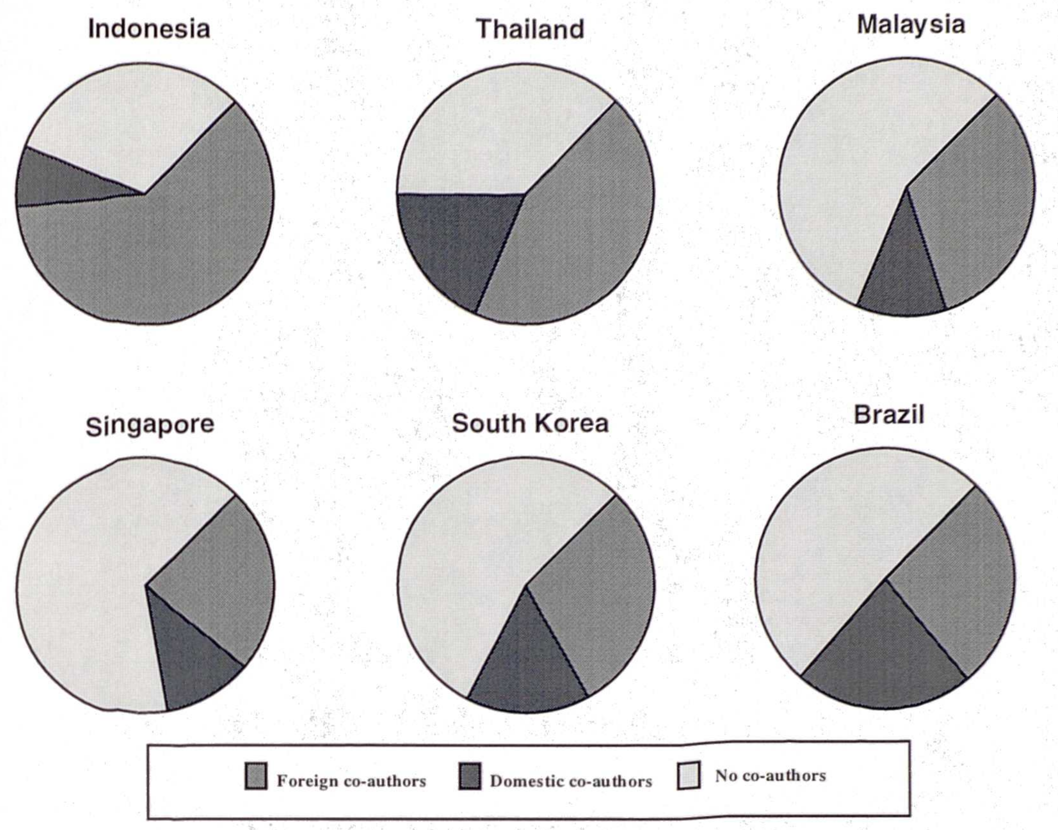
For detailed figures see table A8.1 of Appendix 8.

Figure 3.1.3 **Distribution of Articles by Field of Science in Selected Countries, 1986**



SOURCES: For both figures were from *Science and Technology Indicators 1993*, p. 86 & 88. For detailed figures, see table A8.1 of Appendix 8.

Figure 3.1.4 **Institutional and International Coauthorship Involving Residents of Indonesia and Selected Other Countries, 1983 - 1986**



SOURCE: *Science and Technology Indicators*, p. 89
See table A8.3 of Appendix 8 for detailed breakdown.

Although Indonesia ranks fifth in the world in terms of population[175], its book production is very low (see tables A5.1 and A5.2 of Appendix 5). 6303 titles were published in 1992 of which 6,128 were book titles[176], 715 were school textbooks[177] while 1,084 were children's books.[178] Table 3.1.3 shows that Indonesia runs a large publications deficit with the rest of the world and this imbalance has grown larger in recent years in spite of increased government support for the industry.

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[175] The 1990 census recorded 178.573 m people living in Indonesia and official estimates at 1993 put the figure at 188,327 m with further 0.81m living in the East Timor; data from *The Europa World Year Book, 1994*, p. 1468.
[176] *UNESCO Statistical Yearbook, 1994, p. 7-68.*
[177] *UNESCO Statistical Yearbook, 1994, p. 7-80.*
[178] *UNESCO Statistical Yearbook, 1994, p. 7-6.8.*

Table 3.1.3 **International Trade of Books and Periodicals in Indonesia (in US$ million)**

Books & Pamphlets	1980	1985	1992
Export	0	0.1	0.7
Import	(3.1)	(8.3)	(17.4)
Balance	(3.0)	(8.2)	(16.7)
Newspapers & periodicals			
Export	0	0	0
Import	(0.6)	(1.6)	(4.1)
Balance	(0.6)	(1.6)	(4.1)
Overall	(3.6)	(9.8)	(20.8)
Exchange Rate	626.994	110.580	2029.921

SOURCE: *UNESCO Statistical Yearbook*, 1992, 1993 & 1994

Since 1980, Indonesia has twice devalued its currency by more than 50% each time[179] (the Indonesian government took loans in the Yen from the Japanese government but as the Yen has strengthened against the Indonesian Rupiah, as well as other currencies, the cost of servicing the debt has soared). In addition, various taxes and the high cost of currencies have limited the available funds allocated for buying books to the barest minimum[180]). In order to continue to discharge their important role, University presses in Indonesia have been given grants by the Directorate-General of Higher Education and The World Bank, amongst others. There is a "Consortium of the Services", which decides on standard curricula, minimal textbooks, reference materials, and the list of foreign titles to be translated into bahasa Indonesia.[181] The foundation of Obor,[182] for instance, (which means "torch" in the bahasa Melayu/Indonesia) chose Indonesia as a pilot project to develop scholarly books.[183]

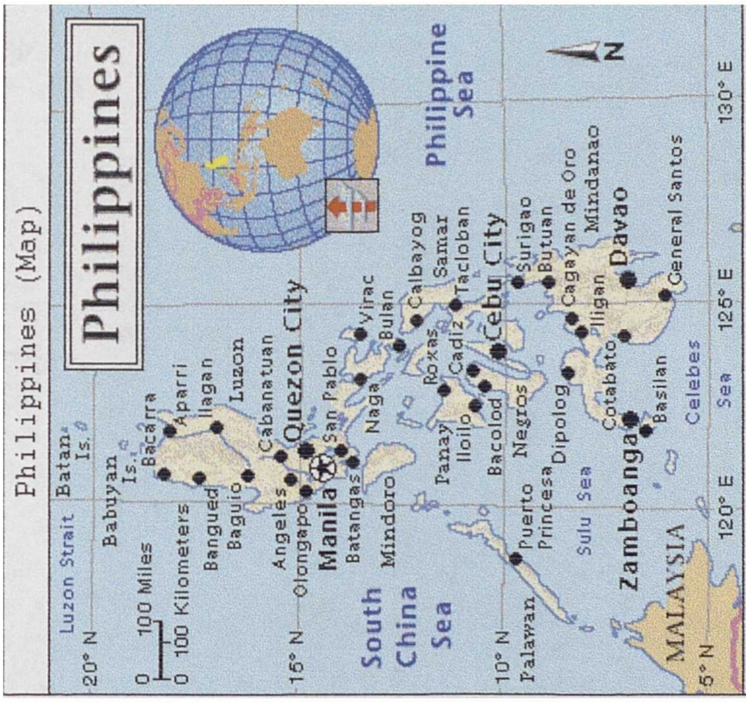
[179] Moto Sekino, 'Toward a Greater Book Exchange in Asia' in *Disseminating Asia's Scholarly Books*, (Norway: IASP, 1986), p. 50.
[180] Moto Sekino, ibid., p. 50.
[181] Pauline Khng, 'Academic Publishing in the Countries of ASEAN' in *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers (IASP), 1986), p. 85.
[182] Obor is a registered public charity in New York State; its governing body is an international Board of Trustees, drawn from five nationalities. "Obor Indonesia" was set up in 1975. In the late 1980s, Obor extended its activities to Malaysia, The Philippines, Pakistan, and Thailand. It publishes in the local languages through a number of affiliated centres. Representatives of these centres meet regularly to plan regional projects aimed at informing each participating country of its neighbours.
[183] Ivan Kats, 'Obor Foundation and its Experience in Book Development', a paper presented in a seminar of Book Development and Cultural Exchange in the East Asian Cultural Tradition, on 23 - 25 October, 1989, Tokyo.

In spite of assistance, the problems faced by the scholarly publishing industry in Indonesia, as summarised by a delegate during an academic publishing seminar held in Singapore (September 1985), were: the low buying power of the public; acute distribution problems due to lack of funds; and lack of a low mailing tariff (relative to income); the existence of piracy activities where pirated books or photocopies fill the gap in the availability of scholarly texts; the nation's poor reading habit;[184] and the limited number of public libraries which reduces the sale of books.[185] Additional problems include the limited number of scholars who have ample time for translating or writing original text or reference books, and the increasing costs of production. Regarding the nation's poor reading habit, Ivan Kats has different view when he says that Indonesians are a book-loving people, a cultural trait that cannot be taken for granted; besides its large population and its high literacy. However, based on tables A5.1 & A5.2 of Appendix 5, controlling for the population size, the number of all publication titles, number of book titles only and the number of school textbook titles are all far below that expected for a country of similar population in the sample. This seems to support the argument that Indonesians have a poor reading habit. The situation is also true when taking into consideration the people's purchasing power (GNP per capita), the exception being the number of book titles produced; there the figure suggests that the situation above is expected for a country of similar economic wealth in the sample. It seems that after controlling Indonesia's literacy[186] rate and income per capita, the nation's reading habit is poor. The researcher believes this situation is due to an inefficient publishing industry and acute distribution problems. The country consists of 13,677[187] islands although two thirds of the population live in the main islands (Java and Sumatera: Java has 112 million people and Sumatra has 39 million people), the remainder of the market scattered over the remaining islands, however poor infrastructure in the main islands is also prevalent. This causes an acute distribution problem with increased marketing costs culminating in a higher price. In addition, those who live in rural areas are generally poorer

184 This contradicts the statement made by Ivan Kats, see 'The Story of the Obor Foundation', *LOGOS*, vol.2, issue 3, 1991.
185 Pauline Khng, op. cit, pp. 85 - 86.
186 By this we mean the number of people who are literate enough to read newspapers.
187 'Indonesia: But for the Flaws', *The Economist*, 1 October 1994, p. 73.

than those in the urban areas due to several reasons such as legal complexities, land rights and educational inadequacies which eventually lead to lack of purchasing power to purchase books.[188] Government policy of constructing trade barriers (Indonesia did not allow any books written in the domestic language to be imported) resulted in an inefficient publishing industry. Instead of import tariffs and trade barriers protecting the industry it created an environment with little competition. The cost of paper is also high as the government puts high tariffs on imported paper to protect the local paper industry, but this provides little incentive for Indonesian paper producers to cut costs; political considerations seem to take precedence over economic sense[189]. The government control on the freedom of press[190] has worsened the situation. That is why Indonesia, after controlling for its population (the world's third largest country[191]) and income has the worst publishing industry amongst ASEAN countries.

188 'Sumptuous Sumatera', *The Economist*, 24 September, 1994, p. 67.
189 'Indonesia: But for the Flaws', *The Economist*, 1 October 1994, p. 73.
190 *The Economist*, 17 September 1994, pp. 63 - 64.
191 'Indonesia: But for the Flaws', *The Economist*, 1 October 1994, p. 73.


Philippines (Map)
Philippines
Luzon Strait
Batan Is.
Babuyan Is.
Bacarra
Aparri
Ilagan
Luzon
Bangued
Baguio
Cabanatuan
Angeles
Olongapo
Quezon City
Manila
San Pablo
Batangas
Mindoro
Naga
Virac
Bulan
Calbayog
Samar
Tacloban
Roxas
Cadiz
Panay
Iloilo
Bacolod
Negros
Cebu City
Surigao
Butuan
Cagayan de Oro
Mindanao
Iligan
Dipolog
Cotabato
Davao
General Santos
Zamboanga
Basilan
Puerto Princesa
Palawan
Sulu Sea
Celebes Sea
South China Sea
Philippine Sea
MALAYSIA
0 100 Miles
0 100 Kilometers
20° N
15° N
10° N
5° N
120° E
125° E
130° E
N

3.2 Publishing in the Philippines

3.2.1 Background

Philippines has a population of 64.259 million (1992 figure) many of which have had little schooling; out of the over 25 age of population, 19.8% have had no schooling, 56.4% have entered and/or completed second level, and 9.6% have some kind of post-graduate training. It had 52 universities and over 1,000 colleges with a total enrolment in 1986 of 1,335,889 students[192]. By 1991, there were 1,656,815 students in all higher learning institutions with 70,012 staff (figure for 1988).[193] In university or equivalent institutions a total of 1,378,316 students were enrolled in 1991.[194] In total, females represented 59% of students (1991) in third level education and accounted 47% of students in universities (in 1991).[195]

3.2.2 Publishing Situation

The beginnings of scholarly publishing in the Philippines can be traced to the 17th century during the early years of Spanish rule, when the first grammars, dictionaries, and histories were published in Spanish in the interest of scholarship and meant for a specialised audience.[196] Many of the books published during the early Spanish regime were printed at the first printing press set up at the University of Santo Tomas[197]. Towards the end of the 19th century the Americans took over as rulers; Filipinos took to learning a new language and were soon publishing in English several scholarly journals that survive to this day.[198] Scholarly journals have continued to grow in number and variety in contrast to scholarly books which numbered only a dozen from 1900 - 1935, growing from one a year before World War II to about 15 each year (as reported in 1986).[199]

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[192] *The Europa World Year Book 1994, p. 2390.*
[193] *UNESCO Statistical Yearbook 1994*, p. 3-282.
[194] Ibid.
[195] *UNESCO Statistical Yearbook 1994*, p. 3-331.
[196] Esther M. Pacheco, 'Academic Publishing in the Philippines', *Academic Publishing in ASEAN*, ed. by S. Gopinathan (Singapore: Festival Books Singapore Ltd, 1986), p. 40.
[197] Esther M. Pacheco, *Academic Publishing in ASEAN*, p. 40.
[198] Esther M. Pacheco, *Academic Publishing in ASEAN*, p. 41.
[199] Ibid.

Although the Philippines has a long history of publishing, Filipinos in general have not been educated to enjoy reading. Looking at the country's cultural history, literature was oral and remained so during the Spanish colonial period. Until the 19th century, printing was largely devoted to religious material. General printed texts were not available until the 20th century and then only in the English language which very few local people had mastered. Most people only read vernacular-language magazines, which are "not serious" reading. Serious reading has always been associated with schools and libraries, and this attitude has not produced too many highly literate people.

Scholarly publishing in the country is carried out by different agencies - general publishing houses, research centres and institutes, government agencies, professional organisations, and university presses. Since general publishing houses are mainly profit-making, they rarely publish scholarly books and if they do so, they are considered as mere "prestige adjuncts" to their main business.[200] Research centres and institutes most of which are attached to institutions of higher learning, put out monographs, journals, occasional papers and books - all of which are results of research and studies these bodies are mandated to undertake. While the government agencies focus on publications in their respective area of specialisation, such as the National Historical Institute, the National Library, the Institute of Philippine Languages, the National Museum and the National Economic Development Authority. A fourth group of publishers is made up of professional academic associations which publish only academic journals to which their members subscribe. The three university presses, the last group making up the core of scholarly publishing in the country, are: Ateneo de Manila, De La Salle and University of the Philippines, although there are some 70 universities in the country.

Scholarly books only make 3%[201] (5%[202]) of the book trade and to a large extent are dominated by reprints of foreign textbooks. Most sustained local scholarly publishing is undertaken by

[200] Esther M. Pacheco, 'The Challenge of University Press Publishing in the Third World: The Philippine Case'in *Publishing and Development in the Third World*, ed. by Philip G. Altbach (Kent: Hans Zell Publishers, 1992), p. 266.
[201] Esther M. Pacheco, ibid, p. 2.
[202] In her article in *Academic Publishing in ASEAN*, Pacheco reported the figure as 5%.

two university presses: Ateneo de Manila and University of the Philippines.[203] Some university press titles also sell abroad, especially in the United States, through co-publication arrangements (Ateneo Press is the most active in this regard) or exclusive distribution by an American publisher - e.g. the University of Hawaii University Press, which distributes the Philippines Press books.

Similar problems to Indonesia beset scholarly publishing in the Philippines and can be found in the areas of finance, promotion and sales, manuscript development, recruitment and distribution. In a larger context, the problems include the nation's income, cultural history, poor reading habit and a population which is scattered over many islands. The population of the Philippines was 64,259 million in 1992[204] with a literacy rate of 89.7% in 1990 (a 5.8% reduction from 1980 to 1990 in the number of illiterate people).[205] Although its literacy rate is considered high, only half of these can be considered as 'really literate' according to a Ministry of Education survey which revealed that the average grade six pupil cannot discern the main idea in what he reads.[206]

Local book publishing in the Philippines is a sad scene, according to Esther M. Pacheco: "if one steps into a typical Manila book shop, one sees hundreds of titles, only some 10-15% of them are books published locally"[207]; this is also reflected in table 3.2.3 which shows a vast trade deficit in books and periodicals with other countries in particular the Western countries.

[203] Esther M. Pacheco, ibid., p. 2.
[204] *UNESCO Yearbook 1994*, p. 1-7.
[205] *World Education Report*, 1993, p. 122.
[206] Esther M. Pacheco, 'Books and Reading: Country Report for the Philippines', a paper presented in *Regional Seminar on Promotion of the Reading Habit*, Singapore, 7 - 10 September, 1981.
[207] Esther M. Pacheco, 'Books and Reading: Country Report for the Philippines', ibid., p. 2.

Table 3.2.3 **International Trade Balance in Books and Periodicals in Philippines (in US$ million)**

Books & Pamphlets	1980	1985	1991
Exports	0.1	0.1	0.3
Import	(13.7)	(4.3)	(18.4)
Balance	(13.6)	(4.2)	(18.1)
Newspapers & Periodicals			
Exports	0.3	0.3	0.6
Imports	(3.6)	(2.3)	(4.7)
Balance	(3.3)	(2.0)	(4.1)
Overall	(16.9)	(6.2)	(22.2)
Exchange Rate to US$	7.511	18.607	27.479

SOURCE: *UNESCO Statistical Yearbook*, 1992, 1993 and 1994.

Textbooks makeup 42.3% of all local books published (figure in 1991) as they offer attractive financial returns. There were 323 titles of school textbooks published in 1991 of which only 10 titles were children's books.[208] However, as in Malaysia, in 1986 the government took over textbook publishing for the public school system (elementary and secondary schools) drawing strong protests from publishers.

On the whole, the publishing industry faces a serious crisis. Due to the small number of buyers, publishers print a limited number of books. At the same time they face a spiralling rise in production costs. A major component of costs is paper, which is produced locally but at a cost more than twice that of foreign paper. Importation of paper has been minimal because of tight foreign-exchange controls. Furthermore, publishers cannot obtain loans at low interest rates which has forced them to pass on higher financing costs to customers many of which are then not able to afford books.

Distribution is amongst the most problematic publishing functions for publishers in the Philippines. Most stockist are in the Metro Manila and surrounding provinces, where only about 30 percent of the people live, with the rest over the 7,000 or so islands. Bookstores are virtually non-existent outside Metro Manila. Contributing to this situation is the expensive and inefficient transportation system and postal facilities, the non-existence of an effective national library network, the poor use publishers make of promotional aids such as press releases and

[208] *UNESCO Statistical Yearbook, 1994*, pp. 7 - 77 to 7 - 78.

book reviews, and the poor purchasing power of academics (salaries of academics are low) for whom scholarly books are ultimately meant. Problems also abound in the rest of the production process, amongst the major ones are the lack of appreciation of good book design resulting in poorly packaged books, poor quality printing, especially of government books, which by government regulation need to be printed by the lowest bidder, the soaring cost of production, as the inflation rate is high in the face of a foreign debt that eats up practically half of the national budget, and the lack of knowledge in design and production techniques - especially among publishing managers and journal editors (ignorance that ends not only in sorry-looking publications but also in waste of money, effort, and time).[209]

Tables A5.1 & A5.2 (of Appendix 5) reaffirm the above arguments since after controlling for population size and GNP, the number of all publications titles published, number of book titles and number of school textbooks, are all far below the expected for a similar country in the sample, although the situation is slightly better than in Indonesia. In order to promote books and reading, several associations and organisations have been established and they have organised a variety of activities, e.g. "Binhi" and Bookdale Lending Book shop. "Binhi"(Seed) Children's Library Development is a project which creates a children's book corner in an existing town or city library. It supplies children's books to members who, after paying for a membership card in a Bookdale Lending Book shop, can borrow as many books as they want. The outlets are found in places frequented by crowds such as at supermarkets and airports.

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[209] Pacheco, op. cit.

Thailand (Map)

3.3 Publishing in Thailand

3.3.1 Background

The population of Thailand in 1992 was 57.760 m[210] increasing from 51,580m[211]in 1985. According to the 1990 census, the adult literacy rate was 93.3%.[212] Of the total population over 15, 18.7% have had no schooling, 67.7% have reached up to the fourth grade, 9.9% have completed at least the seventh grade, 2.7% have completed secondary school, and 1% have completed some kind of post-secondary training.[213] In 1985, 21.9% of the population were in the important age group of 15 - 24, this is projected to decrease to 19.5% by the year 2000.[214] Ninety per cent of the population speak Thai of Sanskrit origin with borrowings from Khmer and Pali although Teochiu Chinese and Malay are also common. English is the second official language and books in English are used widely at higher learning institutions.

3.3.2 Publishing Situation

The term 'press' in Thailand, as in many developing countries, is synonymous with a printer, a publishing house or a university press, since publishing activities can be carried out by all and sundry.[215] Until the creation of a proper university press, Thai scholarly publishing had to rely on the Social Science Association, consisting mainly of university teachers in Humanities and Social Sciences, which published most scholarly books. In 1963, an editorial board was established with authors drawn mainly from institutions of higher education.[216] Until 1975, the Association had been able to bring out between 5 to 10 titles a year including university textbooks and general books.[217] The first firm, however, to publish textbooks at the university level is reputed to have been Thai Watana Press, the country's principal publishing house for many decades. By 1984, the press had published 511 titles for university students.[218]

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[210] *UNESCO Year Book, 1994*, p. 1-7.
[211] *UNESCO Year Book, 1992*, p. 1-7.
[212] *UNESCO Year Book, 1992*, p. 1 - 7.
[213] George Thomas Kurian, *Encyclopaedia of the Third World* (London: Facts on File, 1992) 4th edn,, p. 1886.
[214] *Encyclopaedia of the Third World, ibid.*
[215] Sulaksana Sivaraksa, 'Scholarly Publishing in Thailand' in Scholarly Publishing in South East Asia (Kuala Lumpur: Association of Southeast Asian Institutions of Higher Learning, 1975), p. 159.
[216] Sulaksana Sivaraksa, ibid., p. 159.
[217] Ibid.
[218] Kraiyudht Dhiratayakinant, 'Academic Publishing in Thailand' in Academic Publishing in ASEAN: Problems and Prospects, ed. by S. Gopinathan (Singapore: Festival Books Singapore Ltd, 1986), p. 62.

The main problem for Thai publishers is that academic books can be published by all. Lecturers or tutors may, for example, "publish" their own textbooks either through commercial printers or, more crudely, have their work xeroxed with covers provided by commercial printers. These books are then sold by authors themselves or through book shops. These books form the major portion of academic books in the market, and there are several thousand such titles. The print run for such books, however, is between 200 - 500 copies only and 1,000 is exceptional. Faculties and research institutes also publish their own books in a similar manner. These are not regarded as academic publishers because they do not publish regularly.

There are only two university presses in Thailand - Chulalongkorn and Thammasat whereas the country has 12 universities. Chulalongkorn University is Thailand's oldest university, it started its own press only in 1979 and by 1985 had published 80 titles.[219] Chulalongkorn applies stringent rules on quality of manuscripts and publishes normally in Thai, as translations are expensive and there is a scarcity of qualified or willing translators. Translations of western classics are acceptable but translation of works is not encouraged. The average print run of books published by Chulalongkorn is 1,000 and these take four years to sell. Thammasat, unlike Chulalongkorn, also publishes local academic books in English. It has published more titles than Chulalongkorn because it also publishes and sells the lecture notes prepared by its lecturers for students. It publishes about half of the journals available in the country.

Total number of all titles published in Thailand in 1990 was 7,783 of which 7,684 were book titles (the rests are non-book titles). By 1992, the titles had decreased to 7,626 of which 7,565 were books. There were 241 private publishing houses, 44 government and semi-government offices involved in publishing industry in Thailand (figure for 1988),[220] of which 20 are producing children's books only and a further 50 published children and other titles.[221] Almost

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[219] Pauline Khng, *LOGOS*, op. cit., p. 87

[220] K. Karnchanachari, 'Commercial Book Publishing in Thailand' (unpublished Ph.D. thesis, Loughborough University, 1991), p. 16.

[221] K. Karnchanachari, ibid., p. 79.

all commercial book publishers are based in the capital city of Bangkok. Tables A5.1 & A5.2 (of Appendix 5) show that the publishing output was far below that expected after taking into consideration the population and GNP per capita, thus the scope for development is considerable even in the context of the present situation. The low rankings suggest the problem lies elsewhere than in population size or wealth, perhaps in population demographics, piracy, distribution, government regulations and universities.

A survey undertaken by Karnitha Karnchanachari based on 90 publishers (respondents) showed that professional and reference books (including professional, dictionary and reference) represented 31.8% of total value while 17.6% of publications could be categorised as professional and reference books[222] (for both figures see table A9.1 of Appendix 9). According to Karnchanachari the publishing industry accounted for 0.25% of the total GNP, representing a minuscule amount of the economy.

BOX 3.3.1: Comments on Karnchanachari's work

The figures in Table A9.1 (see Appendix 9) calculated by Karnchanachari used an aggregate percentage based on the assumption that all book publishing house are equal in size. In her earlier findings of the publishers' profile, Karnchanachari showed that there were some differences in the size of publishing houses in the sample. Therefore, it is incorrect to calculate the aggregate as it does not reflect the real size of the publishing industry. Therefore, the figures showed in her findings most likely do not reflect the correct situation as she has claimed as the size of the respondents differed and the figure 0.25% was based on only 90 respondents.

Although a Textbook Project Committee was established in 1968 to meet the pressing need for textbooks especially from English language, the Committee failed to meet the demand due to weaknesses such as the absence of a strong secretariat and size of their membership (the Committee only managed to publish 10 titles up to 1975).[223]

[222] The researcher however quoted this figure with some reservation, please see box 3.3.1 for explanation.
[223] Sulaksana Sivaraksa, 'Scholarly Publishing in Thailand' in *Scholarly Publishing in South East Asia* (Kuala Lumpur: Association of Southeast Asian Institutions of Higher Learning, 1975), p. 159

Table 3.3.1 shows that Thailand has a large trade deficit with respect to its publishing industry, and as with other countries in the region the deficit has been growing in recent years.

Table 3.3.1 **International Trade of Books and Periodicals in Thailand (in US$ million)**

Books & Pamphlets	1980	1985	1991
Export	0.1	0.3	4.0
Import	(4.5)	(8.2)	(21.1)
Balance	(4.4)	(7.9)	(17.1)
Newspapers & periodicals			
Export	0.2	0.8	2.7
Import	(0.6)	(1.6)	(12.8)
Balance	(0.4)	(0.8)	(10.1)
Overall	(4.8)	(8.7)	(27.2)
Exchange Rate Baht/US$	20.476	27.159	25.517

Source: UNESCO Statistical Yearbook, 1992, 1993 and 1994.

Among the problems that have been identified in the country's scholarly publishing industry are:[224]

1. Academic books practically price themselves out of the market because of the population's low income level.

2. In Universities, there is low demand for academic books since there is a high degree of competition among university faculties teaching the same subject: there exists no mechanism by which all instructors of the same subject at one university (nor in the US or UK), not to mention different universities, are required to adopt even those textbooks judged of highest quality (each lecturer promotes his own book, normally xeroxed copies, and each faculty promotes books published by its own faculty). Since a large portion of the limited budget is spent on English textbooks and journals, libraries have very little left for purchasing local books.

3. The status of universities themselves causes a hindrance to the development of a sound scholarly book publishing industry. As all universities are government agencies and their academicians are government servants, they have to conform strictly to civil service procedures - in the all "pervading atmosphere of bureaucracy, there is little room left for originality and innovation"[225].

[224] Pauline Khng, 'Academic Publishing in the Countries of ASEAN' in *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers (IASP), 1986), p. 87.
[225] Sulaksana Sivaraksa, 'Scholarly Publishing in Thailand' in *Scholarly Publishing in South East Asia* (Kuala Lumpur: Association of Southeast Asian Institutions of Higher Learning, 1975), p. 159.

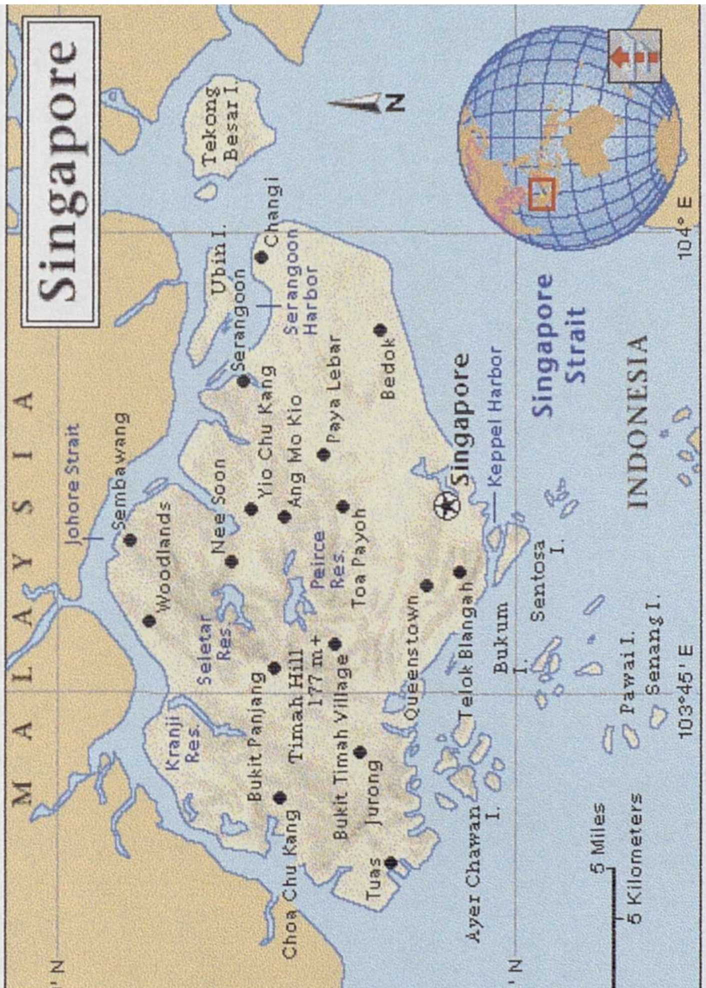
4. There is poor book marketing in the country particularly in non-urban areas, while distribution in the city of Bangkok is less problematic because of the presence of several book shops, very little direct sales have been attempted by Thai publishers. Most books are sold via provincial bookstores together with some publicity through Bangkok's newspapers.

5. Costs of quality production are very high, since services by good typesetters and printers are expensive.

6. Publishing personnel are in short supply because of low salaries. Publishers' attempt to control the increasing cost of production by limiting salaries has led many able personnel to join other media industries.

Academic publishing in Thailand is still in its infancy, even by ASEAN standard; it remains to be seen to what extent and how rapidly Thailand solves its problems. Major problems stilll exist in the areas of distribution, copyright and marketing. Continued economic growth should help publishers by allowing them easier access to cheap capital, advanced equipment, improve the professionalism of its publishing personnel, and finally, most important of all, improve the purchasing power and hopefully buying habit of its populace.

Singapore (Map)



3.4 Publishing in Singapore

3.4.1 Background

Singapore as an island of 2,798,000 million[226](1992 figure) people is atypical of the region, although still referred to as one of the "emerging" economies, its GDP was at US$ 19,300 (1993 - growing at over 6.1% per annum between 1985 - 1993[227]). It has only two universities[228] and two polytechnics with total enrolment of 50,756[229] (nearly three times the Malaysian enrolment rate). In 1990, approximately 19% of young people were studying at a third level education institution, see table 2.3.5 (in Chapter Two). With so many young keen to improve their fortunes via education, this has created an environment where the quality of books matters rather than the price. This has created a (small) domestic market that is inelastic with reference to its demand for books. At present, the most widely used language is English, while Chinese, Malay and Tamil serve as the other official languages.

Singapore's literacy rate has been rising since the end of the Second World War - from 46% in 1947, 52% in 1957, 72% in 1970, 84% in 1980[230] to 89.1 in 1990 (for age 15 and above)[231] a reflection of the success of its educational system. Researches and surveys done on reading habits in Singapore are much more than in other countries in ASEAN and can be grouped into four sections: primary, secondary, tertiary and adult. Under the primary section, research started with a survey conducted by the Research Unit of the former Teachers' Training College in the late 60s, followed by Gopinathan, Heaton in 1979 and Ng in 1980.[232] (Due to lack of up to date data, the researcher is unable to measure the present situation regarding reading promotion in Singapore). Under the secondary section, there were five studies completed between 1977 and 1979, indicating that the school curriculum seems to influence the students' reading, the amount of reading materials at home is related to the socio-economic status of the parents; the reading habit of parents has an effect on the children, as well as rigid rules and

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[226] *UNESCO World Education Report, 1993,* p. 118.
[227] *The Economist,* 20 May 1995, p. 116.
[228] *The World of Learning 1995*, p. 1330.
[229] Figures for number of students in all level of higher education in 1990 derived from *Human Resources for Science and Technology: The Asian Region* (Washington: Natural Science Foundation, 1993), p. 23 & 61.
[230] Lau Wai Har, 'Reading Research in Singapore', a paper presented at Regional Seminar on the Promotion of Reading Habit, 7 - 10 September, 1981, Singapore.
[231] *UNESCO Statistical Yearbook 1994*, p. 1 - 30.
[232] Lau Wai Har, op. cit., pp.1 - 4.

hours in school libraries have kept students from their main source of reading materials. Findings from a survey done on the tertiary level by Lee in 1979 suggested that students who formed reading habits as youngsters continue reading in spite of external influences. A survey undertaken by the National Book Development Council in 1981 on adults found that only 2.7% were non-readers, 90% spent some time per week reading and 38% read newspapers (see Chapter Four for a comparison of reading habit among people in Malaysia). A comprehensive survey on publishing, printing, book selling and library activity conducted by Dr Cecil K. Byrd on behalf of National Book Development Council of Singapore during 1969/70 concluded that very few people do not read at all although it could not be said that Singaporeans have a high level of reading in spite of its high literacy rate.[233] There has been a growing awareness of the role of reading amongst the society judging by the amount of research done in the country. The country is also active in conducting various activities to inculcate a reading habit among its people. Reading contests and mobile book shops for example have been organised with the co-operation of various parties who are interested in promoting reading including publishers and booksellers. In mobile book shops, booksellers or publishers visit schools and provide information on books to both school children and teaching staff. In direct contrast to this in Malaysia the government had at one time banned publicity or promotion by booksellers or publishers in school compounds (see discussion in Chapter Two), perhaps because publishers and booksellers in Malaysia are only too eager to promote school work books.

3.4.2 Publishing Situation

Unlike its neighbours', book shops in Singapore can be found all over the island, especially in shopping complexes where Singaporeans tend to congregate a lot of the time.[234] There is also relatively high standard of production and printing. The success of scholarly publishing industry in Singapore, especially academic journals, can be linked to the success of World Scientific Publishers.[235] Founded in 1980 with the aims of publishing scientific books for a global market inexpensively, World Scientific has now emerged as a major international

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[233] Lau, p. 9.
[234] S.V. Krishnan, 'The Role of the Book Industry', paper presented at Regional Seminar on Promotion of the Reading Habit, Singapore, p. 2.
[235] S. Gopinathan, 'Academic Journal Publishing in the Context of the Crisis in Third World Publishing' in *Publishing and Development in the Third World*, ed. by Philip G. Altbach (Kent: Hans Zell Publishers, 1992), p. 297.

scientific publisher. In 1990, World Scientific published 16 journals (with an aim to add 10 new journal titles a year) in fields ranging from computing through to mathematical physics, mathematics, artificial intelligence, and solid state science.[236] Most academic publications are sold abroad. The key to the success of World Scientific's journals according to Gopinathan was the aim to produce state-of-the-art journals, meeting the most stringent peer-review criteria, which would make indisputable contributions to knowledge with good, prestigious managing editors.[237] Table 3.4.1 shows that Singapore, unlike other countries in ASEAN does not have a trade deficit of its publishing industry, and to its credit, the surplus has been increasing in recent years. Singapore's output per million population was a hefty 666 titles compared to only 257.77 in Malaysia (2.6 times less per million population). This compares favourably with countries such as the USA with 251.5 titles per million (book titles only), although Sweden had the highest concentration with 1,405.84 titles per million (see Appendix 5).

Table 3.4.1 **International Trade of Books and Periodicals in Singapore (in US$ million)**

Books & Pamphlets	1980	1985	1992
Export	45.0	58.8	231.5
Import	(31.8)	(39.3)	(104.4)
Balance	13.2	19.5	127.1
Newspapers & periodicals			
Export	3.2	6.0	22.8
Import	(14.8)	(15.5)	(25.4)
Balance	(11.6)	(9.5)	(2.6)
Overall	1.6	10.0	124.5
Exchange Rate to US$	2.141	2.200	1.629

SOURCE: UNESCO Statistical Yearbook, 1992, 1993 and 1994.

The Institute of Southeast Asian Studies (ISEAS), which is the largest academic publisher of books on modern Southeast Asia, publishes about thirty titles a year, in addition to three academic journals and an annual review.[238] Singapore University Press (SUP) publishes assigned readings for undergraduates and sells 60 - 70 percent of its production outside the country while the Institute of Southeast Asian Studies (ISEAS) sells 90 - 95 percent abroad, as

[236] Ibid.
[237] S. Gopinathan, ibid., pp 297 - 303.
[238] Pauline Khng, 'Academic Publishing in the Countries of ASEAN' in *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers (IASP), 1986), p. 88.

it is not affiliated to any University and its books are on the Southeast region.[239] The National University library has collections exceeding 1.8 million[240] volumes, making it the largest university library in ASEAN.[241] P.G. Medical Books, as reported by N.T. S. Chopra is a successful scholarly publisher in Singapore. It has done well in the Asian and American and European markets.[242] Scholarly publications are also published by Nanyang University, Singapore Polytechnic, the Regional Institute for Higher Education and Development, the Regional English Language Centre, Asian Mass Communication Research and Information Centre (AMIC), Singapore National Library, and societies such as South Seas Society and Island Society.[243]

Singapore's economic strategy has in large part determined its view of knowledge and culture. In contrast to Malaysia, Singapore has had an internationalist outlook and took a pragmatic view of issues that in Malaysia caused deep divisions.[244] Singapore views the publishing industry as an economic utility irrespective of its ownership.[245] It also has a strong pragmatic developmental philosophy, firm political control and a strong achievement-oriented administrative elite which made a success of Singapore's economic and social development, and which further valued the contribution that university-based research and academics could provide.[246] This limiting of the marketplace of ideas made the university an effective medium for the transmission of knowledge - unlike the Malaysian setting, in which a transformation of society was envisaged as a result of intellectual activity.

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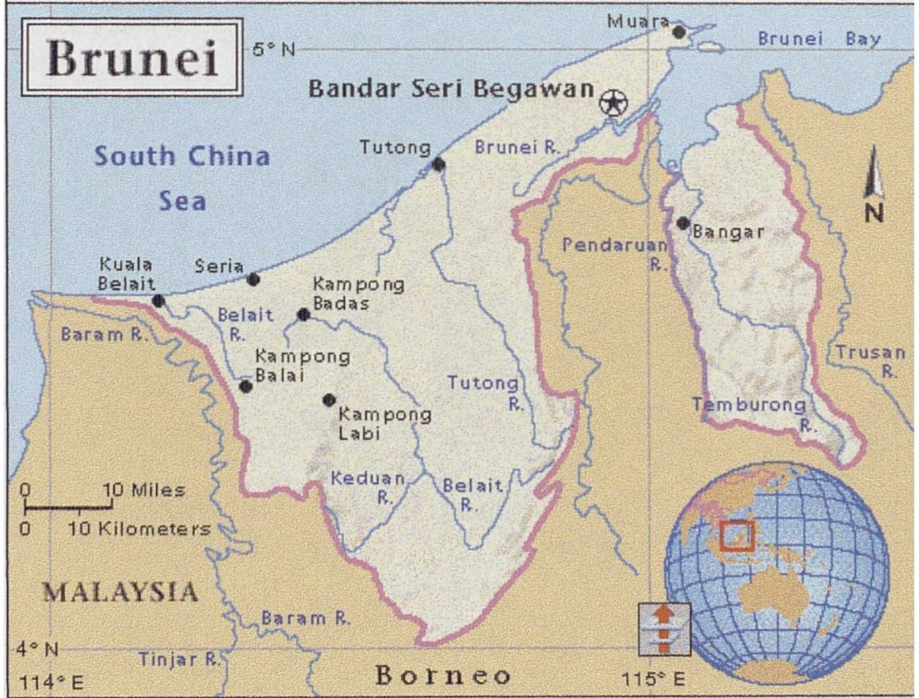
[239] Pauline Khng, ibid.
[240] *The World of Learning 45th edition* (London: Europa Publications Ltd, 1995), p. 1330.
[241] Moto Sekino, op. cit, p.50
[242] N. T. S. Chopra, p. 83.
[243] N. T. S. Chopra, 'Scholarly Publishing in Singapore' in *Scholarly Publishing in South-East Asia*, (Kuala Lumpur: Association of Southeast Asian Institutions of Higher Learning, 1975), p. 175.
[244] S. Gopinathan, 'Academic Journal Publishing in the Context of the Crisis' in *Publishing and Development in the Third World,* ed. by Philip G. Altbach and Gail P. Kelly (England: Hans Zell Publishers, 1992), p. 296.
[245] Ibid.
[246] S. Gopinathan, ibid., p. 297.

Brunei (Map)


Brunei
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Bandar Seri Begawan
South China Sea
Tutong
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Bangar
Pendaruan R.
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Seria
Kampong Badas
Belait R.
Baram R.
Kampong Balai
Kampong Labi
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Tinjar R.
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Borneo
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3.5 Publishing in Brunei

3.5.1 Background

Brunei with a population of 270,000 (1992 figure)[247] shot into prominence with the discovery of petroleum and natural gas in the 1920s, bringing wholesale changes to the economy, making the tiny sultanate the country with the highest per capita income in South East Asia. In 1991, its GDP was B$ 6,604.3m, equivalent to B$ 25,400 (US $14 000) per head.[248]

3.5.2 Publishing Situation

Its literacy rate was around 87.8%[249] in 1991 (for age 15 and above) somewhat lower than expected for a country of comparable wealth. Table A5.1 & A5.2 (of Appendix 5) shows that the number of copies published per capita in Brunei was the lowest amongst the selected countries (although this figure only constitutes home production and not consumption i.e. imports and exports have been ignored. This is important because Brunei imports most of its publications). This measure seems to suggest that the people of Brunei have a poor reading habit. Of course the number of titles written and the number of copies produced are related to each other to some extent. If a country produces a very few titles, customers have a very low choice and consequently may be deterred from buying, and vice-versa, a country where few copies bought by customers may deter publishers from putting out titles. Efforts could be taken to improve the situation as Brunei in some ways is quite similar to Norway, - small, but high income per capita. Norway, however, is one of the most active countries in producing books (the number of book titles published in Norway in 1990 was 2998).[250] Even compared to its neighbour Singapore, which shares many characteristics (both have a high GDP per head, about US $14 000 for Brunei and US $12 000 for Singapore, both are classified as small countries, have a similar origin and development of history; but this is where the similarities end,) the publishing industry in Singapore is far more advanced than in Brunei. In fact Singapore has an excellent reputation in technology-related journals. The argument usually put forward is that Brunei is too small to support an indigenous publishing industry and sees no need to, if it can import, but this argument is of limited value.

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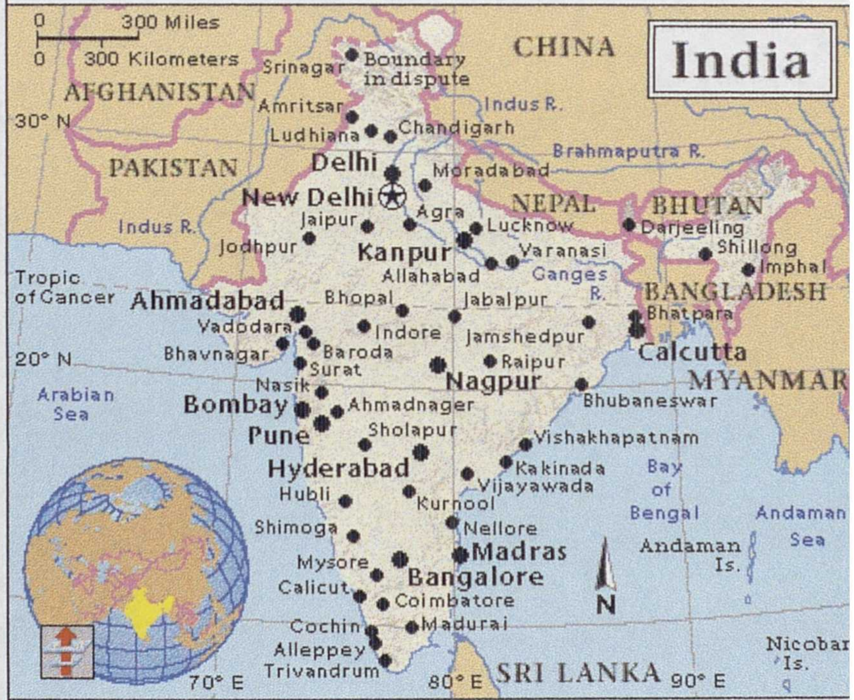
[247] *UNESCO Year Book, 1994*, p. 1-7.
[248] *The Europa World Year Book, 1995*, pp. 640 - 646.
[249] *UNESCO Year Book, 1992*, p. 1-27.
[250] *UNESCO Year Book, 1992, p. 9-27.*

In 1989, there was one teacher-training college, five colleges for vocational and technical education, one institute of higher education and one university. The University of Brunei Darussalam was formally established in 1985 and by 1992/93 had 1065 students enrolled,[251] (still many students continue to be sent to universities abroad). At present there is no academic publishing. However, its needs on school textbooks are taken care of by its own Dewan Bahasa dan Pustaka which had published 267 such titles (up to 1986).[252]

[251] *Commonwealth Universities Year Book 1994* (London: Association of Commonwealth Universities, 1994).

[252] Pauline Khng, 'Academic Publishing in the Countries of ASEAN' in *Disseminating Asia's Scholarly Books* (Norway: International Association of Scholarly Publishers (IASP), 1986), p. 85.

India (Map)


India
CHINA
AFGHANISTAN
PAKISTAN
NEPAL
BHUTAN
BANGLADESH
MYANMAR
SRI LANKA
0 300 Miles
0 300 Kilometers
30° N
20° N
70° E
80° E
90° E
Tropic of Cancer
Boundary in dispute
Indus R.
Brahmaputra R.
Ganges R.
Arabian Sea
Bay of Bengal
Andaman Sea
Andaman Is.
Nicobar Is.
Srinagar
Amritsar
Ludhiana
Chandigarh
Delhi
New Delhi
Moradabad
Jaipur
Agra
Lucknow
Jodhpur
Kanpur
Varanasi
Allahabad
Darjeeling
Shillong
Imphal
Ahmadabad
Bhopal
Jabalpur
Bhatpara
Vadodara
Indore
Jamshedpur
Calcutta
Bhavnagar
Baroda
Surat
Raipur
Nasik
Nagpur
Bhubaneswar
Bombay
Ahmadnager
Pune
Sholapur
Vishakhapatnam
Hyderabad
Kakinada
Vijayawada
Hubli
Kurnool
Nellore
Shimoga
Madras
Mysore
Bangalore
Calicut
Coimbatore
Cochin
Madurai
Alleppey
Trivandrum
N

3.6 Publishing in India

3.6.1 Background

India has a long history of indigenous publishing. In the 19th century, due to the cultural renaissance in Bengal, books were published in vernacular languages, especially in Bengali, Marathi, Malayalam and Tamil.[253] The expansion of the educational system in the country led to a great demand for textbooks at both school and college level. This opened the way for the British publishers to establish themselves in the country - Macmillan (1903), Longman (1906) and OUP (1912), to complement indigenous publishers.[254] Initially the majority of books were directly imported by these British publishers, as the curriculum in India was more or less the same as in England.

Until 15 years ago, the publishing of scholarly books in India was largely confined to books on the Indian sub-continent and on India's art and cultural heritage. In this area work started a long time ago and dates back several centuries. Visiting scholars from other countries also did in-depth studies on the various aspects of India's rich heritage. More recently, British scholars have written and published a great deal on India during the colonial era. The first three universities established by the British administration were Calcutta, Bombay and Madras in 1867. By 1948, when India became an independent republic with a sovereign constitution, it boasted no less than 22 universities. The expansion continued and by 1988, there were about 155 universities with a total enrolment of nearly 4 million students (see table 3.6.1 of growth in enrolment in colleges and universities from 1950 to 1988). This improved situation would seem to suggest a great opportunity for the marketing of scholarly books; unfortunately, however, this opportunity has not been fully exploited.

[253] Heemanshu Gupta, 'Book Distribution and Marketing: India as a Case Study' (unpublished M. Phil dissertation, University of Stirling, 1986), p. 62.

[254] Philip G. Altbach, *Publishing in India: An Analysis* (New Delhi: Oxford University Press), 1975, p. 37

Table 3.6.1 **Growth in Student Enrolment and the Number of Colleges and University (and in Similar Institutions), 1950 - 1988**

Year	No of Students	No of Colleges	No of Universities
1950 - 1951	396,745	695	27
1960 - 1961	1,034,934	1,542	45
1970 - 1971	3,112,404	3,604	105
1980 - 1981	2,752,437	4,722	123
1987 -1988	3,681,870	6,040	155

Source: Tejeshwar Singh, p. 242[255]

Calcutta University Press was set up in 1908 and has to its credit over 1,000 titles of scholarly products in humanities and science by eminent scholars recognised by international scholars and having an international market, and a number of Indian universities and learned societies constantly make efforts to publish scholarly works in English as well as in the regional languages of India.

Lately the University Grants Commission recommended that a documentation centre and a national clearing house in educational research should be developed at the National Council of Educational Research and Training (NCERT), a non-profit research organisation. As a number of universities with publication departments have sprung into being of late, there was a need for a forum where intellectual resources can be co-ordinated to better publish and market scholarly works, and this led to the formation of an Association of University Presses in India. The University Grants Commission also helps universities in publishing scholarly books although this assistance can be greatly improved.

Books published in English dominate with at least 35 percent of the titles published. A similar situation can be witnessed with English newspapers since the most respected daily *Times of India* is published in English. This seems to suggest that there could be a relationship between the number of newspapers sold in a particular language, and the number of books sold. However the language spoken bears little relationship to books sold. Table 3.6.1 shows the output of books by language of publication and language spoken by region in percentage while table 3.6.3 shows the circulation of principal dailies newspapers for 1991.

[255]Tejeshwar Singh, 'Publishing in the Third World: Learning Do's and Don'ts from India' in *Publishing and Development in the Third World*, ed. by Philip G. Altbach (Kent: Hans Zell Publishers), 1992, p. 242.

Table 3.6.2 **Output of Books by language of publication and percentage of language spoken by region**

Book Titles*						Mother Tongue+	
Language	1978/79	1982/83	1984/85	1986/87	1988/89	Region	%
Assamese	259	350	202	207	201	Assam	1.54
Bengali	1,039	1,032	1,275	1,622	1,372	W. Bengal	7.71
English	7,089	5,856	5,132	5,318	6,101	-	0.0
Gujarati	979	708	426	565	761	Gujarat	4.6
Hindi	2,966	2,811	2,488	2,745	2,169	North	30.37
Kannada	823	417	na	885	823	Karnataka	3.9
Malayalam	819	607	732	883	825	Kerala	3.8
Marathi	1,345	1,264	1,226	1,172	1,097	Maharashtra	7.5
Oriya	270	618	510	393	205	Orissa	3.5
Punjabi	273	308	272	408	418	Punjab	2.49
Sanskrit	111	97	102	251	195	(Used mainly by Brahmin priests)	na
Tamil	1,595	1,152	1,465	1,434	1,381	Tamil Nadu	6.9
Telugu	414	1,030	419	556	654	Andhra Pradesh	8.5
Urdu	401	300	287	376	366	North	5.3
Others	201	110	55	155	67		
TOTAL	18,584	16,660	14,591	16,970	16,635		

Notes: * Source: Tajeshwar Singh, "Indian Publishing" in *Publishing and Development in the Third World,* ed. by Philip G. Altbach, p. 262
+ Source: George Thomas Kurian, *Encyclopaedia of the Third World* (London: Facts on File, 1992) 4th ed., p. 809. Languages such as Snide, Binary, Rajasthani were spoken by 7.49%.

Table 3.6.3 **Principal dailies newspapers' circulation, 1991**

Newspaper and language	Circulation
Times of India (English)	1,115,924
Indian Express (English)	715,027
Malayala Manorama (Malayalam)	530,691
Ananda Bazar Patrika (Bengali)	400,354
Statesman (English)	399,000
Mathrubhami (Malayalam)	390,062
Hindu (English)	378,825
Nav Bharat Times (Hindi)	372,027
Daily Thanti (Tamil)	320,343
Juganta (Bengali)	319,682
Hindustan Times (English)	267,647
Lok Salta (Marathi)	207,915
Maharashtra Times (Marathi)	192,382
Hindustan (Hindi)	160,969,

SOURCE: George Thomas Kurian, *Encyclopaedia of the Third World* (London: Facts on File, 1992) 4th edn, p. 833.

3.6.2 Publishing Situation

India has widely been quoted as the largest publisher in the developing world (excluding China); Philip Altbach states: "Without question, India ... will have a key role to play in the intellectual balance of power in the 21st century. Its publishing and film industries are already powerful forces in the Third World"[256]. Based on UNESCO figures, India published 14,438 titles in 1991 of which 11,170 were books.[257] In terms of numbers of titles India can be regarded as the largest publisher in the developing world (excluding China) and ranks ninth in the world [according to the figures presented in Appendix 5, although the true rank may be lower (or higher if the number of titles are grossly underestimated) since data was not available for all countries].[258] India ranks third after USA and UK in terms of titles published in English which account for nearly 40%[259] of total production, "a considerable accomplishment given its low per capita income".[260] Table 3.6.4 presents the number of titles published in India, 1980 - 1991, showing that production has been erratic over the period.

Table 3.6.4 **Number of all titles published in India 1980 - 1991**

Year	Number of Titles
1980	17,168
1981	11,562
1982	10,644
1983	na
1984	9,954
1988	14,408
1989	11,851
1990	13,937
1991	14,438

SOURCE: UNESCO Statistical Yearbook, 1992, 1993 & 1994.

Indian publishing is large by any standards but after taking into consideration its huge population, with only 16.85 titles per million people it pales into insignificance against the likes

[256] Philip G. Altbach, 'Centre and Periphery: The Case of India', *International Social Science Journal*, 37, 1 (1985), pp. 109 - 118.
[257] *UNESCO Year Book*, 1994, p. 7- 6 - 8.
[258] *UNESCO Year Book*, 1992
[259] Philip G. Altbach, 'What We Know About Third World Publishing: Issues and Debates' in *Bibliography of Publishing and Book Development in the Third World: 1980 - 1993*, by Philip G. Altbach and Hyaeweol Choi (Ablex Publishing Corporation Norwood, New Jersey, 1993), p. 17.
[260] Philip G. Altbach, ibid., p.12.

of Sweden, a small country of 8.5 million people which produced an outstanding 1405.84 titles per million inhabitants. In order to determine the wealth effect, the figure was standardised for billions of dollars GNP. India again ranked lower than expected in terms of the number of all titles published, the number of books and the number of textbooks. However the situation was slightly better than in Indonesia (see Appendix 5).

Over the period 1980 to 1992 the number of literate people in India grew from an estimated 275.4 million to 431.7 million, a growth of some 156.3 million[261], resulting from an increase in population (to an estimated 950 million in 1995)[262] and a steady improvement in the literacy rate (from 40.8% in 1980 to 48% in 1992).[263] Potentially this represents a huge market but the peculiarities of this vast country make such a simple diagnosis flawed. The number of titles of books, did not increase over the corresponding period and, although the data is erratic in its behaviour, one may conclude that production has been stagnant. Logically, as the population has increased as well as the literacy rate,[264] the number of books produced/book sold should have increased at least in direct proportion. However, this has not been the case in India due to many reasons of which the changing environment is just one: books have to compete with other media attractions such as TV and films since people in the Third World are generally attracted more to audio visual media.[265] In addition the number of titles reported to UNESCO may not always concur with the true number of titles, since many remain unlisted by the National Libraries of developing countries for a variety of reasons. An estimate in a report suggested that the minimum number of titles which India produced was in the region of 20,000 while the number reported by the National Library for the same year was 12,932, an underestimate of

[261] Calculated by taking the difference between the number of literates in 1980 (1980 literacy rate x 1980 population figure from UNESCO) and the estimated number of literates (1991 population from Economist, 883.5 x forecast growth rate of 1.8% x 1992 literacy rate from *The Economist*, 12 March 1994, p. 132).

[262] The population of India was estimated in 1995 to be at 950m, second only to China; figure quoted from 'India: Hello World', *The Economist*, 21 January 1995, p. 1 .

[263] The literacy rate for 1980 derived from *UNESCO Statistical Yearbook 1992*, p. 1-29 while figure for 1992 derived from *The Economist*, 21 January 1995, p.23.

[264] For the case of scholarly books, there was a steady growth in enrolment of students and an increasing number of universities), and income per capita, (although there is evidence to suggest that the increased wealth has not been equally shared. Many have become poorer in recent years as a result of the austerity measures introduced by the government and the rich have become richer.

[265] Tajeshwar Singh, 'Indian Publishing' in *Publishing and Development in the Third World* (Kent: Hans Zell Publishers, 1992), p. 244.

some 35% on the estimated figure. Using this as constant underestimate, perhaps the number of true titles for India may be in the region of 22,300 for 1992. However, even this results in only 24.8 titles per million population (using population figure for 1991 of 883.5 million and the forecasted annual growth rate over the period 1991-2000 of 1.8%, to estimate the 1992 population figure).[266] In 1993 expenditure on books was less than US $1 per capita, although the total expenditure for the country was US $650 m (see table 3.7.4)

With at least 12,000 publishing firms,[267] India is by no means a small publisher, but most of these are small family-owned businesses, handed down through generations, and are in no position to challenge modern western publishers. Diversities and paradoxes are abound in all Indian industries with the publishing industry being no exception. Like other publishers in developing countries, Indian publishers face many obstacles such as lack of expertise in producing and marketing the products and scarcity of capital (working and fixed) with correspondingly small print runs. Due to small print runs or ignorance, many of these publishers do not bother to register titles, which therefore cannot be traced by the National Library. If the number of titles was taken as realistic then one would be led to believe that each publisher produced on average just over one new title per year. Obviously this is not true since in this case most would become bankrupt very quickly.

The Directory of Indian Publishers listed 11,266 publishers (in 1986) in all languages, of these 1,328 were author publishers and 9,938 were regular publishers. Among the regular publishers, 993 were government or institutional publishers. These statistics are not completely reliable as the directory includes everyone who has been engaged in publishing, irrespective of whether they have published one or ten books, and whether they are still active in publishing, or have abandoned it altogether.[268] The unreliability of these figures is clearly portrayed in another survey by the Department of Education. The Survey of Indian Book Industry in 1976 revealed that there were about 3,000 active commercial publishers in the country. Of these 2,700 were

[266] *The Economist*, 12 March 1994, p. 132.
[267] C. N. Rao, 'Publishing and Book Promotion in India', a paper presented at Regional Seminar on Reading Habit in Singapore, 1981.
[268] Lokenath Bhattacharya, *Books and Reading in India* (Paris: UNESCO, 1973), p. 10.

small publishers, who on average published 5 to 11 new titles per year, and very few of them were adequately equipped or financed, or possessed sufficient facilities for efficient distribution. The discrepancies can be explained by the fact that publishing in India is more of a family business where sons inherit from their fathers and become publishers without any professional knowledge of the trade i.e. academic knowledge of the job, rather than on the job experience.

The government of India is aware of the importance of the book and its role in developing the nation. As a consequence of this awareness, a large number of books, especially textbooks are produced by government publishers. Unfortunately, these government publishers like other parts of the public sector in India are characterised as inefficient, bureaucratic, overmanned, costly and heavily unionised.[269] Add to this the limited use of technology, a poor infrastructure and distribution system, lack of modern equipment, the problem of having to deal with at least 15 major languages recognised by the constitution and about 1,652 mother tongues and dialects,[270] and a misuse by state and central governments of government publishers as instruments of political persuasion rather than as disseminators of knowledge, and one can see clearly why Indian publishing is in the doldrums.

When comparing the number of titles (see table 3.6.5) of school textbooks published among selected countries, India by far has the least number of titles published (with the exception of Brunei) and by ratio to the population, the number of titles published was disappointing. This was also the case for children's books as the number of titles published was discouraging when taking into the consideration its huge population compared to other countries like Malaysia, Thailand, Indonesia and China. Table 3.6.5 shows the comparison of number of titles of school textbooks and children's titles published in some selected countries.

[269] 'SURVEY INDIA: They Can't Let Go', *The Economist*, 21 January 1995, p. 20 of survey.
[270] George Thomas Kurian, *Encyclopaedia of the Third World* (London: Facts on File, 1992) 4th edn, p. 810.

Table 3.6.5 **Number of titles and copies of school textbooks published**

	School Textbooks		Children's Books	
Country	Titles	Copies	Titles	Copies
Malaysia	* 672 (1991)	6,029,000	1,088 (1991)	5,802,000
Philippines	323 (1991)	n/a	10 (1991)	n/a
Thailand	640 (1992)	n/a	439 (1992)	n/a
India	269 (1991)	n/a	679 (1991)	n/a
Indonesia	715 (1992)	n/a	1,084 (1992)	n/a
Brunei	6 (1990)	22,000	9 (1990)	16,000
China	11,107 (1990)	2,657,140,000	3,861 (1990)	171,930,000

SOURCE: *UNESCO Statistical Yearbook, 1994*, pp 7.77 - 7.80
Note: * Figures compiled by the researcher from National Library of Malaysia indicated 772 titles for 1991. N/a = Not available.

The wide disparities between educated and uneducated people, male and female literacy and the rich and poor reflect the entrenched social inequalities in India. For example, Kerala's literacy rate is 90% which is better even than China's 73%, but the overall rate for India is 48%. According to Amartya Sen, professor of economics at Harvard, "India's hierarchical, brahmin-dominated society has been noticeably casual about primary education; resources have been poured into the higher education that benefit the upper class."[271] As primary education is not compulsory in India, in rural India, a quarter of boys and half of girls in the 12-14 age group have never been to school. Only 2.3% of the population has a household income of more than 78,000 rupees (US$2,484) and the average GDP per head is US$310. How can people in a country where only 14% of the population have access to clean water, 63% of children under five are malnourished and that is home to 40% of the world's desperately poor[272] afford to buy books? In addition, the "caste system divides Indians so rigidly"[273] that high levels of education do not guarantee rapid promotion as India has a huge supply of people with higher education than they can use. This has led to many people deciding not to send their children to school, even to primary school, since people from lower castes believe they can never leave their past and become successful. The concept of reading begins at home since much research has shown that parents and the home are the strongest influence in the child's life especially in promoting reading habit[274] but this cannot be easily implemented in India where most mothers are

[271] 'Illfare', *The Economist*, 21 January 1995, p. 23 of survey.
[272] 'Hello, World', *The Economist*, 21 January 1995, p. 3 of survey.
[273] 'Illfare', *The Economist*, 21 January 1995, p. 23 of survey.
[274] Nancy Larrick, 'Reading Begins at Home', a paper presented at Regional Seminar on the Promotion of Reading Habit, Singapore 1981.

illiterate; the literacy rate among women is much lower than men, i.e. 39.3%, compared to 64.1% for men. This disparity, albeit less pronounced, is also in existence among the rich elite where women are discouraged from studying for fear of being westernised.

Since the mid-1980s, most Indian publishers have begun to minimise their risks by reducing print runs. For example, many publishers of scholarly books have cut back print runs from 1,100 to 500 units.[275] In recent years several states have been shifting resources from the tertiary sector, where subsidies benefit normally the already well-off, to the primary sector.[276] This may mean that many universities and libraries are short of funds and have had to cut back on acquisitions. In addition during 1991 the educational budget was squeezed as a result of severe budgetary problems for the central government which had less than two weeks of foreign exchange left in the country. This is evidenced by the large drop in imports (see table 3.6.6) as the government enforced strict foreign exchange controls. The drop in allocations to institutions resulted in decreased allocations also to libraries, which purchased less textbooks and led educational publishers to decrease print runs.

Table 3.6.6 **International Trade of Books and Periodicals in India (in US$ million)**

Books & Pamphlets	1985	1990	1991	1992
Export	8.5	10.0	10.3	13.1
Import	(38.5)	(45.6)	(24.8)	(39.8)
Balance	(30.0)	(35.6)	(14.5)	(26.7)
Newspapers & periodicals				
Export	5.0	6.7	5.5	5.7
Import	(3.5)	(1.8)	(2.9)	(6.0)
Balance	(1.5)	(4.9)	(2.6)	(0.3)
Overall	(28.5)	(30.7)	(11.9)	(27.0)
Exchange Rate to US$	12.369	17.504	22.742	25.918

SOURCE: *UNESCO Statistical Yearbook, 1992, 1993 & 1994*

Indian publishers, like others all over the world, are optimistic of overcoming their problems which include: a service to a population of around 950 million, adverse marketing environment; low purchasing power; low literacy; many languages and the low quality of production

[275] Tejeshwar Singh, 'Publishing in the Third World: Learning Do's and Dont's from India' in *Publishing and Development in the Third World*, edited by Philip G. Altbach (Hans Zell Publishers, England), 1992, p. 242.
[276] 'Illfare', *The Economist*, 21 January, 1995, p. 23 of survey.

materials. Although the demographics of India reveal a strong and literate population, effective demand for books comes mainly from the elite, who use English both for study and communication and although only 2% of Indians[277] are familiar with English, this minuscule percentage constitutes a tidy market (35% to 40% of titles are in English).

In the publishing industry as in any industry, capital plays an important position. For government publishers, subsidies play a major role in their continued functioning, while they create a major barrier to entry for private commercial publishers. India is peculiar in the sense that it is both a "high cost" and "low cost" publishing country. Raw materials are very expensive whereas manpower is very cheap. Paper is the biggest problem for publishers, the price of which has increased in recent years and at the same time, more than 30% of the retail price of the paper manufactured is comprised of various levies[278] the current government however has cut subsidies and taxes drastically.

As stated before, the central government recognises the important role books can play in the national development and is now the single largest publishing agency in the country. It accounts for nearly 20 percent of the total production and it is estimated that about 993 public sector agencies are involved in regular publishing. The government established various bodies such as Publications Division, National Book Trust (NBT), National Academy of Literature, National Museum, National Council of Educational Research and Training (NCERT) and different departments of the Ministry of Education and Broadcasting, and the National Council of Applied Economic Research. Among the above-mentioned publishing agencies the most important is the National Book Trust. NBT publishes books in English as well as other regional languages, undertakes surveys on the book market, reading habit, and has organised book fairs and exhibitions in different parts of the country as well as organising mobile exhibitions vans and is doing commendable work for the promotion of books and reading habit. However, NBT is not immune to the problems which beset the rest of the government sector but suffers from similar problems to the rest of the government sector.

[277] Tajeshwar Singh, op. cit., p. 242.
[278] Tajeshwar Singh, op. cit., p. 252.

In summation, India has made significant strides in the area of scholarly education and publication: First, India has successfully completed the transition from British cultural and educational dominance to sturdy independence. Second, it has shown high receptivity to foreign ideas and the ability to adapt them to its own needs. Third, it has enjoyed relative stability and continuity as a functioning democracy. Fourth, there is the existence of a positive market; even with a mere 2% of the population that are versed in English, it is still one of the world's largest markets for imported English books. Fifth, it has respected international authors that have been encouraged by increased government support for scholarly publishing. And lastly, a progressive government policy has been effective in promoting education and research activities, which has lead to a greater demand for scholarly publications.

Recently India has started producing publications and journals on information technology, engineering, mathematics and statistics, and finance, partly as a result of new industries being set up in India. For example, software industry in Bangalore and Bombay and partly as a result of large numbers of Indian doctorates returning home in recent years from the US and Europe.

United Kingdom (Map)

3.7 Overview of Scholarly Publishing in Some Developed Countries (with emphasis on the UK)

3.7.1 Background

Scholarly publishing has been established in most of the developed countries such as the USA, Japan and most Western European countries for more than a century. The oldest American Press, the Johns Hopkins University Press, is more than a hundred years old, while both Oxford University Press and Cambridge University Press date back more than 5 centuries.

In developed countries, with modern printing facilities, and well-diversified and specialised publishing agencies, the university press is delegated the task of pursuing the publishing of research results. Generally, university presses and commercial publishers have distinct functions: the former being involved with scholarly publications and the latter with producing textbooks. However, the border between the two kinds of publishers is not necessarily as clear as assumed. University presses sometimes publish books of a non-scholarly nature and some commercial publishers are engaged in publishing books of a scholarly nature. Such situations become possible, especially within the recent economic difficulties, when university presses have sought ways to improve their finances by publishing more textbooks, just as, for reasons that cannot simply be regarded as being financial (perhaps prestige), some commercial publishers may move into the publishing of scholarly books. It is precisely because of this ambivalence of the role of the press that universities often regard presses as something of minor importance. It is sometimes asked why a university should, especially during financially difficult times, spend money to support a university press, if scholarly books can be published by commercial publishers.

The situation in the developing countries as shown earlier is completely different. They cannot depend on commercial publishers for scholarly books as scholarly publication is the preserve of university presses, the universities themselves, and research institutes. These groups are responsible not only for the publication of research results but also for producing educational materials for use in higher learning. The task of printing such material is also often undertaken by these groups. Consequently, the role of the university press in the ASEAN countries is not seen as marginal but vital, and necessary for the execution of the educational and research functions of the university.

3.7.2 Publishing Situation

Almost two thirds of titles published in the world are by developed countries/ Western countries (see table 3.7.1). Therefore it can also be assumed that scholarly publication - the production and communication of scholarly information - is predominantly concentrated in the Western countries of the world. With regards to translation of works, the same situation exists. Figures compiled by the researcher using UNESCO sources revealed that of all the translations published in the world, the majority were into Western languages, and their sources were also western (of which 46% were of English source). The table also showed that from 1970 to 1991, percentage share of titles published by Asia nearly doubled (77% increase; i.e. from 14.1% to 24.9%) while increase in share of population was much less compared to the titles (3% increase from 55.9 to 56.8%). The percentage share of titles published by America for that period fell, Europe excluding USSR, Africa and Oceania and Latin America (and the Carribean) were stable while there was a large drop in the former USSR share. Overall, the percentage share of number of titles published by developing countries had doubled while there were slight drops for the developed countries.

Table 3.7.1 **Regional Percentage Shares in Global Totals of Number of Titles Published and Of Population**

Country	Year			
	1970	1980	1990	1991
Africa (excl. Arab)	➊0.9 ➋7.4	1.3 8.2	1.2 9.3	1.2 9.9
Arab states	0.9 3.3	0.9 3.7	0.8 4.2	0.8 4.4
Asia (excl. Arab states)	14.1 55.9	18.8 57.0	26.7 57.6	24.9 57.8
Latin America & The Caribbean	4.2 7.7	6.0 8.1	5.0 8.3	4.9 8.4
North America	15.9 6.13	13.9 5.7	12.6 5.2	11.8 5.1
Europe including Former USSR	62.7 19.0	57.4 16.9	52.3 14.9	55 14.0
Europe excluding Former USSR	*47.2* *15.4*	*46.2* *11.3*	*43.2* *9.1*	*46.7* *8.8*
Oceania	1.3 0.5	1.7 0.5	1.4 0.5	1.4 0.5
TOTAL - titles - population	521000 3697007	715500 4446859	842000 5295300	863000 5759276
Developing Countries	13.4 71.5	21.4 74.2	28.7 76.8	26.4 78.0
Developed Countries	86.6 28.5	78.6 25.8	71.3 23.2	73.6 22.0

Source: *UNESCO Yearbook 1994*
Key Note: ➊ % share of titles ➋ % share of population

Table 3.7.2 **Sources and Output of Translations by Geographical Area, 1990** (Compiled by the researcher from *UNESCO Yearbook 1994*)

		SOURCES										
	Language of Translation	English	French	German	Russian	Italian	Scand	Spanish	Classics	Arabic	Japanese	Others	TOTAL
O	English	-	5354	628	691	111	135	80	87	42	32	934	8094
	French	1792	-	426	355	181	43	77	100	31	35	378	3418
U	German	7589	1463	-	687	425	376	251	372	40	61	1268	12532
	Russian	574	139	168	-	34	31	33	14	10	21	1108	2132
T	Italian	952	422	280	93	-	10	47	84	3	9	125	2025
	Scandinavian	4496	395	443	136	63	882	74	27	4	7	335	6862
P	Spanish	5517	1450	846	147	450	89	-	196	36	10	331	9072
	Classics	0	0	0	0	0	0	0	0	0	0	0	0
U	Arabic	158	50	21	122	2	4	8	4	-	1	29	399
	Japanese	2466	227	234	92	0	12	14	18	1	-	70	3134
T	Others	3334	760	1038	645	139	130	116	110	180	28	991	7471
	Unknown	5341	1292	993	3627	320	319	233	176	54	31	2592	14978
	TOTAL	32219	11552	5077	6595	1725	2031	933	1188	401	235	8161	70117

3.7.2 The United Kingdom

Marketing activities for publications in developed countries such as the UK and the USA are more dynamic and advanced compared to those of developing countries. With modern technologies at their disposal, and the English language as the international lingua franca these countries can target the largest market. The language advantage was stressed by Mr. Francis, the Director General of the British Council, when he said, "our real black gold is not North Sea Oil but the English Language." [279]

English is the ubiquitous medium for disseminating scholarly knowledge at the present time, English books travel well "because the scholars and professionals for whom the books are written are likely to be able to read English".[280] Scholarly books written in English can be exported to other countries and in the case of the UK, the exports of books have been increasing, as shown in table 3.7.3.

Table 3.7.3 **UK Publishing Industry (Home & Export) Sales (£ million), 1992**

Year	HOME				EXPORT			
	Consumer	School	Academic	TOTAL	Consumer	School	Academic	TOTAL
1981	379.2	78.8	140.6	598.7	149.7	76.3	59.5	285.4
1985	619.2	87.3	242.0	948.5	261.6	87.4	116.3	465.3
1986	628.0	103.7	264.5	996.3	221.1	90.3	110.5	421.8
1987	691.1	105.8	289.3	1086.1	246.1	90.1	112.5	448.7
1988	749.4	100.9	320.1	1170.4	241.5	92.5	124.5	458.6
1989	821.4	107.6	329.8	1258.8	256.7	103.8	128.4	488.9
1990	886.5	115.3	362.3	1364.2	260.5	116.8	153.8	531.1
1991	936.1	136.1	378.9	1451.1	250.1	119.4	166.8	536.3
1992	956.7	161.8	414.9	1533.4	253.9	122.9	194.0	570.8

SOURCE: *Book Trade Year Book 1993*[281]

[279] *The Bookseller*, 15 July 1988, p. 207.
[280] Pearl Bowman and Nancy Essig, 'Marketing Scholarly and Professional Books' in *The Business of Book Publishing*, ed. by Elizabeth A. Geiser (Colorado: Westview Press, 1985), p. 215.
[281] *Book Trade Year Book 1993, A Summary of Statistics about Book Publishing in 1992 and the Past Ten Years* (London: The Publishers Association, 1994), p. 29.

This buoyant export situation is in part due to a number of agencies which are involved directly in promoting and marketing British books. In other words, British publishers work hard in marketing their books besides having the product people want. In contrast to the UK publishers, sales of American scholarly books do not depend greatly on exports. American publishers sell most of their books within the domestic market because the home demand in the USA is greater than in Britain. Table 3.7.4 shows the world book market of which the largest market is the US, accounting for $22.5 bn worth of sales, or 32% of the whole. In addition, the USA has greater numbers of students and the attitude of scholars towards scholarly publications is encouraging as stated by Thomas Joy, " ... for the community of American scholars, books are very important commodities."[282] Its average value per title is approximately eight times larger than the UK. The UK produces a lot of titles but each title sells less copies. This is partly due to the fact that the UK has many writers competing to write books, while the population is much smaller so the revenue per sale is low, but it is also due to the fact that the British do not buy as many books as the public in many other Western countries, and as such this provides some evidence for a poorer reading habit.

[282] Thomas Joy, *The Book Selling Business (London:* Pitman, 1974), p. xviii.

Table 3.7.4 **World Book Market, 1993**

Rank	Country	Total value 1993/$m	Value per capita/$	Title output per million inhabitants	Estimated (1998) total value $m	Average value per title $
1	US	22,500	89	205	26,000	434,146
2	Japan	9,130	74	294	10,000	251,701
3	Germany	8,340	102	953	9,475	107,030
4	UK	3,570	62	1114	3,900	55,655
5	France	3,540	62	735	3,850	84,354
6	Spain	3,185	83	935	3,480	88,770
7	Italy	2,410	42	435	2,550	96,552
8	S. Korea	2,210	51	917	2,500	55,616
9	Canada	1,515	56	724	1,700	77,348
10	China	1,510	1	64	2,000	15,625
11	Australia	920	52	674	1,000	77,151
12	Netherlands	905	60	916	930	65,502
13	Brazil	900	6	130	1,050	46,154
14	Austria	740	95	1336	800	71,108
15	Sweden	705	81	1406	800	57,610
16	India	650	<1	17	750	●41,787
17	Switzerland	560	82	2061	600	39,787
18	Norway	485	113	875	525	129,143
19	Denmark	475	92	2156	525	42,672
20	Belgium	440	44	686	470	64,140
21	Finland	335	66	2035	375	32,432
22	Portugal	235	22	595	260	36,975
23	S. Africa	175	4	130	200	30,769
24	Ireland	145	41	756	160	54,233
25	N. Zealand	135	40	1062	150	37,665
26	Hungary	105	10	803	120	12,453

SOURCE: *The Bookseller*, 7 October 1994, p. 8. Average revenue per title was calculated by the researcher (value per capita * 1,000,000 person /title per million inhabitants). All values are in US $. ● Estimated by the researcher using a 1993 population figure of 915 million (883.5m in 1991 * 1.018 forecast growth rate)

One of the most important sales and marketing aspect in British book-selling and publishing is the Net Book Agreement (NBA) (see Chapter Four for detailed explanation) which aims to promote a stable and diverse industry.[283] Under this agreement, net books must not be sold to the public at less than the published price.[284] Any contravention by a bookseller of this regulation could result in litigation at the insistence of the Publishers Association, which could be costly, and the possibility that no publisher would subsequently be willing to supply books to such a bookstore in the future.[285]

[283] Alison Baverstock, *How to Market Books* (London: Kogan Page, 1990), p.15.
[284] Alison Baverstock, ibid., p.14.
[285] Some big publishers and booksellers, e.g. Penguin, HarperCollins and W.H. Smith however recently

Several steps have been taken by the book shops to encourage people to buy, particularly liaising with banks for free book vouchers for students which can be used to purchase necessary books. Furthermore the provision of fast and efficient services through tele-ordering systems, where orders can be processed in a very short period, also assists in increasing the sales levels of scholarly publications. The researcher's own experience in placing orders at Stirling University book shop found that if the book is not in stock it is normally ordered from the nearest branch, i.e. Glasgow University book shop and takes from one to three days to arrive. However if it is not available at Glasgow University book shop, the book can take as much as four weeks to arrive (depending on whether the book ordered can be obtained from the wholesaler, publisher or has to be imported). 'Hotline' is another marketing tool used by book shops. The service is provided by publishers in order to provide a better service to their customers. The publisher allocates a few telephone numbers that regularly take urgent orders from book shops for express delivery. Emphasis is placed on this service at the beginning of the academic term. Another marketing technique used by some book-shops for a few weeks at the beginning of the term is portable book shops which advertise the facilities of the main book shops to students. This can be particularly helpful to inform new students who are unfamiliar with their new surroundings.

However, students have been found not always to buy the books they need for their courses. When comparing the amount of money spent on books amongst students in the UK with other European countries, British students were found to spend the least (among the countries in the survey, see table 3.7.5), i.e. £60 per annum per head on books and also to buy fewer books (as on average no more than 40 - 50% of students were likely to purchase a text). Although textbook prices are generally much lower in the UK compared to other European countries,[286] this explains only part of the difference, as the rest is due to the single fact that they buy fewer number of books. Table 3.7.5 also shows the examples of prices of some typical textbooks (prices were calculated in sterling at current exchange rates) in order to give a better picture and consideration when making the comparison. The percentage of students who bought their

withdrew from the agreement, see *The Economist*, 30 September 1995, p. 89.

[286]A leaflet by The UK Publishers Association, 1991.

recommended textbook according to leading academic booksellers in particular countries were also illustrated in the same table.

Table 3.7.5 **Prices of Some Typical Textbooks in Selected Countries for a Range of Subjects and Book Expenditure, 1986/87: figures in £**

Book	UK	Netherlands	Sweden	Finland	Norway	Denmark	Belgium
Macro-economics	11.95	17.15	20.95	21.60	19.11	20.83	17.67
Organic Chemistry	18.95	21.10	24.65	30.27	26.76	27.48	25.53
Engine./ Maths.	16.95	20.50	23.80	23.46	22.50	24.08	23.00
Intro. in Psychology	14.50	21.43	30.48	22.27	19.96	25.00	15.70
Molecular Biology	21.95	27.14	34.00	32.40	29.73	25.00	28.33
Expenditure per annum	£60	£285	£190	n/a	£195	£210	n/a
% of student buying textbooks	40-50%	90%	85%	n/a	65%	*90-95%	n/a

SOURCE: Publishers Association
Note: * 80% of Social Science students. N/a= not available.

Price differentials are partly due to different taxation policies (books are not taxed in Britain), and partly explain the differences in expenditure patterns, but they do not adequately explain why a greater percentage of European students buy textbooks for course purposes. Table 3.7.7 shows comparison between 1982/83 and 1986/87 surveys of UK students expenditure per head per annum and shows clearly the drop in expenditure on books between 1982/83 and 1986/87.

Table 3.7.6 **Expenditure of UK Students**

Expenditure Categories	NUS Survey 1982/83 (in £)	DES Survey 1986/87 (in £)	% change
Alcohol, Tobacco & Entertainment	333	494	+48
Transport	225	330	+47
Clothing	94	128	+36
Miscellaneous	265	375	+42
Books & Equipment	123	110*	-11

SOURCE: Leaflet by Publishers Association based on RSL report on Undergraduate Income and Expenses Survey, 1986/87. Note: * Books only component equals approximately £65.

Although students face increasing financial hardship and this may partly explain the decrease on book expenditure, it is however disappointing to note that over the period 1982 - 1987, expenditure on alcohol, tobacco and entertainment increased by 48%. The implications of the figure quoted is that books are valued as "discretionary purchase" items.[287] In direct contrast, a survey[288] of attitude to books amongst students in the US found that 68% of US students said they were building book collections which they felt be useful in their careers. The same survey indicated that US students (in line with other European findings) spend three times as much on books as their UK counterparts This cannot be accounted for by differences in income and taxation alone and suggests that UK students do not have such as strong a buying habit as their counterparts in other Western countries and the US.

3.8 A Comparison of Trade Statistics for the Publishing Industry

Total imports of printed materials (SITC rev. 2 codes 8921+8922, see Methodological Notes to Appendix 7 for explanations) into Malaysia amount to US$ 69.522 million in 1993, nearly a threefold increase on the 1981 imports. Of this amount books, brochures, maps and globes (SITC 8921) accounted for US$ 57.275 million while the remainder consisted of newspapers, periodicals and journals (SITC 8922, see table A7.2.5). However this represented a mere 0.1% of total Malaysian imports (table A7.3). The vast majority of printed material imports consisted of books and brochures (SITC 8921) which accounted for no less than US$ 56.059 million in 1993 (table A7.3).

Both the US and Singapore have overtaken the UK to become the biggest sources of books, together these two countries accounted for nearly 47% of total Malaysian book imports in 1993, while the UK trailed in third place with US$ 10.442 million. In the case of Singapore, most imports are in actual fact later **re-exported**. Singapore imports large quantities of publications (see tables A7.2.1 to A7.2.5) from the US and UK. Due to its strategic position and historical

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[287] *Student Watch 1986 - College Consumer Survey*, The College Stores Research and Education Foundation, a leaflet by The Publishers Association, UK, 1990

[288] A leaflet by The Publishers Association, UK, 1990.

background, it has attracted many Anglo-Saxon publishers seeking sole distributors for the entire Southeast Asian region. Using the Singapore hub, Anglo-Saxon publishers are able to access a large market for their books with minimal effort, however this is both problematic and costly for the region's importers. Taking these re-exports into account the true level of imports from the Anglo-Saxon countries is certainly much higher.[289] Malaysia managed to export US$ 41.463 million worth of SITC 8921 publications in 1993, however a significant proportions of this figure consisted of picture and colouring books (SITC 89212 - US$20.285 million, see table A7.4) rather than books in the normal sense (SITC 89211 - US$20.703 million).

Although Malaysia shares a common language with Indonesia and theoretically there exists a large opportunity for trade in publications, Malaysia imported a minuscule US$ 440,000 worth of SITC 8921 goods in 1993 from Indonesia, while Indonesia imported even fewer SITC 8921 publications at only US$ 358,000. Trade between Brunei and Malaysia was however, much healthier especially in newspapers and periodicals (SITC 8922). Brunei imported no less than US$ 901,000 worth of books, brochures, maps and globes (SITC 8921) and US$ 312,000 worth of newspapers (the share taken up by books has been increasing, see tables A7.2.1 to A7.2.5 and table A7.4), periodicals and journals (SITC 8922) in 1993 from Malaysia. However this still placed Malaysia second to Singapore as a source of publications, which given the historical, cultural and language ties between these two countries is worrying. Although it is also true that many publishers find it uneconomical to deal directly with Brunei, Singapore is used as the distribution hub for Brunei. The biggest export destination for Brunei's fledgling pubishing industry was Malaysia followed closely by Singapore.

Intra ASEAN[290] trade at first sight seems encouraging, since member states imported approximately 22% (SITC 8921+8922, the figure for SITC 8921 was 25%) of their publication needs in 1993 from other member states (see table A7.1.5). However this percentage masks the

[289] An estimate using original source and final destination figures put the level of Malaysian book imports from the Anglo-Saxon countries at approximately 60%.
[290] Excluding Brunei.

true picture and is heavily inflated since Singapore was the source for the vast majority of intra ASEAN imports, which as detailed before is a large distributor for UK and US publishers. Much of its exports are mainly **re-exports** of American and British publications. Excluding Singapore and Brunei intra member state imports between the remaining four member states of ASEAN[291], Malaysia, Thailand, The Philippines and Indonesia amounted to a meagre 1.2% (derive from table A7.2.5) of their 1993 requirements. To complicate matters this figure, however, is likely to be an underestimate for the simple reason that many ASEAN member states also use Singapore as a hub for world-wide distribution (see tables A7.2.1 to A7.2.5).

Another large source of publications for Malaysia are other Asian countres of which the largest trading partner is Hong Kong (another distribution hub favoured by Anglo-Saxon publishers). The vast majority of imports from Hong Kong[292] consist of newspapers, periodical and journals (SITC 892).

Malaysia exported nearly US$ 4 million worth of books (SITC 89211, see table A7.4) to the UK in 1993, a large improvement on the US$ 96,000 (for SIC 8921) it exported in 1981. However the largest export market for Malaysia was Singapore which took US$ 10.547 million worth of books and brochres (SITC 89211) and a further US$ 35.345 million worth of picture and colouring books (SITC 89212) in 1993. Again many of these publications are re-exported by Singaporean distributors (table A7.4). Malaysian exporters/importers are hampered by the fact that many foreign parties prefer to deal with single distributors for the whole ASEAN region (the Singaporean distributors). Other than lost revenues due to lower discounts, the publications are recorded as Singaporean exports (only goods which remain at the docks are not classified as exports, if they leave the docks, which most publications do, they are classified on their outward journey as Singaporean exports) while the truth is that they are effectively re-exports (in this case it is better to look at country of origin data). This makes it even more

[291] ASEAN membership in 1993.
[292] This data has not been shown in Appendix 7.

difficult for Malaysian importers/exporters to attract and deal directly with their foreign counterparts, and the already strong position of Singapore is further strengthened.

Books, brochures, maps and globes (SITC 8921) accounted for no less than 0.3% of total British imports and 0.7% of total exports in 1993. Thus the US publishing industry (excluding SITC 8922) plays a far greater role in the international trade than for any other country in the sample (see table A7.4). However in recent years the US has overtaken the UK as the world's premier source of publications, in particular books (SITC 89211). The Anglo-Saxon countries were also each others biggest trade partners (see tables A7.1.1 to A7.2.5), but the UK publications trade surplus in 1984 and 1987 had given way to deficits in its trade with the US by 1990, and the 1993 figures show that this deficits is growing (see tables A7.2.1- A7.2.5).

3.9 Summary

The brief survey of the ASEAN region revealed several obstacles to academic publishing and regional co-operation. Both in Malaysia and Indonesia, where there is a common national language (Malay), there are still significant differences which the standardisation of the spelling alone cannot correct. In addition, purchasing power is one of the crucial problems: most academic publishers rely on subsidies, and the low income of a population depresses the buying potential of readers. Marketing and distribution problems are acute, especially domestic distribution in countries that can cover many islands such as Indonesia and the Philippines. Although the book needs of various countries are different, all book-poor countries have certain factors in common:

- Inefficient distribution systems;
- Poor interface between the government and the private sector publishers (with the exception of Singapore where a mutually beneficial relationship has led to a healthy book industry);
- Lack of technology;
- Lack of marketing know-how;
- High cost of paper;

- Low revenue due to low income and poor reading habit;
- Low reading habit among students resulting from the implementation of a "parrot learning system" in which "students are being taught by lecturers who are unable to gain access to current research and scholarship. The lack of books and teaching materials has led to students having to rely on lecture notes provided by their teachers which cannot be conducive to enlightened learning" [293];
- Low number of people who are in real terms "literate" and
- Pirating activity due to weak enforcement of Copyright Act.

Having explored the situation of publishing in some developing and developed countries one could see that both share some problems at micro level while problems at macro level were more commonly shared among the developing countries. The situation in the developing countries can no doubt be improved with the commitment from all concerned towards a healthy book industry not only from the countries concerned but also from the Western countries.

[293] Hans M. Zell, 'Africa The Neglected Continent', *LOGOS*, vol. 1, issue 2, 1990, p. 22.

CHAPTER FOUR

MICRO-MARKETING ENVIRONMENT AND READERSHIP BEHAVIOUR

4. Micro-Marketing Environment and Readership Behaviour

4.0 Introduction

Marketing is defined as the function through which the company encourages exchanges of goods for money that are profitable to it and satisfying to its customers. This chapter will now focus on marketing practice and its problems in scholarly publishing from the micro-environment point of view. The marketing environment comprises the "non-controllable" forces that impact on the publishers' markets and marketing. The macro-environment consists of the larger societal forces that affect all of the actors in the micro-environment. The political, technological and economical facets of the macro-environment were discussed in detail in Chapter Two, while in this chapter we will discuss the cultural traits.

Micro-marketing is the performance of activities that seek to accomplish an organisation's objectives by anticipating customer or client needs, and directing a flow of need-satisfying goods and services from producer to customer or client.[293] The actors in the micro-marketing environment comprise the core marketing system of the company. The company's success will be affected by two additional groups, namely, a set of competitors and the public. In the process of gaining profits and satisfying the needs of the markets, the publisher needs to link itself with a set of suppliers and a set of marketing intermediaries to reach its target customers.

A major responsibility for a publishing manager is to define and evaluate the elements of the publisher's marketing system and identify the interactions between them. The interacting group of items that make up a general marketing system for the publishers are: the publishers, publications, potential and existing customers, competing publications and media (imported publications, audio-visual and multi-media products), suppliers of business resources and the macro environmental forces.

[293] Jerome McCarthy & William Perrault, Jr., *Basic Marketing: A Managerial Approach* (Illinois: Irwin, 1987), p. 8.

4.1 The Suppliers: The Academics/Researchers

Marketing starts even before the book is contracted to be written. To identify an author to write a scholarly publication is not as hard as other types of books, although the pool of writers is bigger in other sectors of publishing. As it is easy to identify writers, it is also easy to identify the target market for scholarly publishing (the writers are scholars, the consumers are scholars). The problem is not of identification, but of communicating and influencing behaviour, whether to write or buy. Unfortunately, the skills needed for such activities are sometimes lacking in scholarly publishers.

Academics are very keen to have their work published and by no means free from economic incentives to publish; by having their work published, they are doubly rewarded by promotion and royalties. However, scholars themselves seldom take the initiative to disseminate the results of their research and have little knowledge about even the most basic aspects of the book trade. This statement is confirmed by Peter Mann when he points out basic facts such as how low print runs result in high production costs and consequently higher retail prices are not known to aspiring authors, and how many cannot understand why two similar length books are priced differently.[294]

This guidance and exposure should also applied to all academics. Nevertheless, whether the academic has a Ph. D. or a bachelor's degree, he should be expected to publish the results of his research. The need for publishers' intelligence networks is essential since they would enable them to locate interesting work either in progress, just submitted, or plans for future research which may lead to successful publications. Identifying potential authors and establishing a dialogue between these new/beginning writers and publishers is one of the most important actions in the chain of events which leads from inception to submission and then to completion.

Some journal publishers, for example, have indicated that contributors often do not know the right form and length of a journal article, and do not study the particular interests and style of a journal enough before submission. Articles which could well be published in the journals of

[294] Peter Mann, op. cit., p. 13.

other professions, such as accountancy or town planning, are nevertheless sent to "straight" law journals.[295] But submitting an article to a journal is a simple matter compared with submitting a book proposal to a publisher.

It may be argued that during undergraduate studies it is only important that students become acquainted with a range of journals in their field and there is no need for them to familiarise themselves with the names of the publishers [296] (it is easier to develop a concept of "brand loyalty" with books - through recognition of a publisher or an author). However, there is little justification for this argument. A concept of "brand loyalty" must be nurtured at the early stage while the mind is still malleable. Many of these undergraduates will one day themselves become scholars, researchers and high level professionals - an attachment to a brand name would enhance the sales of that publisher not just for the particular journal read by the student during his undergraduate studies but for other publications as well (for example, students who pursue their studies in the US and then become academics are more likely to use and suggest students' books from the US than the UK). It is generally easier to ferment a sense of 'brand loyalty" in certain fields such as law, medicine and in some technology-related subjects because there may be a few well known publishers, but brand loyalty can also be bred into humanities, social and natural sciences, where the range of publishers/journals is vast.

A "pro writing" environment can be promoted if academics have colleagues in their department/colleage who share similar interests. If these colleagues are already in contact with publishers then so much the better. On the other hand, authors are less likely to be motivated to write if there is nobody who shares the same interest or where senior staff have no interest in helping them or where they themselves might not be involved in writing. Many authors have been influenced to write as a direct effect of a change in the leadership of a department where the new head is an active writer and in contact with publishers.[297] Under his stimulus and guidance several members of staff who had been thinking about writing books were encouraged to write when they were put into contact with publishers. It is clear that a more formalised

[295] Peter Mann, ibid, p. 14.
[296] Ibid.
[297] Peter Mann, op. cit., p. 16.

structure would aid the development of academic publishing by forming and cementing relationships between publishers and authors; the need to become involved in a "network of communication" would be especially beneficial to junior academics[298]. Therefore, this research attempts to investigate various factors which might influence or hinder academics from involving themselves in writing. Once an academic has been brought into contact with publishers and has written a successful book he moves into a new role of being an "author". Publishers may ask him to comment on other people's submissions; over the first hurdle, he will be encouraged to think up ideas for new books, he may be asked to edit books and eventually he may himself become a senior broker;[299] thus the "healthy circle" continues.

4.2 The Publishers

It has been widely quoted that scholarly publishers in Malaysia can be grouped into five categories: the university presses, research institutes, DBP, commercial publishers and learned societies. The researcher however found that the number of commercial publishers involved in scholarly publishing is negligible[300]; most considered themselves as scholarly publishers even though they published only one or two scholarly titles a year (for 'prestige') while others included publications for 'O'(SPM) and 'A'(STPM) level (exam oriented books) as scholarly publications. Therefore, this research places emphasis more on university presses and DBP because of their increasing importance and role within the Malaysian scholarly publishing industry while the other three groups are discussed in general (although certain research institutes, e.g. MARDI, are quoted[301] as being actively involved in producing scholarly publications). Research institutes and learned societies are discussed more in relation to scholarly journal publishing (see Appendix 10 for a list of scholarly journals published by various societies and organisations).

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[298] P. H. Mann, op. cit., p. 16.
[299] P. H. Mann, op. cit., p. 16.
[300] Azizah Hamzah in her Master's dissertation quoted that there were 24 commercial publishers engaged in scholarly publishing, see Azizah Hamzah, 'Scholarly and Academic Publishing in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1988), p. 30.
[301] Although MARDI has been widely quoted as publishing a high number of publications, the 'real' figure of publications which can be categorised as scholarly (according to the definition in this research) is small, see chapter eight for detailed analysis. Jama'yah Zakaria in her dissertation quoted that MARDI recorded scholarly publication sales of more than M$48,370, but in fact this includes many non-scholarly publications, see Jama'yah Zakaria, 'Marketing Scholarly Publications in Malaysia' (unpublished M. Phil dissertation), University of Stirling, 1989, p. 39.

Scholarly publishers in Malaysia can be regarded as small, independent publishers which face numerous problems and hurdles in competing successfully with larger, well-established rivals in making themselves known in the market place. Many advanced marketing techniques utilised by most companies and large publishers in the Western countries are not available to publishers in Malaysia, let alone to scholarly publishers due to various reasons of which financial constraint is just one; even small publishers in the West rarely use such techniques. Although one can accept this argument, this still leaves a considerable scope to use other marketing tools, but Malaysian scholarly publishers use few of these; their idea of marketing is "mail-shotting". Rarely do they actively solicit authors for manuscripts and open a dialogue with university and learned societies; they wait until a manuscript somehow finds its way to them. Little information is given to authors on where and how to submit manuscripts. At the other end of the chain, little is done to acquire the views of customers on their satisfaction regarding current publication, their criticisms and what they would like to be published in the future. With this web of complacency and inefficiency, it is no wonder the "pool of writers" is considered small, scholars are deterred from writing and customers from buying. As a result the books remain stored in warehouse collecting dust. Tinkering with parts of the marketing system will not provide a solution. A complete overhaul and rethink is called for, some of which is outlined below.

Publishing is considered a service to society besides having the characteristics of any other business. Publishing managers, therefore, must understand the social and moral responsibilities of the profession to suit with their business objectives and to state them clearly to those working with them. Like any other business, if it is to survive, publishing must make profitability a basic requisite (while most businesses look for a profit between 15 and 20% on net returns, generally publishers count themselves lucky to achieve in between 5 - 10%[302]). However profit maximisation need not be dominant in the case of scholarly publishing nor deter the organisation from its primary social objective of disseminating scholarly knowledge. The degree to which a balance is drawn between these objectives will determine the degree of

[302] *The Business of Book Publishing* (London: Book House Training Centre), 1990, p. 5.

success achieved (i.e. maximising social profit by disseminating maximum knowledge at minimum cost).

Planning

Having determined its strategic mission statement, the publisher has to work out a plan to achieve its objectives. Considerable information is needed for planning - this could be obtained from statistical digests and through carrying out market studies which are still lacking in Malaysia. Information on such characteristics as demographics, literacy rate, educational enrolment, purchasing power, reading habit among the target market (or in other words macro and micro marketing factors) is crucial as these data can be useful in indicating the market for the kinds of books intended to be published, and to work out what can be expected as a realistic target for market penetration.[303] This information is important as the basis of budgeting any publications and preparing a cash flow summary. Forecasting budgetary implications can help publishers to better " see where, when and how capital expenditure will be involved, where collections will be received and how much shortfall or profit can be expected at any given time."[304]

Organisation

Publishing houses in Malaysia are organised in a variety of ways and to different degrees of formality. Typically they are composed of editorial, design, production, marketing, finance, and administrative management (or publisher's office) departments in their general structure, with the first three being concerned mainly with the production of books and the next two with distribution. But this may differ with the size of publishing house. Another factor that may affect the structure of a house is the sector of publishing the house operates in, i.e. the kind of books the house produces. Traditionally book publishing has been divided into adult trade books, scholarly or academic books, educational or textbooks, juvenile books, religious books etc. Although some believe that these divisions account partly for the argument that publishing is very distinctive from other industries, as all these sectors have unique features exclusive of

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[303] *The Business of Book Publishing*, ibid., p. 8.
[304] *The Business of Book Publishing*, ibid., p. 9.

each other[305], this is in fact just as true for other industries, such as automobiles which can be divided into producing cars, trucks, buses, jeeps etc. as well as the intra-differentiation such as production of limousines, saloons and hatchbacks.

Editorial, design, production and marketing departments form the operational part of the publishing house from script acquisition and selection, editing and marking up, designing the physical form, producing the form and making the final product available to the market through the distribution outlet. While the accounts department monitors the financial side of these events and warns the management if any part of the operation is financially unsound, it also processes orders, collects bills and controls credit.

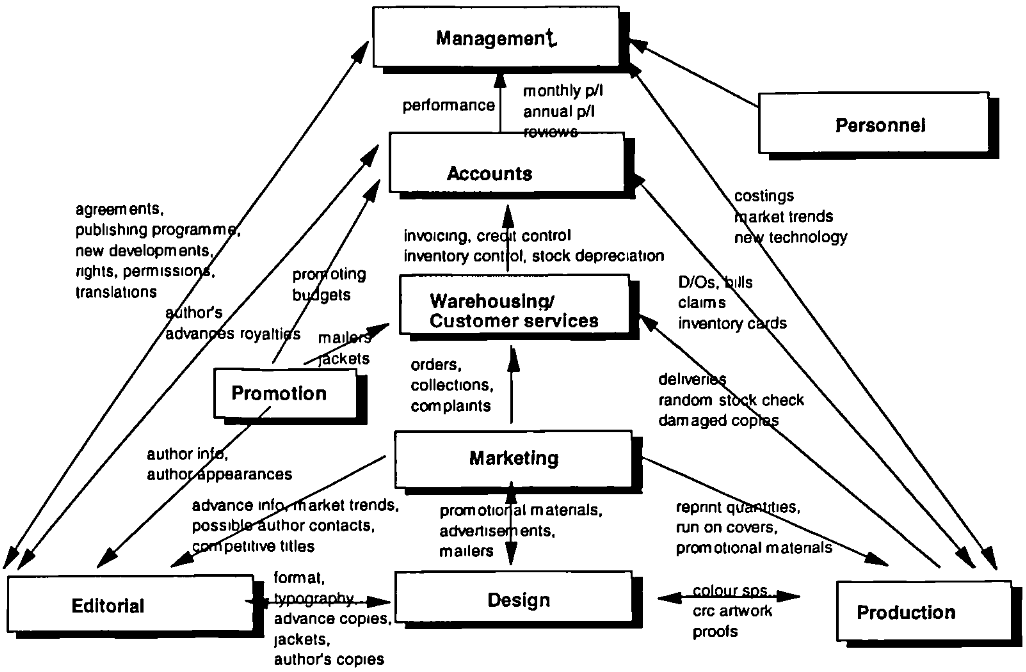
The structure and flow in a well organised publishing house is illustrated as in Figure 4.2.1. The figure shows the relationships between each part and its contribution to the overall working of the house. Figures 4.2.2 and 4.2.3 show typical University Presses in Malaysia.[306] One can clearly see the fundamental differences between these charts (figure 4.2.1 and figures 4.2.2 & 4.2.3). The organisational structure presented in figure 4.2.1 is based on functions in which all decisions are controlled by the responsible department while the organisational structure of typical scholarly publishers in Malaysia is subject-based with non-professionals routinely making decisions on subjects outside their area of competence. Some might argue that the typical publishing house organisational structure can only be applied to bigger publishers; this is not true. Some of these functions can be combined (one person can handle both functions) but they must be professional. If editors are selected from those who are specialised in their own field, this should also be applied to other functions in the book business. It seems that editors have to deal with various aspects of the book business outside their area of expertise with the absence of clear responsibility centres, murky channels of communication and an organisational hierarchy based on political considerations rather than business sense. The situation of the typical B university press is rather worse (university presses in this category are UIA, UUM, USM and UPM). In addition to the deficiencies of the typical model A, typical

[305] Lewis A. Coser, et. al, *Books: The Culture and Commerce of Publishing* (University of Chicago Press), 1985, p. 8.
[306] ITM Publication Department (BIROTEKS) is taken as an example.

B organisations may be run by only one person who is in charge of all aspects related to publishing (usually the Chief Librarian who also acts as the Chief of Publication Unit). The Chief Librarian has precious little time to devote attention to matters concerning publishing and considers this aspect of his job as burdensome.

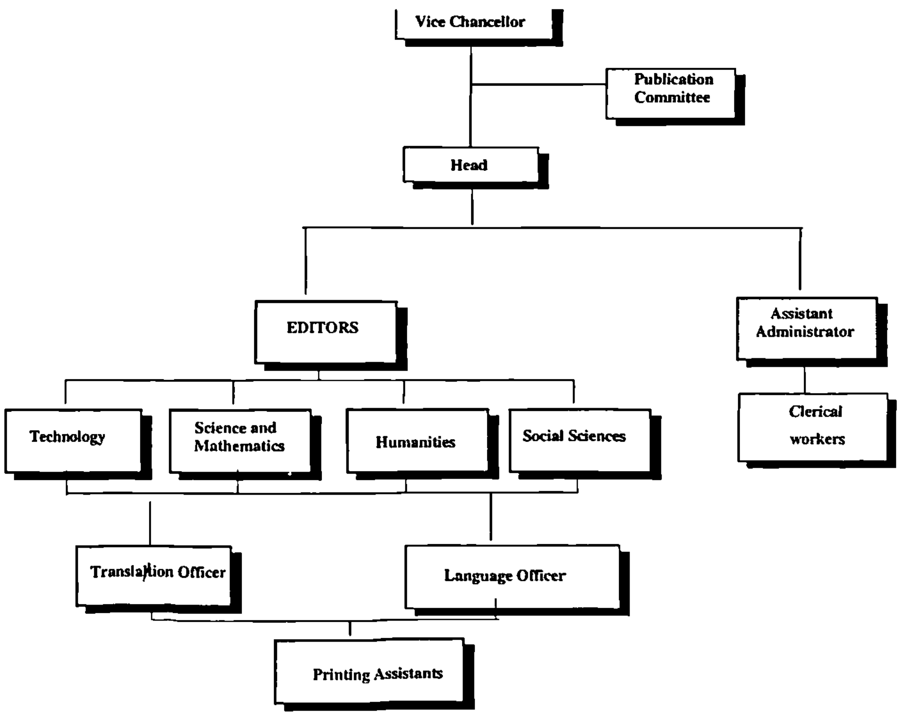
The personnel in charge of these publication units, for example, sometimes have no background in business/finance but are given responsibility to deal with financial aspects of the book business besides performing their duties as editors. During personal interviews with personnel in university presses it was clear some did not know what was going within their unit - even the number of titles published and number of print runs were not known, let alone some other business aspects (most were not able to provide accurate responses to the questionnaire provided by the researcher). Some admitted that the decision taken as to which manuscript is qualified for publishing is dubious and influenced by higher "authorities" in the university regardless of the opinion communicated by themselves. Success is measured through size, by the number of staff (normally editors) and equipment and titles; some university presses have their own typesetting and desktop publishing. The tendency is to publish as many titles as possible, which, although encouraging in its own right, is of little use if those titles are of poor academic quality and consequently lie in store rooms waiting to be sold. Reasons such as social obligations and non-profit orientation seem to be misused by university presses (also by DBP) whereas the profit objective (or at least a financial control mechanism) provides an ability to inculcate discipline, control and reduce wastage (in this case the government sector is not excluded from performing these responsibilities, the functions and roles of university presses and DBP in relation to marketing activities are discussed in detail in a later section). Universities have a social obligation to reduce wastage, increase efficiency and disseminate knowledge i.e. maximise social profit; books produced at high cost, based on political rather than academic considerations which eventually lie in store rooms cannot possibly come under the proper domain of "social obligations" and "scholarly publishing".

Fig 4.2.1 **Structure of Well Organised Publishing House (with lines of communication)**



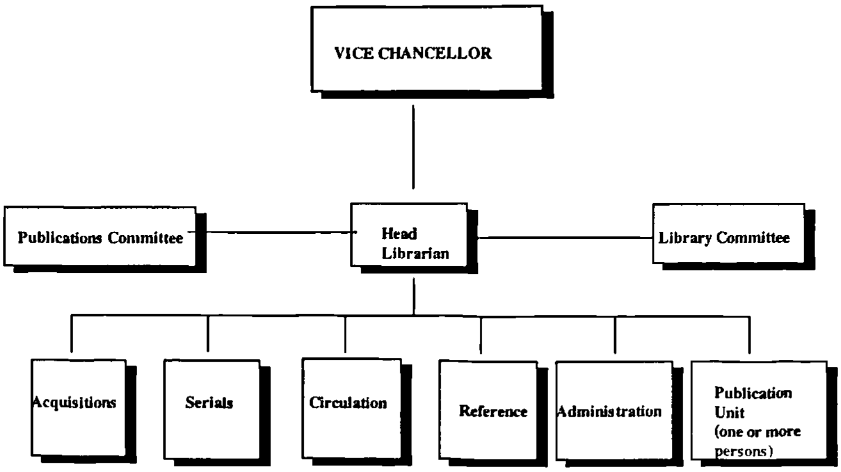
Source: *The Business of Book Publishing*, p. 11.

Fig 4.2.2 **Organisational Chart of University Press (Typical Model A)**



SOURCE: Based on BIROTEKS ITM organisational structure with minor modifications made by the researcher

Fig 4.2.3 **Organisational Chart of University Press (Typical Model B)**



Source: *The Researcher*

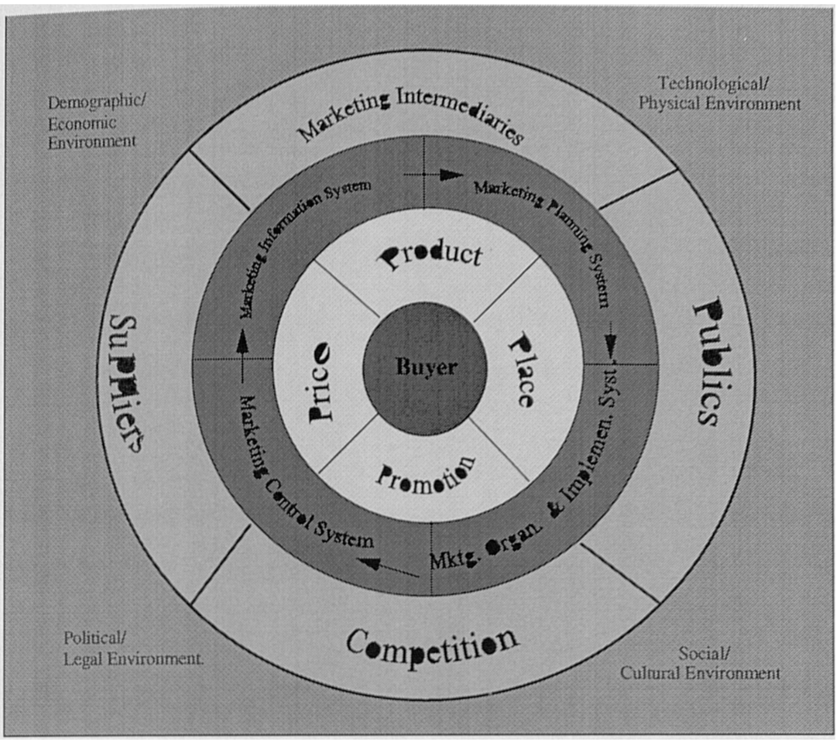
Co-ordinating

Other than planning and organising, each department in the publishing house needs to co-ordinate the publications produced and not leave this to the publication department only. Marketing, as emphasised earlier, cannot be left to the marketing department alone, in fact it should be adopted by all departments in the publishing house while the department responsible functions as the co-ordinator of marketing activities; with poor lines of communication and no clear centres of responsibility, as in the case of Malaysian University Presses, co-ordination is difficult resulting in delays.

4.2.1 Marketing Mix in Publishing

The definition of marketing discussed earlier shows that various activities are performed to facilitate and expedite exchanges. Marketing activities are affected by two general kinds of variables: those relating to the marketing mix and those relating to the marketing environment. Figure 4.2.4 (an extension of figure 2.1) shows the factors which influence a publisher's marketing mix variables. These factors are affected in many ways and to varying degrees by the marketing environment variables (aspects of the general business environment over which the firm has little or no control).

Fig 4.2.4 **Factors Influencing Publishing Marketing Mix**



Source: Philip Kotler, *Marketing Management*, p, 72.

The marketing mix consists of four major components: product, place/distribution, promotion, and price. Some authors have used 7Ps or 21Ps etc., but the essence of the models remains the same. Alternatively the mix can be grouped as Four Values: Understanding Values, Creating Values, Communicating Values and Delivering Values. The components are called marketing decision variables because a marketing manager can vary the type and amount of each element. One primary goal is to create and maintain a marketing mix that satisfies consumers' needs for a general product type. To be successful the marketing mix must interact with a buyer in the core. By making decisions and managing activities relating to each marketing mix variable, a marketing manager can create a successful and thus satisfying mix.

Marketing mix variables often are viewed as "controllable" variables because they can be changed. However, there are limits to how much these variables can be altered as they are not totally controllable. For example, because of economic conditions or government regulations[307], a manager may not be free to adjust prices from one day to the next. Changes in sizes, colours, shapes, and designs of books are expensive; therefore such product features

[307] See Chapter Three under section on how government policy influences the publishers.

cannot be altered very often. In addition, promotional campaigns and the methods used to distribute publications ordinarily cannot be changed overnight. **Understanding** values within the publishing business is the assessment of actual/potential markets before books are contracted and authors are identified while **Creating** values is adding value to publications, either tangible and intangible and setting up the right price. **Communicating** values including Advertising, Public Relations, Marketing Information System, and Promotions. **Delivering** values is the true contact between customer and products/services, distribution, customer service, collaborative activities, inspection copies, reviews, warehousing/physical distribution, retailing and book outlets and etc. For simplicity in this research, the 4Ps variables are used with reference to the marketing activities in the publishing business and in particular the scholarly publishing.

The Product Variable

A product can be a good, a service, or an idea. Marketers need to consider several aspects of the product such as specifications, product benefits, styling, functions, materials, packaging and range and variety. Publishers, for example must know who their target customers are and understand their needs and expectations. They should assess the actual or potential markets before publications are contracted and authors are identified. In the case of scholarly publications, the consumers' needs and wants (be they students, lecturers, researchers or professionals) consist of the psychological benefits obtained from buying books such as gaining knowledge or passing examinations. Therefore publishers should be alert and aware of these psychological benefits and must exploit these in order to market their products successfully.

Although the market for scholarly publications is easy to identify, to reach these customers is another matter. The students are assumed to rely heavily on the lecturers' recommendations on what books to buy; the publishers should therefore 'win over' lecturers in order to reach their ultimate customers. As in the case of pharmaceutical drug marketing, the doctor is the middleman (intermediary/interface) who influences heavily the (prescribed) medicine purchased by patients. Similarly, lecturers have a great ability to influence students about the books they buy; but what happens if lecturers themselves are not motivated to buy. In addition the study patterns of students reflect the belief and perception that what matters most is passing examinations and for this lecturer's notes will suffice.[308] Furthermore, some lecturers would rather choose/recommend imported books for reasons including: the book is well acknowledged throughout the world and there is no local book on the same topic (more probably they will be ignorant of the existence of a similar book by a local author and publisher - this is sometimes the lecturers' fault and sometimes due to poor promotion by the publisher).

Lecturers within the same institution as the university press are ill-informed of publications produced by their own university press, let alone by other university presses. When they are informed of outcoming titles in their area of interest, they rarely adopt this title and opt for an expensive book citing the reason that the other book is poor in quality. During an interview with Marketing Manager of Longman[309], the manager provided an example of an (excellent) university book which was written by an academic serving at a particular university and through the company's marketing research, which was found to be potentially saleable in another three universities. After careful consideration, the right number of titles had been published but few copies were actually sold - only bought by students taking the course taught by the lecturer-cum-writer. According to the manager this might be due to the fact that some academic still did not acknowledge that their own colleague from a local university was capable of writing a university textbook indicating that they held a prejudice towards local writers.

Other than the factors confronting scholarly publishers explained earlier local publishers also face competition from already 'established products'. Western/imported books are readily acknowledged by most lecturers and this further reduces the already small market, besides the macro-marketing environment problems relating to the Malaysian situation which have been discussed in Chapter Three.

[308] Regarding students attitudes towards learning, Amir Hussin revealed how students rely heavily on lecture notes, tend to be passive and do not provide feedback on the teaching methods by lecturers. They only react if they fail in the examination or receive low marks, see Dr Amir Hussin, 'Perlaksanaan dan Kemampuan Bahasa Melayu sebagai Bahasa Pengantar dalam Semua Bidang', Seminar Perlaksanaan Bahasa Malaysia, 4 & 5 Februari 1983, USM.
[309] Interview with Wong Swee Peng, Marketing Manager, Longman, March 1993.

When customers come to a shop, they are normally aware of the brand of the product they want to purchase and sometimes they end up buying on brand name and reputation. The book trade, however, which has many more products to deal with, "classifies its wares largely on the basis of in-house information"[310]. Customers are usually not interested in who publishes a book (although it could be argued that, in certain cases, a publisher's name has some influence on sales marketing and this could be exploited as brand loyalty); it is the author who becomes the brand in their own right, and sometimes it is the look of the imprint that customers remember. People might have the pre-conception of the book published by the scholarly publishers, but as the publishers themselves are not 'well-established', it does not really matter who publishes the book. In the case of DBP, publishing certain 'guaranteed saleable books' help to subsidise the costs of other publications (although it still needs to rely on annual grants from the government) but this does not seem to help the development of an 'open-market' system of publishing in Malaysia.

Although the author plays an important factor in influencing potential readers to buy scholarly publications, this factor does create a problem for publishers. Most scholarly books are written by scholars and it is undeniable that the quality of the books is high (providing the books have been selected for their academic content). However, books are different from other goods as there are many factors contributing to the success or failure of a scholarly book. Editors always complain that they find it hard to deal with scholars-cum-writers, as few allow their original work to be edited or modified by the editor and as a result, the work done by the scholars although rich in subject content is poor in readability. But what is the use of high quality contents if these do not provide satisfaction to readers? Lecturers as potential scholarly writers were asked their opinion regarding this matter and the findings are shown in Chapter Seven. The writings of authors are only manuscripts until the publishers put them into a journal or book and publish them for all interested people to read. Sir John Brown of OUP considers the editorial service of university press publishing as: "by far the most important and the most difficult of any publisher's functions"[311].

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[310] Alison Baverstock, p. 58.
[311] Peter Mann, p. 16.

The Distribution Variable / Place

To satisfy customers, products (publications) must be available at the right time in a convenient and accessible location. In dealing with the distribution variable, a marketing manager attempts to make products (publications) available in the quantities desired to as many customers as possible and to hold the total inventory, transportation, and storage costs as low as possible. A marketing manager may become involved in selecting and motivating intermediaries (wholesalers and retailers), establishing and maintaining inventory control procedures, and developing and managing transportation and storage systems.

The key factors in distribution are accuracy in order fulfilment, speed, reliability and economy in despatch, and the physical protection of the products; failure in any of these areas can lead to lost sales, diminished retail display, increased costs to the publisher and loss of confidence by both booksellers and readers.[312] In accordance with the general definition of distribution, "the planning, implementing and controlling the physical flows of materials and final goods from points of origin to points of use to meet customer needs at a profit. It is a potent tool in competitive marketing ... companies lose customers when they fail to supply goods on time."[313] Distribution of books, therefore, is an integral part of the marketing activities in the publishing industry although its implementation is rather problematic, especially in developing countries where lack of infrastructure makes matters more complex (see discussion in Chapter Three).

In theory, publishers have a variety of channels to distribute their publications:

① directly to customers

② through retailers

③ through wholesalers then retailers

④ through a specialist distributor who might distribute to wholesalers then to retailers or directly to retailers.

Depending on the size of the publishing house, a publisher may choose either to undertake distribution in house or subcontract its distribution function. The smaller publishers tend to

[312] Clark, op.cit., p. 114.
[313] Philip Kotler, op. cit., p. 577.

distribute their own books as few distributors find it economical to handle such small quantities, or it may be uneconomical to use intermediaries. However, small publishers can use the facilities of special distributors who are specifically geared to handle titles with small print runs at economical rates, or they can pool resources with others to handle together warehousing and distribution.

Larger publishers find it pays to maintain their own warehousing, invoicing and accounting facilities. However medium-sized operations tend to evaluate decisions on a title basis, with subcontractor's distributing some titles, while others are distributed by in-house staff. The decision, whether to subcontract or handle in house, is reached after taking into consideration the benefits of releasing resources from use on other aspects of publishing function. Publishers are likely to handle distribution themselves either for titles with a small print run where the economics of subcontracting mean that the publisher cannot afford to risk sharing the proceeds with the distributor, or when the publisher sells in large quantities to a limited number of customers; for example a publisher rarely uses a distributor in the case of school textbooks when he can sell in large quantities directly to schools, saving himself the 10% of the list price he would have to pay the distributor.

Publishers can therefore choose either to distribute their products directly to retailers or through wholesalers. If the publisher sells directly to the retailer, he can sell at a lower discount, compared to via a wholesaler to the retailer, and eventually gain a bigger return. However, this may cause inefficiencies and delays as more transactions have to be processed. Dealing with a wholesaler has another problem: while a publisher is interested in promoting his own titles, a wholesaler is indifferent to particular publishers and is just interested in making money regardless of whose books they are. The expenses of having a sales force, maintaining a distribution system and the accompanying loss of focus on the core publishing activities of the firm must be weighed against the expected increase in income by cutting out the "middleman".

Wholesaler/wholesaling

Wholesaling includes "all activities involved in selling goods or services to those who buy for resale or business use."[314] Wholesalers provide many services to both publishers and booksellers:[315]

To the producer/publisher:

① Perform specialised accumulation and allocation functions for a number of books/publications; and this allows the publisher to concentrate on developing and producing publications that satisfy consumers' needs;

② Serve as an extension of the publisher's sales force;

③ Provide financial assistance (e.g. bear the cost of transporting, reduce publisher's warehousing expenses and inventory expense, extend credit and provide a source of working capital - if they pay promptly);

④ Cater for information within the marketing channel (e.g. passing along the publisher's promotional plans to others in the marketing channel and provide feedback on consumer satisfaction).

Ideally, many publishers would like to deal directly with retailers (if possible, even customers) since fewer participants in the chain result in discount savings, which benefit both publishers and customers. The totality of discounts maybe smaller, but larger shares are transferred to fewer participants, and with fewer participants in the chain the flow of events may be faster, more efficient and allow publishers to communicate directly with the customers. Wholesalers however usually have a closer contact with retailers because of their strategic position within the marketing chain. Besides that, although a publisher's own sales force is probably more effective in its selling efforts, wholesalers can spread their costs over many more publications than most publishers, which leads to lower distribution costs per book sold.

To the retailers:

Wholesalers are usually somewhat better at understanding market conditions and experts at negotiating final purchases of products, and can:

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314 Philip Kotler, op. cit., p. 549.
315 Sally Dibb, op.cit., p. 295.

① Help retailers select inventory and offer a wide range of publications;

② Perform physical distribution activities more efficiently, provide quicker service than a publisher, frequently deliver and decrease inventory holding costs for retailer and wholesalers, negotiate bigger discounts than retailers as they normally order in large quantities and to stock a range of best-selling titles from a number of publishers.

Distribution situation in publishing industry

Although other industries have long recognised the importance of distribution, the publishing industry in the Third World has woken up belatedly to the benefits of effective and efficient distribution systems. In fact, distribution has become a controversial subject between publishers and booksellers. The "unique" features of books, low in price relative to size and weight and orders in low quantities mean that distribution costs are high. The dispute between publishers and booksellers of how the costs of distribution should be shared could be solved when both parties make full commitment to make the customer "the king" and not "nothing". Inventory control, for example, seems to be neglected by most publishers, particularly scholarly publishers. Instead of publishing what is needed, most publishers 'miscalculate' the print run needed to break-even (see section on Pricing for detailed explanation on this matter). This results in books being "published for storage" instead of meeting the customers' needs.

Dewan Bahasa dan Pustaka (DBP) for example has more publications "going into storage" than for selling, (see table 4.2.1 for the flow of stock copies published between 1984 to 1988).

Table 4.2.1 **DBP inventory flow, 1984 - 1988 (in number of copies and value - M$)**

Year	Incoming Stock	Total Stock	Outgoing Stock	Overall Balance	% of Outgoing over Total Stock
1984	2,786,359	7,620,772 ($ 35,664,109)	1,602,758 ($5,927,206)	6,018,014 ($29,737,903)	17
1985	2,128,137	8,146,151 ($42,084,011)	1,878,964 ($10,137,485)	6,267,187 ($31,946,526)	24
1986	1,963,017	9,230,204 ($47,337,979)	3,163,928 ($15,603,979)	6,066,276 ($31,734,000)	33
1987	5,449,677	11,515,953 ($62,984,470)	2,159,652 ($21,459,021)	7,356,301 ($41,525,449)	34
1988	3,050,401	10,406,702 ($60,643,233)	3,108,227 ($16,693,897)	7,298,474 ($43,949,336)	28

SOURCE: Hamedi Adnan (Unpublished Masters dissertation), University Malaya, tables 5.2 and 5.3.

Although DBP distributes its publications through selected agents which act as wholesalers, their performance has been poor for several reasons. Most of these agents are bumiputeras, who lack a large capital base and thus cannot afford to rent or buy premises in strategic locations; in addition they lack experience and professional knowledge of book distribution, book selling and marketing know-how. However DBP, although aware of such problems, is restricted in its choice of agents due to political considerations although more commonly these are labelled under the titles of social obligations and non-profit making objectives. A similar situation is observed among university presses in Malaysia as the number of titles published matter more than the number of books sold (see later in this chapter and Chapter Eight for detailed discussion on this point).

Efficiency in inventory control can save publishers (and booksellers) from unnecessary costs and guarantee that publications arrive with customers at the right time, place and price. For example, philosophies of material management and control in manufacturing industries such as zero defects and *just-in-time* (JIT) directed at reducing inventory levels and increasing inventory turnover have proven to improve profits, resulting from reduced inventory costs, and improved quality; the fundamental principle of these philosophies is to produce the right units in the right quantity at the right time.[316] The essence of such principles can also be applied to publishing and printing industries.

The situation regarding book distribution in many developing countries is disappointing to say the least. As discussed in Chapter Three, most of these face acute distribution problems due to an inadequate infrastructure (publishers in countries such as Indonesia and the Philippines with thousands of islands cannot possibly reach all their markets). In addition problems abound in the relationship between publishers and distributors. In China there are only two channels for book distribution; one is directly from the publishing house to retail book shop and other retail outlets, and the other via the national Xinhua Bookstore network, whose function also includes retailing.[317] An absence of wholesaling services (without efficient communication and transport networks - researcher's emphasis) has limited the availability of books to the public[318]: see figure 4.2.6. An attempt is also made to illustrate the distribution situation in Malaysia (some unofficial chains are not included in Figure 4.2.5). Figures 4.2.6 to 4.2.8 present distribution chains in the publishing industry for three selected countries.

Like China, the wholesaling in books in Malaysia is under developed. Wholesalers in Malaysia can be categorised into three types: [319]

① Distribution subsidiaries of the publisher: distributing either locally published books by the parent company or imported books from subsidiaries abroad. Most distributors under this heading are local subsidiaries of major UK publishers, e.g. Longman Berhad, a subsidiary of Longman Group (UK) Ltd. and Penerbit Fajar Bakti (PFB), a local subsidiary of Oxford University Press; they publish both locally and act as distributors for the parent company.

② Act as a wholesaler and supplier/distributor for other wholesalers or act as foreign sole agents, e.g. Parry and UM Book Shop/Distributor. UM Book Shop acts as sole distributor for UNESCO publications for Malaysia.

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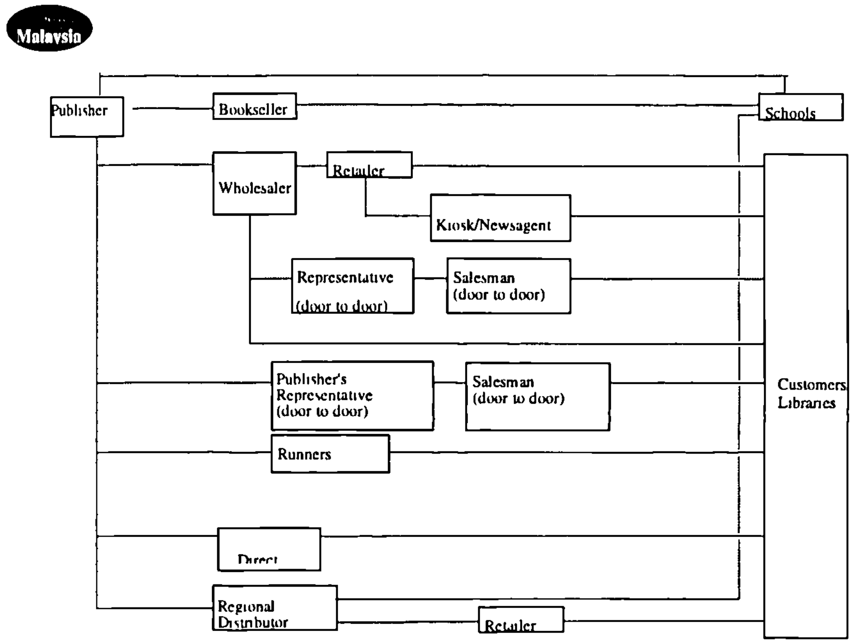
[316] David R. Andersen et. al, *An Introduction to Management Science* (Minnesota: West Publishing, 1991), 6th edn., pp. 493 - 494.
[317] Siying, Zhang, 'A Discussion of Some Aspects of Book Marketing in the Chinese and British Publishing Industries' (unpublished M. Phil dissertation, University of Stirling, 1991), p. 98.
[318] Ibid.
[319] Shaari Abdullah, op cit., p. 32

③ Publishers cum retailers, e.g. Berita Book Centre (Berita Publishing) and Anthonian Book Store.

Fig 4.2.5 **Book Distribution in Malaysia**



Source: The Researcher

Fig. 4.2.6 **Book Distribution in China**

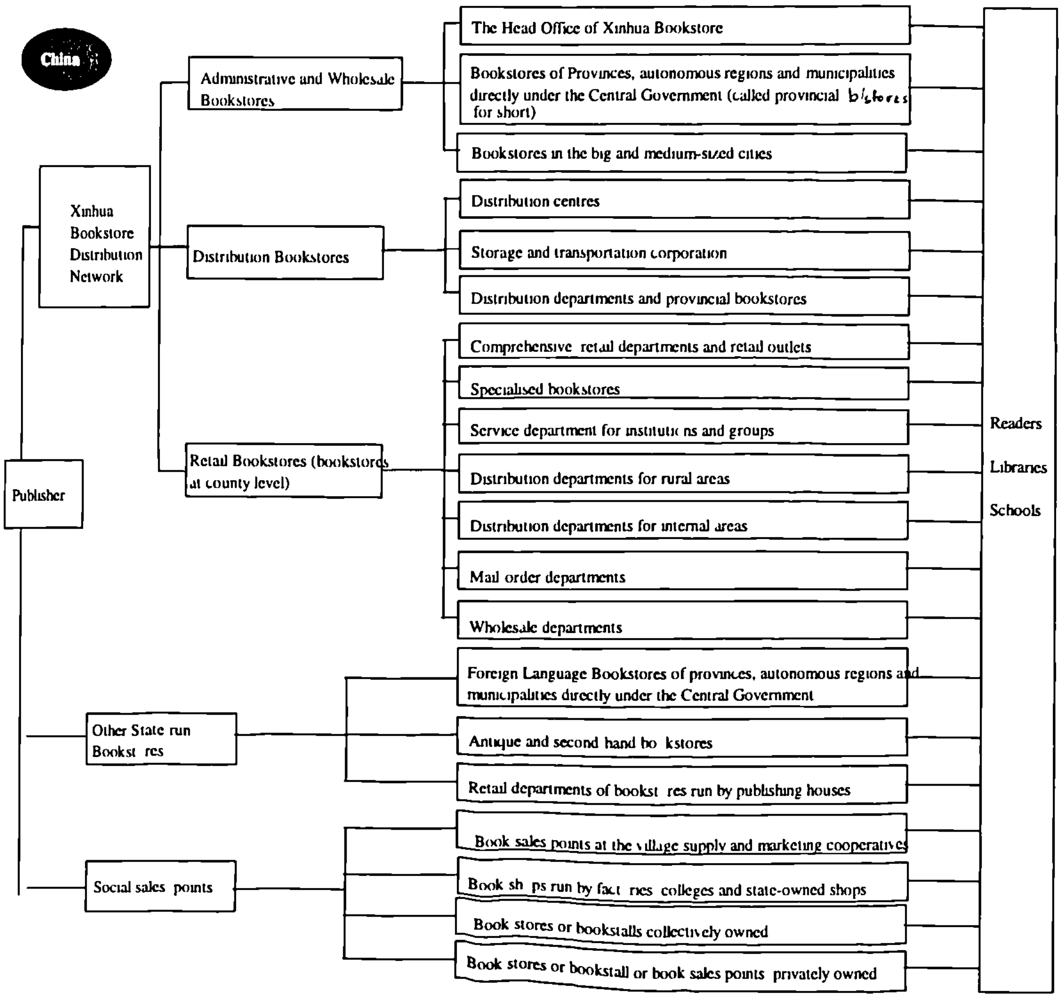


Fig 4.2.6 **Book Distribution in Japan**

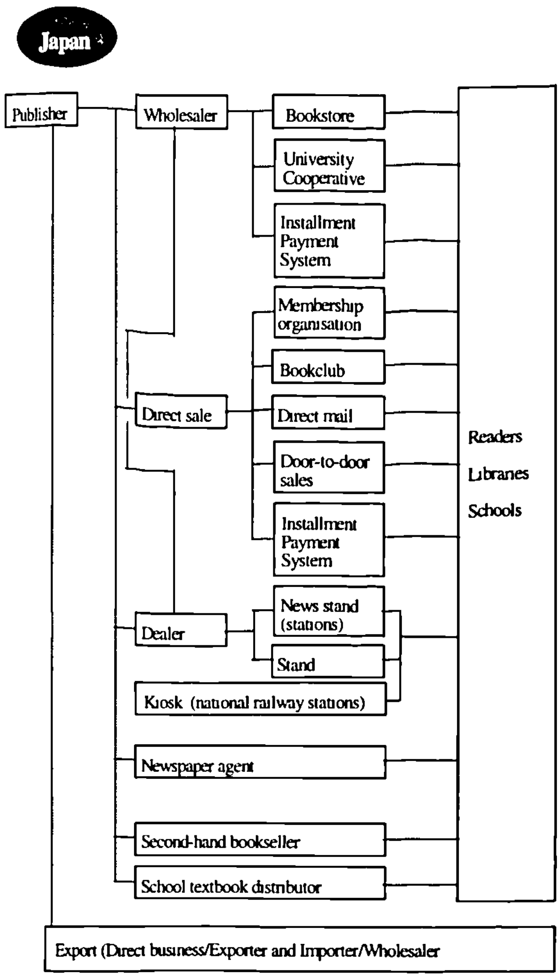
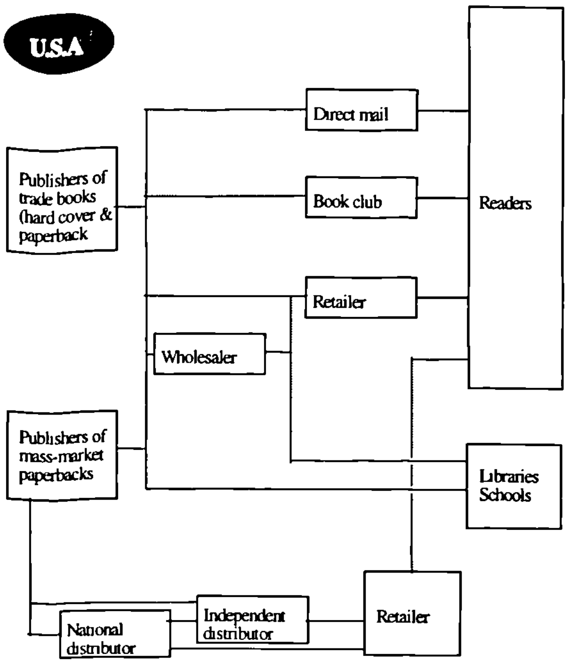


Fig 4.2.7 **Book Distribution in U.S.A**



SOURCE for figures 4.2.6 - 4.2.8: *ASIAN Book Development Newsletter*, Vol XC111, No. 4, 1988.

The Promotion Variable

The ability and quality of writers are critical factors but clearly just as essential for commercial success is promotional support. The promotion variable is used to facilitate exchanges by informing one or more groups of people about an organisation and its products. Promotion is used for various reasons; for example, it might be used to increase public awareness of an organisation or a new product or brand. In addition, promotion is used to educate consumers about product features or to urge people to adopt a particular position on a political or social issue. It may also be used to renew interest in a product whose popularity is waning. No matter what the reasons the ultimate objective is to generate increased profitable sales, or increased awareness in the case of a social/political message.

Although a company can utilise a standard promotion, e.g. an advertisement towards numerous audiences, marketers often design a communication precisely for a specific target market. In order to gain maximum benefit from promotional efforts, marketers must make every effort to properly plan, implement, co-ordinate and control communication. Effective promotional activities are based on information from the marketing environment, often obtained from an organisation's marketing information system. The acceptance of a product by a customer involves many steps, e.g. awareness, interest, evaluation and adoption. After the customer is aware of the product, he might have little information about the product; only when he is motivated to obtain information about the product's feature, uses, advantages, price or location does he move to the next stage: evaluation. During the evaluation stage, customers will consider whether the product will satisfy certain criteria that are crucial for meeting their needs. Peers and friends are important during this trial stage, so marketers should avoid creating expectations that cannot be satisfied. The customer finally moves to the adoption stage by choosing the specific product. Adoption occurs at the final stage but rejection can occur at any time. Product adoption is a major focus for any promotional activity. There are five basic communication aims:[320] category need, brand awareness, brand attitude, brand purchase intention and purchase facilitation. For a product like scholarly books, it is important for marketers to influence "opinion leaders" in order to reach the ultimate buyer. However, although the "opinion leader" may succeed in convincing the ultimate buyer, the consumer needs the product to be available at the right time and at the right place. Booksellers are essential at this stage: the publisher must therefore ensure that other marketing factors such as product and place do not hinder the purchase. Publishers believe that history has not taught many lessons to retailers. For example, in 1872, a leading publisher told *Publishers Week*, " I'm about discouraged with the retailers. The bookseller won't order books unless you make them order. They will buy only what they must buy, after you have made them feel a demand from the public. So, I believe in getting at the public rather than the trade."[321] To this day, similar complaints are reiterated. Although the quote relates to more than a century ago and to a different country (America), the situation in present day in Malaysia is none the better. In

[320] Sally Dibb et. al, op. cit., p. 385.
[321] Quoted from Nat Bodian, *Book Marketing Handbook*, Volume 1, p. 186.

discussions and interviews with publishers, their dissatisfaction can be summarised in the following words: "...we do everything for the bookseller, he needs to do a little. We provide the discounts, do the promotion, provide the catalogues, deliver, take the risks and offer to take back the book if there is no sale, yet even then they cause us problems. They do not provide adequate details, so we must contact them for reconfirmation, and sometimes after all the effort and time, the books ordered are sent back to us. We do the work, another gets the glory, booksellers gain the profit and we end up taking the risk". This situation is explored in research findings on booksellers - publishers relationship.

Several types of promotional material can be used to inform individuals, groups and organisations. The four traditional ingredients of a promotional mix are: advertising, personal selling, publicity and public relations and sales promotion. Increasingly, sponsorship and direct mail are growing elements of the mix in their own right. Selecting the right promotional mix depends on several factors: promotional resources, objectives, characteristics of the target market, characteristics of the product, and cost and availability of different promotional methods. Direct mail, for example, is considered as "the most powerful marketing tool"[322] for scholarly publishers. In this discussion therefore, emphasis is given on Direct Mail, Advertising and Publicity. Marketers must also consider whether to use a "push policy" (promote products to the next institution; e.g. retailer/wholesaler) or "pull policy" (promote product directly to consumer) or a combination of both. The importance of promotional methods from the academic's point of views are explored in this research so as to provide information to publishers to help choose the right promotional tools to reach their target audience.

Direct Mail, Book Publicity and Advertisement.

As there are acute shortages of technical retail outlets for scholarly publications, not only in Malaysia but all over the world,[323] the special characteristics of scholarly publications show the importance of direct mail. Direct Mail is used to create brand awareness and stimulate

[322] Nat Bodian, Vol 1, p. 5.

[323] Nat Bodian stated that there were more than 19,000 book stores in the US of which some 1,500 claimed to be technical book stores, but he was unable to get people to list even 35 actual technical book stores, see Nat Bodian, *Book Marketing Handbook*, Volume 1, p. 3.

product adoption. Direct Mail packages must prompt the recipient to open them, rather than bin them as "junk mail ....80% of direct mail is opened; 63% is partially read; less still leads to an order or donation."[324] The material included in the Direct Mail package must be written, designed and produced to appeal to the receipt. Copy writing therefore is an important skill in the promotional mix, particularly in the production of direct mail. Mailing lists must be as up-to-date and accurate as possible; in this sense, the attractions of "database marketing are immense. Powerful, data-crunching computers known as massively parallel processors, equipped with neural-network software (which searches, like the human brain, for patterns in a mass of data), hold out a vision of marketing nirvana: instead of advertising their products indiscriminately to fuzzy segments of the population, marketers can speak directly to individuals."[325] According to a survey on 100 large British businesses, more than half of the respondents said that databases will be their main promotional tool within five years.[326] Although it is a little much for scholarly publishers to use such sophisticated equipment, simpler and cheaper direct mail techniques are at their disposal.

Some reasons for using direct mail given by Nat Bodian include: publisher has complete control and flexibility, place information on "opinion leaders" who might not be interested in buying but may influence purchases of others can be stored, and the fact that the success rate of direct mail can be traced and analysed. This may provide guidance in finding other potential markets or for learning which medium is most effective for future advertisement efforts. Although there are many advantages to using direct mail, it is, however, as some companies have found out, not immune to risk. The pitfalls start with widespread hostility to junk mail. In addition some firms have thrown together a database without working out how they want to use it.[327]

Advertisement "is a key tool of publishers who resort to direct selling ... Such advertising can benefit even retailers ... by sending them customers who prefer to obtain the book locally"[328]

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[324] Sally Dibb et. al, op. cit., pp. 466 - 468.
[325] 'How to turn junk mail into a goldmine - or perhaps not', *The Economist*, 1 April, 1995, p. 63.
[326] Ibid.
[327] 'How to turn junk mail into a goldmine - or perhaps not', ibid., p. 64.
[328] J.P. Dessauer as quoted in Nat Bodian, op. cit., p. 141.

and although advertising "can build good sales into big sales; ***it cannot possibly sell the book which no one wants to read.***"[329]

As scholars are highly peer conscious, "a review in a respected scholarly journal, especially one signed by an acknowledged authority or someone having a highly regarded affiliation, will carry considerable weight in influencing the purchase of a scholarly book"[330] (see section on scholarly journals in this chapter regarding peer review system and lecturers' reactions towards this in Chapter Seven). Unfortunately, this opportunity cannot be adequately exploited by scholarly publishers in Malaysia due to the virtual non-existence of local reliable and frequently-produced scholarly journals and book trade journals. Few university presses use direct sales to promote books to lecturers; most forward posters and rudimentary information to book shops and display posters of recent publications at the premises of the publishing house itself. They also put up advertisements at conference centres (for example, PEPET holds displays of its memberships' publications during meetings) and catalogues are also produced not only by the university press but also by PEPET.

Many booksellers view publishers' direct mailing activities as an infringement of their commercial rights. They complain that any type of direct selling from publishers to end customers threatens their very existence. However, a study by Wiley and M.I.T[331] on how direct mail affects book stores sales and other sales outlets showed that those books included in the experiment (listed in the direct mail) enjoyed sharply higher sales for the entire year of the test, but surprisingly book stores also enjoyed increased sales: thus in some way one may complement the other. In a memorandum on Fair Book Trade Practice, presented to the Ministry of Trade in Malaysia, it was proposed that publishers should not be allowed to undertake any direct selling to customers. Thong Hon Keong in his paper on behalf of the Booksellers Association proposed that "publishers sell only to the booksellers and not directly to the schools, libraries and individuals or use runners and other suppliers".[332] The Booksellers

[329] Franklin Spier as quoted in Nat Bodian, op. cit., p. 107.
[330] Nat Bodian, op. cit., p. 143.
[331] Nat Bodian, op. cit., p. 185.
[332] Thong Hon Keong, 'Book Distribution in the Country', a paper presented at National Book Industry Convention, Kuching, Sarawak, Malaysia, August 1992, p. 4.

Association is disturbed by the emergence of runners[333] in book distribution in Malaysia and claims that runners have considerably damaged booksellers, especially when publishers offer saleable titles exclusively to runners for distribution, in addition to the practice of using preferred agencies by publishers to distribute their publications, and booksellers therefore need to contact these runners and agencies for the books they need.

The Price Variable

Price is the key element in the marketing mix because it relates directly to the generation of total revenue, as in the equation

$$\begin{aligned} \text{Profits} &= \text{Total Revenues} - \text{Total Costs} \\ &\quad \text{or} \\ &= (\text{Prices} \times \text{Quantities Sold}) - \text{Total Costs} \end{aligned}$$

Price affects the profit equation in several ways: i) it directly influences the equation because it is a major element (higher prices mean a larger contribution per sale); ii) it has an indirect impact because it can be a major determinant of the quantities sold (higher prices mean lower sales); iii) and more indirectly it influences total costs through its impact on quantities sold (higher prices lead to lower sales leading to reduced economies of scale).[334] It is one of the most difficult and critical decisions in publication management, as it affects both profits and buyers' perceptions of value.

Buyers are interested in the price of a product because they are concerned about the value obtained in exchange. They exchange buying power which depends on buyers' income, credit and wealth. Unlike other elements in the marketing mix, price can be adjusted quickly and easily to respond to changes in the external environment although under some circumstances price variables may be relatively inflexible.[335] Products such as books may need a lengthy process to develop, promotion takes time to plan and place/distribution requires a long term

[333] Runners according to Thong Hon Keong practise illegally since they may have no legal place of business, operating mainly from their home, garage etc.
[334] Sally Dibb et. al, op. cit., p. 479.
[335] Sally Dibb et. al, op. cit., p. 478.

commitment to those who handle the product. Pricing of publications therefore involves quantifiable data on costs and expected revenues and qualitative information on such variables as markets and price elasticities.[336]

A continuous evaluation of pricing decision is an important feedback to aid in future pricing decisions. There are a number of factors to be considered when pricing a book such as:[337]

i) organisational and marketing objectives (price should be set consistent with the organisation's goals and mission);

ii) types of pricing objectives (can heavily influence price setting decision);

iii) cost ;

iv) other marketing mix variables (price can affect other marketing mix variables);

v) buyers' perceptions (some are price sensitive, some are not; therefore publishers must aware of its importance to target market); and

vi) competition (knowledge of the price of competing titles is essential).

Scholarly publishers always hold the view that publications should be as inexpensive as possible to ensure wide circulation (to fulfil social obligations); this in fact can lead to serious problems if estimates of audience interests are exaggerated and the financial implications of increased volume are not carefully calculated.[338] The popular price multiplier or mark up approach to pricing (which focuses on the unit cost and reduction in unit cost that can come from increased volume) used in publishing in general and scholarly publishing in particular does not necessarily lead to a healthy publishing programme. It is not the number of copies published that establishes the true cost of sales (though it does establish accounting cost of sales) but rather the number of copies sold.[339]

It is assumed that if price decreases, volume or quantity demanded increases, and vice-versa. But this is not always true. This depends on whether the demand for the book is price elastic or

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336 Margaret M. Quinlin, *Pricing: Its Place in the Marketing Mix & Its Contribution to Profit* (Washington DC: Society for Scholarly Publishing, 1988), p.1.

337 Sally Dibb et. al, op. cit., p. 479.

338 Margaret M. Quinlin,op. cit., p.2.

339 Margaret M. Quinlin, p.2.

inelastic. Price elasticity of demand "provides a measure of the sensitivity of demand to changes in price".[340] The percentage change in quantity demanded caused by a percentage change in price is much greater for elastic demand than for inelastic demand.

> Price Elasticity of Demand, $Dd = \frac{\Delta Q}{\Delta P}$
> where ΔQ is the change in quantity demand
> and ΔP is the change in price

It is easier to set a price once price elasticity of demand is determined for the publications intended to be published. If demand for a publication is inelastic (some specialised monographs normally have a price-inelastic demand), the volume is not likely to change significantly if the publisher lowers the price of the publication, total revenues will be reduced while circulation is not increased. For an elastic publication, it works vice-versa; therefore it is wise for publishers to consider a lower price.

In order to measure the price-elasticity of a publication, publishers need to obtain information on and get feedback from the market; this can be done through market research for example. The more publishers understand their audience or market, the better their ability to select optimum prices, e.g. understanding of their income levels and reference groups.

Scholarly publishers in Malaysia, in particular University Presses and DBP, are not aware of the price elasticity of their publications and consequently record losses instead of profits. Social obligations are given as an excuse while the true reason is the lack of understanding of the audience. Social profit can also mean an increase in the readership; books lying in warehouses collecting dust cannot legitimately be labelled as social profit. Publishers cannot depend solely on price elasticity considerations; they must also examine other factors such as the cost associated with different volumes and see what happens to profits.[341] Understanding demand, cost and profit relationship can help publishers to set the right price. Other factors

[340] Sally Dibb et al., p. 506.
[341] Sally Dibb, op. cit., p. 505.

such as characteristics of the author, audience interest, competing titles, reviewing historical data concerning the cost of goods from existing publications, (or from competing titles), to supply information on price sensitivity and analysis of response rates at different prices, help publishers to lessen the risk in decision making.

In calculating the price another complicating factor is costs. Each publishing house has a different cost structure that plays a significant role in pricing and profit determination.[342] Thus many publishers arrive at pricing using the mark-up approach despite published researches disputing its value. The mark-up approach according to Shatzkin can lead to four problems:[343]

① its emphasis on costs contributes to the tendency to increase the print run in order to price down the mark up formulae;

② it tends to ignore differences in fixed versus variable cost ratios that require different responses (a book with lower ratio of variable costs has a greater potential for a higher profit at higher volumes of sale - assuming it has a price-elastic market. The unit cost of such a book may be similar, if not identical, to a book with a higher ratio of variable costs; therefore the pricing strategies for these two books should differ);

③ it focuses on the minor aspects while missing the most important points; and

④ the unit-cost approach assumes a unit overhead which implies that every copy of a publication should carry its share of overhead which is fine for internal accounting purposes but problematic for pricing.

The unit-cost approach, therefore, is only a rule of thumb that can be useful only after other approaches have been evaluated.

4.2.2 The University Presses

The concept of a non-profit making university press augurs well for the future expansion of academic publishing in Malaysia. The principle that commercial gain is not the decisive factor in scholarly publishing has encouraged universities to establish their own publishing or printing

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[342] Margaret M. Quinlin, p.2.

[343] Leonard Shatzkin, 'The Fallacies of Unit Cost Accounting', *Publishers Weekly*, 216:44, 2 October 1979, p. 37 & 7.

presses. It is seen as a continuance of the role played by academics at the university to disseminate knowledge, not only through lecturing but by making knowledge available to a wider audience, especially to announce their research findings to the whole scholarly community. The three paramount functions of a university are: teaching, research and dissemination of the results of scholarly enquiry.

As discussed in Chapter Two, the need for scholarly books published locally (either in bahasa Melayu or in other languages/English) has not yet been fully met by scholarly publishers, although bahasa Melayu has been used as medium of instruction at all higher institutions since 1983. The growth in demand for Malay academic books increased dramatically during the 1980s as the first batch of students, who underwent the implementation of bahasa Melayu in all subjects at school, enrolled in universities in 1983. Unfortunately this demand was only partly satisfied by increased supply, the numbers of titles published in bahasa Melayu has been increasing, but only erratically and in 1991 and 1992 the titles published were far below those published in 1990 (see table 2.1.1 and for the number of titles published by university presses, see tables A11.1.1 to A11.1.6 in Appendix 11).

Other than DBP, all the universities in Malaysia have established their own "university press" (small in size and limited in activities, the role played by some pushes the use of the term Press to the limit, but in this research the term university press is used to refer to these publishers) to fulfil the needs of scholarly publications. University of Malaya paved the way in 1960 (although the Press actually became operational in 1954, while it was still physically located in Singapore). In its early days, the UMP (together with the UMP in Singapore) were guided by OUP. OUP was responsible not only for editing and production of UMP titles but also their distribution. The distribution network of OUP ensured that these early publications written by both local and expatriate authors were distributed world-wide. After the termination of the agreement between OUP and UMP in 1969, the University of Malaya co-operative Bookshop was appointed as the sole distributor. The bookshop had direct retail outlets as well as acting as a selling channel (UMP acted as agent for imported publications) for buyers in Malaysia's neighbouring countries. The book shop also maintains the services of one mailing list in

Britain and another in the United States. In April 1982, the Publication Department of the University of Malaya was established to replace UMP, as a direct result of the ruling enforced by the University Colleges Act of 1975 which stipulates that the University, as a quasi-government body, cannot operate a commercial concern.

The 1970s and early 1980s saw the establishment of several other institutions of higher learning which set-up their own scholarly publishing programmes; UKM (1970), USM (1972), UPM (1977), ITM (1981) and UTM, UIA and UUM in 1985. Some of these university presses ironically are more active than UM in producing scholarly publications. The establishment of the newer universities in Malaysia was in parallel with the rapid expansion of the Malaysian higher education sector as a whole. As the quality, quantity and scope of higher education grew rapidly, more institutions of higher learning began to form their own university presses.

Most university presses in Malaysia are governed by the university administration, and receive annual grants from their parent universities to finance their running and administrative costs. The exception to this rule is the semi-autonomous status of the University of Malaya Press which by virtue of its historical position is permitted to exercise some independence. Typically, all these University Presses can be categorised into two organisational structures, with only slight difference. UM, UKM, ITM and UTM can be grouped into typical A (see figure 4.2.2) while the rest can be categorised into typical B (see figure 4.2.3), a small unit attached to the library.

The structure of university presses in comparison with commercial publishers (see figures 4.2.1 to 4.2.3), suggests that university presses lack the basic elements of "planning a programme, commissioning or selecting manuscripts and book projects, evaluating the material, editing it for printing; designing, specifying and overseeing manufacture; marketing in all aspects and, managing and co-ordinating these activities."[344]

[344] Chandler B. Grannis, 'The Structure and Functions of Book Business' in *The Business of Book Publishing: Papers by Practitioners* (London: Westview Press, 1985), edited by Elizabeth Geiser, p. 12.

Generally, the structure of a typical A university press comprises a unit under the chancellery office and is managed by a Publication Officer directly responsible to the vice-chancellor and the Chairman of the Publication Committee. This Committee must approve all scholarly publication in the form of books, journals and monographs from the Press. Membership of the Committee consists of representatives of the Deans of Faculties, Directors of Institutes and Centres, the Senate, Chief Librarian, the Bursar and the Publications Officer as the Secretary. It is chaired by the head of department who, although responsible for day to day operations, has only limited rights over his publishing house as he is under the control of the vice-chancellor as well as another two committees. These should theoretically work along the lines of a board of directors and shareholders; however it is common for them to meddle in day to day matters e.g. choose titles. The head is assisted by a number of editors (table A11.2 in Appendix 11 for number of editors in each university press) who run all matters pertaining to publications, but lack professional knowledge or in other words are: "jack of all the trades, master of none". Other than editors, the press is assisted by a number of staff, normally clerical workers who do the typesetting work (if the press has its own typesetting facility - certain university presses such as UM and Biroteks ITM have advanced equipment) or perform other related duties such as typing the manuscripts, designing the layout and administration. The typical B structure is a unit under the command of the university library (the library acts as the secretariat); it has one or two persons in charge of all "publishing work" (see table A11.2 for number of staff in Appendix 11). This unit is also indirectly (through the chief librarian) responsible to the vice-chancellor and the Chairman of the Publication Committee; in this respect it is similar to the typical A structure.

The university press obtains manuscripts by asking academics to write a proposal on a title to be written/translated; or by waiting for the academic to send the manuscript (this is the most common way); or the head of the university press searches for a translator; or manuscripts are received from internal sources such as research reports by a committee member, compilation of seminar papers and proceedings.

With the exception of UM Press, all university presses receive annual grant from their parent university to finance the costs of publication and the administration costs. The income generated from sales is then channelled back into the press to finance further publications. UM Press is treated as a separate entity within the university and finances its own publishing programme from its resources, and support from the parent body is limited to payment of utility bills and free premises.

Some university presses, UKM press for example, use an open distribution system with no single distributor/wholesaler, whereas Biroteks ITM relies on a sole distributor, ITM Co-operative Book shop. Published books are sent to distributors and book shops by publishers, either by mail or distributors/booksellers are asked to collect. Distributors usually receive discounts averaging 35% while book shops receive 25%. Direct Mail is particularly favoured by UKM Press and normally clients are individuals, and institutions both local and international. In order to encourage the public to buy publications, there is a discount scheme: 10 - 50% for the UKM staff, 10% for individuals and 40% for students for the first 50 copies bought. Clearance sales are organised on campus from time to time to reduce old stock with discounts of up to 50%. However, in other university presses, rules governing discounts and methods used for distribution are neither clear nor systematic: during interviews conducted by the researcher, some heads of publication units could not provide details of exact discounts given and had no systematic outlets for distributing their publications - in other words, as long as they managed to publish, their job was finished (see Chapter Eight for detail discussion).

In general, university presses in Malaysia share similar characteristics; these are: small and immature in term of organisational status, as most of them are dependent on their parent university; lacking authority and power to function without reference to the parent body which limits their scope of operations; having subject-based rather than function-based organisational structures (no clear responsibility centres); possessing a civil service mentality instead of being business oriented and using social obligation and non-profit making as weapon to justify losses upon losses; having small print runs which result in high unit prices due to high production costs; and having significant problems in the areas of distribution and marketing. Most staff are seconded from various university faculties; these have neither the qualifications nor time to devote to press business and at times consider the work as burdensome. In addition the presses complain of a shortage of funding from both the government and their parent university. Realising the weaknesses, several steps have been taken by them (to tackle certain problems only) including upgrading the skills of their staff, organising writing and translating workshops for academics with the co-operation of various bodies such as PEPET, IDRC, Translation Association (PPM), and aiding writers in their process of writing. PEPET, for example, was established to help the university presses regarding this matter. Unfortunately some university presses were enthusiastic to have PEPET established but since then have contributed little to make PEPET successful.[345]

4.2.3 The Government Publisher: Dewan Bahasa dan Pustaka (DBP)

Other than University Presses, DBP is one of the main scholarly publishers in Malaysia. Since there are already many studies undertaken on DBP (see Appendix 1) this section will only look at aspects relating to the marketing of scholarly publications by DBP.

Background

Dewan Bahasa dan Pustaka (DBP) was established in 1959, as an autonomous statutory body under the Ministry of Education. Although originally set up to promote the development of Malay literature it has gradually assumed the status of a publisher. After independence, one of the urgent problems faced by the country was the paucity of books in bahasa Melayu to meet the demands of the new National Education Policy (NEP) formulated by the government to replace the old colonial system. Malay publishing for the school system then was small, unreliable and not responsive to the new demands. The magnitude of the task facing the publishing industry, and the large amounts of resources and tight deadlines needed in order to establish a viable industry capable of supplying the book needs of the NEP meant that the government needed to take urgent action. The DBP was drawn in to fill this void and publish books for schools.

[345] Interview with Hasrom Haron, Chairman of PEPET at UKM Press, March 1993.

Private publishers began to publish more books in bahasa Melayu only towards the end of the 1960s when it became obvious that the market for textbooks in the language was expanding and was thus economically attractive. DBP and private publishers began increasingly to compete with each other. In 1975 the government introduced the Textbook Loan Scheme purportedly to standardise school textbooks, avoid unscrupulous book business methods and to ensure that textbooks were available to every child irrespective of his parents' economic background. Primary school textbook publishing then became the preserve of DBP (drawing protests from private publishers) when the government for the first time purchased books using this single source. However, the government left secondary textbook publishing, which also came under the scheme, an open field.

From 1982 onwards new primary textbooks based on the KBSR (National New Curriculum for Primary School) began to replace the old textbooks. The three R's books were published as supplementary reading materials to KBSR textbooks. DBP was asked to be the main publisher of KBSR textbooks, under the supervision of the Ministry of Education, which assumed responsibility for the selection of textbooks to publish. Private publishers questioned whether school textbook publishing had been nationalised by the government as DBP was basically a language and literary planning agency of the government. DBP argued that although it was not set up to take over textbook publishing in bahasa Melayu in this country, or to replace private sector publishing, circumstances had led it to play a significant role in this field. Besides publishing, the scope of its work is indeed wide - ranging from language planning such as specialised terminology development in bahasa Melayu, literary research and documentation, lexicographic works and promotion of literary and creative writing though competition, workshops, courses and seminars.

Organisational Structure

DBP sees publishing not as one of its primary objectives of its establishment but rather as a tool in developing and enriching the growth of bahasa Melayu. There is no specific mention of any particular area of publishing which DBP is supposed to go into, and this very general definition also gives the Dewan the role of helping to publish, and not merely to publish on its own, books in other languages as well.

DBP is governed by a Board of Governors appointed by the Minister of Education. The Board is the highest policy-making body whose members are appointed by the Minister to serve for a term of three years. The Board is assisted by four committees in performing its duties, namely the: i) Executive ii) Finance iii) Tender and iv) Publication Committees.[346] These committees consist of three to six members of the Board, who work in conjunction with the executives of the related departmental divisions of DBP. The administration is run by a Chief Executive - referred to as the Director General and is appointed by the Board with the approval of the Minister of Education.

Upon its establishment nine departmental divisions and four units were set up based on the various functional activities and specific programmes. Over the years, the number of departmental divisions and units has increased, as the need arose; Fig A12.1 of Appendix 12 presents the structure of DBP as at 1993.

Publishing Programme

DBP's role in publishing is directly related to its function in developing the language and promoting literature. There are numerous research, basic references and general guide-book materials on the language and the literature of the country published not only for academics or professional groups, but also for the general population in order to promote bahasa Melayu and the national literature. The literary and creative writings of indigenous writers have been promoted and published, as well as dictionaries, terminology books, and guide-books on the use of the language to help Malaysians learn both the syntax and semantics of their language.

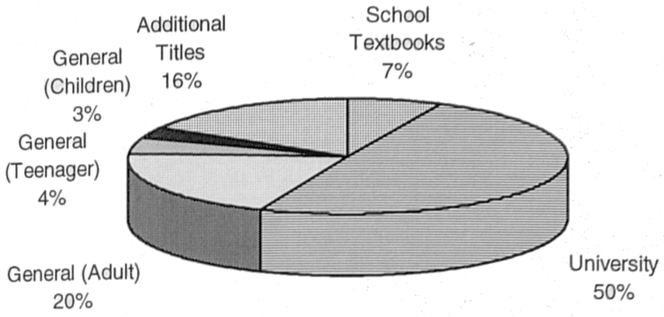
DBP has become the leading publisher of language and literature books and is engaged in almost every type of book/publication. Although some of these books are not economically viable, they are reviewed as important materials for the promotion of the language and

[346] Asiah, op. cit., p. 23.

dissemination of knowledge. DBP took over the responsibility for producing more books for higher institutions following the government plan to switch mediums from English to bahasa Melayu at the university level, leading in 1970 to the establishment of a Malay-medium university known as Universiti Kebangsaan Malaysia (National University of Malaysia); this further fuelled the demand for books in bahasa Melayu.

The development of scholarly publication in bahasa Melayu by DBP occurred in four phases. The first phase began soon after independence. The second phase came with the establishment of UKM in 1970 when DBP was assigned the task of translating 200 titles in sciences and pure sciences for the university. Phase three was an extension of the National Education System when bahasa Melayu was introduced as the medium of instruction for all standard one classes in 1971. Phase four was in 1985 with a nation-wide survey carried out to ascertain the use for books in bahasa Melayu at the tertiary level. Table 4.2.2 shows the number of books published by DBP from 1956 - 1992 (it is strange to discover that the exact number of titles published yearly is not easy to locate although there were a number of studies completed on DBP including various seminar papers, unpublished documents etc. and catalogues, most researches combine the titles into several years or categorise them according to subjects). Efforts by the researcher to list the publications published by year and categories met with little success (see table A12.2 in Appendix 12 of number of titles published by DBP from 1985 - 1990 by categories). However, in 1993 DBP published 14 catalogues of list of publications by subjects. In recent years, scholarly/university books have taken an increasing share (50%) of total books (by titles) published by DBP while school textbooks which contributed up to 60% of the total turnover only make up around 7% of book title published: see figure 4.2.8 of proportion of titles published in 1990.

Figure 4.2.8 **Breakdown of titles by DBP by type of publications, 1990**



SOURCE: Jumaat Mohd. Noor[347]
Note: Additional titles include Exercise, Physical Education and Reference books etc.

Table 4.2.2 **Number of titles published by DBP, 1956 - 1992**

Year	**No of titles**	**Year**	**No of titles**
1956	3	1982	177 (117)
1957	8	1983	149
1958	11	1984	159
1959	10	1985	112
1960	28	1986	204
1961	52	1987	213
1962	41	1988	251
1963	45	1989	312
1964	62	1990	315 (455)
1965	66	1991	330 (408)(517)
1966	51	1992	360
1967	75		

1960 - 1969	313
1970-1979	782
1980-1989	1824 (1655)

Source: Own compilation from various DBP's report, working papers, unpublished dissertations etc. Some figures were reported differently as in the brackets.

DBP policy is to price books with a view to fulfil social obligations rather than maximising profit, but in view of this it seems strange that the stock of books has been increasing if books are affordable and readily available. The truth is likely to be that marketing operations are both ineffective and limited in scope (see discussion under distribution section and table 4.2.1). If

[347] Jumaat Mohd Noor, 'Sumbangan Dewan Bahasa dan Pustaka dalam Pembangunan Perbukuan Negara' (DBP's Contribution Towards the National Book Development), a paper presented at the National Book Convention, Kuching, Sarawak, August 1992, p. 6.

publications are affordly priced and arrive at the right time and place, the social profit of DBP objective should been achieved. Unfortunately, this is not the case - book prices are expensive in some ways, lax cost controls push up costs of production since 1/3 of total expenses are met by the government, and poor marketing results in poor sales. When taking into consideration that DBP is the "monopoly publisher for guaranteed saleable books", this only highlightens the poor management of DBP. DBP runs a deficit each year (for detailed figures see Chapter Eight). Looking at table 4.2.3, one can clearly see that percentage copies produced which were sold for five years ranged from 16% to 31%.

Table 4.2.3 **Number of copies published and sold (1982 - 1986)**

Year	Title	Copies Published	Copies Sold	% of Copies Sold
1982	117	2,699,208	611,357	22.65
1983	149	2,153,000	339,516	15.77
1984	159	1,757,000	285,463	16.25
1985	146	1,074,000	337,595	31.43
1986	204	1,582,000	407,520	25.75

SOURCE: Hamedi Adnan, p. 82.
Note: The number of copies published for years 1984, 85 and 86 were different from table 4.2.1.

Although DBP has a business oriented organisational structure (see Fig A12.1 of Appendix 12 for the organisational chart) it does not practice a business philosophy. Taking social obligation as the objective, DBP however has failed to achieve profits: social and normal profits. A comprehensive study completed by Hamedi[348] on book distribution by DBP showed that the main factors contributing to the failure of distribution of books published by DBP were due to its social objective to help bumiputeras in business and the policy of publishing "non-saleable" books. According to Hamedi, distributors were appointed amongst bumiputeras who were incapable of distributing or marketing books efficiently. Although the amount of books taken by these distributors cannot exceed the amount of bank guarantee, many distributors had large outstanding debts; two distributors were held in contempt and banned from being the

[348] Hamed Adnan, Unpublished Master's dissertation, University Malaya, q.v. Appendix 1 for details.

distributors for DBP for failing to settle their credits (in theory such things should not have happened since the rule states clearly the amount of books taken by these distributors cannot exceed their bank guarantee yet DBP is still facing problems from distributors who fail to settle accounts promptly resulting in large losses).

There are two types of book distributors appointed by DBP: those who sell books under the School Book Scheme (they are given commission for these books) and those who sell only "open market books" (books outside the School Book Scheme). The system, according to Hamedi, has meant publishers concentrate more on the School Book Scheme (as they are guaranteed saleable books). To make matters worse, some distributors received higher commission rates for School Book Scheme titles compared to other type of books (see table 4.2.4 for the comparison of books purchased and commission received). On average, these distributors gained around M$150,000[349] each (for the year 1987 to 1988) for distributing School Book Scheme titles.

Table 4.2.4 **Amount of books purchased and commission received from School Book Scheme**

Distributors	Amount of Purchase (M$)	Commission Received from School Book Scheme Books (M$)
Balai Pustaka, Taiping	111,667	202,325
Gema Enterprise, Sg. Petani	40,449	84,621
BYP Enterprise, T. Intan	80,345	102,999
H.M. Joned, Bahau	45,902	67,957
Ahmad Omar, K. Trengganu	138,483	177,534
Sukaramai, Mersing	8,290	22,634
Sy. Kerjasama Serbaguna, Jasin	76,911	77,315

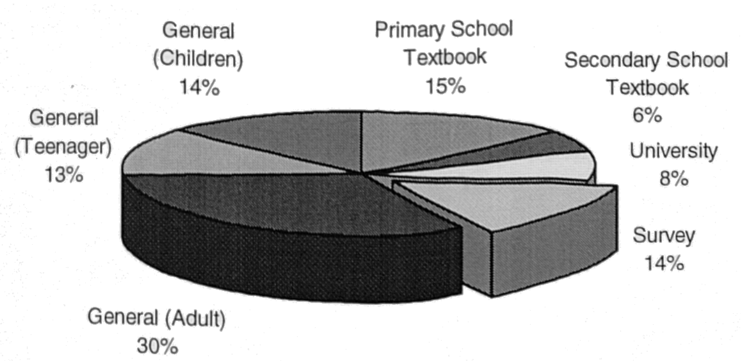
SOURCE: Hamedi Adnan, p. 318

The distributors are partly to blame for the inefficiency in distribution: DBP however should also be blamed for aggravating the situation. In addition to the weaknesses of University Presses outlined earlier, DBP's decision-making process for selecting publications to be published is chaotic and ill-managed. Although DBP was "forced" to publish non-saleable books, the fact that an unprofessional approach is used when creating the product is among the

[349] Hamedi, op. cit., p. 317.

weaknesses of the organisation. For example, around 13.9% of total book titles published were Survey/Research Findings, see figure 4.2.9. These type of publication are highly specialised and meant for a small select group of people and therefore they should have been published in a more economical way, so as to reduce cost yet fulfilling the objective of social obligations and disseminating knowledge. Examples of such poor product design are numerous, for instance, survey findings on the usage of bahasa Melayu at higher learning institutions (*Kajian Laporan Kajilidik Penggunaan Bahasa Malaysia di Institusi Pengajian Tinggi di Malaysia*; A Report on Survey Findings on the Usage of Bahasa Malaysia at Higher Learning Institutions) was published in two volumes; this in fact could have been condensed into a more "readable and popular" book which could have reached and informed a wider audience. The technical aspect of the survey which took one-third of the total pages is only suitable to be included in a report style of publication/monograph rather than a beautifully presented book, as the purpose of spending a massive amount of money on certain research is to let the maximum audience know the result; hence cost-reduction in producing the findings in a publication can lead to a lower price, helping achieving DBP's objective: social profit and disseminating knowledge (this is only one example of a number of surveys published by DBP). Distributors were then reluctant to order such books as their market was limited (not only because of the nature of the books but also their prices).

Figure 4.2.9 **Categories of books published by DBP during 1989**



SOURCE: Hamedi Adnan, p. 313
NB: Survey is also categorised as scholarly publication. The proportion of scholarly books publish by DBP is vary from year to year.

The Translation Programme

Following the implementation of the language policy in 1971 requiring all primary schools to use bahasa Melayu, the need for books in bahasa Melayu increased significantly leading to the formation of a translation unit in DBP to cater for the dearth of books in bahasa Melayu. Numerous seminars,[350] discussions and studies have been undertaken by various associations questioning the ability of bahasa Melayu as a medium of instruction at higher learning institutions. Realising the issue had been debated without any concrete survey, DBP commissioned a survey regarding the usage of bahasa Melayu in higher learning institutions in 1987.[351] As one of its findings, the majority of the students and lecturers (about 81% and 89% respectively) were convinced of the ability of bahasa Melayu to act effectively as the medium of instruction in all higher learning institutions.[352] However, the percentages for those who had confidence in bahasa Melayu were slightly higher for individuals undertaking non-professional courses.[353] The findings showed that bahasa Melayu had gained in popularity. DBP had multiplied its efforts to fulfil the needs for books in bahasa Melayu. One of the efforts taken by DBP was the "Translation and Publication of Higher Education Book Scheme". With the co-operation of the Malaysian Translators Association[354], various courses, seminars and conferences on translating have been held for academicians from all higher learning institutions. Under the scheme, DBP planned to translate and publish five hundred books within five years starting from 1987 covering all subjects taught in higher learning institutions.[355] Private publishers were also involved in this scheme by acting as publishing agencies on behalf of DBP. Unfortunately DBP failed to achieve this target. Several reasons were given for this failure, such as lack of professional translators, delays in getting the

[350] Such as Status Dasar Bahasa Malaysia di IPT Malaysia,(28 - 29 July 1980), Menilai Pelaksanaan Bahasa Malaysia di IPT (4 - 5 January 1983), Kongres Bahasa dan Persuratan Melayu 1V (7 - 10 December 1984) etc.
[351] The research took 2 years to be finished due to its wider scope.
[352] *Laporan Kaji Selidik Penggunaan Bahasa Malaysia di Institut Pengajian Tinggi* (A Survey Report on the Usage of Bahasa Malaysia at Higher Learning Institutions), Dewan Bahasa dan Pustaka, Kuala Lumpur, 1989, p.705.
[353] *Laporan Kaji Selidik*, ibid, p. 705.
[354] PPM is a voluntary professional organisation formed in 1978 with membership opens to any who shows an interest in translation. It has organised many workshops, seminars and conferences at both national and international level.
[355] Zainab Kassim, Social Obligations vs. Profit Making (unpublished Master's dissertation, University of Loughborough, 1991), p. 99.

copyright clearance and failure to meet the deadline at certain stages in the process of translating which caused delays in publication.[356]

In order to make good the shortage of skilled translators, several initiatives have been undertaken by DBP - workshops for lecturers, co-operation with some universities: UPM, UTM , USM and ITM (More recently i.e. July 1995 with USM to set up a Malay Language Centre on the Internet to provide language translation tools and dictionaries etc, see discussion in Chapter Two). The universities decide on the titles, and bear the cost of translating and editing, the lecturers translate the works, while DBP publishes and bear all the other publishing costs. It also established several subject panels - these experts suggest and evaluate manuscripts on specific subjects such as Law, Communication and Medicine.

In late 1993, a government subsidiary company (under the Ministry of Finance), Malaysian National Institute of Translation Bhd was established to translate more books, particularly scholarly books, mainly with the aid of computer software. To date, little feedback has been available regarding this company, but its establishment has been received with mixed feelings from those involved in translation, particularly from the members of Malaysian Translators Association. The need to have a company dealing with translations had been proposed by the Malaysian Translators Association. However this newly created company is a totally separate body from Malaysian Translators Association. Political motives behind its establishment seem to have added to its secrecy, while information has not been forthcoming because of the usual "confidentiality" clause covering such establishments. The shroud of secrecy has only added to the voices asking questions regarding its effectiveness and legitimacy.[357]

4.2.4 Research Institutes, Professional/Learned Societies and Foundations

In Malaysia, some autonomous research institutes involved actively in publishing are the Institute of Medical Research (IMR), Rubber Research Institute of Malaysia (RRIM), Forest Research Institute of Malaysia (FRIM), Standards and Industrial Research Institute of Malaysia (SIRIM), Tun Ismail Atomic Research Centre (PUSPATI), Palm Oil Research Institute of

[356] Zainab Kassim, p. 101.
[357] Please note that all information regarding this matter are valid up to 1993.

Malaysia (PORIM) and Malaysian Agricultural Research and Development Institute (MARDI). It is estimated that there are about 28 government departments involved in publishing scholarly and scientific publications.

In all these research institutes, staff are required to write books and present academic papers for career promotions and publications. However, the challenges facing the research institutes as publishers are enormous including the need to transfer information as rapidly as commercial publishers, processing information for wider consumption, and developing or adopting newer and more advanced methods of production.

4.2.5 Professional/Learned Societies and Foundations

This group of scholarly publishers is made up of learned societies such as the Malaysian Translation Association (PPM), Malaysian Medical Association (MMA), Malaysian Economic Association and Yayasan Penataran Ilmu (Knowledge Foundation) producing scholarly journals and monographs, covering their respective areas of interest. These professional bodies use publishing as a tool to inform and communicate with their members. Since their membership is restricted, their publications are also very limited in scope, with a small print-run, and not commercially-oriented although their contributions cannot be overlooked. Most of these learned societies publish scholarly journals in addition to monographs. Although there are no reliable figures on the number of scholarly journals published[358], an attempt has been made to list all scholarly journals published in Malaysia based on the researcher's own investigation on journals kept in the storage room at the National Library and from other primary sources such as personal experience, observations and discussions. As this is considered to be the first attempt to list down the journals, the list may be incomplete. Appendix 10 presents some of the publications by these professional groups/learned societies and other organisations (some journals may no longer exist since the information was valid as at 1993).

[358] Hasrom quoted the figure as 160, while the researcher managed to identify only 121 journals, see Hasrom Haron, 'Memorandum to the Ministry of Trade and Consumers Affairs', op. cit., p. 14.

Issues in Scholarly Journals

Several issues which are normally faced by those producing scholarly journals include unreliable production, lack of contributions, lack of professional editors, peer review system and last but not least the marketing aspect (some of these aspects are investigated in this survey from the academicians' point of view).

As manuscripts contributed to scholarly journals are regarded as an integral part of academic life, the peer review system is seen as indispensable in journal publication. The problems which beset the peer review system can be categorised into three[359]: attitude, administration and effectiveness. The normal policy is to allow for two referees to evaluate each manuscript, however a third may be needed in case of dispute. Some reviewers, however, do pose problems for the editorial board and contributors. Local academicians may restrain themselves from submitting manuscripts because of the existence of reviewers - they might be colleagues with whom they have some personal problems and some reviewers might treat the manuscript as an opportunity to underrate their colleagues with cynical remarks. Sometimes reviewers are straightforward and reject a manuscript outright while others might delay evaluating the manuscripts resulting in a severe waste for both publishers and contributors. Most journals also have a clause that while an article is under consideration, it cannot be sent to another journal for consideration. And sometimes after a long time waiting, the author gets a rejection and it is too late to submit to another journal because the value of research may have declined. Such occurrences aggravate the problems already besetting journal production and add to delays causing journals to overrun scheduled publication dates. As an example, the delays faced by *Malaysian Journal of Tropical Geography (MJTG)* caused a loss of interest among its subscribers, the number declined from 436 subscribers in 1980 to 306 in 1987.[360] Table 4.2.5 show the time lag between scheduled and actual date of publication, this varied from three months to 23 months.

[359] J. M. Banner , 'Preserving the Integrity of Peer Review' in *Scholarly Publishing* (19: 109 - 15) and J. C. Bailar and K. Pattison, 'The Need for a Research Agenda in Journal Peer Review' in *Journal Medical* (312: 654 - 7) quoted in A. Latiff and A.H. Zakri, 'Ethical Issues on Peer Review in Journal Publishing - The Malaysian Experience', a seminar paper presented at Seminar Peranan Editor dalam Penyuntingan Jurnal (The Role of an Editor in Journal Editing), Serdang, Selangor, Malaysia, 18 - 20 October 1988, p. 2.

[360] Voon Phin Keong and Khoo Soo Hock, ibid., pp. 17 - 18.

Table 4.2.5 **Time lag between scheduled and actual date of publication of MJTG, vol. 1-16**

	Date of Publications		
Volume	Scheduled	Actual	Time lag (months)
1	Sept. 1980	Dec. 1980	3
2	Dec. 1980	Aug. 1981	8
3	June 1981	March 1982	9
4	Dec. 1981	Sept. 1982	9
5	June 1982	July 1983	13
6	Dec. 1982	Sept. 1984	9
7	June 1983	May 1985	23
8	Dec. 1983	May 1985	17
9	June 1984	Nov. 1985	17
10	Dec. 1984	March 1986	15
11	June 1985	July 1986	13
12	Dec. 1985	Jan. 1987	13
13	June 1986	April 1987	13
14	Dec. 1986	Oct. 1987	10
15	June 1987	Dec. 1987	6
16	Dec. 1987	July 1988	7

SOURCE: Voon Phin Keong and Khoo Soo Hock[361]
N.B.: MJTG has been taken as an example but similar delays are experienced by most scholarly journals in Malaysia.

Although academicians are encouraged to write publications, local scholarly journals still face a lack of contributions from academicians. This might due to several reasons, for example with the tenure system after confirmation of appointment, there are fewer compelling reasons to publish[362], although merit is given for the publications for promotion. This might be due to the fact that such merits are also given to the membership of committees, consultancy and administration post holders and the higher merit given for publishing in international journals. Some academicians would rather "queue up for 12 to 18 months to get into American or European journal, than be published in a less fashionable regional journal, even though its field may be more appropriate and the waiting time shorter."[363] Academicians' views regarding this matter were also ascertained in the survey (see Chapter Seven).

For the case of *MJTG*, the number of international contributors far exceeds locals. Contributions from African countries for example (between 1980 to 1987) accounted for 54%

361 Voon Phin Keong and Khoo Soo Hock, ibid., p. 17.
362 Voon Phin Keong and Khoo Soo Hock, ibid., pp. 10- 11
363 Ungku A. Aziz and Yip Yat Hoong, 'The Role of the University and Appropriate Technology' (1976) in Voon Phin Keong and Khoo Soo Hock, ibid., p. 11.

of total manuscript received compared to 14% from Malaysia.[364] It is quite often that contributions come from the members of editorial board of the journals.

4.2.6 The Commercial Publishers

This is a select group of commercial publishers with roots in international publishing houses and include: Fajar Bakti Sdn. Bhd. (formerly known as Oxford University Press), and Longman (Malaysia) Sdn. Bhd. Other publishers engaged in scholarly publications include Arenabuku, and Utusan Publications. Investigations into these publishers showed that the number of scholarly publications published by them were few as they selectively publish their titles. They prefer those likely to be used as textbooks for undergraduate courses and below. Therefore, "in reality they do not concentrate on publishing scholarly research titles which are more usually non-profit making, but employ a commercial yardstick."[365] For Penerbit Fajar Bakti (PFB), other than having strong marketing and distribution system, its main asset is having the advantage of being affiliated with world renowned OUP which enables PFB to utilise OUP's world-wide marketing and distribution network. Detailed discussion of these commercial publishers is in Chapter Eight.

4.3 Marketing Intermediaries

Publishers always claim that they take on more risk than booksellers while booksellers blame publishers for inefficiency in order processing resulting in lost sales for booksellers. In reality both are to blame as both share responsibility for satisfying customers' needs. Having discussed the role played by publishers in satisfying the customer, this section will look briefly at the role played by booksellers as retailers.

4.3.1 Booksellers

The bookseller is an important link in facilitating the movement of publications from the publisher to the book buyer; they are both marketers and customers for publishers and wholesalers. They are usually the most visible element in the marketing chain to the ultimate buyer and are in a strategic position to gain important feedback from consumers regarding

[364] Voon Phin Keong and Khoo Soo Hock, ibid., p. 14.
[365] Abdul Manaf Saad, op. cit.

publications and relay these to publishers. For scholarly books, in particular university textbooks, the role played by lecturers as opinion leaders cannot be overlooked, therefore their roles are also discussed in this section.

There are two most important factors in retailing that booksellers should not overlook; buying and customer service. Bookseller must understand the customers' behaviour, and identify their needs so that they can offer books and book services which satisfy customers and also earn a profit. Therefore, booksellers must be clear in their business goals and use the right retail strategy to achieve them.

The 4Ps in marketing activities can also applied to the book selling business. Having understood their customers' needs and expectations, booksellers must make decision on the right type and quality of publications to stock. An effective stock control system can save the bookseller from having a large capital tied up in stock. Booksellers normally order books on "see-safe" or "sale or return" (returned for a credit if not sold) condition and when making returns, the booksellers pay only direct and indirect costs of physically returning the books, but the situation is more acute for publishers. Returns can prove a substantial determinant in a publisher's profit forecast. It is hard for publishers to estimate how well titles are selling, and how many copies to reprint when existing stock might be returned.

The dispute between publishers and booksellers regarding order processing and delivery were discussed under the distribution section. Booksellers blame publishers for the losses they incur because they are unable to give accurate times for delivery of orders to customers. An alternative for a quicker delivery is by sending order to wholesaler: using this method booksellers receive a lower discount.

Publishers on the other hand blame booksellers for being uncooperative when placing orders since they are frequently unclear and for single copies. Some publishers therefore, offer "firm sale" in contrast with "see-safe" (sale or return) option with larger discounts. Firm sales also pose problems as there is no clear period of when those titles are eligible for marking down by bookseller. This is similar to the situation of the NBA in the UK where booksellers are not allowed to sell books at lower prices than the net (minimum) price.

Publishers complain that it is costly to entertain single copy orders from bookseller. Booksellers accuse publishers of lying since at the same time they entertain single copy orders through direct marketing as direct marketing means less discount given to intermediaries. Single copy order books, according to publishers, are normally high price and specialised in scope which booksellers might be reluctant to stock. Through their databases, publishers can detect customers who prefer to buy by post. An arrangement can be made with booksellers on the different term of discount based on the speediness and amount of order placed.

Other than dealing with returns, publishers also face the problem of delayed payments by booksellers which can have cash flow repercussions. DBP for example, faced mounting debts from its selected distributors/booksellers, see table 4.2.6. Publishers therefore, need to implement greater financial control and chase up non-payment with penalties e.g. charging an interest rate on outstanding balances. They have to establish a maximum period for returning overstock held by retailers or wholesalers (DBP allows up to three months for their distributors to settle the payments). Direct sales are of proven advantage not only for publishers' own financial survival but do help the sales of books from the book shops, and therefore should be encouraged, q.v. discussion on direct sales earlier.

Advances in technology have brought publishers and retailers together for better dialogue and communication. Technological advances such as computerisation of book shop systems, electronic book trade communication networks and information technology (e.g. bibliographic database) can help to improve the sales of books. These together with other aspects of marketing techniques should be fully utilised by booksellers in addition to publishers. The number of book shops in Malaysia are few although some have predicted the figure to be around 500, there were only 129 book shops registered with Malaysian Booksellers Association in 1991, q.v. table 4. 2.7.

Table 4.2.6 **Distributors' Debt to DBP in M$, as at 1989**

Distributor	Bank Guarantee	Debit
Balai Pustaka Bhd., Taiping	114,000	110,370
Pustaka Sri Manjong, Setiawan	10,000	24,444
Syarikat Ghani Ngah, Ipoh	138,000	222,649
Alam Murni, Klang	50,000	176,019
Pasar Buku Dewan Cipta, Kajang	30,000	92,767
Sepadu Enterprise, Banting	30,000	485,151
Syarikat Barakbah, Kuala Lumpur	25,000	179,233
Toko Buku Manaf, Muar	10,000	118,690
Syarikat Sri Wangi, Kuantan	75,000	101,741
Kuantex Industries, Kuantan	20,000	82,776
Gema Enterprise, Sg. Petani	50,000	97,826

SOURCE: Hamedi, p. 322

Table 4.2.7 **Number of Book Importers, Booksellers and Book Publishers Registered**

State	①No. of Book Importers (1992)	②No. of Booksellers (1991)	③No. of Book Publishers (1992)
Kuala Lumpur	15	24	54
Johor	0	15	0
Kedah	0	3	0
Kelantan	0	6	1
Melaka	0	2	1
N. Sembilan	0	3	0
Pahang	0	8	0
Perak	0	17	3
P. Pinang	0	12	2
Sabah	0	7	0
Sarawak	1	12	0
Selangor	18	18	36
Trengganu	0	2	0
Singapore	4	-	0

SOURCE: ①MBIA, ②MBSA and ③MABOPA.

The retailing mix (the 4Ps) of a book shop can be developed and effectively delivered to customers based on the understanding of the four marketing concepts: product, pricing, promotion/store image and place/store location.

Product

Like publishers, booksellers must also know who their target customers are and understand their needs and expectations, so they can provide the right publication to satisfy the different reading preferences. For example, the campus book shops sell mainly books to the university students, staff and professionals, therefore they must stock books to cater to their needs such as course textbooks, revision aids, monographs, research publications and reference materials, differentiated by subject and degree of complexity.

A book is a sum of the book's functional, aesthetic and service features as well as the psychological benefits that the book buyer expects. This is called "the total product concept". [366] For example, in buying books students are not only attracted to the physical attributes of the books such as cover designs and illustrations but the psychological benefits obtained from buying books such as knowledge. Although booksellers are not responsible for the manufacturing of the product, the service added to the selling of books such as advice on new titles of books adds value to the book bought.

The book shop management must make decisions on the type and quantity of products to stock. Right selection of products refers to which product-mix strategy a book shop wants to choose. A product-mix is made up of product lines and product items.[367] Book as a product line can further be divided into merchandise groups and categories, for example fiction books such as classic or modern novels, and non-fiction books namely academic and professional books, or cookery books; these can be further differentiated by subject, type of cooking etc. To get the right balance of books in the shop is a difficult decision, taking into consideration the number of different titles available in the market is vast and there are many courses in the university each with differing needs. Therefore, a wise decision based on information gained from lecturers could help booksellers to stock the right titles and quantities. In addition, an effective stock control system minimises the necessity to order books at short notice and reduces the working capital tied up in stock. If the bookseller is able to plan ahead and inform the publisher well in advance of his needs, then he can cut stock, boost productivity and satisfy customers. But for this to work he must give a sufficiently long lead time to publishers so they

[366] Dale M Lewison & M. Wayne DeLozier, *Retailing* (Ohio: Merill Publishing Co.,1986), 2nd edn., p. 415.
[367] William M. Pride & O. C. Ferrel, *Marketing Basic Concepts and Decision* (Boston: Houghton Mifflin Co., 1985), 4th edn., p. 208.

can fill the order. Providing the publisher can keep his side of the arrangement, a mutually beneficial partnership can bloom.

Pricing

Retailers need to give careful attention to pricing because it directly contributes to business profitability in which a customer will buy a product or service if its perceived value (measured in monetary units) is greater than the price.[368] Although booksellers are not completely free to fix the price, efficiency in serving customers can justify whether a price is worth the product, and further "service beyond the call of duty"which can add a premium in terms of price in the case of some products can, more importantly for booksellers, increase customer loyalty since it would be difficult for booksellers to charge higher prices than their counterparts.

Promotion

As a book shop stocks a variety of reading material, therefore they must communicate to book-buyers what it has to offer. Advertising, publicity and personal selling are the three main forms of the marketing communication mix[369] which can be applied to book shop businesses. Retail publicity can be used to make consumers aware of the book shop and its merchandise. Book reviews and authors' signing session in the book shop are a few forms of valuable publicity. An author's signing session in a book shop (although not very suitable for scholarly books) is valuable if it leads to good local newspaper coverage,[370] which book shops in Malaysia rarely exploit. Some international publishers (in co-operation with other organisations) have organised seminars and workshops for professionals in Malaysia. During such seminars speakers present speeches on subjects relating to a book they have written recently; audiences have welcomed such presentations and shown their appreciation by buying the author's book at the end of the seminar. However local publishers have been reluctant to use such publicity channels.

Personal selling is another method of promotion which involves the two-way flow of communications between the bookstore representative and their customers. The University

[368] Hermann Simon, *Price Management* (Amsterdam: Elsevier Science, 1989), p. 1.
[369] Philip Kotler, 1988.
[370] 'Joint promotions - the rising price of co-operation', *The Bookseller*, 15 Dec 1989, pp. 1920 - 1922.

book shop can practice personal selling by visiting lecturers in their office or by giving talks/presentations to students, perhaps by the author of a particular subject they are trying to promote and at the end of the talk students can place orders. Communication by word of mouth is another selling method which is proven to be significant in promoting the book shop image. Students who have good experience and satisfaction with the book shop influence their peer groups particularly the new students.

Place/ Store Location

It has often been said that the three most important properties of a retail store are location, location and location.[371] It is of prime importance to select the right location because once a decision is made it is difficult to change. One of the reason of poor sales by selected agencies/distributors/booksellers appointed by DBP is believed to be their poor location (most have a small capital base and therefore cannot afford to rent a strategic location).

University book shops however operate mainly on the university campus; this affords them an advantage over its city centre rivals as it offers students a convenient way to buy books without having to go to other book shops in town. Whether location can influence university students to buy was investigated in the survey by comparing responses from students using campus and off-campus book shops.

Store Image and Perception

A good store image can be build up in the shopper's mind either through professional appearance, in-store displays, customer service, or wide selection of publications. It can be used for example to maximise product appearance or stimulate product interest. Point of Sale (POS) displays and selections are both eye-catching and suitable for the limited space in book shops. Special displays improve store sales and build store image, with the main purpose of attracting customer attention. Spinners, lighting and signing are important to attract customers' attention as "people are like moths: they are attracted by light and they always gravitate by towards light and away from dark."[372] Signing is important to enable customers to identify the

[371] Ken Jones & Jim Simmons, *Location, Location, Location - Analysing the Retail Environment* (Toronto: Methuen Publications, 1987)
[372] 'Lighting up', *The Booksellers*, 12 April 1991, p. 1106.

different sections and to locate items they are not interested in. Inadequate signing, however, can cause confusion to the buyer. For example, a group of Publishing Students at Stirling University were asked to get a book on Pagemaker from the University book shop as they were told by their lecturer that the book was available from the University book shop. However, they were not able to locate the book in the Publishing section and presumed that either the book was out of stock or unavailable, whereas the book was categorised under the Computer/Software section.

Store lay-out influences the customer's movements: good in-store atmosphere and the ability of the customers to find items of their interest easily are essential. Regular customers tend to remember locations of books in the field of interest, hence changes in store lay-out must not confuse the customers. Positive changes and improvements are to be welcomed, but frequent changes are likely to have an opposite, detrimental effect on sales.

Customer Care

Due to the nature of books as slow moving items, customer care is equally important for book retailers due to increased competition. Many researches have shown that it costs more to get a new customer as to retain an existing one. In this respect, students were asked some questions about their satisfaction towards their university book shop and how these contributed towards influencing their buying behaviour (see Chapter Six).

4.3.2 Lecturers

Other than booksellers, lecturers are one of the main channels to reach the target market/students in scholarly publishing. In this respect lecturers are the main players as marketing intermediaries for scholarly publications. Publishers therefore should not overlook the importance of this group. Although there are many ways of informing potential buyers about new publications, the word of mouth is still regarded as the most effective way of promoting books.[373] The reasons for the importance and effectiveness of word of mouth lie in the character of new ideas, new products, and other innovations. One of the more important

[373]Lewis A. Coser, et al, *Books: The Culture and Commerce of Publishing* (Chicago: The University of Chicago Press, 1982), p. 202.

discoveries of modern social science is that the mass media generally does not directly change people's minds. They are changed, rather, by the intervention of other people, called "opinion leaders."

Opinion leaders informally influence the actions or attitudes of others, who may be opinion seekers or merely opinion recipients.[374] In this case, a lecturer through his natural characteristics, is an opinion leader for students and colleagues. Students perceive their lecturers as a highly credible, objective source of product information which can help them decide their priorities and achieve their goals: passing the examination. Some lecturers however, do not updated their syllabus and at times the books recommended have become outdated or no longer on the market. Lecturers, in turn, are motivated to give information or advise students (other than as part of their obligations) and colleagues because it enhances their own status and self-image. They acquire information on books related to their subjects/areas of interest through reading, research and membership of professional societies they subscribe to.

The role of interpersonal influence in the transmission of information from the mass media to the population at large is highlighted in the two-steps flow of communication theory.[375] The theory provides that information and influence often are two-way processes, and opinion leaders both influence and are influenced by opinion receivers. Publishers/booksellers/marketers therefore should direct their promotional efforts at lecturers, who will then transmit the information to those who seek advice on textbook adoption. The role played by lecturers as opinion leaders, the extent to which publishers/book sellers direct their promotional effort to this group and their outcome via advice to students and colleagues were also investigated in the survey.

4.4 Consumer - Buying and Readership Behaviour Characteristics

Having explored the major actors in the micro-marketing environment in scholarly publishing and its marketing activities, the study would not be complete without looking at the main actor

[374] Kanuk, p. 520.
[375] Kanuk, op. cit., p. 520.

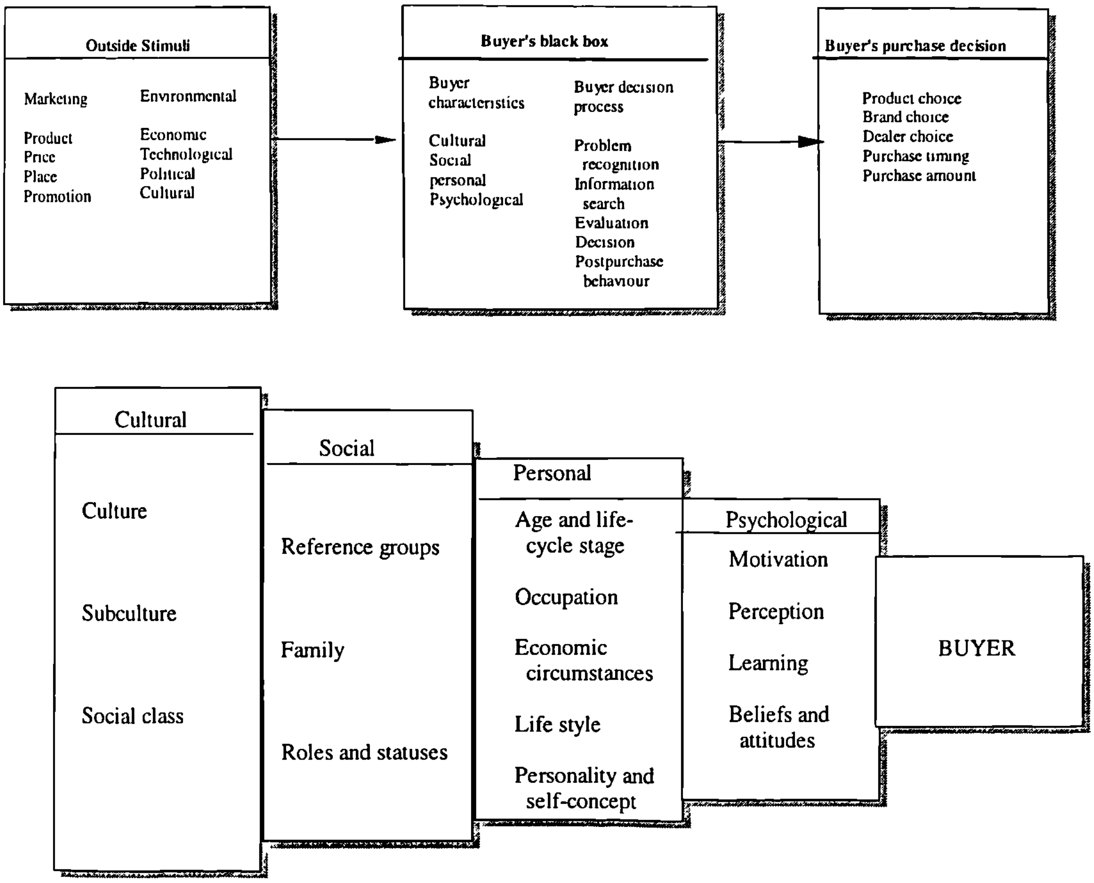
in any marketing process, i.e. the consumers.[376] Marketing is above all a study of human behaviour and the factors that influence, condition and constrain it. The marketing manager is primarily concerned with influencing human behaviour. This requires an understanding of buyer perception, motivation and behaviour. If products and services are to be developed to meet human needs then these needs must first be identified and appreciated.

The consumer lies at the heart of marketing and most marketing models, therefore it is important to study the consumer characteristics which influence to buy. As emphasised by most modern writers on marketing, "Marketing starts with the analysis of consumer behaviour which is those acts of individuals directly involved in obtaining, using, and disposing of economic goods and services, including the decision processes that precede and determine these acts."[377] Most literature review has concentrated on consumer behaviour and has tended to ignore the behavioural aspects of employee interaction and motivation.[378] By the time the buyer makes the commitment to purchase, he has undergone a lot of processes in his mind. During these processes, a number of influences will act on him such as cultural, social, personal and psychological factors.

Figure 4.4.1 presents a simplified buying behaviour model from Philip Kotler [379] showing that buyers are subjected to many influences which go through their psyche and lead eventually to purchasing responses. Although little is known about the 'buyer's black box,' Kotler deduces that the buyer's character and his buying decision process constitute this "box" (model).

376 Keith C Williams, *Behavioural Aspects of Marketing* (Oxford: Butterworth Heinemann), 1992, pp. 1 - 11.
377 James F. Engel, Roger D. Blackwell, Paul W. Miniard: *Consumer Behaviour*, 5th edition (New York: Theb Dryden Press, 1986), p. 5.
378 Keith C Williams, *Behavioural Aspects of Marketing* (Oxford: Butterworth Heinemann, 1992), p. 1 - 11.
379 Philip Kotler, *Marketing Management (New Jersey: Prentice Hall, 1991)*, pp. 164 - 165.

Figure 4.4.1 **Model of Buyer Behaviour**



SOURCE: Philip Kotler, *Marketing Management*, pp. 164 - 165

One can only hazard a (calculated) guess at its inner workings by studying inputs and outputs. There are several models which represent radically different conceptions of the mainsprings of human behaviour, such as The Marshallian Economic Model, The Pavlovian Learning Model, The Freudian Psychoanalytic Model, The Veblenian Social-Psychological Model and The Hobbesian Organisational-Factors Model. The details of these models are not discussed in this research, instead the research concentrates on the major factors which influence the buyers, which are the cultural, social, personal and psychological factors in buying scholarly publications (which are discussed through out the thesis).

Besides the Buyer Characteristics, the Buyer Decision Process is another constituent of the Buyer's Black Box. There are quite a number of models of consumer decision process such as the ones of Howard and Sheth, Francesco M. Nicosia, Engel/Blackwell/Kollat and James R.

Bettman,[380] which break the model down into six interrelated components (variables): Information, brand recognition, attitude, confidence, intention and purchase.[381] Information such as brochures, newspapers, radio, television, and word-of mouth are sources of information for the buyer. It can be a stimulus in which one or more of the buyer's five sense organs are exposed to, either voluntarily or involuntarily. Word-of-mouth (advice of lecturers) which is the best way in marketing scholarly publications to students while direct mail is best for lecturers; this hypothesis was tested in this research and the results are shown in a later chapter of findings. As students rely heavily on lecturers' recommendation, marketers should target these intermediaries through various type of marketing techniques/promotion. This research therefore investigates the effectiveness of various types of promotional aid and using responses from lecturers. In return, it is the perception resulting from a stimulus which is the standard measure of the consumer's perception; this can be gauged via recall. Information received by students from lecturers allows them to recognise the particular title or publisher, to evaluate it in terms of their needs, and to create in their mind a level of confidence or certainty of how well they can judge if the brand yields satisfactory or unsatisfactory results. It is important to note that the detailed theory of consumer behaviour is not discussed in this thesis, therefore, the empirical study of this research does not test their applications to the marketing of scholarly publications in Malaysia.

4.4.1 Reading and Buying Behaviour

How can the publishing industry and trade contribute towards the promotion of the reading habit, what has been done, is being done and what more can be done? Or how can a good reading habit help the book industry? Although reading is a matter for parents and schools/libraries, the publisher needs to give attention to this matter as without readers there would be no book trade.

It is widely accepted that the reading level is comparatively high among children whose parents also read and in whose homes are found a variety of reading material. A reading habit means

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[380] Harold H. Kassarjian and Thomas S. Robertson, *Perspectives in Consumer Behaviour* (Brighton: Scott, Foresman and Company, 1968), pp. 515 - 539.
[381] John Arnold Howard, *Consumer Behaviour in Marketing Strategy (New Jersey*: Prentice Hall, 1989).

that the reader concerned feels the needs to read, voluntarily chooses the type of reading materials, uses all efforts to obtain the materials and actively reads them with utility and understanding.[382] Children who are exposed to a reading environment will grow up and then regard reading as part of their life, hence reading becomes one of their most interesting habits. It is therefore important to have a literate society and women (mothers) in particular should be educated as they are the first teachers of children as "language is the basis for acquiring knowledge so talk and read to your child from birth".[383] Once children have been brought up to love reading, the task of teachers become easier since they need only to continue stimulating a reading habit already developed among the children. A curriculum which encourages students to read and learn voluntarily and not parrot learn or memorise can lead to an enhanced reading society, thus the situation where students stop reading once they finish school or even university can be avoided.

The government has initiated various programmes to promote reading habits among the population through schools and libraries although evidence to support the success of these programmes is thin. For example, the English Language Reading Programme[384], launched in 1979, was designed to encourage students in over 200 secondary schools to read in English while The Library Association of Malaysia organised a reading project in 1986 for youths between the ages of 18 - 25.[385] National and state libraries have also organised many efforts to promote a good reading habit especially amongst children. However, due to a shortage of funds, not many were lucky enough to benefit from these activities, particularly those in remote areas. In addition public library development in Malaysia is a relatively new phenomenon with the State Public Library Corporations being set up only during the early 1970's.[386] Thus the majority of public have not had the opportunity to benefit from free public library services or efficient school libraries.

[382] Rohani Rustam, 'The Campaign to Get Malaysians to Read More: The State of Play and the Way Ahead', a paper presented at ISIS National Affairs Seminar on Reading and National Development, 29 - 30 April, 1986, Kuala Lumpur, p. 6.
[383] Linda Gray, *Good Housekeeping,* June 1993, p. 100.
[384] Xavier Anthony Gomez, 'What Schools Can Do to Promote Reading', a paper presented at ISIS National Affairs Seminar on Reading and National Development, 29 -30 April, 1986, Kuala Lumpur, p. 6.
[385] Zawiyah Baba, 'What Libraries Can Do To Promote Reading', a paper presented at ISIS National Affairs Seminar on Reading and National Development, 29 -30 April, 1986, Kuala Lumpur, p. 16.
[386] Zawiyah Baba, ibid., p. 6.

The Role of Publishers and Booksellers

The book trade can help towards promoting the reading habit through organisations which were set up to promote reading habit: The Book Trust in the UK, the Center for Book in the USA, Deutsche Lesegesellschaft in Germany and the National Book Council in Australia. They can also help financially and in other ways in campaigns to persuade governments, national and local, to spend more money on school books and school library books. The more attractive the books that are available to children, the more likely they will be stimulated to read.[387] The publisher should also aid campaigns to persuade government to spend more on the public library service: the more pleasant the library and the better its stock, the more it will be used.

It is vital that publishers understand and promote the importance of children's books as publishers always think of their children's department as a minor concern. Increased efforts and skills should be put into children's books so that the books can be marketed well since a customer who is "hooked" at an early age is a life-time customer; one only has to see the success of Penguin in the UK to know the benefits of such a strategy. For that belief, this research also touches (although at glance) on reading habit among children. Children one day will go to university, perhaps become scholars, therefore to improve sales of scholarly books in the future, efforts must be made now with children. Of course most scholarly publishers do not publish children's books, especially university presses, but their children's department can be thought of as the university textbook department and this is where they must focus their energies. Booksellers as well must aid publishers by displaying the books in prominent positions and giving attentive and professional service to their students' section.

However, it must be stated that the book trade can only assist, since the core of the influences to promote reading are parents and teachers/lecturers. These two elements can inculcate reading in the young with the desire to read and appreciate what can be gained from reading.

[387] Martyn Goff, *Reading Promotion* (London: International Publishers Association), a leaflet, p. 14.

Readership Behaviour Survey

It is important to conduct continuously readership behaviour surveys to provide an indication of readership characteristics e.g. types of reading materials bought or borrowed from the libraries: age/sex of readers, the types and numbers of book bought/borrowed, most read titles etc. These may allow one to discover not only the volume of readership but also changes in tastes and personal preferences of readers.- which could help publishers, booksellers and other interested parties in planning future campaigns. Survey data can also provide educationists with a means of gathering information regarding pupils' tastes in reading and, if problems are diagnosed, to propose remedies. Similar information could also be obtained from publishers and booksellers based on the type of books they sell (direct mail for example gives some useful information and background of buyers' profile such as what type of books a customer buys, how much was spent, age, status etc.). The result could enable publishers to : i) plan future publishing programmes, and ii) correctly estimate print runs. The survey findings could provide answers to important questions (these can be grouped in four basic classes: reading act, reading need, reading environment and socio-economic factors):

1. How does reading differ according to ethnic background, age, sex and socio-economic status? How much do people read?
2. How much does the kind of books affect purchases? And how many books are being bought?
3. What possible relationships exist between reading and purchasing books?
4. What motivates people to read books? And what do they learn or obtain from it?
5. The status of the reading environment? What barriers exist to obstruct reading?
6. To what extent do reading needs and environment influence reading and book purchasing patterns?

In Malaysia a centralised body is urgently needed to conduct research into various aspects of publishing. Aspects to study include reading habit and how to develop it, market requirements, and the feasibility of adaptation/translation of existing material. NBDC could handle this and be strengthened by publishers who could contribute substantially towards this. For example, The Training Centre in Singapore has undertaken several initiatives such as training of research teams to help conduct surveys on various aspects of publishing especially in relation to the promotion of the reading habit; it has lectured editors on their responsibilities so that they can function effectively, trained translators in the various languages of the region so that works of merit can be translated into local languages and English for the benefit of the reading public, and schooled sales personnel in the publishing industry and the book trade with special reference to teaching them the ability to assess market requirements.

The first (and only) survey undertaken on readership in Malaysia was in 1982 with a sample of 15,054 respondents (0.5% of total population of 11,849,000 in 1980). As there has been no other survey completed on readership, a brief synopsis of the findings of the survey is illustrated here to provide a background of readership characteristics and behaviour among the population, although some of the findings may no longer be relevant now.

The survey was confined to Peninsular Malaysia and the population was restricted to literate in the 16 - 50 years old age group. Sixty thousands households were chosen with the average of 2.5 eligible respondents per household. The questionnaires collected information on: profile, socio-economic status (SES), factors which influence respondents to read (e.g. who encourages to read and what facilities are available), habits and interests on reading (e.g. type of reading materials, frequency of reading and when and why people read), and attitudes, opinions and values on reading.

<u>Reading Environment/Materials/Encouragement</u>[388]

- Availability of reading facility

- Around 44% of households indicated that they had a special retreat for reading in the house of these the highest percentage (63%) used the dining table while 14% of households had a special reading table.

[388] Atan Long et. al., *A Survey on The Reading Habits and Interests of Malaysian People* (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1983).

- Newspapers

- The survey discovered that around 10% of households did not have a newspaper at home; according to ethnic background 14% of Indians, 11% of Malay and 9% of Chinese, and by location 13% of rural and 7% of urban people did not buy newspapers. Those of higher socio-economic status (SES) were more likely to buy newspapers (13%of low, 5% of middle and 3% of high SES have no newspaper at all).

- Newspaper were read by the vast percentage of respondents (97%) followed by magazines (67%) and books (42%).

- Magazines

- Around 30% of Malaysian households had no magazines at home; ethnically Chinese had the highest percentage of households with no magazines (37%), then Indian (36%), and Malay (24%); geographically 33% of rural and 26% of urban households had no magazines while higher SES (socio-economic status) households were more likely to have magazines.

- Books

- Approximately 27% of households had no books at home; among the ethnic groups 19% of Chinese and 31% of Malays and Indian households, 34% of rural and 18% of urban had no books, and again it was noticed that those of higher SES were more likely to own books (35% of low, 11% of middle and 3% of high SES had no books).

- In the six months prior to the survey, 58% of respondents had not read a book, while the reasons for not reading were 59% "no time" (63% of urbanite and 57% from rural areas), 11% indicated that "other works are more important", 7% said because it was "difficult to get hold of books" (3% of those from urban areas and 10% of country dwellers), and 5% stated that they were able to get "information from other sources".

- Malaysia's libraries' ability to influence reading habits or act as a source of reading materials seemed minimal as 89% of households had no family members who were library members, and only 3% indicated that the main source of reading materials was a library, while 36% indicated neighbours/friends and 60% indicated bookstores.

- A list of contents was regarded by respondents as the most important aspect to look at when buying books (30%), followed by the title (29%), author (15%), and price (11%).

● Encouragement to read

- 52% of respondents were of the opinion that parents play crucial role in developing a reading habit amongst children, while only 27% regarded the role of teachers as cardinal.

- Of the 41% of respondents who had received presents during their childhood, some 53% got books i.e. 22% of all respondents had been given a book as a present when they were young.

- Half of respondents (50%) remarked that the schools they went to possessed no school libraries.

● Expenditure

- On average, the mean household expenditure on reading material was M$ 28 per month; M$ 17.5 on newspapers, M$ 6.3 on magazines and M$ 4.3 on books.[389] The researcher however regarded the figures with reservation, see Box 4.1 for explanation.

- The mean expenditure among the Chinese was M$ 34.4, Malays M$ 24.4 and Indians M$ 16.8 per month.

- The mean expenditure amongst urbanites was M$ 37.8 while those in the countryside spent around M$ 16.6 per month.

- The mean expenditure for higher SES was M$ 64.1, middle SES M$ 37.2 and low SES categories was M$ 19.9 per month.

- For the detailed breakdown of expenditure, please see table 4.4.1.

[389] In the abstract of the survey, the expenditure was wrongly reported as $8 on newspapers, $4 on magazines with the remainder on books, see p. ix of the survey.

Table 4.4.1 **Expenditure of households**

		Reading Materials	Books	Newspapers	Magazines
Race	Chinese	34.4	5.2	23.2	6.6
	Malays	24.4	4.1	14.8	6.2
	Indians	16.8	2.3	12.3	5.8
Place	Urban	37.8	6.5	24.2	9.1
	Rural	16.6	2.3	10.4	4.0
SES	High	64.1	18.0	33.2	13.9
	Medium	37.2	6.8	23.0	9.2
	Low	19.9	2.1	14.1	4.6
Overall		28	4.3	17.5	6.3

SOURCE: *A Survey on The Reading Habits and Interests of Malaysian People* (Kuala Lumpur: Dewan Bahasa dan Pustaka, 1983).

Box 4.1. **Expenditure on books**

The figures reported in the survey findings seem large. If these were taken to be representative of Malaysia as a whole, then the book publishing industry in Malaysia would have been M$ 611 million in 1982 (11.849 m people * 12 months - assuming no imports/exports). Obviously this seems inflated given a 1991 estimate of M$ 250 m, see discussion in 2.3.2). The expenditure of people in Malaysia in 1982 was M$ 28 per month, that means that M$ 336 per year were spent on publications in which M$ 20.64 was on books, also seemed to be much higher than expenditure in 1991 calculated in section 2.3.2.

4.5 Competitors

The expansion of higher education institutions indicates the paramount importance of education in the rapid development of the Malaysian society. The profusion of private institutions and (current) emphasis on the use of English ensure a ready market for books in English; nearly 25 years after the implementation of bahasa Melayu in the educational sector, the local publishing industry is still not able to provide an adequate number of tertiary level books in bahasa Melayu[390], this has provided ample opportunity for English-speaking publishers to profit from the situation. The changing pattern of students pursuing their studies in the USA, Canada and Australia at the expense of the UK has increased the preference for the American books. The increased number of lecturers trained in the USA has meant American textbooks are preferred

[390] Gulrose Karim & Khoo Gaik Sim, *The Market for British Books in Malaysia: A Survey* (Kuala Lumpur: The British Council, 1993), p. 20

to British especially in Management disciplines since most recent management gurus have been American.

In order to gain the market for their books, Anglo-Saxon publishers have been more flexible in giving high discount rates, in fact evidence suggests that they have been dumping their remainder stock in Malaysia. They have also been aggressive in marketing their books by having more representatives per publisher.[391] Table 4.4.2 illustrates the value of British and American book imports from 1989 to 1992. Although UK exported nearly as much as US in 1990, it seems that on average the share occupied by US is increasing; this could be partly attributable to the fact that a greater number of Malaysian academics are being educated at American universities.

Table 4.4.2 **Sale of Imported Books in Malaysia, 1989 - 1992 (in M$)**

Year	UK	US
1989	19,605,374	26,074,582
1990	28,010,304	30,907,388
1991	25,661,737	31,691,324
1992	26,186,530	39,868,704

SOURCE: Gulrose Karim & Khoo Gaik Sim, *The Market for British Books in Malaysia: A Survey,* The British Council, 1993, p. 22

4.6 Summary SWOT Analysis of Scholarly Publishing in Malaysia

After having analysed elements in the micro and macro-marketing environment in the scholarly publishing industry, the situation in Malaysia can be summarised into four categories: strengths, weaknesses, opportunities and threats.

i) Strengths

Despite a small market size, scholarly publishing in Malaysia has the potential to grow as the number of young people entering higher level education is increasing as well the encouraging belief amongst the populace that education is of paramount importance. The growing number of higher educational institutions (private and government) means that the need for scholarly

[391] Gulrose Karim, ibid, p. 19.

books will become deeper as well as wider as new subjects begin to be taught for the first time: an example of this is the Masters in Publishing Studies at UM starting in 1995.

ii) Weaknesses

The whole structure of book publishing in Malaysia is ill-organised which discourages development. The overlapping roles played by publishers, distributors and booksellers have increased industry inefficiency, and this is partly responsible for the scarcity of reliable and contemporary data and information on the industry, in addition to a dearth of research on the industry itself. As the government itself does not yet regard publishing as an industry, the trade is managed by unprofessional and unskilled personnel particularly in aspects relating to marketing activities. Most publishers, particularly scholarly publishers in Malaysia can be categorised as small independent publishers, which they share similar problems to those faced by small independent publishers in the UK[392]: distribution, limited funds, limited time and dependence on too few people. The various associations that have been established to aid the book publishing industry in Malaysia have met with limited success and to some extent have been impotent in working towards a vigorous book trade; infighting, poor participation and bickering are amongst the key reasons for failure. Without a clear lead from the government, in a society such as Malaysia, where central authorities play a key role, future progress will be limited. Although the literacy rate among the public is high, the reading and buying habit is still lacking among the society at all levels, and since out of society come writers, incompetence now will only breed incompetence later. An embarrassing situation thus arises where even intellectuals themselves have a poor reading habit and this is reflected in their method of teaching and learning, which in turn does little to encourage students to read or buy. The advancement of the technology used in publishing is poorly utilised by publishers and other parties such as libraries, booksellers, writers and buyers. Urgent remedial action is needed to resolve problems in this area; the provision of cheap loans by government to academics to purchase computer equipment seems to be a step in the right direction.

[392] Audrey and Philip Ward quoted in Clare, op. cit., p. 27.

iii) Opportunities

There exists opportunities for the publishers to expand their market into other ASEAN countries as well as at international level with the increasing number of scholars who can write proficiently; here Malaysia can learn from Singapore and India. Sharing a similar language, bahasa Melayu, with Indonesia and Brunei gives local publishers an advantage over foreign rivals although at present there are some restrictions imposed by the Indonesian government regarding the importation of books in bahasa Melayu/Indonesia to the country; however with the establishment of various bodies such as APEC (Asian-pacific Economic Co-operation) and AFTA (Asian Free Trade Area), all the regional trade barriers are to be reduced over the next quarter of a century. Once the writers and publishers have brought themselves up to international levels i.e. managed by professional and skilled personnel, it is likely this problem will be more easily resolved. The usage of English at higher institutions would allow the publishers to expand their market both locally and internationally. Furthermore, the steady increasing of GDP is a good indicator for the purchasing power of consumers.

iv) Threat

The policy decision made recently to allow the use of English in higher education threatens those local publishers who are not able to adapt to the new circumstances but provides opportunities of a larger market for others. The competition with foreign publishers will be hard fought by local publishers but providing opportunities are seized the imports of foreign English books can be minimised. The growing number of private higher education institutions using English and the increasing number of graduates from overseas provide ample opportunities for English publishers to exploit the market and pose a threat to publishers specialising solely in local languages; thus indigenous publishers must to a certain degree diversify into English. Such a change is likely to be detrimental to the use of Malay in scholarly publishing, but not necessarily to the use of Malay in other sectors of publishing; at least local scholarly publishers will survive; the other option would lead to the demise of local publishers as well as the reduced influence of Malay as a scholarly language.

CHAPTER FIVE
RESEARCH METHODOLOGY

5. RESEARCH METHODOLOGY

5.0 Introduction

This chapter discusses the general methodology applied in this research, including sampling procedures for data collection and statistical techniques used for data analysis. The chapter also provides an account of some of the problems encountered during the process of data collection.

In view of the absence of detailed information on the scholarly publishing industry in Malaysia, it was necessary to carry out a detailed survey amongst people concerned in the industry. Several types of participants in the scholarly communication chain were solicited for their views:

- lecturers/scholars
- students
- publishers
- booksellers
- librarians.

Survey questionnaires were designed for each of the above groups and administered independently.

The determination of the items on which information was to be collected, the degree of detail to be attempted, and the ways in which the information could be best obtained, constituted the most difficult part of the survey planning. Careful consideration was given at the beginning to the purpose for which the survey was undertaken, the type of information to be collected, and the use to which the information was to be put. The survey is one of the few of its kind in the country and is likely to provide key information that could be used for many purposes, particularly curriculum planning, inventory control, government education policy formulation, marketing and improvements in administrative procedures. The surveys covered a large variety of questions only some of which are directly reported in this research; many others were used as background information to back up theories.

5.1 Data Collection and Strategies

This research used the two generic classifications of data:

❶ Primary data: data which have to be collected for the first time by either one or a blend of:

a) questionnaires b) observation;

❷ Secondary data: existing information which was available.

5.1.1 Primary Data

Questionnaires

Primary research conducted for this survey can be categorised into several sections as more than one set of questionnaires were distributed.

Questionnaire to lecturers

The opinions of scholars and researchers on a wide range of issues concerning scholarly publications, with special reference to their authorship and readership are vital in formulating recommendations on the future of scholarly publishing in Malaysia. It is anticipated that new issues relating to scholarly publications in Malaysia will be identified and clarified. The complexities of problems faced by scholarly publishers will be exposed in order to help the authorities understand the needs and demands of scholarly publishing. Thus, the demands and challenges on how to strengthen the industry can be met so that the nation, in its dearth and hunger for knowledge, can benefit fully from scholarly communication.

The questionnaire (Section A to D, see Appendix 13) distributed amongst lecturers serving in all eight[393] universities in Malaysia was based on a survey commissioned by American Council of Learned Societies, undertaken by Herbert C. Morton and Jamieson Price in November 1985 while Section E was based on the "Lost Book Survey" conducted by Publishers Association (UK), 1988. The questionnaire (Section A to D), which has been prevously used by PEPET for its survey in late April 1989, was modified to suit the purpose of this research. Seven hundred questionnaires were distributed in June 1993 to selected samples; most were returned between July and December 1993.

393 Although ITM is not considered as a university in term of status it is included in the survey as one of the eight public universities/higher learning institutions in Malaysia.

The survey was conducted for the purpose of acquiring data on Malaysian scholars as prospective producers and consumers of books, journals and other scholarly publications for their teaching and research purposes, and to investigate the flow of information about textbook adoptions at higher learning institutions in Malaysia. In particular, one part of the questionnaire (Section E) was to determine how, if at all, lecturers notify local book shops (i.e. the campus book shop) about likely requirements, and how booksellers may chase lecturers for such information. The determination of the extent booksellers are out of stock of key books as a result of poor communication is essential to improve services and consequently sales of important texts, and it is such improvements in activities that hopefully would be indicated from the research. The respondents' views were also sought on library facilities and services, professional reading, authorship, peer review system and technological advancement. Empirical evidence on scholars and scholarly publishing will be used to formulate recommendations on how to develop and consolidate scholarly publishing in Malaysia.

Questionnaires to students

Another questionnaire was distributed among students attending the eight public institutions of higher learning in Malaysia to identify problems from their point of view, their reading and buying habits and to compare the findings with responses from lecturers. As one part of the questionnaire to the lecturers (Section E) concerned communication between lecturers and bookshops, the questionnaire to students was designed to get feedback on how they found the guidance they received from their lecturers on which books to buy, their perceptions of book shops and library facilities. The responses were cross-referenced where appropriate with the answers from lecturers to see how perceptions differed.

Interviews with booksellers

Interviews with booksellers were used to obtain primary data on bookseller activities. The booksellers chosen were responsible for stocking textbooks for specific courses at all the eight universities in Malaysia. Campus book shops were chosen since they were thought to be the main outlets for students and lecturers to obtain their books, and some are listed government suppliers of books to university libraries. The questions on book shops were designed to cross reference with the answers from Section E of the lecturers' questionnaire. The book shops were handed a printed questionnaire in order to facilitate the interview, but all responses were noted personally by the researcher on a separate questionnaire.

In-depth interviews and discussions with all the eight university publishers, DBP, some selected private publishers and research bodies.

Personal interviews and discussions were used to obtain data from some of the main scholarly publishers in Malaysia. Unfortunately, though the researcher provided the printed questions, most of the publishers could not answer the questions satisfactorily for several reasons: insufficient information and, in certain extreme cases, no financial information about their own organisation, lack of knowledge of what scholarly publishing is, non-existence of marketing departments in their organisations - some publication units were just part of the library or functioned as a publication committee, and had no professional personnel dealing specifically with publishing activities. These provided additional information on the actual situation of publishing in Malaysia and as this is the first comprehensive piece of research dealing with all elements in the scholarly communication process. The researcher's frustration increased as there was no other way to obtain information. The researcher had to use her own initiative to balance the situation, such as through her own observations, digging out the titles of publications published by the particular university press, and unofficial discussions with lecturers/officers who were or had been involved with publications.

Observations

The non-reactive research technique, widely used in scientific studies and often termed the 'classical method of investigation'[394], was used considerably in this research. Both participant and non-participant observations were used. Watching people's behaviour as buyers (and readers), being a lecturer and experience as a student allowed the researcher to be a participant observer. Furthermore, the researcher was one of the first batch who used bahasa Melayu as the medium of instruction at school and at university and as such a product of the policy. This personal experience helped contextualise additional information obtained from other sources.

[394] Peter M. Chisnall, *Marketing Research*, 3rd edn (London: McGraw-Hill Book Co. Ltd., 1986), p. 30.

5.1.3 Secondary Data

A review of secondary literature on marketing in general and specifically applied to the publishing industry was undertaken. An emphasis was made on publishing in the developing countries, in particular in the Malaysian context. Internal and external research was utilised in order to gain some information on publishing. Other than desk research done in the library, the researcher used reports (published and unpublished) from various organisations involved in research.

Publishing, scholarly publishing and marketing were defined in detail in **Chapter One** as well as the importance of marketing to scholarly publishing. Scholarly publishing as a part of the publishing business was described from a macro point of view, as well as some background as to the current situation in Malaysia. Research objectives are explained in a later section of the chapter. As the publishing sector is not regarded yet as a separate industry from printing by the government, there is no way of sketching an accurate picture of the current state of development from reliable sources. The researcher has tried to compile as much information as possible, especially from unpublished seminar papers, dissertations and serious discussions with people who are actively interested in this industry.

Chapter Two then looks at scholarly publishing from the macro-marketing environment: political, technological and economical forces; cultural elements were discussed in Chapter Three in relation to consumer reading and buying behaviour. Scholarly publishing in Malaysia was reviewed from the political point of view in terms of its historical perspectives, and how the government policies on language and education have influenced the publishing industry. The Copyright Act and its enforcement, and the role played by various associations related to scholarly publishing were also discussed.

In order to provide a more focused picture of the publishing industry in this world, especially of scholarly publishing, an overall description of this industry in some selected countries has been given in **Chapter Three**. Indonesia, Singapore, the Philippines, Thailand, Brunei and India have been taken as examples of the developing countries, together with a general scenario of some developed countries - UK in particular - in order to draw some comparisons and to borrow strategies which may allow the formulation of a market strategy for the scholarly publishing sector in Malaysia.

Chapter Four reviewed the relevant theories in marketing to be applied to the publishing situation. It can be argued that most marketing theory cannot be applied to the publishing industry easily. The researcher tried to mould existing marketing theories with her own ideas/perceptions in order to see how marketing could be used successfully in publishing. The distinctive characteristics of the Malaysian market were highlighted and marketing theory applied to take into account such factors. Marketing of pharmaceutical drugs was used as an analogy to publishing. Having explained the factors of macro-marketing environment in earlier chapter, the elements in micro-marketing environment were discussed in this chapter. The marketing mix (better known as 4Ps) as practised (or not) by scholarly publishers and booksellers was also covered.

Chapter Four also concentrated on consumer buying behaviour and reading habits as the researcher believed these to be the most influential factors in determining the success of publishing in Malaysia. As the primary objectives of this research is to study the behaviour of students and lecturers (the target market), this section is important in providing an insight into buying and reading habits.

5.2 Research Design

One of the preliminary steps in conducting a research project is to formulate a research design that is consistent with the research objectives. Kinnear and Taylor define a research design as: " .. the basic plan which guides the data collection and analysis phases. It is the framework which specifies the types of information to be collected, the sources of data, and the data collection procedure."[395]

[395] Thomas C. Kinnear & James R. Taylor, *Marketing Research: An Applied Approach*, 2nd edn (London: McGraw-Hill International Book Co.), 1983, p. 118.

Research may be classified in several ways depending on the objectives and the types of research. The present work is considered as descriptive research although some statistical procedures have been used to support theories. It fits into the general category of objectives of descriptive research outlined. In view of these objectives, it was decided that the research would be in the form of a cross-sectional study. As such, a survey on students, lecturers, publishers and book shops was undertaken.

The survey provides detailed information with regards to the guidance received by students from lecturers and other relevant consumer characteristics. Analysis of students and lecturers should therefore throw some light on the patterns and trends in current consumer behaviour. In addition, the result of such analysis also reflects the profiles of the consumers. A sample of each set of questionnaires is attached in Appendix 13.

In addition, a comparative study of scholarly book users between lecturers and students identified the similarities and differences in consumer behaviour Consumer profiles also provide useful information as far as the formulation of marketing policies is concerned.

5.2.1 Sampling Procedure

A simple stratified random sample was drawn for the purpose of this research. Each university was stratified into faculties and departments. The classification of subjects was based as close as possible on the standard OECD (Organisation of Economics Co-operation and Development) classification scheme (6 categories): Natural Sciences, Engineering, Agriculture, Medical, Social Sciences and Humanities.[396] For each group, a 10% sample was randomly selected. Although the researcher attempted to standardise the courses by using OECD classification, some problems occurred which meant the sampling frame and the sample did not coincide exactly. This was outside the control of the researcher due to the fact that some universities could not provide figures for students by courses, but according to the schools/faculties, and where the researcher failed to get good co-operation from certain authorities, she had to use other methods, such as asking the dean concerned to get the number of students needed. For

[396] See appendix 14.

example, Communication Studies (which includes Journalism, Advertising, Public Relations, Broadcasting and Publishing) was categorised as under the heading Social Science according to OECD, but certain universities classified it as Humanities while others as Social Science; therefore systematic sampling errors exist in addition to an expected random error which exists in all sampling procedures, but post adhoc information on courses lead the researcher conclude that such errors are within acceptable tolerance limits.

5.2.2 Sample size

One of the issues that normally confronts a researcher in conducting a survey is the determination of sample size. A large sample size would give a better accuracy in terms of lower standard error but it also increases the probability of committing non-sampling errors (such as errors in administering the data collection process) and raises the costs of conducting the survey. On the other hand, small sample size would increase the probability of sampling errors.

Theoretically, in determining the sample size of a survey research, the following considerations have to be taken into account:

a) The degree of precision, accuracy and the representatives of the samples in order to be able to form a general picture of the overall population.

b) The financial constraint faced by the researcher.

c) Time constraint. This could also be a limiting factor in determining the sample size. A large sample size would take a longer time to administer, and to key responses in to a computer.

d) The way the results are to be analysed also affects the sample size. For example, the size of the samples in each sub-group or stratum should be sufficient to be analysed meaningfully. For categorical data, it is not possible to estimate the mean, standard deviation and the standard error, at least in the usual meaning attached to such statistical terms. Such statistical sophistication of determining sample size is better suited for continuous data. However since the survey consisted of both types of data a balance had to be drawn and after considering all the above factors, it was decided that a sample size of around 10% per subject stratum was sufficient for the study.

Lecturers -In view of time and financial constraints, it was decided to use 10% of the population as the sample size. The lecturers were chosen randomly based on 10% from each department of each faculty in each of the eight universities in Malaysia. However, for some institutions which have branches all over Malaysia, the samples were taken only from those serving at main campus (although for ITM, the samples were taken from those serving at two sites: Shah Alam and Petaling Jaya (PJ) as one of the first degree courses is at the PJ site).

Students - Ten per cent sampling of students who enrolled on first degrees were chosen, using the same method as for the lecturers.

Book shops - Interviews were conducted with all the eight campus book shops (for most of the book shops, the researcher interviewed the manager or the manager's representative), however USM and UKM book shops declined to answer the questionnaire.

Publishers - As mentioned earlier, all university publishers, Dewan Bahasa dan Pustaka, some selected private publishers which (claim to) publish scholarly publications - Longman, OUP/Fajar Bakti, Utusan Publications and Berita Publishing - and two research bodies - MARDI and FRIM - were interviewed (in most cases, the researcher interviewed the Managing Director or Head of Publications Unit).

University and National Libraries - as they are some of the major buyers of scholarly books, they were interviewed in this survey (the researcher interviewed either the Chief Librarian, Assistant Chief Librarian or Acquisition Librarian).

5.2.3 Questionnaire design

The questionnaires were designed to provide analysable data relevant to the defined research objectives. A covering letter explained the aim of the study, provided assurances of confidentiality, and thanked potential respondents in advance for their participation.

In distributing the questionnaires amongst students, the researcher selected a group of students as representatives from each department of each faculty in each university to distribute the questionnaires. The filled questionnaires were returned by students through the representatives within two weeks (March/April/May 1993). For the lecturers, in some cases the researcher distributed the questionnaire to the respondents through their head of department or dean. Some questionnaires were distributed through officers in charge of certain universities who attached their own covering letter on behalf of the researcher. In the interest of time, it was asked that the completed questionnaire be returned as soon as possible, through the officers in charge, or else they were collected personally by the researcher. A deadline was not stated, due to the unknown rate of response.

The questionnaire for the lecturers comprised 82 questions (231 variables) divided into five sections: For the students, there were 38 questions (45 variables) divided into four sections. The Malay version was distributed but in the appendix only the English version is attached.

Questions were primarily set-choice type with some open-ended responses. An additional comment section was included to provide general feedback on each topic and solicit possible avenues for future research.

Pilot questionnaires were initially distributed to students in UM and ITM and lecturers in UM. Returned questionnaires indicated small areas of misinterpretation and these were modified before the final version were administered.

5.2.4 Response Rate

The response rates for the study were as follows:

1) For the students, out of a sample of 5303, the overall response rate was 43.4%. In order to categorise the students into a standardised category of subjects, OECD classification of subject was used as a standard form. Although each university had different titles for similar subjects, they were all categorised according to OECD subjects. They were initially grouped into a UNESCO classification scheme with 22 classes, but due to a small number of respondents in certain subjects, it was decided that the OECD scheme was preferable. The detailed breakdown of response rate is shown in Chapter Six: Profile of Students.

2) For lecturers, out of a sample size of 700, 121 questionnaires were returned. Time constraints were probably evidenced by non-response. As the size of the resultant sample was low the results are less reliable than for the student sample; however the responses were sufficient to proceed with statistical analysis. Findings from the questionnaire to lecturers will also be reviewed for comparative purposes, although it is recognised that generalisation to a wider population may be unjustified by the sample size, especially in the case of UM. However higher responses at particular universities allow conclusions to be made for those particular institutions.

5.3 Research Limitations

This is one of the pioneering surveys of its type in Malaysia and some of the difficulties and lessons learned with regard to the questionnaire, the field-work and related aspects, may be useful for those undertaking similar surveys in the future. Some of the difficulties are briefly discussed below.

l) The determination of the details of the information to be collected was a major problem at the planning stage. The problems arose in determining the information required and how best to obtain this. Thus, apart from some theoretical background to indicate what information might be relevant, a careful study of the aims of the survey and its purposes was essential before undertaking a survey.

2) For some of the analysis presented to enable international comparisons, the researcher had to rely on secondary data from various international organisations. Since there are always problems of harmonisation in the data collection, the definitions (although harmonised to a certain degree) are not always applied by data collectors due to problems such as cost and simplicity at the national level. For example, someone who is considered as illiterate in one country may be considered as literate in another. In addition, in many developing countries, the infrastructure does not exist to allow reliable estimates of a given phenomenon, e.g. in the case of a population census it may not be possible to send out census forms to everyone in the country as the post may not be reliable, or the fact that some of the people are illiterate and cannot possibly complete a census form. The results of the inter-country analysis therefore must not be taken at face value and require a judgmental dimension to their interpretation. The statistics can only be seen as either a "calculated guess" or the best information given the circumstances, and open to large measurement errors. Thus researches based on such facts are also liable to have errors built in and must viewed from an intellectual and judgmental viewpoint and note must be taken of the limitations of the conclusions drawn. The researcher noted where possible the degree of reliance which can placed on the data collected, especially where data regarding the same phenomenon are differ from different sources.

3) It would have been useful if the survey could have been undertaken with the help of intelligent and widely informed interviewers/research assistants who could easily be trained about the purpose of the survey and how to conduct it. This would certainly have resulted in both a higher response rate, and increased quality of responses.

4) It was difficult to obtain co-operation from some Malaysian authorities for this survey. This constituted the most serious impediment for the researcher, as most of the people who were expected to facilitate collection of the information, and for whom this research is intended, were the most reluctant. Inefficiencies in providing information and data led to a severe waste of time and effort. For example, delays occurred in arranging appointments, and occasionally key personnel had taken holidays or sick leave without briefing anyone on the relevant questions. This resulted in a waste of time as the person acting was not in a position to assist.

In addition, for every single item of information, staff asked for a special letter from the vice-chancellor; they disregarded the letter from the researcher's supervisor at Stirling University. Even if their own vice-chancellor provided such a letter, they refused to co-operate as that letter did not mention the specific information wanted by the researcher. If this 'policy' has to be followed, one would have to provide 20 different letters or more just from one particular vice-chancellor. University staff were reluctant to help when they noticed that the researcher was not from their own institution, and as a result, the researcher had to forgo some important information.

5) It is needless to mention the importance of a proper sampling frame from which to draw a sample. This however, is very difficult to obtain in many developing countries, and in particular in Malaysia, as most of the answers given were: "This is confidential and under the Secrecy Act. We are not able to disclose this information"; yet this same information had been given by staff at another university without hindrance.

6) Time and financial constraints limited the questionnaire returns as the researcher could not afford to have research assistants to chase up non-responses. Geographical problems added to this limitation; but in spite of all these, the scope of this survey included the whole of Malaysia and every effort was made to cover all the sampling frame. The only thing that the researcher was not aware of when scheduling was the time the survey would take place. Most universities have their final examinations from April to June and as the time varies from university to university, this further complicated the situation. From the end of February until a month later was the Muslim fasting month, Ramadhan, and staff were quite reluctant to entertain appointments during this time. And after Ramadhan was the Eid, and because the celebration coincided with the school holidays, it was again impossible to make appointments with anybody for interviews. This continued for almost two months, and by the time the Eid celebration was over the universities were on holidays until the middle of July. However, the researcher was able to complete the survey satisfactorily, in spite of these enormous problems, by persisting with the research even in the face of uncooperative, and often hostile staff, and especially during the fasting month of Ramadhan.

In spite of the problems mentioned, and the limited facilities available, the questionnaires were comprehensive and determined efforts were made to make the survey as complete and representative as possible.

5.4 Data Analysis and Statistical Methodology

The questionnaires were precoded and designed to suit the SAS computer package for statistical analysis. MS- EXCEL, a spreadsheet program, was used for data entry prior to exporting to SAS. Initially, univariate analysis was used to provide descriptions of the variables under study as well as to detect typographical and coding errors. Cross checks were made to determine inconsistencies within the questionnaires, for instance, if a respondent had replied to a section which he should not have ticked, then changes were made to be consistent.

Preliminary data analysis started with frequencies and two way cross tabulations. The results were further studied using a number of statistical tests at the 5% and 1% levels of significance.[397] The measurement of 'statistical significance' indicates the probability that an observed difference is a real difference and is not due to chance alone. If the odds are one in twenty that a difference results occurs purely by chance, then the difference is 'probably' significant and this is referred to as the 0.05 (or five per cent) level of significance. If the odds are one in a hundred, then the difference is 'highly' significant (the 0.01 or one per cent level of significance).[398]

The 0.05 level of significance is accepted for most practical marketing research purposes as being statistically significant.[399] This is obtained by taking approximately two standard deviations either side of the mean (i.e. 95% of the values of a sample statistic can be expected to lie within this range and 5% of the values outside it).[400] Significance measures the probability

[397] Leslie W. Rodger, *Statistics for Marketing* (London: McGraw - Hill Book Co. Ltd., 1984), 1984, p. 117.
[398] Ibid.
[399] Ibid.
[400] See glossary.

of a given value falling outside the predicted margin of error and occurring completely by chance.[401] An event or result is significant if its occurrence purely by chance is rare.[402]

5.4.1 Chi-square, Cramer's V and Adjusted Residuals

Chi-square (denoted by the symbol χ^2) test of independence is one of the many types of tests of significance which have applications in marketing and is used to consider relationships between factors as represented by survey data.[403] It is especially useful in determining whether actual or observed sample results differ significantly from expected results based on some hypothesis. If the actual results are the same as the expected ones then there is no difficulty. If, however, there is a difference between the observed results and those expected then the question becomes one of whether or not the difference is real (i.e. statistically significant), or attributable to chance sampling errors or fluctuations. In other words, it provides a test of whether or not the actual results obtained 'fit' our expectations. The χ^2 equation is written as:

$$\textit{Chi-square, } \chi^2 = \sum \frac{(O - E)^2}{E}$$

where O is the observed cell frequency, E is the expected cell frequency.

However, the χ^2 test should not be used when one has low frequencies in the cells. The normal rules[404] say that no cell should contain less than 5, but this seems too stringent for real life applications and most statisticians use the rule that none of the cells should contain zero and no more than 20% should contain less than 5. If more than 20% contain less than 5 or there are zero frequencies then the normal approach is to combine classes but care must be taken not to undermine the very reasons for which the test is being conducted and it should be remembered that the χ^2 test becomes less powerful by following such a strategy.[405] For large cel frequencies the χ^2 test is particularly powerful, and relatively small differences in the cell frequencies can result in a significant value for χ^2. This is not really a weakness of the test, but rather its power; however such significant values of χ^2 do not tell us the strength of the

401 Leslie W. Rodger, op. cit., p. 117.
402 Ibid.
403 R. Slater and J. Curwin, *Quantitative Methods for Business Decisions, 2nd ed.* (London: Van Nostrand Reinhold (International), 1988), p.227.
404 R. Slater & J. Curwin, ibid.,, p. 229
405 Barbara G. Tabachnick & Linda S. Fidell, *Multivariate Statistics*, 2nd ed. (New York: Harper & Row), p. 240.

association and only show that there is a significant association, however small it may be. Therefore to measure the strength of such association it was decided to use Cramer's V Measure of Association.[406] Cramer's V Measure is based on the normal χ^2 test, which suffers from the deficiencies noted above, but is standardised to take into account the number of observations and the size of the contingency table, i.e. the number of rows and columns.

$$Cramer's\ \mathrm{V} = \sqrt{\frac{\chi^2/\mathrm{N}}{\min\,(\mathrm{r}-1, \mathrm{c}-1)}}$$

where χ^2 is the chi-square test statistic value, N is the total number of observations, r is the number of rows and c is the number of columns in the contingency table.

As a secondary measure to the χ^2 test we decided to use a 95% Confidence Interval (CI) for Cramer's V, and if the lower CI value bounded the zero region, i.e. was zero or negative, then we decided again to accept the null hypothesis even though the χ^2 test had rejected it because the strength of the association was too weak. The chi-square test shows there is an association, the Cramer's V reports the strength of this relationship, next we are interested in isolating those cells which contribute significantly to this relation. Of course one could simply gauge from the cell frequencies, but by simply looking at the smallest and largest cell frequencies one risks either identifying differences which do not exist or leaving out significant contributors to the χ^2 value. To isolate these significant relationships adjusted residuals can be calculated for the underlying cell frequencies. Adjusted residuals are the standardised deviations of observed frequencies from expected values. They are normally distributed with a mean zero and standard deviation of 1, thus the values calculated can be compared against standard normal points found in normal distribution tables.

$$Adjusted\ residual,\ d_{ij} = \frac{(\mathrm{n}_{ij} - \mathrm{E}_{ij})/\sqrt{\mathrm{E}_{ij}}}{\sqrt{[(1-\mathrm{n}_{i.}/\mathrm{N})(1-\mathrm{n}_{.j}/\mathrm{N})]}}$$

[406] Brian S. Everitt, *The Analysis of Contingency Tables*, 2nd edn. (London: Chapman & Hall), 1992, p. 49.

where n_{ij} is the cell frequency in the ith row and the jth column, E_{ij} is the expected cell frequency, n_i is the row frequency total, $n_{j.}$ is the column frequency total.

Using a 95% confidence interval, if the adjusted residuals are greater than 1.96σ (then σ = standard deviation), the observed frequency is statistically larger than the expected one and if the adjusted residuals value is less than 1.96σ then the observed cell frequency is statistically less than the expected under the null hypothesis.

5.4.2 Correspondence Analysis

Correspondence Analysis is a graphical approach to analyse the data in contingency tables by performing a weighted principal component analysis on the chi-square distances.[407] The approach is particularly popular in France and Japan where it is used in a host of applications.[408] It is particularly useful for market research where one is trying to identify target populations.[409] All row and column categories are represented as points in an euclidean space and normally the first two dimensions of this space are plotted in order to determine the relationships between the points. The interpretation is not based on the distances between category points but rather on the points being found in approximately the same direction from the origin. The approach is simple enough for social scientists to understand and complete enough to analyse multivariate relationships. It is sometimes used as a pre-step to more complicated procedures such as log linear modelling. The complex nature of more advanced procedures such as log linear models precluded such techniques for the purposes of this research. In addition such analyses have many assumptions to fulfil which can be difficult to achieve in real life applications.

5.4.3 ANOVA and Duncan's Multiple Range Test

One-way Analysis of Variance (ANOVA) can be used to test whether there are any differences in the mean between groups. The main assumptions of the approach are that the sample means

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407 Brian S. Everitt, op. cit. , p. 49.

408 M. J. Greenacre, *Theory and Applications of Correspondence Analysis* (London: Academic Press Inc., 1984) pp 1 - 13.

409 *SAS Supplementary Procedures Guide Release 6.03 edition* (North Carolina: SAS Institute Inc., 1986), p.32.

follow a normal distribution and that the groups have approximately homogeneous variance. In practical cases, such as the survey conducted for the purposes of this research, these assumptions are sometimes violated. The approach is, however, robust and it is not a serious problem even if some of the assumptions are not fulfilled.[410] The null hypothesis is that all means are not significantly different and the alternative hypothesis is that the mean of at least one group is statistically different from the others.

The sources of variation from the grand mean for all groups can be stated as:

Value Observed for, Observation *i*	= The Grand Mean	+	Difference due to Group	+ Difference due to Individual *i*

The variation in an observed phenomenon can be due to the fact that the observation belongs to a particular population or it could also be due to a chance fluctuation. The objective of the ANOVA analysis is to see if the differences observed are due to normal variation of individuals or due to the fact that the different groups furnish different characteristics. We ascertain this by calculating the F statistic which is the ratio of the BETWEEN GROUP VARIATION to the WITHIN GROUP VARIATION.

$$F\,statistic = \frac{\text{BETWEEN GROUP VARIANCE}}{\text{WITHIN GROUP VARIANCE}}$$

A large value of F suggests that the null hypothesis is false/not valid. The F statistic follows an exact theoretical distribution and can be checked in statistical tables.

If we ascertain that the groups differ then we may be interested in performing a post hoc test such as Duncan's Multiple Range Test to investigate exactly which groups display different characteristics. Duncan's test is very popular amongst researchers because of its simplicity and error protection.[411]

The procedure is as follows:

[410] *Statistics and the SAS Programming Language* (North Carolina: SAS Institute Inc., 1986), p. 136.

[411] Lyman Ott, *An Introduction to Statistical Methods and Data Analysis*, 3rd edn (Boston: PWS-Kent Publishing, 1988), pp. 452 - 453.

1. The t sample means are ranked.
2. Two populations are significantly different if the absolute value of their sample difference is larger than

$$W'_r = q'_\alpha(r,v)\sqrt{\frac{s_w^2}{n}}$$

where n is the number of observations, s_w^2 is the mean square between samples, v is the degree of freedom for s_w^2, and $q'_\alpha(r,v)$ is the critical value of the studentised range for Duncan's procedure when the means are r steps apart.

If the ANOVA test indicates a difference but the post-adhoc test indicates no difference, then the null hypothesis, that there is no difference, is accepted.

5.4.4 Kruskall-Wallis Test

The χ^2 test treats both the rows and column categories as nominally scaled, i.e. just categories such as yes/no, male/female.[412] However, at times we have data which are ordinary scaled such as for the majority of cases in this survey; here the use of χ^2 is not advisable since some of the information is disregarded when transforming an ordinal scale to nominal values and this results in a corresponding loss of power. There are several statistical methods exist which use more of the entropy of the data. For ordinal data such methods can be often very powerful and relatively simple to use and interpret.[413]

The Kruskall-Wallis test is used in experimental situations where random samples of population (k) have been obtained and we want to test the null hypothesis which regards all the populations as identical against the alternative hypothesis that some of the populations furnish greater observed values than others. This test can be used on any observations that may be arranged in increasing order according to some properties such as agreement and preferences. The Kruskall-Wallis test statistic is a function of the ranks of the observations.

412 Alan Agresti, *Categorical Data Analysis* (New York: Wiley, 1990), p. 49.
413 William J. Conover, *Practical Non-Parametric Statistics*, 2nd edn (New York: Wiley, 1990), p. 213.

$$\textit{Kruskall Wallis, } T = \frac{1}{S^2}\left(\sum_{i=1}^{k}\frac{R_i^2}{n_i} - \frac{N(N+1)^2}{4}\right)$$

where N is the total number of observations, R_i is the sum of the ranks for the ith population, k is the number of populations and where

$$S^2 = \frac{1}{N-1}\left(\sum_{\substack{\text{all}\\ \text{ranks}}} R(X_{ij})^2 - N\frac{(N+1)^2}{4}\right)$$

If the null hypothesis, that all samples are equal, is rejected then one can use the formula below to determine which pairs of populations tend to differ. If the inequality is satisfied then the populations are significantly different. To determine which population is higher up or lower down the scale we must analyse their respective mean scores.

$$\left|\frac{R_i}{n_i} - \frac{R_j}{n_j}\right| > t_{1-(\alpha/2)}\left(S^2\frac{N-1-T}{N-k}\right)^{1/2}\left(\frac{1}{n_i}+\frac{1}{n_j}\right)^{1/2}$$

where R_i is the sum of ranks for population i, n_i is the number of observations in population i, R_j is the sum of ranks for population j, n_j is the number of observations in population j, and $t_{1-(\alpha/2)}$ is the $(1-\alpha/2)$ quintile of the t distribution with N-k degrees of freedom.

The approach is presented graphically in this research by adapting the approach taken in the Duncan's Multiple Range Test.

5.4.5 Regression Analysis [414]

The objective of regression analysis is to explain a relationship between a variable of interest, often referred to as the dependent variable, and one or more explanatory variables, sometimes called independent variables. In the case of one independent variable it is referred to as simple regression and its simplest form, that of simple linear regression takes the form of a straight line equation:

[414] Lyman Ott, op. cit., ch.8 - ch.13.

$$y = \beta_0 + \beta_1 x + \varepsilon$$

where β_0 is the y-intercept (value of y when x=0), β_1 is the gradient of the straight line (the change in y for each additional unit change in x) and ε is the random error (a normally distributed error term with mean zero in our prediction of y at given x). The model uses a process known as least squares, which minimises the distances between the observed values and the straight line of the linear regression, to arrive at predictory model.

There are not many situations where one can use such a simple model: the relationship may not be a straight line but rather curves, based on logs or higher degrees etc. In these cases the variable x is replaced by another function of x e.g. log(x). There may also be occasions where one independent variable is not enough to predict adequately the value of y, in this case other variable terms are needed and we refer to the analysis as multiple regression. Some of these variables need not be continuous variables, i.e. with a large range of number values we could simply have a binary type variable taking the values 1 and 0. These binary form variables are often referred to as 'dummy' variables and are a form of classification. For instance you might be interested to see if there is a difference between the incomes of males and females. Looking at the means might not be advisable since income might be a function of number of years of work experience and whether the person had a degree or not. You could decide on formulating a regression model with the dependent variable as income and independent variables years of experience, gender (male=1, female=0) and qualification (degree=1, no degree=0). This type of model should be much more reliable than just looking at means. The interpretation of the regression coefficients is a little more difficult than in the case of simple regression. Here the slope relating to a particular independent variable means the increase (or decrease) in the dependent variable subject to the value of all other independent variables being controlled. Taking our above example and the variable gender, it would be mean the increase in income if the person is male (a unit increase in gender) providing years of experience and qualification remain unchanged. The degree to which a set of independent variables can predict the value of a dependent variable is measured by the r^2, the coefficient of determination which takes a value from 0 to 1 (or in percentage terms 0% to 100%). The r^2 is the amount of the total variation explained by the set of explanatory variables. The overall adequacy of the model is tested by the F-statistic. The significance of the individual coefficients is measured by using student t statistics with the normal 5% significance level.

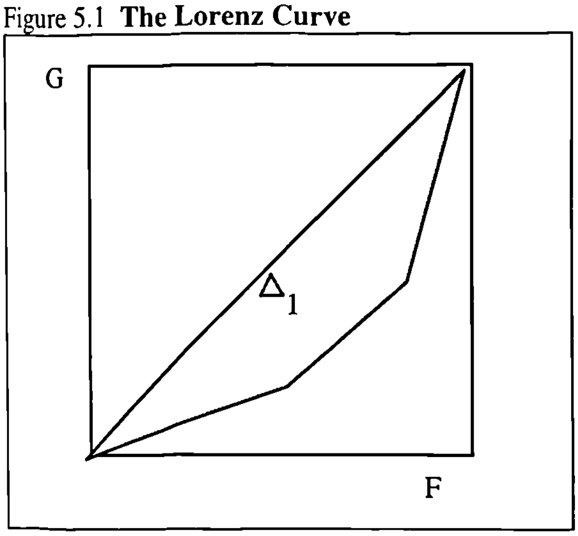
5.4.6 Lorenz Curve & Gini Coefficient [415]

Both the Lorenz curve and the Gini coefficien are simple measures of relative concentration to gauge the dispersion of a given phenomena and are commonly used in the field of economics to measure phenomena such as the relative contribution of regions to the GNP of an entire country.

Lorenz Curve

The Lorenz curve is simply a graphical representation of dispersion with the relative frequency on the horizontal axis and the relative contribution to the total on the vertical axis.

Figure 5.1 **The Lorenz Curve**



Mathematically:

Let x denote a given phenomenon whose relative concentration we are trying to measure.

[415] G. Buttler & S. Maass, *Formelsammlung Zur Grundausbildung In Statistik* (Formulae for Basic Education in Statistics), (Nürnberg: Verlag Der Universtätsbuchhandlung Büttner & Co., 1988), p. 11.

1. Rank all value of x in ascending order

$$\boxed{\begin{array}{l} x_{(1)} \leq x_{(2)} \leq \ldots\ldots\ldots \leq x_{(n)} \\ \text{where n is the total number of observations} \end{array}}$$

equation(i)

2. For each ordered value of x calculate a corresponding F (cumulative frequency) value.

$$\boxed{F_{(i)} = \frac{i}{n} \text{ where } i = 1,2,\ldots\ldots,n}$$

equation(ii)

3. For each ordered value of x calculate a corresponding G (cumulative contribution to total) value i.e. the present value of x plus the summation of all x values before.

$$\boxed{G_{(i)} = \sum_{j=1}^{i} g_j \text{ where } g_j = \frac{x_j}{\sum_{i=1}^{n} x_i}}$$

equation(iii)

Plot the F values against G to graph the Lorenz curve. The shaded area in figure 5.1 represents the degree of inequality with a maximum equality existing when this area is zero and the Lorenz curve is the same as the straight diagonal line.

Gini Coefficient

The gini coefficient is a simple indicator of relative concentration which takes the value one when there is a maximum inequality where only one observation contributes to the whole total value of x while all other observations contribute nothing. It takes the value zero when all observations contribute equally.

Mathematically:

$$\boxed{\text{Gini Coefficient, } K_G = 1 - \frac{1}{n}\sum_{i=1}^{n}\left[G_{(i-1)} + G_{(i)}\right]}$$

equation(iv)

5.5 Summary

Accurate data and information on scholarly publishing are scarce. The survey was therefore undertaken to partly fill the deficit of reliable information. In order to extract maximum amount of information from the survey and to quantify the findings, several statistical methods have been used. Statistical theory allows us to attach a degree of assurance (confidence intervals) to conclusions rather than interpreting frequencies etc. which can be subjective. Conclusions based on statistical theory are sound and better able to support policy formulation by reducing risks due to the misinterpretation. Several of the tests were not available in standard statistical packages although there are presented in the statistical literature so the researcher was obliged to program those tests herself using the SAS programming language, these include:

- Confidence intervals from Cramer's V,
- Calculation of Adjusted Residuals,
- Class comparison for Kruskall Wallis and
- Calculation of Lorenz Curves and Gini Coefficient.

CHAPTER SIX

PROFILE OF STUDENTS

6. PROFILE OF STUDENTS

6.0 Introduction

This chapter investigates the socio-economic profile, environmental factors and the influence of courses and guidance on book buying behaviour of students in all the eight universities of Malaysia. The analysis includes the following key aspects of the survey conducted for students:

i) Demographic structure

ii) Courses and guidance

iii) Use of the library

iv) Use of bookshops

v) Grants

Demographic structure includes number of students in different courses, age, gender and marital status. These social and economic indicators variables (gender and marital status were used as descriptive variables instead of statistical class variables) play an important part in the students' perception their studies, type of course, reading habits and buying books.

The range of courses provided at Malaysian universities is not necessarily the same as in academic institutions in western countries. For instance, many universities in Malaysia offer Islamic courses: The International Islamic University (UIA) offers a range of courses based on Islam, and students enrolling on such courses come mostly from the Islamic World.

Bahasa Melayu is the medium of instruction used in all government educational establishments including higher learning institutions even though the syllabus draws inspiration from the British system (as mentioned earlier in Chapter One). For various reasons, the local publishing industry is not able to supply these institutions with an adequate number of textbooks in bahasa Melayu; therefore for some subjects the majority of the academic literature is in English.[416] The frequent change of government policy (whether English or bahasa Melayu should be the medium of instruction in the higher learning institutions[417]) has resulted in a gradual decline in the standard of English and bahasa Melayu and added to the confusion and instability in the publication of local books. As a result, more and more western books[418] have been used, resulting in a lack of demand for those books written by Malaysian authors in bahasa Melayu, and increased the risks for local publishers.

An analysis of library use reflects the library facilities available to students and their interest in reading textbooks rather than relying on lecture notes alone. The annual review of library stock and students' interest in reading textbooks are largely motivated by the type of course and style of guidance from lecturers. In many higher institutions course syllabuses are not reviewed on an annual basis; consequently lecturers' notes are not updated to include recent developments. Such practices discourage students from reading textbooks as they can collect lecture notes from their seniors and prepare themselves to pass examinations. The pattern of library use in relation to courses reveals the stereotype rather than an innovative education system in developing countries like Malaysia.

The bookshop use is studied in relation to guidance from lecturers. It is assumed that an affordable price, efficient bookshop service and sufficient stock of books may influence book buying behaviour. It has long been recognised by marketers that income plays a vital role in influencing consumers' buying behaviour and in this case, the student grant may play the role of the students' purchasing power; therefore student grants and their relation to other factors are discussed in this chapter. It was expected that the survey question on grant would indicate

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[416]K. Gulrose and G.S. Khoo, *The Market for British Books in Malaysia: A Survey* (Kuala Lumpur: The British Council, 1993), p. 9.
[417]An announcement made by the Prime Minister of Malaysia, Dr Mahathir Mohammad to allow the use of English as the medium of instruction for teaching science and technology courses in the higher learning institutions has been received with mixed blessing by both scholars and the public.
[418] See table A3.2 of Appendix 3 for export figures.

economic solvency of students and whether this factor might influence students' attitudes towards buying books.

6.1 Student Population and Sample

There were 2,593 respondents to this survey, approximately 43.4% of the total sample. The sample itself was 10% of the 59,785 students studying in all the eight higher institutions in Malaysia at the first degree level during 1993. Table 6.1.1 shows the number of students and respondents classified according to institution and course.

The highest response rates were for UIA and UPM, approximately 86% and 82% respectively. Low response rates were recorded for USM (10.7), UTM (17.1) and UKM (27.4%). This could be due to the location of the university and the timing of the survey. For UKM, the location was not the reason for the low response rate. Unfortunately when the research was undertaken, the students in UKM were sitting their end of year examinations. Careful attention was given to the interpretation of results from the low response rate institutes .

As can be seen from table 6.1.1 the number of students in the category of Social Sciences were high due to the fact that many subjects fall into this category when using the OECD classification scheme. In Malaysia, the number of students in Social Science (56%) and Humanities (17%) are comparatively higher than in other courses. These two categories account for more students than Science subjects.[419] The lowest number of respondents were from Agriculture making up only 4% of the sample. This is due to the fact that six institutions out of eight do not offer courses in this field.

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[419] Based on the ratios of students by broad field of study in 1989, in World Education Reports 1993, the ratios showed that there were 32% of students in Education; 7% in Humanities; 32% in Law and Social Science; 26% in Natural Sciences, Engineering and Agricultural and 3% in Medical Sciences. The figures shows that in Malaysia more students enrol on Social Sciences and Humanities subjects than Science and Technology subjects, see tables A14.1 and A14.2 of Appendix 14 for the breakdown of subjects for OECD classification scheme and subjects offered at Malaysian universities.

Table 6.1.1 **Breakdown of respondents and population by university and course (OECD) in percentages and head count, February 1993**

	UM	UKM	UPM	UIA	UTM	USM	UUM	ITM*	Total
NS	42 214 2139	56 201 2012	95 253 2534	0 n/a n/a	28 214 2142	25 204 2036	10 55 546	21 18 178	①277 ②1159 ③11587
ENG	18 86 856	44 43 428	43 53 535	0 n/a n/a	48 668 6678	18 118 1184	0 n/a n/a	36 56 561	207 1024 10242
AGRI	2 n/a n/a	8 n/a n/a	92 118 1177	0 n/a n/a	0 n/a n/a	0 n/a n/a	0 n/a n/a	0 n/a n/a	102 118 1177
MS	73 108 1083	40 83 825	0 n/a n/a	0 n/a n/a	0 n/a n/a	11 82 819	0 n/a n/a	0 n/a n/a	124 273 2727
SS	81 271 2714	105 355 3554	365 303 3033	227 267 2665	105 177 1767	34 381 3812	389 526 5263	147 250 2495	1453 2530 25303
HUMAN	318 287 2871	0 240 2397	0 n/a n/a	105 91 909	0 n/a n/a	0 97 970	0 n/a n/a	7 160 1602	430 875 8749
Responses Response Rate	534 55.3	253 27.4	595 81.8	332 85.5	181 17.1	88 10.7	399 68.7	211 43.6	2593 43.4
Sample	**966**	**922**	**727**	**358**	**1059**	**882**	**581**	**484**	5979
Total	④9663 ⑤10311	9216 10975	7279 11168	3574 4844	10587 10587	8821 11598	5809 5823	4836 31599	59785 96905

Source: *Own compilation derived from each Registrar's Office*
Figure for: ① Responses ② Sample ③ Total Number ④ First degree students only ⑤ Total Number of Students
* Only students enrolled on courses equivalent to a first degree in ITM Shah Alam & PJ were included. N/a = Not applicable.

Note: The sampling frame was drawn from University records. The researcher approached the registrar offices and asked for lists of students number by courses. Most registrars were unable to provide such detailed breakdowns but provided student numbers at the faculty level. Most university records were not computerised and some staff were not helpful, which led the researcher having to ask information from each dean concerned. Some registrars face difficulties in providing the number according to a classification scheme as on some courses (first or second year) since students had not specialised yet and this caused some confusion. Since the researcher had no knowledge of the exact breakdown of courses within those faculties, it was nearly impossible to reconstitute faculties as defined by the university from the title of courses supplied by students on returned questionnaires (taking example for researcher herself who is from the School of Mass Communication; some universities categorise this as Humanities while others as a Social Science - see discussion in Chapter Five). Therefore the use of OECD standard classification scheme meant that certain courses ended up with a higher number of respondents then the sample. Of course this somewhat complicates the situation since the sampling frame and the sample are not the same definition, resulted in inconsistencies and errors in sampling. However such sampling errors were outside the control of the researcher as the researcher was not able to obtain relevant information. The use of standard classification scheme somewhat simplified the problems by allowing meaningful comparisons to be drawn between subjects.

6.2 Demographic Characteristics

Demographic characteristics, such as age, sex, marital status, income, occupation and educational characteristics are used in this study as the basis to understand the pattern of market segmentation in Malaysia (some were used only for descriptive purposes). Demographics of students help to locate a target market, while psychological and socio-cultural characteristics help to describe who these members are, and how they think and feel. A summary of student characteristics by grants, institute, course, gender, age and marital status is provided in table 6.2.1 (at the end of this section).

Education in Malaysia begins with the duration of six years compulsory education at the age of six, followed by three years at the lower secondary, two years at upper secondary where they sit for the Sijil Pelajaran Malaysia (SPM - equivalent to GCSE), and finally two years at pre-university which they sit for Sijil Tinggi Persekolahan Malaysia (STPM - equivalent to 'A' Level) before entering university.

As shown in table 6.2.1, nearly 90% of the sample were between 20 - 30 years of age while students in the age group of 41 - 50 made up a very small proportion, no more than 0.12% of the sample. This indicates that most university students are young school leavers. The respondents in the age group of 41 - 50 were traced back to a professional teachers course at UPM for working teachers. University records showed that the sample data in this survey is fairly representative of the population from which it was drawn, although there were some exceptions resulting mainly from different classification schemes (as explained earlier).

The breakdown of respondents in the sample was approximately 52% male and 48% female; this reflects roughly the actual breakdown of students studying in universities or equivalent institutions, which was 54% male 46% female in 1990.[420] It may seem that the proportion of male students in higher education is relatively higher than the number of female students but this does not necessarily imply a bias in favour of male students. Female students have the same chance as their male counterparts to enrol in higher institutions in Malaysia, as selection relies on grades/performance. The disparity is mainly the result of past differences which have still yet to be removed at higher levels of the education system. The government has actively encouraged the participation of females[421] but since this process must start somewhere, namely the primary level, it will be still a number of years before the number of females reach and eventually surpass the number of males in higher education (they will most probably eventually surpass the number of males in higher education since there are more females than males in the population). Any other unexplained disparities are likely to be due to the courses undertaken by males and females and therefore indirectly affected by government policy rather than directly. For example the Malaysian government has encouraged the opening of technology and science based universities and subjects offered by such universities are likely to attract a disproportionately higher number of male applicants than female applicants.

More than 93% of students were single, approximately 6% married and less than 0.4% divorced/ widowed. This tends to reflect the pattern of student makeup in Malaysian universities as a whole. Most people get married only after graduating and securing stable employment normally during their late twenties or early thirties.

[420]The total number of students studying for degrees in Malaysian universities in 1990 was 57059 of which 26286 were females, quoted from UNESCO Yearbook 1993, p. 3 -262. For a detailed breakdown in the growth of university enrolment, please see Chapter Two (Section on Economics).
[421] Sixth Regional Conference of Ministers of Education and those Responsible for Economic Planning in Asia and the Pacific, Kuala Lumpur, 21-24 June 1993, *Draft Final Report*, Paris, UNESCO, 1993.

Table 6.2.1 Distribution of respondents by gender, age, marital status and courses of students by institutions (percentages)

Character / University	Gender		Age				Marital Status		
	Male	Female	< 20 yrs	20 - 30	31 - 40	41 - 50	Single	Married	Divorce/Widow
UM	41.38	58.62	2.81	96.63	0.56	0.00	96.24	3.01	0.75
UKM	61.13	38.87	1.98	96.44	1.58	0.00	94.86	4.35	0.79
UPM	57.26	42.74	8.91	83.19	7.39	0.50	91.43	8.40	0.00
UIA	62.88	37.12	5.42	93.98	0.60	0.00	97.28	2.72	0.00
UTM	51.67	48.33	34.81	58.56	6.63	0.00	92.27	7.73	0.00
USM	69.05	30.95	1.14	97.73	1.14	0.00	97.70	2.30	0.00
UUM	44.25	55.75	0.75	94.47	4.77	0.00	94.86	5.54	0.00
ITM	46.57	53.43	1.90	92.42	5.69	0.00	86.26	12.80	0.94
TOTAL	52.23	47.77	6.25	89.89	3.74	0.12	93.82	5.84	0.35

Character / University	Courses					
	Natural Sciences	Engineering	Agriculture	Medical Sciences	Social Sciences	Humanities
UM	7.87	3.37	0.37	13.67	15.17	59.55
UKM	22.13	17.39	3.16	15.81	41.50	0.00
UPM	15.97	7.23	15.29	0.17	61.34	0.00
UIA	0.00	0.00	0.00	0.00	68.37	31.63
UTM	14.92	26.52	0.55	0.00	58.01	0.00
USM	28.41	20.45	0.00	12.50	38.64	0.00
UUM	2.51	0.00	0.00	0.00	97.49	0.00
ITM	9.95	17.06	0.00	0.00	69.67	3.32
TOTAL	10.64	7.98	3.93	4.82	56.04	16.58

6.3 Guidance from lecturers

The role of lecturers is paramount in the chain of processes which ultimately result in students purchasing books. The process starts with lecturers providing guidance to students, via reading lists, on which books to obtain for their course reading. Therefore, it is important that lecturers are up to date on current developments within their field to provide sound advice to students. In addition, it is expected that encouragement and support at this early stage will not only lead to higher sales at the present time, but also stimulate them to read more on related subjects and thus will provide the impetus for these very students to write scholarly publications themselves once they have qualified. It is hoped this web of interactions will be unfolded in the survey when analysing the reactions from lecturers, booksellers, publishers and librarians in later chapters.

This section therefore, assesses the response of students on the guidance from lecturers to students and their motives for reading and buying textbooks. As lecturers may have influence over students, the role of lecturers is evaluated from the students' viewpoint and an attempt is made to compare the responses of students and lecturers. An assumption is made that the availability of books on loan without charge does not seem to constitute a threat to book sales. On the contrary, the dynamics of reading seems to suggest that borrowing stimulates buying: those who read a lot buy a lot and also borrow a lot.

Table 6.3.1 **Student's satisfaction with lecturers' guidance on reading by institutions and courses (in percentages)**

University	**V.Good**	**Fairly Good**	**Average**	**Poor**	**V/Poor**
UM	8.90	44.70	41.29	4.36	0.76
UKM	8.33	57.54	30.95	2.38	0.79
UPM	7.26	53.72	33.28	5.07	0.68
UIA	6.63	48.80	36.14	8.13	0.30
UTM	2.78	37.78	52.22	6.11	1.11
USM	6.82	37.50	44.32	11.4	0.00
UUM	11.34	54.41	28.97	4.79	0.50
ITM	5.77	54.81	35.58	2.88	0.96
COURSES					
NS	6.20	46.72	41.97	5.11	0.00
ENG	5.83	50.00	37.38	5.34	1.46
AGRI	7.84	50.00	35.29	5.88	0.98
MS	4.00	49.60	40.00	6.40	0.00
SS	8.11	51.77	34.79	4.64	0.69
HUMAN	9.84	47.07	36.30	6.09	0.70
TOTAL	7.80	50.14	36.28	5.12	0.66

Generally, students felt that the standard of guidance is good as only 5.8% think negatively (those in categories poor and very poor) of the guidance they receive and around 36% think of guidance as average (see table 6.3.1). Turning to individual courses, no significance differences existed between students of different subjects. Just under 50% of students in Medical Sciences and about 52% in Social Sciences viewed that the standard of guidance as fairly good. However, this was not the case when comparing institutions; UUM students on average reported that they were more satisfied with lecturers' guidance compared to students from other institutions. This was also reflected in UKM, UPM and ITM while USM and UTM students stated that they were less satisfied than on average; see figure 6.3.1 for KW test.[422]

[422] For ease of interpretation, the result is presented graphically as in figure 6.3.1 (this approach will be used for the rest of the analysis). The figure shows that any two groups with a common underscore are not significantly different. The central line shows the overall mean score representing the mean view, i.e. the view of the total sample. The group at the top tend to more positively towards guidance, while the group at the bottom tend to have worse views of lecturers' guidance compared to the sample as a whole.

Figure 6.3.1 **Does opinion on lecturer's guidance differ amongst students of different institute?**

Institute	N	Mean Score	Group				
UUM	397	1172.93	A				
UKM	252	1182.82	A	B			
UPM	592	1258.91	A	B	C		
ITM	208	1264.64	A	B	C		
UM	528	1325.58	A	B	C		
UIA	332	1329.63			C	D	
USM	88	1472.24				D	
UTM	180	1528.04					E

N = 2577 KW χ^2 = 52.09 DF = 7 Prob > χ^2 = 0.0001
Overall Mean Score = 1289.1

When asked about the provision of reading lists, nearly 10% of students said that they received reading lists from all lecturers, about 33% reported most and just above 39% said some of their lecturers gave printed reading lists, another 16% said they received only a few while about 2% said they received no reading lists. Engineering students received statistically the least printed reading list compared to other students; see figure 6.3.2 for KW test. Amongst institutes, UTM students seemed to receive the least printed reading lists from their lecturers which contrasted with students from UUM, which received the most (see figure 6.3.3 for KW result).

Fig 6.3.2 **Number of printed reading list received by course**

Courses	N	Mean Score	Group		
AGRI	102	1172	A		
MS	124	1219.9	A		
SS	1441	1230.5	A		
HUMAN	427	1339.7		B	
NS	276	1407.7		B	
ENG	207	1532.6			C

N = 2577, KW χ^2 = 48.58, DF = 5, Prob >= 0.0001,
Overall Mean Score = 1289

Fig 6.3.3 **Number of printed reading list received, by institute**

Institute	N	Mean Score	Group			
UUM	395	1209.0	A			
UPM	592	1212.3	A			
UIA	331	1235.3	A			
UKM	251	1244.0	A			
ITM	211	1256.3	A	B		
UM	529	1363.5		B	C	
USM	87	1430.7			C	
UTM	181	1627.4				D

N = 2577, KW χ^2 = 66.49, DF =7, Prob >= 0.0001
Overall mean Score = 1289

Regarding the quality of the reading list, a high percentage of students, nearly 50%, stated the quality as fairly good and nearly 6% as very good. On the other hand, only around 7% considered the quality as poor and around 1% as very poor. Students from UTM and USM and those doing Engineering, Humanities and Natural Sciences had worse views on the quality of the reading lists they received, see figures 6.3.4 and 6.3.5 for KW result. For breakdown, see figures 6.3.6 and 6.3.7.

Fig 6.3.4 **Opinion on quality of reading list received, by course**

Courses	N	Mean Score	Group		
MS	123	1166.5	A		
AGRI	102	1253.5	A	B	
SS	1436	1257.3	A	B	
NS	273	1328.8		B	C
HUMAN	428	1338.8		B	C
ENG	203	1371.1			C

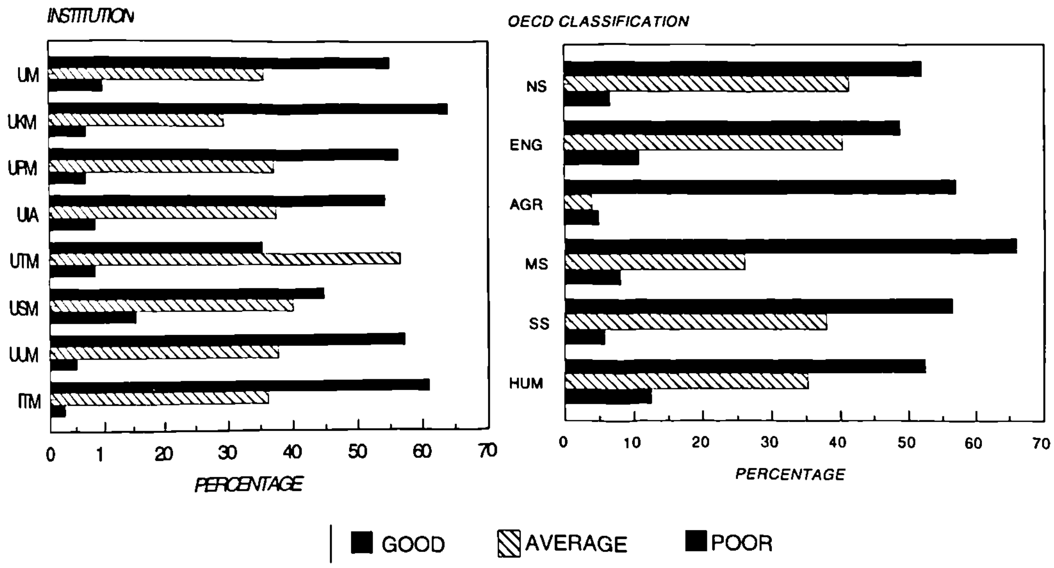
N = 2565, KW χ^2 = 13.68, DF = 5, Prob >= 0.0178
Overall Mean Score = 1283

Fig 6.3.5 **Opinion on quality of reading list received, by institute**

Institute	N	Mean Score	Group			
UKM	249	1166.1	A			
ITM	210	1201.1	A	B		
UUM	395	1228.8	A	B		
UPM	587	1265.3		B		
UM	528	1298.5		B	C	
UIA	332	1315.0		B	C	
USM	85	1449.2			C	D
UTM	179	1535.4				D

N = 2565, KW χ^2 = 45.012, DF = 7, Prob >= 0.0001
Overall Mean Score = 1283

Figures 6.3.6 & 6.3.7 **Frequency of opinion regarding reading list by institutions and courses**



(For detailed figures, q.v. table A15.1 of Appendix 15)

Nearly 44% students said that they didn't receive a printed reading list for at least one course. Of these students, some 70% didn't receive for one to two courses, 25% did not receive any reading list for three to five courses. Alarmingly, some 6% of students reported that they did not receive printed reading list for more than five courses. The highest number of students who did not receive printed reading list for more than five courses came from UKM. Table 6.3.2 shows the number of courses for which the students did not receive printed reading lists among those who claimed that they did not receive any. Medical students were less likely than under the null hypothesis to report that they had some courses for which they did not have any printed reading list while Engineering students were more likely to report such an event. Thus the needs of Medical students seem to be better met than other groups of students while Engineering lecturers were less likely to provide printed reading lists, see figures 6.3.8 and 6.3.9 for Duncan's tests.

Fig 6.3.8 **Differences in number of printed printed reading list, by course**

Courses	N	Mean Score	Group
ENG	103	3.087	A
NS	106	2.802	A
HUMAN	164	2.585	A B
SS	564	2.112	B
AGRI	58	2.000	B
MS	27	2.000	B

DF=5, F Value = 3.47, Pr > F = 0.0040

Fig 6.3.9 **Differences in mean number of printed reading list, by institute**

Ins	N	Mean Score	Group
UKM	83	3.145	A
UM	200	2.780	A B
UTM	78	2.590	A B C
USM	35	2.429	B C
UPM	281	2.352	B C D
ITM	73	2.110	C D E
UIA	128	1.789	D E
UUM	144	1.750	E

DF=7, F Value = 8.45, Pr > F = 0.0001

Table 6.3.2 **Number of courses and relative frequency of students that did not receive any printed reading lists, by institute and course, in percentages**

University	1 - 2	3 - 5	Above 5
1) UM	54.50	38.50	7.00
2) UKM	57.83	26.51	15.66
3) UPM	68.33	24.20	7.47
4) UIA	79.69	19.53	0.78
5) UTM	65.38	29.49	5.13
6) USM	71.43	20.00	8.57
7) UUM	83.33	14.58	2.08
8) ITM	73.97	21.92	4.11
Courses	**1 - 2**	**3 - 5**	**Above 5**
NS	64.15	25.47	10.38
ENG	54.37	33.01	12.62
AGRI	77.59	18.97	3.45
MS	70.37	25.93	3.70
SS	74.29	21.10	4.61
HUMAN	57.32	37.20	5.49
TOTAL	68.59	25.34	6.07

About 11% of the students said that they received guidance from **all** of their lecturers on what books to buy, while 5% said none of their lecturers give any guidance on what books to buy. The highest percentage of students who reported not receiving any guidance from their lecturers on what books to buy came from USM; nearly 18% of USM students reported receiving no guidance. A KW analysis of responses to this question by courses and institutions revealed that there was evidence to suggest different views on the number of lecturers who give guidance to the students. Humanities and Agriculture students tended to have the least number of lecturers providing guidance on which books to buy. Natural Sciences and Medical Sciences students tend to have around average view of lecturers' guidance, while Social Sciences and Engineering students seemed to receive more guidance from their lecturers than on average, see figure 6.3.10 for KW result.

Fig 6.3.10 **Amount of guidance received from lecturers on what books to buy, by course**

Course	N	Mean Score	Group			
SS	1443	1184.95	A			
ENG	207	1241.79	A	B		
NS	274	1328.48		B		
MS	124	1357.36		B	C	
AGRI	101	1505.16			C	D
HUMAN	421	1549.78				D

KW $\chi^2 = 98.311$, df = 5, p> = 0.0001,
Overall Mean Score= 1285.5

Fig 6.3.11 **Amount of guidance received from lecturers on what books to buy, by institute**

Ins.	N	Mean Score	Group				
UUM	397	976.29	A				
UKM	252	1111.80		B			
ITM	210	1225.74		B	C		
UPM	593	1267.10			C		
UIA	331	1404.04				D	
UM	523	1418.36				D	
UTM	179	1554.08					E
USM	85	1675.99					E

KW$\chi^2 = 168.25$, df = 7, p> = 0.0001,
Overall Mean Score= 1285.5

Amongst institutes, it seems that USM students, as stated before, and UTM students which belong to the group that received the least guidance from lecturers followed by UM and UIA students. UPM students were just above the mean along with ITM. UUM students seem to have higher numbers of lecturers providing guidance, see figure 6.3.11 for KW result by institutes.

When asked how they perceived the quality of the guidance on what books to buy, nearly 35% of respondents said it was quite reasonable while 7% and 1% respectively thought the guidance was poor or very poor. Views differed both amongst courses and institutes, see figures 6.3.12 and 6.3.13. UKM students seem to have a high opinion of the guidance they receive from their lecturers as did students from UUM, UPM and ITM. UIA and UM think less highly of guidance from their lecturers. UTM and USM had worse views of their lecturers' guidance on what books to buy, although the views were not statistically different than those of UIA and USM students.

Fig 6.3.12 **Opinion on guidance from lecturers on what books to buy, by course**

Courses	N	Mean Score	Group		
SS	1435	1246.64	A		
AGRI	101	1272.81	A	B	
ENG	205	1279.23	A	B	
NS	271	1281.84	A	B	C
HUMAN	419	1328.52		B	C
MS	122	1446.17			C

$KW\chi^2 = 12.721$, df = 5, p> = 0.0261,
Overall Mean Score= 1277

Fig 6.3.13 **Opinion on guidance from lecturers on what books to buy, by institute**

Institute	N	Mean Score	Group		
UKM	252	1174.1	A		
UUM	394	1205.85	A		
UPM	592	1240.71	A		
ITM	208	1279.62	A	B	
UIA	328	1291.50		B	C
UM	520	1325.64		B	C
UTM	178	1443.14			C
USM	81	1465.61			C

$KW\chi^2 = 31.55$, df = 7, p> = 0.0001,
Overall Mean Score= 1277

On the basis of the six questions relating to guidance from lecturers, generally it can be concluded that students were satisfied with both the quantity and quality of guidance materials from lecturers. However a predictable pattern does seem to have emerged at the inter sample level where we note that Medical students had their needs well catered for, while Engineering students felt that they were not receiving adequate guidance. With reference to the institutes students were attending, USM students assiduously rank their lecturers lower than other students while UUM students appraised them more highly. It is assumed that good guidance could encourage students to buy more. It is interesting to highlight a comment made by some respondents regarding guidance on reading lists and buying books. There were cases where lecturers provided list of titles which were not available either in the bookshop or even in the library, and felt that such lists were of little value.

6.4 Use of the library

Library use reflects the study habits of students. It was expected that questions relating to library use and facilities would help to obtain information on bookstock, number of hours spent in the library by students and library facilities. These factors are believed to be strongly related to scholarly book buying behaviour. Table 6.4.1 indicates how students of different universities and course spent their time in the university library and in the class. Students generally spent 11 - 20 hours in formal classes, which is relatively high, with the exception of Medical Sciences students, 60% of them spent more than 20 hours in class per week.

Table 6.4.1 **Hours spent in library and class by institute and course, in percentages**

University	**None**	**1 -5**	**6 - 10**	**11- 20**	**> 20**
UM	13.83 -	❶43.94 ❷4.57	24.81 9.33	10.61 48.57	6.82 37.52
UKM	15.08 -	37.70 7.20	27.38 14.0	16.27 43.60	3.57 35.2
UPM	12.37 -	51.69 5.46	21.19 6.14	12.03 55.46	2.71 32.94
UIA	13.29 -	46.53 4.56	30.21 3.65	8.46 79.03	1.51 12.77
UTM	7.73 -	39.23 3.93	25.41 3.37	23.20 35.95	4.42 56.74
USM	4.60 -	47.13 5.0	21.84 7.50	6.90 47.50	19.54 40.0
UUM	7.04 -	52.51 7.16	29.65 6.65	9.05 78.78	1.76 7.42
ITM	9.52 -	53.81 6.73	20.48 10.58	13.33 38.46	2.86 44.23
Courses					
NS	6.88 -	40.94 4.12	29.35 7.87	16.67 52.44	6.16 35.58
ENG	19.02 -	42.44 8.37	21.46 7.39	11.22 47.3	5.85 36.95
AGRI	13.86 -	45.54 7.07	25.74 6.06	11.88 44.44	2.97 42.42
MS	29.27 -	46.34 8.06	14.63 17.74	6.50 13.71	3.25 60.48
SS	9.49 -	49.31 4.97	25.28 6.93	12.26 61.1	3.67 27.01
HUMAN	11.45 -	47.90 6.12	27.34 6.82	9.81 63.3	3.50 23.76
TOTAL	11.41 -	47.34 5.58	25.26 7.54	11.95 56.5	4.04 30.39

Key: ❶ In library ❷ In class

Nearly 73% of students spent 10 or less hours in the library during a week while around 11% did not spend any time at all in a week. Significant differences were noted in the amount of time spent in library among students from different courses and institutions. Medical students spent the least hours in the library compared to students from other courses, see figure 5.4.1 for KW test. This might due to nature of Medical courses where students tend to spend more time in the laboratory. Students from USM spent more hours in the library (nearly 20% spent more than 20 hours) while only in between 1.5% to 1.7% of students from UUM and UIA spent more than 20 hours (see figures 6.4.2 to 6.4.4 for KW tests).

Fig 6.4.1 **Amount of hours spent in library, by course**

Courses	N	M/ Score	Group		
MS	123	964.59	A		
ENG	205	1214.92		B	
AGRI	101	1256.66		B	
HUMAN	428	1269.23		B	
SS	1444	1302.09		B	
NS	276	1462.61			C

N = 2577, KW χ^2 =47.318, DF =5,Prob >= 0.0001
Overall Mean Score = 1289

Fig 6.4.2 **Amount of hours spent in class, by course**

Courses	N	M/ Score	Group		
HUMAN	425	1212.48	A		
SS	1429	1248.74	A	B	
NS	267	1312.83	A	B	
ENG	203	1321.04	A	B	C
AGRI	99	1430.39		B	C
MS	124	1490.43			C

N = 2547, KW χ^2 =23.948, DF =5,Prob >= 0.0002
Overall Mean Score = 1274

Fig 6.4.3 **Amount of hours spent in library, by institute**

Institute	N	M/ Score	Group		
UPM	590	1223.28	A		
UIA	331	1230.68	A	B	
ITM	210	1258.94	A	B	
UUM	398	1285.10	A	B	
UM	528	1292.54	A	B	
UKM	252	1334.61		B	
UTM	181	1483.69			C
USM	87	1488.33			C

N = 2577, KW χ^2 = 30.40, DF =7, Prob >= 0.0001
Overall Mean Score = 1289

Fig 6.4.4 **Amount of hours spent in class, by institute**

Institute	N	M/ Score	Group			
UUM	391	1011.31	A			
UIA	329	1097.31	A			
UKM	250	1237.37		B		
USM	80	1296.21		B	C	
UPM	586	1342.15			C	
UM	525	1349.52			C	
ITM	208	1370.32			C	
UTM	178	1659.42				D

N = 2577, KW χ^2 =148.03, DF =7, Prob >= 0.0001
Overall Mean Score = 1274

Although it is generally assumed that female students are likely to spend more hours in the library, a Wilcoxon Sum of Ranks test showed that there was no statistical difference between male and female in term of amount of time spending in the library ($Pr > \chi^2 = 0.2038$), see table 6.4.2 for amount of hours spent in library by gender.

Table 6.4.2 **Amount of hours spent in library, by gender, in percentages.**

University	None	1 -5	6 - 10	11- 20	> 20
Male	12.84	46.43	25.53	11.17	4.03
Female	9.78	48.76	24.96	12.85	3.65

Books that are highly demanded by students or lecturers are kept in the Reserve Book Room (RBR). Just under 95% of students used the RBR as often as 10-20 times a week. It appears that RBR is one of the most important sources for students. Students from different universities and courses spent different amounts of time in the RBR, in particular UTM and Engineering students spent the least time. Although some students spent a lot of time in the library they did not necessarily use the RBR more often. Medical Sciences students for example, spent least hours in library but belonged to the students who used the RBR more frequently. However, USM students spent the most hours in library and frequently used the RBR (see figures 6.4.3 and 6.4.5 for KW results). Table 6.4.3 shows the amount of time spent in the RBR by gender, female students tended to use the RBR room more compared to male students ($\chi^2 = 18.537$, DF = 1, $Pr > \chi^2 = 0.0001$) although the number of books borrowed were not significantly different between the gender (KW $\chi^2 = 0.31290$, DF = 1, $Pr > \chi^2 = 0.5759$).

Table 6.4.3 **Amount of time spent in RBR, by gender, in percentages**

	None	1 - 10	11 - 20	21 - 30	> 30
Male	48.82	41.95	5.26	1.98	1.98
Female	41.55	44.30	8.66	3.66	1.83
Total	45.2	43.0	7.0	2.8	2.0

Fig 6.4.5 **Amount of time RBR used per semester, by institute**

Institute	N	M/ Score	Group		
UTM	175	889.25	A		
UKM	251	1065.20	B		
UIA	331	1103.90	B		
ITM	206	1254.32		C	
UUM	395	1282.10		C	
UPM	591	1425.75			D
UM	530	1453.97			D
USM	87	1460.30			D

N = 2566, KW χ^2 =176.31, DF =7,Prob >= 0.0001
Overall Mean Score = 1283.5

Fig 6.4.6 **Amount of time RBR used per semester, by course**

Institute	N	M/ Score	Group	
ENG	203	944.50	A	
SS	1434	1294.74	B	
NS	275	1295.76	B	C
MS	124	1303.52	B	C
HUMAN	428	1354.26	B	C
AGRI	102	1445.86		C

N = 2566, KW χ^2 =62.589, DF =5,Prob >= 0.0001
Overall Mean Score = 1283.5

Almost half of the students borrow up to 5 books per week and just under 15% of students borrowed between 6 to 10 books. It is interesting to note that over 10% of students borowed more than 15 books. The demand for books was higher for Agriculture and Humanities subjects. Fourteen per cent of Natural Sciences students borrowed more than 15 books a week 12% from Engineering, 10% from Social Science and 16% from Humanities. Medical Science and Engineering students tended to spend the least hours in library and also borrowed the least number of books from library (see figure 6.4.7 for KW test; the result of KW test by institute was: KW χ^2 = 20.408, DF = 7, Prob > χ^2 = 0.048).

Fig 6.4.7 **Amount of books borrowed per week, by course**

Institute	N	M/ Score	Group	
MS	124	787.30	A	
ENG	206	1253.96	B	
NS	275	1261.69	B	
SS	1442	1281.39	B	
AGRI	102	1294.36	B	
HUMAN	424	1482.93		C

N = 2623, KW χ^2 =96.885, DF =5,Prob >= 0.0001
Overall Mean Score = 1262.5

A comparison of book borrowing by universities shows that around 40 - 60% (except UM - 29%) borrowed 1-5 books. About 15% borrowed 6 -10 books and 7% of students borrowed 11-

15 books. Figure 6.4.8 shows the number of books borrowed by the students, expressed in percentages, by subject classification and institutes.

Figure 6.4.8: **Number of books borrowed per week by students in all courses**

Course	None	1 - 5 books	6 - 10	11 - 15	More than 15
NS	24.4	44.7	12.7	4.4	13.8
ENG	23.3	47.1	12.1	5.8	11.7
AGRI	16.7	53.9	12.8	10.8	5.9
MS	54.8	35.5	1.6	2.4	5.7
SS	20.7	48.1	14.7	6.4	10.1
HUMAN	17.0	35.4	21.0	10.6	16.0
Institute					
UM	30.5	29.1	17.7	8.4	14.3
UKM	31.4	44.1	11.5	6.8	6.4
UPM	20.3	50.0	14.2	5.4	10.1
UIA	19.6	47.9	10.2	8.1	14.2
UTM	21.1	45.6	17.8	5.0	10.6
USM	8.1	61.6	8.1	2.3	19.8
UUM	15.6	51.4	17.1	8.3	7.6
ITM	19.1	50.2	13.9	5.3	11.5
TOTAL	22.2	45.2	14.6	6.80	11.2

Around 88.5% students found some difficulties in obtaining books from the library for their courses (all those who did not tick seldom or never). Amongst these, Humanities and Agriculture students experienced more difficulty as did students from UTM, USM and UPM see figures 6.4.9 and 6.4.10 for KW results.

Fig 6.4.9 **Difficulty in getting library books, books, by institute**

Institute	N	M/ Score	Group		
UTM	181	1200.56	A		
USM	86	1225.20	A		
UPM	591	1228.18	A		
UUM	397	1264.53	A	B	
UIA	329	1282.94	A	B	
UM	529	1330.14		B	C
ITM	208	1341.89			C
UKM	252	1412.97			C

N = 2537, KW χ^2 = 19.907, DF = 7, Prob >= 0.0058
Overall Mean Score = 1283.5

Fig 6.4.10 **Difficulty in getting library books by course**

Institute	N	M/ Score	Group		
HUMAN	427	1129.25	A		
AGRI	100	1186.11	A		
ENG	206	1275.67		B	
SS	1442	1293.49		B	
NS	276	1355.48		B	
MS	122	1709.33			C

N = 2573, KW χ^2 = 72.577, DF = 5, Prob >= 0.0001
Overall Mean Score = 1287

Around 75 - 80% of students (except Medical - 50%), felt that there were not enough copies of books they need for their courses. There were some differences in response from students in different courses within the universities and responses of students from different universities.[423] Medical Science students had different views from other courses and needed books to consult more often. This mean that they were obliged to use the RBR (or have their own copy) to get some of the necessary book. As most Medical books are expensive and libraries have only limited budgets to buy multiple copies, the books bought were placed in the RBR room. Medical students were not really happy about using the RBR room as it has many limitations, e.g. books are only allowed to be used for a few hours and they cannot be taken out of the library. Table 6.4.4 shows the response rates of students, who found it difficult to get books because of lack of copies in the library, Medical students were more positive than students from other courses. This might be due to the fact that Medical students use the RBR room the most but spent the least hours in the library on the whole - as they might prefer to have their own copy.

Table 6.4.4 **Difficulties getting books because lack of copies of books, by percentages**

	Yes	**No**
UM	74.36	25.64
UKM	69.14	30.86
UPM	77.40	22.60
UIA	79.32	20.68
UTM	82.02	17.98
USM	82.35	17.65
UUM	79.59	20.41
ITM	74.37	25.63
Course		
NS	74.72	25.28
ENG	80.69	19.31
AGRI	82.18	17.82
MS	54.95	45.05
SS	76.88	23.12
HUMAN	80.62	19.38
TOTAL	76.82	23.18

423 Result for institute: χ^2 = 17.532, DF = 7, Prob > χ^2 = 0.014, Cramer = 0.084, and for course: χ^2 = 37.199, DF = 5, Pr > χ^2 = 0.000, Cramer = 0.122

Although students complained of shortages of books in their subjects, however they seldom suggested to lecturers to request the library to buy more books. When asking students whether they had suggested to lecturers that a book ought to be in the library, nearly 80% had never made such a request. This may indicate the pattern of teaching in the universities, where students heavily rely on their lecturers' notes. However, about 39% of ITM students had requested to their lecturers to ask the library to buy a particular book. The detail results are shown in table 6.4.5.

Table 6.4.5 **Suggest to lecturer on books to buy in library, by institute and course, as expressed in percentages (N = 2566)**

	Yes	No	% of respondents
UM	18.29	81.71	20.46
UKM	19.84	80.16	9.82
UPM	21.05	78.95	22.95
UIA	20.54	79.46	12.90
UTM	11.11	88.89	7.01
USM	28.74	71.26	3.39
UUM	24.43	75.57	15.47
ITM	39.02	60.98	4.87
NS	22.18	77.82	10.72
ENG	22.82	77.18	8.03
AGRI	18.63	81.37	3.93
MS	13.01	86.99	4.79
SS	23.62	76.38	55.92
HUMAN	18.35	81.65	16.56
TOTAL	21.82	78.18	100.00

About 42% of students felt that library stock was average. Again responses were relatively consistent between universities, where 34 - 46% viewed the quality of stock as of average standard. The highest proportion of respondents who considered the library stock in their subjects as "poor" or "very poor" came from Engineering and Agriculture, 36 and 35% respectively.

When asking students to offer suggestions to improve library services, the highest (approximately 45%) wanted more books on the shelves, with other suggestions including frequent updating of stock. These might reflect the acute shortage in the supply of recent publications, and indicative of the budgetary problems experienced by university libraries and show that most courses are very stereotyped. In addition, since the syllabus is not updated every year, and lecturers themselves do not update notes, they cannot inform libraries of any changes in their requirements.

6.5 Use of Bookshops

In assessing book buying behaviour, it was found that students use the university and other bookshops equally to get their textbooks. For most universities with the exception of UTM and ITM, students preferred to use their university bookshop. Students from ITM may prefer to use other bookshops e.g. UM bookshop, Marwilis and Berita Book Centre are more accessible to ITM students at Shah Alam campus while for ITM students at PJ site, UM bookshop is more accessible rather than ITM bookshop at main campus in Shah Alam. A similar situation arises in the case of UTM bookshop which is located outside the campus, students may find it easier to obtain their books from the town centre (Johor Bharu or from Singapore which takes between half to one hour to reach from their campus). Well over 60% of students from UUM and USM use their university bookshop, which is an indication that these campus bookshops are major outlets for students to buy books. The location of UUM campus which is isolated from the capital of Kedah makes it inconvenient for students to get access to bookshops off-campus. In addition, the university itself which is situated in northern part of Peninsular Malaysia has far fewer major bookshops compared to institutions in the Klang Valley area and it is probably the reason why students heavily rely on the campus bookshop. The highest percentage of students using their university bookshops were from UM (67%). This is due to the fact that UM bookshop is well known as the best university bookshop with a large stock of scholarly books. Its strategic location makes it convenient for both students and professionals to get books they need. In addition, the UM bookshop is given priority over other bookshops by suppliers, it is also the main stockist of publications from international organisations such as

UNESCO and OECD, see table 6.5.1 for detailed breakdown[424] of the bookshops used by respondents according to institutes and courses.

Table 6.5.1 **Bookshops respondents normally bought textbooks, by institute and course, as expressed in percentages (N = 2562)**

Institute	Uni. Bookshop	Others	Both
UM	67.36	28.27	4.36
UKM	52.63	44.13	3.24
UPM	39.97	55.95	4.08
UIA	41.69	56.19	2.11
UTM	12.92	82.58	4.49
USM	60.00	35.29	4.71
UUM	63.82	32.91	3.27
ITM	15.87	82.69	1.44
Course			
NS	45.56	51.85	2.59
ENG	33.06	64.04	2.96
AGRI	46.00	48.00	6.00
MS	58.54	35.77	5.69
SS	48.06	48.82	3.12
HUMAN	51.42	44.10	4.48
TOTAL	47.58	48.91	3.51

6.5.1 Opinion on book stock in bookshops

As students bought books from diferent sources, the analysis of book stock from the students' perspective will be based on which bookshops they used. Only a small percentage of students responded that the book stock in their subjects, either at their university bookshop or other shops, was very good. Most (45%) viewed the book stock on the whole as reasonable, and 18% of respondents thought the stock was either poor or very poor. Amongst courses, Medical Science has the highest percentage of students who reported the stock of books for their subjects (from both university and non-university bookshops) as very good (see table 6.5.2 and figure 6.5.2). In general, whether it is a university bookshop or any other bookshop, the patterns of supply are the same, showing that there are problems with particular subjects.

[424] χ^2 test showed that the differences among institutes were statistically significant. (Cramer: 0.260, Pr > χ^2 = 0.000)

Medical students for example have positive views on the book stock for both types of bookshops, while Agriculture students thought postively towards university bookshops, but negatively towards non-university bookshops. Their needs are better catered by university bookshops since those off-campus are not likely to be attracted to supply books for this subject.

Fig 6.5.1 **Opinion on books stock on subject, by institute (uni bookshop)**

Institute	N	M/ Score	Group
UM	329	500.21	A
ITM	33	501.29	A B
UKM	123	515.04	A B
UIA	112	568.42	B
UPM	224	595.93	B C
UTM	22	627.18	B C D
UUM	246	637.91	C D
USM	51	745.78	C D

N = 1140 , KW χ^2 = 53.080, DF =7,Prob >= 0.0001
Overall Mean Score = 570.5

Fig 6.5.2 **Opinion on books stock on subject, by course (uni bookshop)**

Institute	N	M/ Score	Group
MS	70	510.01	A
HUMAN	193	512.60	A
AGRI	42	562.38	A B
SS	653	579.07	A B
ENG	67	622.11	B
NS	115	628.76	B

N = 1140, KW χ^2 =15.963, DF =5,Prob >= 0.0070
Overall Mean Score =570.5

Fig 6.5.3 **Opinion on books stock on subject, by institute (non-uni shop)**

Institute	N	M/ Score	Group
UKM	109	430.55	A
UIA	183	542.38	B
ITM	161	578.99	B C
UPM	314	595.98	B C
UTM	138	613.24	C D
UM	141	629.19	C D
UUM	100	642.99	D
USM	29	793.21	E

N = 1175 , KW χ^2 = 48.600, DF =7,Prob >= 0.0001
Overall Mean Score = 583.0

Fig 6.5.4 **Opinion on books stock on subject, by course (non-uni shop)**

Institute	N	M/ Score	Group
MS	42	409.01	A
SS	647	575.03	B
ENG	126	582.46	B
NS	126	603.83	B
HUMAN	183	615.48	B
AGRI	46	732.83	C

N = 1170, KW χ^2 =25.968, DF =5,Prob >= 0.0001
Overall Mean Score = 585.5

Fig 6.5.5 **Opinion on books stock on subject, by course (overall)**

Institute	N	M/ Score	Group
MS	118	974.72	A
HUMAN	396	1174.04	B
SS	1398	1207.58	B C
ENG	200	1219.73	B C
NS	251	1268.26	C
AGR	94	1361.65	D

N = 2457 , KW χ^2 = 23.518, DF =5,Prob >= 0.0003
Overall Mean Score = 1179.5

Table 6.5.2 **Quality of book stock in the bookshop, by percentages**

	V/Good	F/Good	Average	Poor	V/Poor	Total
UM	①7.29 ②7.09	37.99 31.21	36.47 41.84	11.25 14.18	6.99 5.67	28.86 12.05
UKM	8.13 12.50	30.89 54.81	46.34 28.85	6.50 2.88	8.13 0.96	10.79 8.89
UPM	1.34 6.37	28.12 37.58	49.11 40.13	8.93 7.32	12.50 8.60	19.65 26.84
UIA	0.89 4.92	31.25 45.36	50.0 42.62	9.82 2.19	8.04 4.92	9.82 15.64
UTM	0.0 2.90	22.73 35.51	54.55 50.72	13.64 6.52	9.09 4.35	1.93 11.79
USM	0.0 0.0	9.80 20.69	50.98 41.38	21.57 17.24	17.65 20.69	4.47 2.48
UUM	2.03 7.0	21.95 32.0	47.97 37.0	16.67 12.0	11.38 12.0	21.58 8.55
ITM	6.06 6.21	36.36 38.51	45.45 44.10	0.0 3.11	12.12 8.07	2.89 13.76
NS	1.74 5.56	22.61 37.30	50.43 41.27	13.04 6.35	12.17 9.52	10.09 10.77
ENG	2.99 7.94	31.34 36.51	31.34 41.27	14.93 8.73	19.40 5.56	5.88 10.77
AGRI	2.38 2.17	26.19 21.74	57.14 50.0	11.90 13.04	2.38 13.04	3.68 3.93
MS	7.14 19.05	37.14 50.0	34.29 26.19	18.57 2.38	2.86 2.38	6.14 3.59
SS	2.76 5.72	29.10 40.34	47.17 42.04	10.57 5.10	10.41 6.80	57.28 55.30
HUMAN	8.81 5.46	32.64 36.07	40.93 39.89	9.84 12.02	7.77 6.56	16.93 15.64
TOTAL	3.95 6.24 ③5.11	29.56 38.55 33.82	45.09 41.28 43.00	11.49 6.92 9.39	9.91 7.01 8.68	100.0 100.0 100.0

Key: ① University bookshop ② Non-university bookshop ③ Overall

Some 34% of students had ordered books which were not in stock. Medical students tend to order more books which were not in stock (59%), followed by Engineering students (with nearly 40%). The lowest percentage of students who ordered books not in stock were from Humanities (about 26%). Using a χ^2 test it was shown that the number of students reporting that they had ordered books not in stock differed statistically. However this relationship as reported by the Cramer value was weak.[425] These tests indicated that UUM students experienced the most problems getting books because books were not in stock, while USM students were more likely to obtain their books.

However, an analysis of variance (ANOVA) for those indicating that they had ordered a book not in stock showed that there was no statistical difference in the number of books ordered which were not in stock.[426] Table 6.5.3 shows the percentage of those who had ordered books not in stock by courses, while table 6.5.4 shows the mean number of books not in stock ordered by course and institute. Those who had problems obtaining books from bookshops and therefore were forced to order were more likely to report dissatisfaction with bookshop stock. Put simply, customers who have problems getting what they want when they want are disappointed.here.[427]

Table 6.5.3 **Ever ordered books not in stock (Q30)**
Base: Those who ordered books only (Respondents = 838)

Course	Yes	No
NS	31.27	68.73
ENG	38.92	61.08
AGRI	29.59	70.41
MS	46.28	53.72
SS	36.13	63.87
HUMAN	25.75	74.25
TOTAL	34.40	65.60

[425] χ^2 test showed that the association between this variable and institute and course were weak: DF = 7, χ^2 = 49.708, Pr > χ^2 = 0.0000, Cramer = 0.142, LCI = 0.101, UCI = 0.182; By course: DF = 5, χ^2 = 26.629, Prob > χ^2 = 0.0000, Cramer = 0.104, LCI = 0.065, UCI = 0.143.
[426] By institute; DF = 7, F Value = 1.02, Pr > F = 0.4134 and by course: DF = 5, F Value = 0.39, Pr > F = 0.8543).
[427] Wilcoxon test: χ^2 = 14.575, DF = 1, Prob > χ^2 = 0.0001.

Table 6.5.4 **Mean number of ordered books not in stock by institute and course**

Institute	N	Mean
USM	20	4.70
UKM	83	4.69
ITM	60	4.65
UIA	79	4.23
UPM	175	4.0
UUM	177	3.29
UM	133	2.70
UTM	46	2.65

Course	N	Mean
MS	51	4.78
HUMAN	95	3.94
ENG	76	3.79
SS	455	3.63
NS	68	3.35
AGRI	28	2.57

Out of 1755 students, only 838 students (about 48%) ever ordered books not in stock: nearly 62% of these ordered on average 1 - 2 books, while under 3% had ordered more than 10 books not in stock in a session (see table 6.5.5). The mean number of books ordered not in stock was 3.9 (4 books) for those who had reported having ordered a book not in stock[428] (while overall mean for all sample was 1.87 $\approx$ 2 books). Almost half of the students said that the delivery of books ordered was average and when asking them to specify the time, around 55% of students said that it is around one week or less, see table 6.5.6.

Table 6.5.5 **Number of books ordered, in percentages**

	1 - 2	3 - 5	5 - 10	> than 10
TOTAL	61.5	31.0	4.8	2.7

Table 6.5.6 **View on delivery of books, in percentages**

	V/Quick	F/Quick	Average	F/Slow	V/Slow
TOTAL	1.9	11.6	43.5	33.84	6.54

Most students (78%) prefer to buy books early in the semester rather than any other time in the year. Only 4% of students bought books before their examinations. Women were more likely to buy in early semester than men ($\chi^2 = 17.835$, DF = 2, Prob > $\chi^2 = 0.000$). Half of the students felt that the customer service provided by bookshop staff was average. Few respondents (2%) felt that bookshop staff were **very** helpful, but worryingly 24% said that staff were unhelpful.

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428 Differences by course and institute were not significantly different.

UM had the highest proportion of students who were satisfied with their university bookshop staff services, followed by UIA, see figure 6.5.6 for KW test. Table 6.5.7 presents the opinion regarding bookshop staff by institute while table 6.5.8 shows the overall opinion on satisfaction towards bookshop in general by institute and course in percentages.

Fig 6.5.6 **Opinion towards staff helpfulness**

Institute	N	M/ Score	Group		
UM	520	1058.84	A		
UIA	325	1084.87	A		
UUM	379	1199.08		B	
UKM	237	1281.10		B	C
ITM	226	1284.77		B	C
UPM	166	1299.89			C
UTM	564	1385.30			C
USM	143	1389.89			C

N = 2416, KW $\chi^2 82$ =74.337, DF =7,Prob >= 0.0001
Overall Mean Score = 1208.48

Table 6.5.7 **Opinion of staff bookshop services , by institute, in percentages**

Institute	V/Helpful	F/Helpful	Average	F/Unhelpful	V/Unhelpful	% of respondents
UM	4.62	26.92	53.65	13.65	1.15	21.52
UKM	1.69	23.63	43.46	24.05	7.17	9.81
UPM	1.42	19.86	49.11	23.94	5.67	23.34
UIA	0.92	32.00	49.23	16.31	1.54	13.45
UTM	0.00	13.29	55.94	25.17	5.59	5.92
USM	1.22	12.20	54.88	25.61	6.10	3.39
UUM	1.06	24.54	51.45	19.53	3.43	15.69
ITM	2.41	19.28	49.40	24.10	4.82	6.87
TOTAL	1.99	23.43	50.54	20.16	**3.89**	100.00

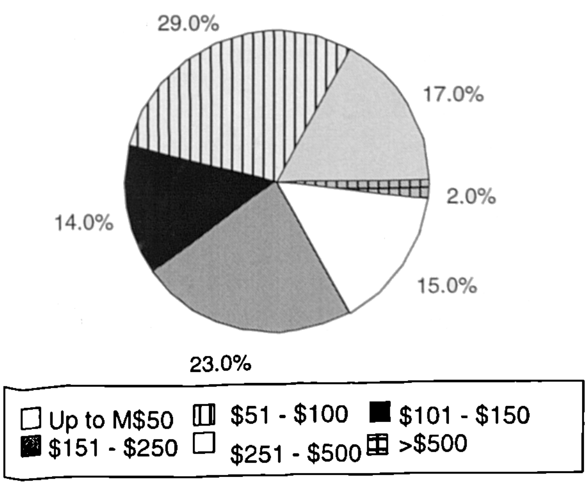
Table 6.5.8 **Satisfaction towards bookshop in general, in percentages**

Institute	V/Good	F/Good	Average	Poor	V/Poor	% of respondents
UM	1.02	9.50	2.04	8.36	0.00	20.92
UKM	0.16	2.90	2.57	3.83	0.33	9.79
UPM	0.12	5.55	6.48	10.03	1.18	23.37
UIA	0.12	2.90	3.83	6.00	0.53	13.38
UTM	0.00	0.90	2.20	3.10	0.49	6.69
USM	0.08	0.77	1.18	1.31	0.04	3.38
UUM	0.20	3.59	4.28	6.44	0.82	15.33
ITM	0.04	1.43	2.32	3.02	0.33	7.14
Course						
NS	0.04	2.85	2.45	5.02	0.45	10.8
ENG	0.00	1.67	2.69	2.94	0.53	7.8
AGRI	0.00	1.02	1.06	1.71	0.20	4.0
MS	0.04	1.67	1.18	2.04	0.04	5.0
SS	0.65	13.58	14.97	24.14	2.20	55.5
HUMAN	1.02	6.73	2.57	6.24	0.29	16.8
TOTAL	1.75	27.53	24.92	42.09	**3.71**	100.0

6.6 Expenditure on Books

The highest proportion of students (nearly 30%) spent between M$51 to M$100 per academic year on books while approximately 2% of students spent more than M$500 on books, see figure 6.6.1.

Figure 6.6.1 **Amount of money spent on books**



Among courses, Medical students spent the highest amount of money; this may be due to the high price of books in the Medical field. Nearly 13% of their students spent above $500 and only 3.2% spent $50 or below. The highest proportion of students spent, except for Medical courses, were between $51 - $100 per academic year, see table 6.6.1.

Table 6.6.1 **Money spent on books by institutes and courses, as percentages of students**

	Up to M$50	**M$51 - M$100**	**$101 - M$150**	**M$151 - M$250**	**M$251 - M$500**	**Above M$500**
UM	15.84	24.36	10.10	24.55	20.79	4.36
UKM	6.96	20.87	16.96	29.13	24.35	1.74
UPM	23.78	36.04	13.15	17.30	9.37	0.36
UIA	14.95	27.57	13.29	25.25	17.94	1.00
UTM	25.49	33.33	11.76	21.57	7.84	0.00
USM	36.49	20.27	12.16	13.51	10.81	6.76
UUM	12.16	28.65	22.97	27.03	9.19	0.00
ITM	13.81	25.97	13.81	24.86	18.23	3.31
Course						
NS	18.03	35.25	16.39	21.31	8.61	0.41
ENG	13.23	33.86	16.40	24.87	10.58	1.06
AGRI	37.50	29.17	10.42	14.58	8.33	0.00
MS	3.23	16.94	4.84	24.19	37.90	12.90
SS	15.30	27.20	15.38	24.70	16.14	1.29
HUMAN	24.75	29.04	12.63	20.71	11.36	1.52
TOTAL	17.26	28.41	14.35	23.26	14.94	1.77

The differences in expenditure amongst students from different courses and institutions were statistically different. Medical Science students spent on average around $328 per academic year on book while figures for those from other courses varied from $115 for Agriculture to to $179 for Social Science. Amongst institutes, UKM, UM and ITM students were the highest spenders with an average expenditure in excess of $200. The lowest book spenders came from UTM, spending barely more than $131 per academic year, followed closely by UPM and UKM. The mean for all students was $173.97, see figures 6.6.2 and 6.6.3

Figure 6.6.2 **Does mean expenditure differ amongst students of different institutes?**

Institute	Mean	N	Duncan Grouping		
UKM	210.81	230	A		
UM	210.12	505	A		
ITM	207.28	181	A		
USM	180.59	74	A	B	
UIA	173.08	301	A	B	
UUM	151.18	370		B	C
UPM	141.54	555		B	C
UTM	131.18	153			C

N = 2369 DF = 7 Mean = 173.97 F Value = 8.95 Pr > F = 0.0001

Fig 6.6.3 **Does mean expenditure differ amongst students of different courses?**

Institute	Mean	N	Duncan Grouping		
Medical Sc	327.68	124	A		
Social Science	178.71	1320		B	
Engineering	157.42	189		B	
Humanities	151.80	396		B	C
Natural Science	142.09	244		B	C
Agricultural Sc	115.37	96			C

N = 2369; DF = 5; Mean = 173.97; F Value = 21.66; Pr > F = 0.0001

Besides having the highest mean expenditure, Medical Science students also paid the highest price for a textbook, around $74 while Agriculture students paid the lowest, i.e. around M$31, see figure 6.6.4. Books for Medicine are always considered expensive and this evidenced by the fact that 79% of Medical students viewed the price of their books as high (see table 6.6.2). A high proportion of students (59.7%) viewed the price of books as expensive (very expensive and expensive) and only 1.2% considered them as cheap (cheap and very cheap) while 39.2% considered them as average. The responses are similar to those recorded by a small scale survey[429] undertaken to ascertain UPM students' views on the price of books where 34% of the respondents regarded the price as average while 60% regarded them as expensive while none of the respondents viewing the price as cheap. In another small scale survey undertaken by the researcher[430], students reported that the main reason they photocopied books was because they

[429] A small scale survey undertaken on UPM students (52 respondents) by Jamaiyah Zakaria, (unpublished M. Phil dissertation, University of Stirling), p. 56.
[430] A small scale survey undertaken on 50 ITM students, see Firdaus Ahmad Azzam (unpublished M. Phil dissertation, University of Stirling), pp. 66 - 68.

regarded books as expensive. 26% of respondents viewed the price of a book around M$20 to M$ 29 as expensive, 24% for a book more than M$30, 10% for a book between M$40 - M$ 49, 10% for a book between M$50 - M$ 59 and 2% for a book M$ 60 and above. The remaining (26%) did not care how much the book costs, as the cost of photocopying was half of the price of the books, they felt justified in resorting to illegal means.

These variables (how students perceived the price of their books) were then recategorised into two variables: expensive (for those who viewed as very expensive and expensive) and average cheap (those who viewed the price as average, cheap and very cheap) and Duncan test performed on the amount of money spent on books, those who viewed the price as expensive were the ones who spent a higher amount of money on books, see figure 6.6.5. This result might be due to the fact that Medical students were the ones who spent the highest amount on money on books and also viewed the price of the books as expensive. Lorenz Curve and Gini Coefficient values of students expenditure on books are shown in Appendix 16b.

Table 6.6.2 **Students' views on price of books**

	V/Expensive	Expensive	Average	Cheap	V/Cheap
NS	7.3	46.0	44.8	0.8	1.2
ENG	9.6	56.8	33.7	0.0	0.0
AGRI	7.2	44.3	47.4	1.0	0.0
MS	17.5	61.7	20.0	0.0	0.8
SS	6.9	52.8	38.9	0.6	0.8
HUMAN	7.5	49.1	42.6	0.2	0.5
Total	7.8	51.9	39.2	0.5	0.7

Figure 6.6.4 **Mean highest price paid by different courses**

Courses	N	Mean	Duncan		
MS	118	73.79	A		
SS	1180	44.44		B	
NS	217	41.10		B	
ENG	162	40.33		B	
HUMAN	368	31.00		B	C
AGRI	91	31.00			C

N = 2136, DF = 5, F Value = 48.5, Pr > F = 0.0001

Figure 6.6.5 **Expenditure by view on price**

View on Price	N	Mean	Duncan	
Expensive	1389	188.41	A	
Average/cheap	931	153.52		B

N = 2320, DF = 1, F Value = 18.60, Pr > F = 0.0001
NB: Due to small size of cells, the views on price are recategorising as expensive (Very expensive & expensive) and averge/cheap (average, cheap and very cheap)

6.7 Grants

It has long been recognised by marketers that income plays a vital role in influencing consumers' buying behaviour. Therefore perhaps students grants play a major role for the students' purchasing power and can be an important variable for distinguishing market segments for books. Nearly 17% of respondents did not receive any grant, most probably due to their parents' backgrounds. The highest percentages of students (58.8%) received around M$ 4000 - M$ 5000 of grant per session while only 0.4% received more than M$ 6000 per session. The grant distribution of the respondents is shown in figure 6.7.1.

Fig 6.7.1 **Distribution of Grant Size**

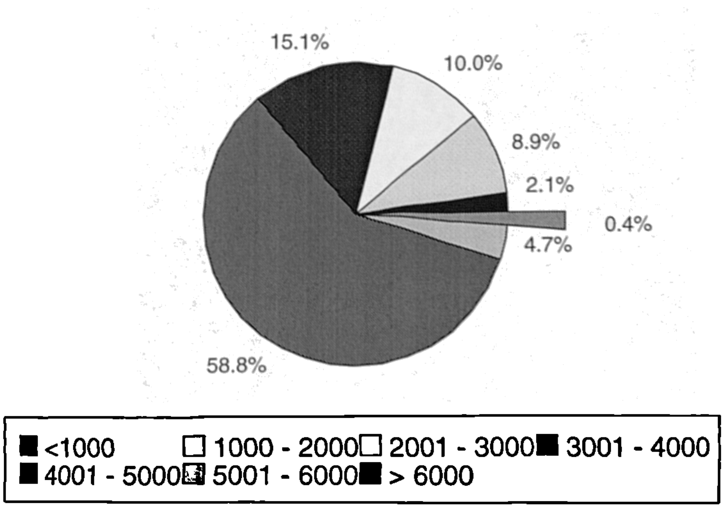


Table 6.7.1 **Mean grant received by respondents according to institution**

University	N	Mean	Standard Deviation
ITM	211	1357.78	1378.70282
UIA	332	3072.65	1516.71370
UKM	253	3468.64	1876.00375
UM	534	3858.42	1230.99811
UPM	595	3231.60	1593.73996
USM	88	2876.31	2445.17100
UTM	181	2887.51	1770.22978
UUM	399	2694.96	1742.49462

Table 6.7.2 **Mean grant received by respondents according to course**

University	N	Mean	Standard Deviation
MS	125	4565.32	1992.49
HUMAN	430	3515.11	1160.74
AGRI	102	3373.74	1506.54
NS	276	2975.22	1939.72
ENG	207	2961.50	1725.47
SS	1453	2861.62	1728.61

The mean grant for students in UM was the highest compared to other institutions at M$3900 per session, while respondents from ITM received the lowest meant grant, about M$1,400 per session (see figure 6.7.2 for Duncan's test and table 6.7.1 for the mean grant received by students according to institute they attend). This reflects the real scenario of amount of grant received by the students in Malaysia. Although ITM is one of the higher institutions in Malaysia, as mentioned earlier it is not regarded as a university and the grants received by its students are smaller in comparison to students from other institutions. However, for the other institutions, the amount of grant received depends more on the courses taken rather than the institution. The mean grant for all students (from the survey) was $3093 per academic session. This compared favourably with the grant received by all students in Malaysia. Among students from different courses, Medical students received the highest amount of grant compared to students from other courses, see table 6.7.2 and figure 6.7.3. This is due to the fact that expenses for Medical students (in terms of books and equipments) are much higher in comparison with other courses. The large standard deviations however indicate that even within the same subject categories, there are large variations to be found and these variations result from the different circumstances of each students, e.g. marital status, family status/background and also the fact that OECD classification includes many different subjects.

Fig 6.7.2 Mean grant received by institute

Institute	N	M/Score	Group
UM	534	3858.42	A
UKM	253	3468.64	B
UPM	595	3231.60	B C
UIA	332	3072.65	C D
UTM	181	2887.51	D
USM	88	2876.31	E
UUM	399	2694.96	E
ITM	211	1357.78	E

DF = 7, F Value = 59.38, Pr > F = 0.0001

Fig. 6.7.3 Mean grant received by course

Course	N	M/Score	Group
MS	125	4565.3	A
HUMAN	430	3515.1	B
AGRI	102	3373.7	B
NS	276	2975.2	C
ENG	207	2961.5	C
SS	1453	2861.6	C

DF = 5 F Value = 31.30 Pr > F = 0.0001

Surprisingly, a higher grant award did not result increased expenditure on books: the correlation between these two variables was low (0.0452, Pr > 0 = 0.0273). This may be due to the fact that students receive an allocation not just on the basis of their course but also on their family background/status or marital status. Students from a poor family receive higher awards than those from more privileged backgrounds. Consequently many students with low grants may be high spenders because they are single or from well-off families which top up their grant, and many low spenders may have larger grants but have to support a family on their award.

It was assumed earlier that the more hours spent in library would encourage the reading habits amongst the students, A gamma test supported this statement since there was some correlation between hours spent in the library and the amount of books borrowed from the library (0.253, Pr > F = 0.024). However, in trying to find out whether hours spent in the library would give any influence on buying behaviour, the correlation was very low (0.0452, Pr > F = 0.0273). This was due to the fact that Medical students spent the highest amount of money on books but spent less hours in the library. Therefore in the Multiple Correspondence Analysis (see section

6.8) Medical Science students were removed in some cases to isolate differences in other courses.

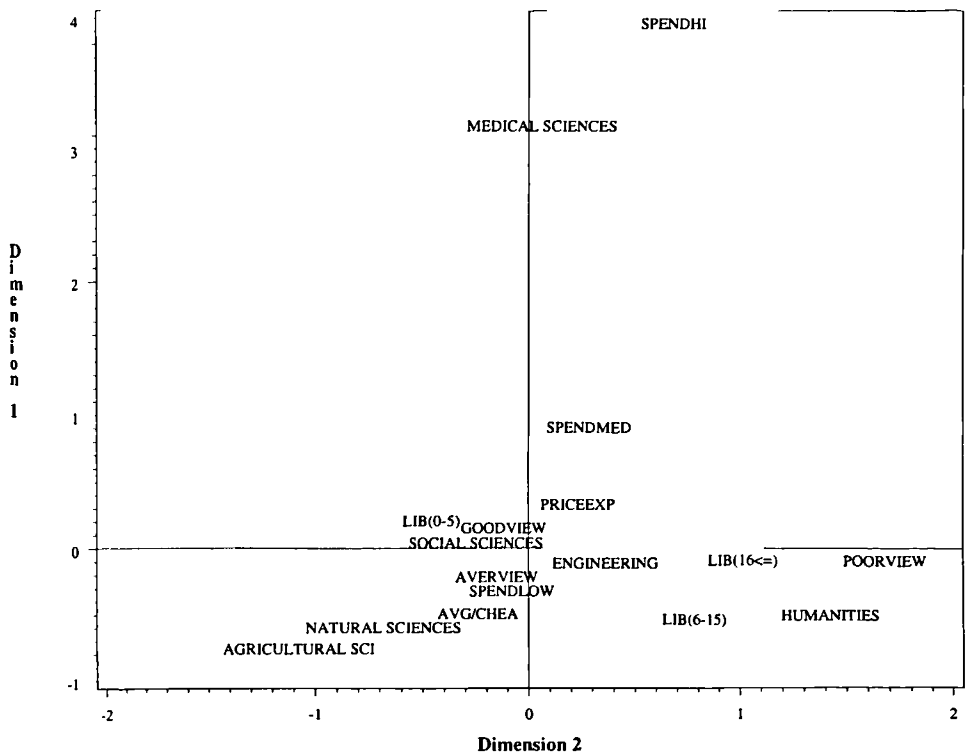
6.8 Summary of Book Buyer Behaviour

6.8.1 Student Characteristics and Book Buying Behaviour

Multiple Correspondence Analysis was used to obtain profiles of students vis-à-vis book buying behaviour. The list of variables was restricted to a set of key variables (of the survey) which were thought to be among the main factors determining buyer behaviour. The institution was not included since it was believed that, with the exception of perhaps ITM, institutional characteristics were secondary in determining students' characteristics and that the primary influence of the institution was via the courses it offered and this had already been captured by the course variable. In addition, in order to reduce the number of cells in the table (since large numbers of zero frequency cells can affect the results), a number of secondary variables such as hours spent in the classroom were not included in this particular analysis (partly because they are already captured by the course). The number of cells were further reduced by amalgamating classes.[431] As noted before the particular characteristics of Medical students meant that they influenced to a large degree the results of the analysis, and so the results have been reproduced again below (see figure 6.8.2) excluding them so that a clearer picture can emerge of students from other courses.

431 Views on lecturers guidance were regrouped as follows: (very good & good = 'GOODVIEW'), (average = 'AVERVIEW'), and (poor & and very poor = 'POORVIEW'); Expenditure on books was recatgorised as follows: (less than or equal to M$200 = 'SPENDLOW'), (M$201 to M$500 = 'SPENDMED'), and (greater than M$500 = 'SPENDHI'); Number of library currently out on loan joined as follows: (0 to 5 books = 'LIB(0-5)'), (6 to 15 books = 'LIB(6-15)'), and (16 or more books = 'LIB(16<=)'); Views on price were grouped as follows: (very expensive and expensive = 'PRICEEXP'), (average, cheap and very cheap = 'AVG/CHEAP').

Figure 6.8.1 **Student Book Buyer Profile (including Medical Science students)**



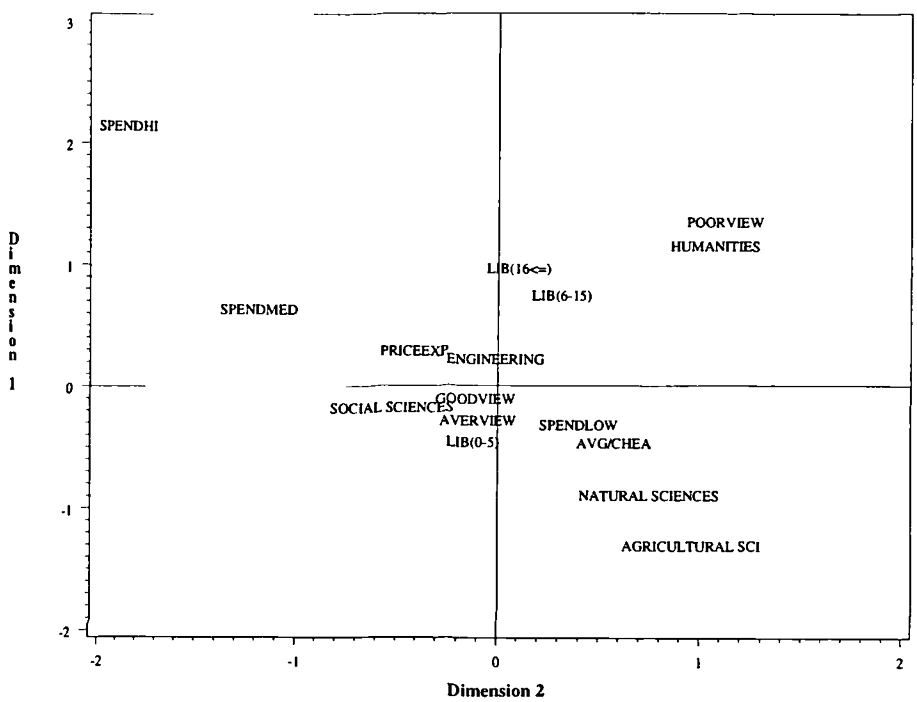
The first two dimensions jointly were able to account for around 31.8% of the underlying variation in the table, which given the number of dimensions and the nature of the study provided an adequate explanation of the data. Starting with the top right hand quadrant, one can see clearly the unique profile of medical students; by far they were highest spenders (M$328 per academic year) even though they viewed the price of their books as expensive (79% of respondents regarded the price as very expensive or expensive). In other words they buy (or are obliged to buy books, see earlier discussion) regardless of what they think of the price. This type of behaviour suggests a relatively inelastic demand curve for medical books. This is not true for all the other courses. Medical students also take out the least number of books from the university library (over 90% took out 5 or less books from the library, were relatively heavy users of the reserve book room), and had a more positive view towards the guidance they received from their lecturers (57% percent considered the quality of guidance as very good or fairly good). Humanities students were the most negative towards the guidance they received (12% viewed the guidance received as poor or very poor), followed by

Engineering students who were associated with both negative and average views (nearly 11% stated one of the poor categories, a further 40% viewed the guidance they received as of average quality while just under half were of the opinion that the guidance they received was good or excellent). However, surprisingly, Humanities students were also more likely to take 16 or more books at one time out of the library than students from other domains (16% took out more than 15 books). Humanities and Engineering students could not be linked to any of the spending categories indicating that they were average spenders but with a large variation within their respective subject classes. However Engineering students were more likely to view the cost of books in their area as expensive than students from other courses with the exception of Medical students (small angle between the points). Agriculture Science students were the lowest spenders, followed closely by Natural Science students. Students from both these course classes had an average view of lecturers' guidance as did students from the Social Sciences sphere and Engineering. The low expenditure on books by Natural Science and Agricultural Science students is not easily explained in the light of their view that the books in their area were viewed as reasonably cheap. Perhaps since the books are cheap they do not have to spend the same amount of money as their counterparts in other fields for a given number of course books; this suggests a relatively elastic demand curve for books in this area (the mean highest price paid for a single text-book by Agricultural Science students was only M$31.00 compared to M$73.79 by Medical students and an overall sample mean price of around M$42.52 - compare this with the lowest price a Medical student can expect to pay for a book which is around M$40; Agriculture Science students are not willing to pay a high price for their books, see earlier discussion). Social Science students had the most heterogeneous intra-sample profile and could not be easily linked to profile characteristics. This could be due to the classifications scheme used. The OECD classification places a large number of subjects into this category although many of the subjects actually have little in common. This is why students in this class accounted for over half of the sample (this is also true of the population as a whole). The large variation in subjects meant that there was a large variation in responses (i.e. the Social Science category had the largest standard deviations and ranges for most variables).

Student Book Buyer Profile (excluding Medical Science students)

Figure 6.8.1 and 6.8.2 are not directly comparable since in the latter Medical students have been excluded, therefore any comparison drawn is relative to the remaining subject categories. The first two dimensions plotted above accounted for a total of 29.1%[432] of the underlying variation and indicate the dominance of the Medical students in the former analysis.

Figure 6.8.2 **Student Book Buyer Profile (excluding Medical Science students)**



Social Sciences and Engineering students were likely to spend more than students from other courses (mean of M$178 and M157 respectively), although it must be stated that there was a large variation in the expenditure pattern of Social Science students, even though Engineering students viewed the price of their books as expensive (small angle between the points). Social Science students took out fewer books from the library (approximately 70% take out 5 or less),

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[432] The figure is relatively low indicating that there are other factors not covered in the analysis which determine book buying behaviour.

but indicated a more positive view of lecturers' guidance. However the lack of a clear position of Social Science students indicated a wide range of differing characteristics. Agricultural Science and Natural Science students also possessed unique characteristics (with the uniqueness being more pronounced for Agricultural students). They are low spenders (mean of M$115 and M$142 respectively) and take out few books from the library (approximately 70% take out 5 or less books at one time). Humanities students had a worse view of lecturers' guidance relative to students from other courses, but incidentally took out the most books from the library (32% took out between 6 to 15 books and a further 16% took out 16 or more books at one time). However it was not possible to link a spending pattern to them and this indicates a large variation in expenditure with the mean being around the average for all the population.

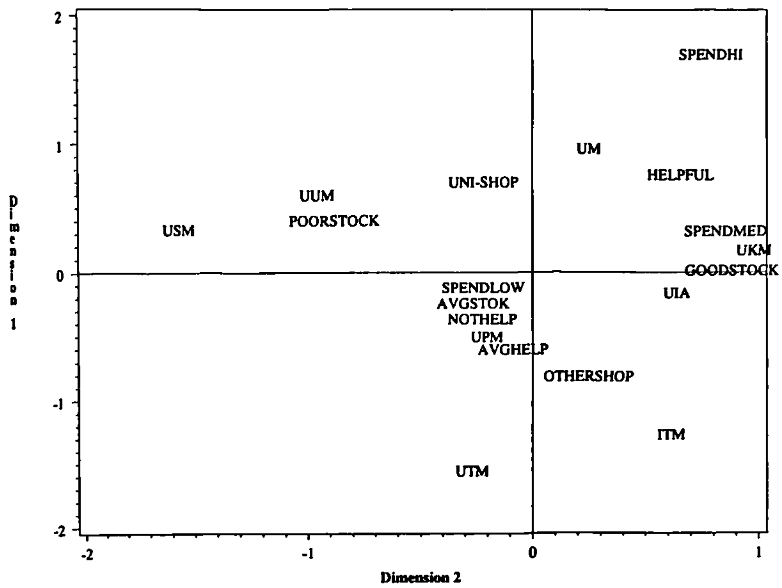
6.8.2 Student Perception towards University Bookshop and its effect on Book Buying Behaviour

Multiple Correspondence analysis was used also to identify how student perception towards their university bookshop may influence buying behaviour. Again the variables were recategorised in order to reduce the number of cells so that there were would be sufficient observations in each cell of the Burt table.[433] The first two dimensions as plotted in figure 6.8 .3 together accounted for over 34.6% of the underlying variation in the contingency table; although this figure is not very high, given the limitations of an empirical study such as this and the large number of variables used, the first two dimensions provide a sufficiently detailed summary of the original data. The variable institution was included in this analysis in order to identify how spending patterns are influenced by the views of students regarding bookshop

[433] Views on bookshop stock were regrouped as follows: (very good & good stock = 'GOODSTOCK'), (average stock = 'AVERSTOCK'), and (poor & and very poor stock = 'POORSTOCK'); Expenditure on books was recatgorised as follows: (less than or equal to M$200 = 'SPENDLOW'), (M$201 to M$500 = 'SPENDMED'), and (greater than M$500 = 'SPENDHI'); Whether bookshop staff were helpful as follows: (very unhelpful and unhelpful = 'NOTHELP'), (of average help = 'AVGHELP'), and (helpful of very helpful = 'HELPFUL').

services, stock and staff, thus allowing one to identify the problems of each bookshop individually.

Figure 6.8.3 **Perception towards University Bookshop and Book Buying Behaviour**



Starting from the top right hand quadrant one can see that the points UM, UKM, HELPFUL, SPENDHI, SPENDMED and GOODSTOCK are connected. Thus UM and UKM students were the highest spenders (both had means of around M$210 per academic year); this could be due to the fact these institutions are two of the three universities which offer Medical Science subjects, with the other being USM. Both UM and UKM students were of the opinion (relative to students from other institutions) that their university bookshop staff were generally helpful; this view was also shared by UIA students. UM, UKM, UIA and ITM students viewed the stock in their university bookshops as of good quality, although it must be stressed that ITM students made heavy use of bookshops other than their own institution's (83% of students normally used other bookshops. This could be due to the location of the bookshop: students from ITM PJ site are far from the main campus at Shah Alam, therefore many ITM students use the UM bookshop, and many ITM main campus students like to combine book buying with shopping and sight seeing trips to Kuala Lumpur). Students from UIA, UTM and UPM also made heavy use of non university bookshops. In the case of UPM and UTM this could be due to the fact that most students viewed the staff as not particularly helpful, and the selection of books as only average. Consequently they were amongst the low spenders (as noted before UPM offers mainly agricultural science based courses and students from these courses were identified as the lowest spending subject class). UM students used the university bookshop more often as their principal source of books (67% normally used the university shop), followed closely by UUM students (64%), although UUM students viewed the quality of stock as very poor (27.8% viewed the stock as poor compared to only 9.2% for UKM, 11.6% for UIA, 12.2% for ITM and 19.1% for UM). USM students also viewed the range of stock as poor (the fact that UUM and USM students viewed the stock as poor but still made heavy use of the university bookshop could be attributed to the fact that there is no other bookshop in the vicinity that can be easily reached). Both USM and UUM had a large number of students in the low spending category perhaps as a results of the problems outlined above. The mean expenditure of M$189 by USM students is actually above the mean of the sample as a whole but this is due to the fact that 6.8% of USM students spent over M$500 (this was the highest proportion of students from an institution in this expenditure class), and since correspondence analysis is based on frequency counts rather than means, the results seems to contradict those reported earlier using the Duncan test that USM students were above average spenders, but a little thought shows that both analyses are correct. Since there is a large variation in the expenditure pattern of USM students the mode and the mean expenditure are quite far from each other. Most of these high spenders from USM came from the Medical Sciences sphere. The fact that UIA students had positive opinions towards the services offered by their institution's bookshop, yet were not high spenders suggests two influences, firstly this may be due to the subjects offered by the university, and secondly a lack of promotion by the bookshop. In addition the close proximity of the UIA campus to the capital may mean that many students buy their books from elsewhere in particular the UM bookshop and bookstores in the KL/PJ districts.

In summary, UM and UKM bookshops were identified in the above analysis to be the role models for other university bookshops in Malaysia. However, the fact that only 68% of UM students used their own bookshops as their principal source of material suggests that there are still some bookshop services that need to be improved, and not all of the higher spending by students from these universities can be attributed to the quality of their bookshops since, as noted before, much of the influence is due to the courses on offer at these institutions, in particular due to the fact that they have a Medical Science faculty.

CHAPTER SEVEN

PROFILE OF LECTURERS

7. PROFILE OF LECTURERS

7.0 Introduction

As part of this research, the responses of lecturers serving in all Malaysian institutes of higher learning were also solicited in order to investigate the academics' roles and views on a wide range of subject including marketing of scholarly publications. Lecturers are an important element in the process of producing scholarly publications, but unlike students, in addition to providing a target market for scholarly books, they are also the source of such books. As the impetus for buying and writing books and scholarly publications is influenced by a number of factors, the questionnaire for the lecturers is divided into the following five sections, each concentrating on a particular facet of the process:

i) Personal and Institutional Background
ii) Professional Reading
iii) Library Resources
iv) Research & Publications
v) Textbook Adoptions

Analysis on **Personal and Institutional Background** included information on demographic structure and socio-economic characteristics of the lecturers such as qualification, status of tenure and institutional background. These variables are important differentiators when measuring buying and writing behaviour, and allow subsamples to be drawn for intra-sample comparisons.

Professional Reading reflects the pattern of reading-habit and book-buying behaviour amongst lecturers. Some questions in the survey touched on marketing tools such as publicity materials often used by the publishers to inform target readers regarding publications. In addition, it elicited views on the quality, frequency and price of local vis-à-vis international publications.

Scholars' views on **Library Facilities and Services** were also elicited since libraries are important sources of needed publications. Their views on technological advancements in libraries were obtained as well as the extent to which they were acquainted with such developments.

Section Four concentrates on **Research and Publications** providing information on Malaysian lecturers and scholars as prospective writers as well as consumers of scholarly publications. Universities are at the leading edge of Research and Development (R&D) in Malaysia; staff involved in research usually have teaching duties but surprisingly there is little published analysis showing the effect of this load on research activities.

Section Five investigates the flow of information about **Textbook Adoptions** at higher learning institutions and attempts to determine how booksellers may develop a communication network with lecturers for such information. It was envisaged that a comparative analysis of students', lecturers' and booksellers' questionnaires would help identify the extent to which booksellers are often out of stock of popular books and other publications resulting from poor marketing communication between the parties involved.

7.1 Personal and Institutional Background

7.1.1 Response Rate

There were 121 respondents to the survey, some 2.8 % of the total population of lecturers serving at the eight institutions covered in this survey. The response rate (28.0%) was low relative to the students' response rate; therefore the analysis was undertaken for only three universities, namely National University of Malaysia (USM), Agricultural University of Malaysia (UPM) and MARA Institute of Technology (ITM) as shown in Table 7.1.1. Where appropriate data for UM was also included. Because there is a high degree of similarity in the subjects taught in Malaysian Universities, it is expected that the sample of three universities may also help determine problems in other Malaysian universities. For example, the courses offered in USM were about the same as in UM, UKM and UIA, while UPM is unique in offering more on agricultural science subjects. Table 7.1.1 shows breakdown of lecturer respondents by university and courses.

Table 7.1.1 **Breakdown of respondents and population by university and faculty (OECD) in percentages and real number, at February 1993**

	UM	UPM	USM	ITM	Total
NS	①0 ②27 ③269	6 32 318	11 21 207	5 22 221	22
ENG	0 7 69	7 7 70	9 16 162	0 16 164	16
AGRI	0 0 0	6 14 136	1 - -	0 0 0	7
MS	2 34 337	0 0 0	8 16 164	0 0 0	10
SS	4 22 219	5 11 112	14 16 155	12 40 395	35
HUMAN	3 31 309	11 9 91	6 19 185	9 29 293	29
Responses Response Rate	9 7.5	35 47.3	49 53.8	26 18.3	119* 28.0
Sample	**120**	71	**91**	**142**	425
Total	④ 1203 *⑤1254*	717 759	909 989	1416 2330	4245 5332

SOURCE: Own compilation derived from each Registrar's Office from the university concerned.
Figure for: ① Responses; ② Sample; ③ Total Number of lecturers for each faculty; ④ Total number of lecturers served at main campus who taught first degree or equivalent only; ⑤ Total number of lecturers at each institution.
Although there were 121 respondents, two questionnaires were excluded from a major part of the analysis because of low item response rates.
NB: For the same reasons as outlined in section 6.1 of students' analysis, when recategorising respondents into OECD scheme, respondents for some faculties were higher than the sample. For the case of USM, although there is no Agriculture faculty, an error occurred when keying in the questionnaires which resulted in one respondents being categorised under Agriculture subject.

7.1.2 Demographic Characteristics

Demographic characteristics and qualification of lecturers help one to understand the market segmentation of scholarly publications in Malaysia. As shown in table 7.1.2, the survey sample included a high percentage of male lecturers (72%) compared to female (28%), and about 87% were in the age group of 30 - 49 years which tends to be in the most productive phase of their careers.[434] While almost all courses have over 40% young lecturers (below 39 years old), Medical Science has 70% of lecturers within the age range 30-49 years.

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434 'Warwick University: Dosh for Dons', *The Economist*, 14 November, 1994, p. 48.

Table 7.1.2 **Distribution of gender, age and marital status and qualifications by faculties and selected institutions, in percentages**

	Gender		Age					Marital Status		Qualification				
Courses	Male	Female	20-29	30-39	40-49	50-59	>60	Single	Married	Bach.	Master	Prof.	Ph. D	Other
NS	86.36	13.64	4.55	50.0	45.45	0	0	0.83	17.50	9.09	31.82	0	59.09	0
ENG	93.75	6.25	6.25	68.75	18.75	0	6.25	1.67	11.67	0	25.0	0	75.0	0
AGRI	87.50	12.50	12.50	75.0	12.50	0	0	0	6.67	0	25.0	0	75.0	0
MS	80.0	20.0	0	10.0	60.0	10.0	20.0	0	8.33	0	0	10.	70.	20.0
SS	54.29	45.71	2.86	62.86	28.57	5.71	0	1.67	27.50	2.86	48.57	5.71	42.86	0
HUMAN	65.52	34.48	3.45	41.38	37.93	17.24	0	5.0	19.17	0	48.28		48.28	0
Institutes														
USM	81.63	18.37	0.00	46.94	38.78	8.16	6.12	10.20	89.80	0	20.41	2.04	75.51	2.04
UPM	80.00	20.00	8.57	57.14	28.57	5.71	0.00	5.71	94.29	2.86	25.71	2.86	68.57	0
ITM	53.85	46.15	3.85	57.69	34.62	3.85	0.00	15.83	84.62	7.69	76.92	7.69	7.69	0
UM	44.44	55.56	11.11	44.44	33.33	11.11	0.00	0.00	100.00	0	55.56	0	33.33	11.11
TOTAL	72.5	27.5	4.2	52.5	34.2	6.7	2.5	9.2	90.8	2.5	36.7	3.3	55.8	1.7

7.1.3 Qualifications

In terms of qualifications, on average 56% of university lecturers were qualified with a doctoral degree, about 68% and 76% lecturers in USM and UPM respectively had a Ph.D. qualification while only 8% of ITM lecturers held a doctoral qualification, see table 7.1.2. The main reason for relatively low qualifications of lecturers in ITM is that the organisation is still regarded as an institute offering mainly diploma courses rather than first degrees. In recent years, however, the institution has obtained more financial assistance from the government for their teaching staff to go for higher degrees. It is assumed that the higher the proportion of lecturers having Ph.D. qualifications, the greater the number of writers who are capable of writing quality scholarly works; this will be investigated in Section 7.4 of Chapter Seven under Research and Publication. Academics with doctoral studies were found to be in higher positions than colleagues without such a qualification, therefore suggesting that a PhD improves the chances of being promoted (*Wilcoxon Sum of Ranks Test, χ^2 approx. = 14.268, DF = 1, prob > χ^2 =0.0002*). Nearly 65% of the respondents were in the lecturer grade, and around 31% were in the categories of Professors (Associate, Assistant and Full Professors). Medical Science courses had statistically the highest percentage of Professors, i.e. 80% (see *figure 7.1.1 for KW test*).

The survey showed that the majority of lecturers joined their parent institutions prior to obtaining their highest degree, since nearly 70% joined their institution before 1985 and 59% obtained their highest degree after this period (*see table 7.1.3 and 7.1.4*). The mean period elapsed between joining the present institution and receiving their highest degree was 3.5 years. Medical lecturers had a more unusual profile since 70% of them had received their highest degree prior to 1985.

A sizeable number of lecturers are reasonably well experienced in Malaysian universities. Sixty five percent of respondents received their current status after 1985, while as stated above, 70% joined their present institution before 1985 suggesting that lecturers have scope for promotion. The mean time elapsing from joining the parent institution to receiving their current status was 4.9 years. The reason that some 70% of lecturers have been with their present institution since prior to 1985 is because most lecturers in Malaysia are bound into a contractual relationship with the institution financing their further studies and are not easily able to move to another institution. In contrast in the UK most lecturers join institutions after completing their doctoral studies; higher degrees are mostly financed by grants from the state, research councils such as SERC or private organisations[435]; and the contract with the university is usually for a period of five years after which lecturers are free to change institutions, and are therefore not as contractually attached to particular institutions as in Malaysia.

Figure 7.1.1 **KW test of status by faculty**

Population	N	Mean Score	Group
AGRI	8	42.5	A
ENG	16	57.4	A
SS	36	58.6	A
HUMAN	29	58.7	A
NS	22	63.3	A
MS	10	91.9	B

N = 121 KW χ^2 = 14.54 DF = 5 Prob > χ^2 = 0.0125, Overall Mean Score = 61

Table 7.1.3 **Year received highest degree, joined present institution and obtained current status by institute in percentages**

INSTITUTE	< &During 70's	Early 80's	Late 80's	1990 onwards
	❶24.5	28.6	22.5	24.5
USM	❷31.1	46.7	11.1	11.1
	❸12.2	29.3	24.4	34.2
	5.7	20.0	42.9	31.4
UPM	31.3	46.9	15.6	6.3
	3.2	35.5	25.8	35.5
	4.0	44.0	28.0	24.0
ITM	31.1	46.7	11.1	11.1
	5.0	15.0	40.0	40.0
	0.0	11.1	44.4	44.4
UM	37.5	25.0	25.0	12.5
	0.0	28.6	28.6	42.9

Key:
❶Figure for year received highest degree, respondents = 119
❷Figure for year joined present institution, respondents = 109
❸Figure for year obtained current status, respondents = 99.

[435]'Warwick University: Dosh for Dons', *The Economist*, 14 November, 1994, p. 48.

Table 7.1.4 **Year received highest degree, joined present institution and obtained current status by faculties in percentages**

Courses	< &During 70's	Early 80's	Late 80's	1990 onwards
	❶13.6	40.9	27.3	18.2
NS	❷33.3	52.4	4.8	9.5
	❸5.3	47.4	21.1	26.3
	18.8	18.8	25.0	37.5
ENG	12.5	43.8	31.3	12.5
	0.0	13.3	46.7	40.0
	0.0	37.5	50.0	12.5
AGRI	16.7	66.7	16.7	0.0
	0.0	33.3	50.0	16.7
	50.0	20.0	0.0	30.0
MS	42.9	42.9	0.0	14.3
	33.3	33.3	0.0	33.3
	8.6	28.6	28.6	34.3
SS	24.2	24.2	42.4	9.09
	10.3	17.2	27.6	44.8
	3.6	25.0	46.4	25.0
HUMAN	42.3	42.3	7.7	7.7
	4.2	33.3	25.0	37.5
	12.6	**28.6**	**31.1**	**27.7**
TOTAL	**29.4**	**40.4**	**21.1**	**9.2**
	7.1	**28.3**	**28.3**	**36.4**

Key:
❶Figure for year received highest degree, respondents = 119
❷Figure for year joined present institution, respondents = 109
❸Figure for year obtained current status, respondents = 99.

7.1.4 Preference of duties

When lecturers were asked to rank their preferences in performing their duties (teaching, research work, consultation and administration) around 75% of them chose teaching as their highest priority, followed by research work, while their lowest priority fell to administration work (see figure 7.1.2). UPM lecturers weighted teaching more heavily in the list of priorities than their colleagues from other institutions. Around 15.4% of ITM staff rated administration as their highest priority while none of the UM respondents thought it was important. Research and consultation duties however were ranked of lower priority than teaching (see table 7.1.5a). Non-professors gave more importance to teaching and less importance to research and consultation than professors (see table 7.1.5b). Agricultural science lecturers had a greater preference for teaching and a lower preference for consultation and administration than staff from other faculties, while Natural Science respondents were more inclined towards administration (see table 7.1.5c).

Figu : **Preferences of duties of respondents in percentages**

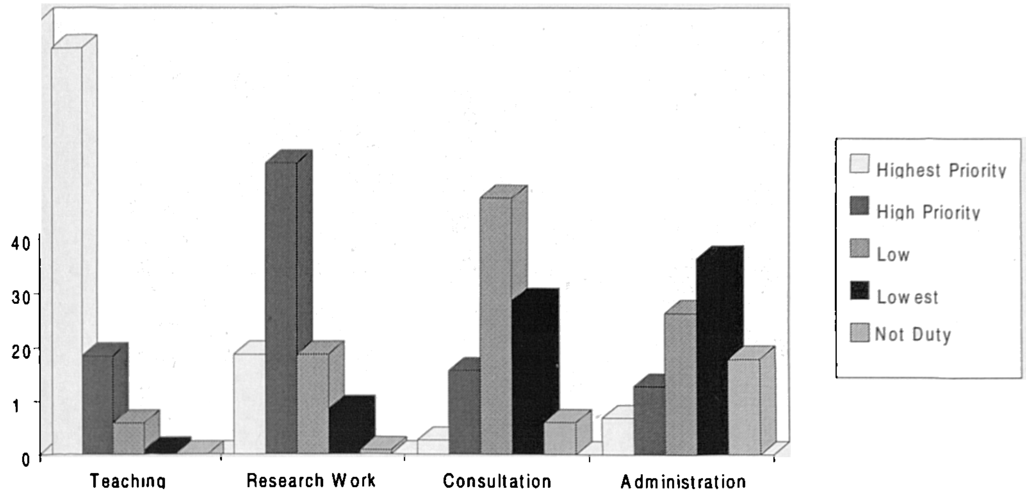


Table 7.1.5a **Preferences of duties by institutes (in percentages)**

Institutes	Highest Priority	High Priority	Low Priority	Lowest Priority	Not duty
USM	❶71.4	18.4	10.2	0.0	0.0
	❷24.5	42.9	24.5	8.2	0.0
	❸4.3	21.3	34.0	36.2	4.3
	❹6.1	18.4	28.6	30.6	16.3
UPM	82.9	14.3	0.0	2.9	0.0
	11.4	77.1	8.6	2.9	0.0
	0	5.9	58.8	26.5	8.8
	3.0	3.0	33.3	42.4	18.2
ITM	73.1	19.2	7.7	0.0	0
	12.0	40.0	24.0	20.0	4.0
	4.0	20.0	52.0	20.0	4.0
	15.4	19.2	11.5	30.8	23.1
UM	66.7	33.3	0	0	0
	33.3	55.6	11.1	0	0
	0	11.1	55.6	22.2	11.1
	0	0	33.3	55.6	11.1

Key:
❶Figures for preference in teaching
❷Figures for preference in research work
❸Figures for preference in consultation
❹Figures for preference in administration

Table 7.1.5b **Preferences of duties by status (in percentages)**

Institutes	Highest Priority	High Priority	Low Priority	Lowest Priority	Not duty
Professors	❶54.01	29.7	13.5	2.7	0
	❷40.5	35.1	16.2	8.1	0
	❸5.4	27.0	35.1	32.4	0
	❹5.4	8.1	32.4	32.4	21.6
Non-	84.3	13.3	2.4	0	0
Professors	31.8	62.2	19.5	8.5	1.2
	1.3	10.1	53.2	26.6	8.9
	7.4	14.8	23.5	38.3	16.1

Key:
❶Figures for preference in teaching ❷Figures for preference in research work
❸Figures for preference in consultation ❹Figures for preference in administration

Table 7.1.5c **Preferences of duties by faculties (in percentages)**

Institutes	Highest Priority	High Priority	Low Priority	Lowest Priority	Not duty
NS	❶72.73	22.73	4.55	0.00	0.00
	❷22.73	50.00	22.73	4.55	0.00
	❸0.00	14.29	38.10	42.86	4.76
	❹14.29	14.29	28.57	23.81	19.05
ENG	87.50	12.50	0.00	0.00	0.00
	6.25	68.75	18.75	6.25	0.00
	6.67	6.67	0.00	53.33	33.33
	6.25	18.75	25.00	37.50	12.50
AGRI	100.00	0.00	0.00	0.00	0.00
	0.00	100.00	0.00	0.00	0.00
	0.00	0.00	87.50	12.50	0.00
	0.00	0.00	14.29	71.43	14.29
MS	80.00	0.00	20.00	0.00	0.00
	10.00	50.00	20.00	20.00	0.00
	10.00	30.00	30.00	30.00	0.00
	0.00	20.00	30.00	50.00	0.00
SS	68.57	20.00	8.57	2.86	0.00
	28.57	40.00	22.86	8.57	0.00
	0.00	29.41	41.18	17.65	11.76
	0.00	11.43	28.57	40.00	20.00
HUMAN	68.97	27.59	3.45	0.00	0.00
	17.86	53.57	14.29	10.71	3.57
	3.57	7.14	53.57	32.14	3.57
	13.79	10.34	24.14	27.59	24.14
TOTAL	**75.00**	**18.33**	**5.83**	**0.83**	**0.00**
	18.49	**53.78**	**18.49**	**8.40**	**0.84**
	2.59	**15.52**	**47.41**	**28.45**	**6.03**
	6.78	**12.71**	**26.27**	**36.44**	**17.80**

Key:
❶Figures for preference in teaching ❷Figures for preference in research work
❸Figures for preference in consultation ❹Figures for preference in administration

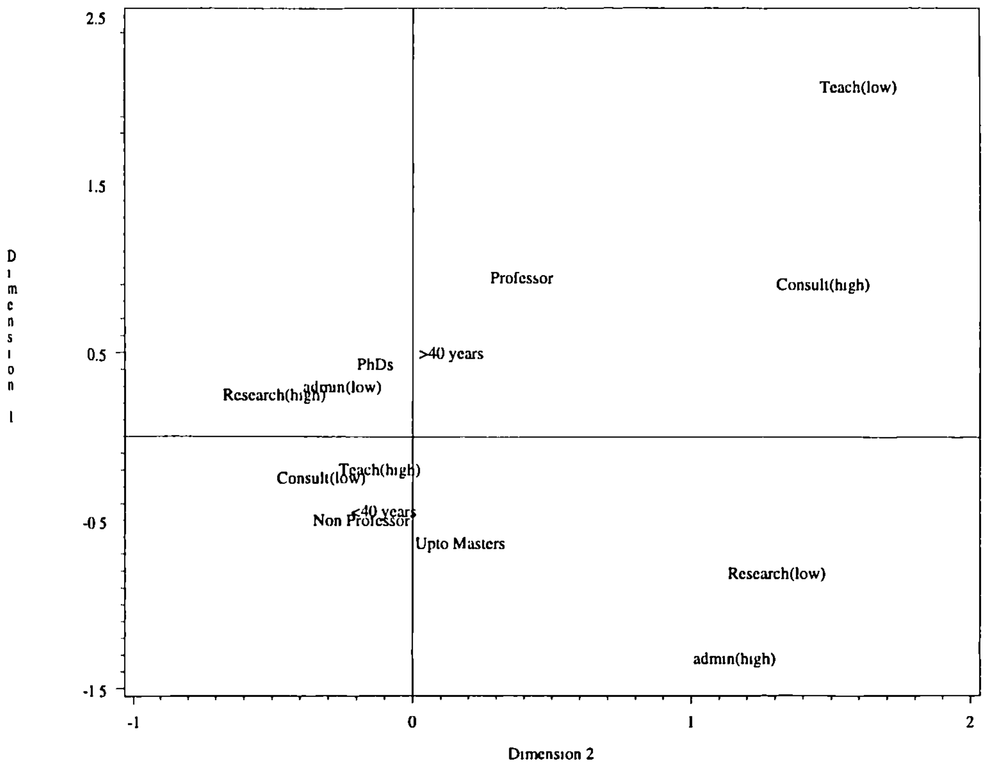
Correspondence Analysis[436] was used to find out the preference of duties by several characteristics: status, age and qualification. The first two dimensions accounted for over 54% of the inertia resulting from the χ^2 decomposition providing a good summary at a two-dimension level of the underlying multidimensional space.

Looking at figure 7.1.3[437], professors tend to have a low preference for teaching but a high preference for consulting, and usually are in the age group of 40 years and above (top right quadrant.) Those who prefer research and give a low priority to administration work usually are those who have doctorate qualifications (top left quadrant.) The figure shows that Professors are normally Ph.D. holders (small angle between these two points.) Non-professors tended to give a higher preference to teaching but low preference to consulting and usually belong to the age group of 40 years and below (bottom left quadrant.) Lecturers who tended to prefer a lot of administration work perform little research and usually have a lower qualification, i.e. up to masters degree. Lecturers with lower qualifications are normally below 40 years of age and non-professor grades (small angle between these two points).

[436] See Chapter Five on Research Methodology for the objective of this statistical analysis

[437] Data were organised into a contingency table by recategorising the various variables. Preference of highest and high were categorised to high and others to low. Age was categorised to below 40 years of age and 40 years and above. Status was categorised to professors (including Assistant, Associate and Full Professors) and Non-Professors including all other grades. The highest degree held was categorised to Up To Masters (including Diploma, Bachelor and Master) and Ph.D. holders (including professional qualifications).

Figure 7.1.3 **Preferences of duties by status, age and qualifications**



With regard to command of working languages for the purpose of scholarly communication, it was expected that lecturers would have a command of at least two languages (bahasa Melayu and English). Surprisingly, only about 61% of the lecturers had a command of two or more languages (findings from a survey done by PEPET in 1989 amongst scholars showed that around 97% of respondents had a command of two or more languages). One hypothesis assumed that those who have command of more languages are more likely to write articles for international publications as the freedom of language encourages them to write for international publications. It is also assumed that the young generation (young lecturers in the age group below 35) are less likely to have command of more than one language for the purpose of scholarly communication as a result of the language policy enforced by the government in 1970 (see Chapter Two for a detailed discussion on this point). All school children starting that year had to use bahasa Melayu and this group are the first batch of that product (see table 7.1.6 for detailed breakdown). This is a worrying scenario as this young group will very soon be the important segment in the "academicians' hierarchy" and if they are not able to communicate at the international level fluently, it will pose a serious problem for scholarly publishing in Malaysia. Tests showed that the mean number of languages used by scholars below 40 years of age was slightly lower (1.5588 languages) than those above 40 years of age (1.6923 languages); however there was no statistical difference (Duncan test: F Value = 1.39, Pr > F= 0.2415, DF = 1, N = 119).

Table 7.1.6 **Number of command of languages for scholarly communication by age (in percentages)**

	20-29 years	30-39	40-49	50-59	60 & >
One	80.0	41.9	29.3	37.5	33.3
Two	20.0	56.5	70.7	62.5	66.7
Three or More	0.0	1.6	0.0	0.0	0.0

Regarding the number of professional societies, the highest proportion of respondents, just over 40% belonged to two to three societies while only around 9.2% did not belong to any societies. Table 7.1.8 shows the number of professional societies belonged to by faculties and institutes. There was no statistical association between the number of societies belonged to and the institutes the respondents came from *(KW Test, χ^2 Approximation = 5.9295, DF = 3, Prob > χ^2 = 0.1151)*; however among faculties, Medical lecturers belong to the most number of societies (50% belongs to ≥ five societies) while Engineering lecturers have the highest percentages of those who did not belong to any society (18.8%), see figure 7.1.4. As assumed, professors tended to join more societies compared to the other rank academics, see figure 7.1.5. However, the fact that one professor grade respondent did not belong to any society and 13% only belong to one society is not encouraging, see table 7.1.7.[438]

[438] Those who are assistant, associate and full professors are regrouped as professors, with the rest as non-professors/lecturers and this recategorisation applies throughout the analysis, although at times those who did not belong to professors or lecturers are grouped as 'others'.

Fig 7.1.4 **KW test of societies belonged to by faculty**

Population	N	Mean	Group
Engineering	16	50.38	A
Social Sc.	36	53.28	A
Humanities	28	56.96	A B
Natural Sc.	22	65.65	B
Agriculture	8	67.31	B
Medical Sc.	10	97.15	C

N = 120, KW χ^2 = 16.4, DF = 5, Prob > χ^2 = 0.0058 Overall Mean Score= 61

Fig.7.1.5 **KW test of societies belonged to by status**

Population	N	Mean	Group
Other	6	50.58	A
Lecturers	77	54.16	A
Professors	37	75.28	B

N = 120, KW χ^2 = 10.652, DF =2, Prob > χ^2 = 0.0049,Overall Mean Score = 60.50

Table 7.1.7 **Number of societies belonged to by status**

Status	None	One	2 - 3	4 - 5	More than 5
Professors	2.7	13.5	46.0	18.9	18.9
Non-Professors	12.0	32.5	37.3	10.8	7.2

Table 7.1.8 **Number of professional societies belonged to by** faculty and institute **in percentages**

	By Faculty							By Institute					
	0	1 Soc	2-3	4-5	5+	N		0	1 Soc	2-3	4-5	5+	N
NS	9.1	13.6	54.6	13.6	9.1	22	UM	37.5	12.5	12.5	0.0	37.5	8
ENG	18.8	31.3	31.3	12.5	6.3	16	UPM	5.71	28.57	45.7	11.4	37.5	35
AGR	0.0	25.0	50.0	12.5	12.5	8	USM	6.1	18.4	44.9	20.4	100	49
MED	0.0	0.0	30.0	20.0	50.0	10	ITM	7.7	46.2	34.6	7.7	0.0	26
SS	13.9	30.6	38.9	8.3	8.3	36							
HUM	3.6	39.3	35.7	17.9	3.6	28							
Total	9.2	26.7	40.0	13.3	10.8	120	Total	9.2	26.7	40.0	13.3	10.8	120

Regarding teaching load, 45% of respondents taught around 6 -10 hours per week, followed by 36% for 11 - 20 hours while about 18% had less than five hours per week. Lecturers from Social Sciences had the highest mean teaching hours while Engineering lecturers had the least, but subjects were not statistically different from each other (Duncan test: DF = 5, F Value = 2.05, Pr > F = 0.0782); see table 7.1.9b. Those who perform administrative duties do not necessarily have less teaching hours (*Mean teaching hours for those holding administration posts and those not holding any were 9.564 and 9.561 respectively*). The details of the teaching load by courses are shown in table 7.1.9a.

Table 7.1.9a **Teaching load by faculties in hours teaching per week by faculty (in percentages)**

Courses	1 -5	6 -10	11 - 20	> 20
NS	14.29	47.62	38.10	0.00
ENG	33.33	60.00	6.67	0.00
AGRI	28.57	42.86	14.29	14.29
MS	42.86	28.57	28.57	0.00
SS	9.09	39.39	51.52	0.00
HUMAN	14.29	46.43	39.29	0.00
TOTAL	18.02	45.05	36.04	0.90

Table 7.1.9b **Mean number of hours by faculty**

Courses	Mean	N
SS	10.647	34
HUMAN	10.571	28
AGRI	9.286	7
NS	9.000	21
MS	8.000	7
ENG	6.867	15

Few lecturers were dissatisfied with their current job (18%), most seemed satisfied (80%). It is interesting to highlight that status obtained by the lecturers does not affect their satisfaction towards their job *(KW Test, χ^2 Approximation = 1.5774, DF = 2, Prob > χ^2 = 0.4544),* but those who held an administrative post were more satisfied than non-administrators *(Wilcoxon Test, χ^2 Approximation = 7.1812, DF = 1, Prob > χ^2 = 0.0075).*

Forty percent of the lecturers said that the pressure from their institute to publish articles in scholarly journals and books was strong while 25% said the pressure was extremely strong. Only 3% said that the pressure was weak or very weak. Although there was no statistically different opinion about the pressure to publish by courses or institution, those with Ph.D. tended to feel more pressured to publish compared to non-Ph.D.. holders *(Wilcoxon Test, χ^2 Approximation = 7.1812, DF = 1, Prob > χ^2 = 0.0075).* Table 7.1.10 shows respondents' opinion on pressure from their university to publish scholarly works.

Generally, the pressure from the university to publish scholarly works is strong as the government has increasingly emphasised publishing works as one of the main criteria for promotion. The questions that arise are: if the pressure is strong, why is the output of published scholarly works low? Are there some other factors which might have influenced the academics to write? These questions are discussed in a later section under the headings of Research and Publications.

Table 7.1.10 **Opinion on pressure to publish scholarly works (as expressed in percentages)**

	Pressure to Publish					
Institute	Extremely Strong	Strong	Moderate	Weak	Very Weak	Not Sure
UM	33.3	55.6	11.1	0.0	0.0	0.0
UPM	42.9	45.7	5.7	0.0	2.9	2.9
USM	24.5	32.7	40.8	0.0	2.0	0.0
ITM	0.0	42.3	50.0	7.7	0.0	0.0
Faculty						
NS	36.4	36.4	27.3	0.0	0.0	0.0
ENG	0.0	62.5	37.5	0.0	0.0	0.0
AGRI	50.0	25.0	12.5	0.0	12.5	0.0
MS	20.0	60.0	20.0	0.0	0.0	0.0
SS	22.9	22.9	51.4	2.9	0.0	0.0
HUMAN	27.6	48.3	13.8	3.5	3.5	3.5
Status						
Professor	24.3	43.2	29.7	0.0	2.7	0.0
Non-Prof.	25.3	38.6	31.3	2.4	1.2	1.2
Qualifications						
Ph. D	34.3	35.8	26.9	0.0	3.0	0.0
Non-Ph. D	13.2	45.3	35.9	3.8	0.0	1.9
TOTAL	25.0	40.0	30.8	1.7	1.7	0.8

7.2 Professional Reading

The objectives of section B on the lecturers' questionnaire was to ascertain the scholars' views on professional reading and to investigate the reading habits and pattern of buying behaviour. Besides determining the degree to which lecturers encourage their students to buy and read more books, it is also important to determine how much the lecturers themselves read and spend on scholarly publications as they are one of the target markets, and to some extent role models for their students.

This part of the questionnaire should also help publishers pinpoint the types of channels that lecturers utilise to acquire knowledge about new publications. As commented by Nick Wells, marketing research shows that "publishing needs to pull its head out of the sand and look at the world around."[439] Such elements like outlets and media usage can help determine how and where to promote and sell books.

Around 78% of the respondents chose review articles as the most common way of getting to know about new publications followed by other types of methods such as direct mail, advertising and representation from publishers, on the other hand nearly 61% thought book shop promotion a less common way. Figure 7.2.1 shows the type of channels to reach the lecturers with their impact group into two classes: common and less common way (the percentages of respondents have been regrouped from four column: most common/common and less common/least common into two in order to provide a clearer view, the detailed results are presented as in table 7.2.1.)

[439] N. Wells, Synopsis of speech at the Books and the Consumer Conference, 18 Feb 1993 in *Books and the Consumer, Report on 1992 Fieldwork* (London: Book Marketing Limited, 1993).

Figure 7.2.1 **Method of getting to know about new publications in percentages**

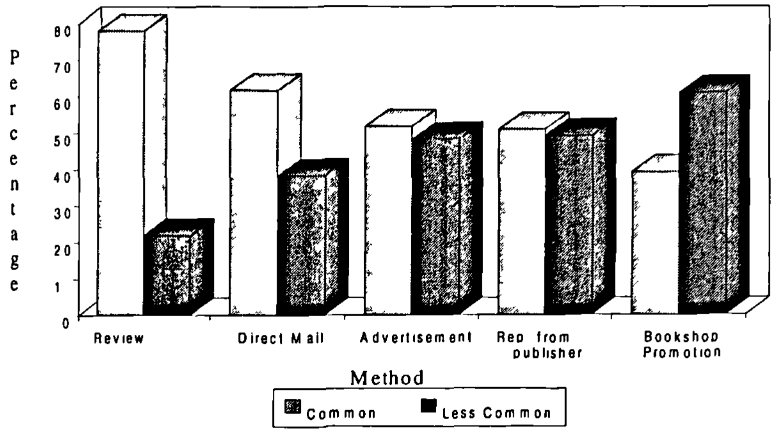


Table 7.2.1 **Types of outlet for getting to know about new publications in percentages**

Outlet	Most Common	Common	Less Common	Least Common
Review Article	48.25	29.82	9.65	12.28
Direct Mail	25.22	36.52	23.48	14.78
Advertisement	9.82	41.96	22.32	25.89
Rep. from publisher	17.54	33.33	21.93	27.19
Bookshop Promotion	10.0	29.09	29.09	31.82

Fig 7.2.2 **Method of keeping up to date with recent publication**

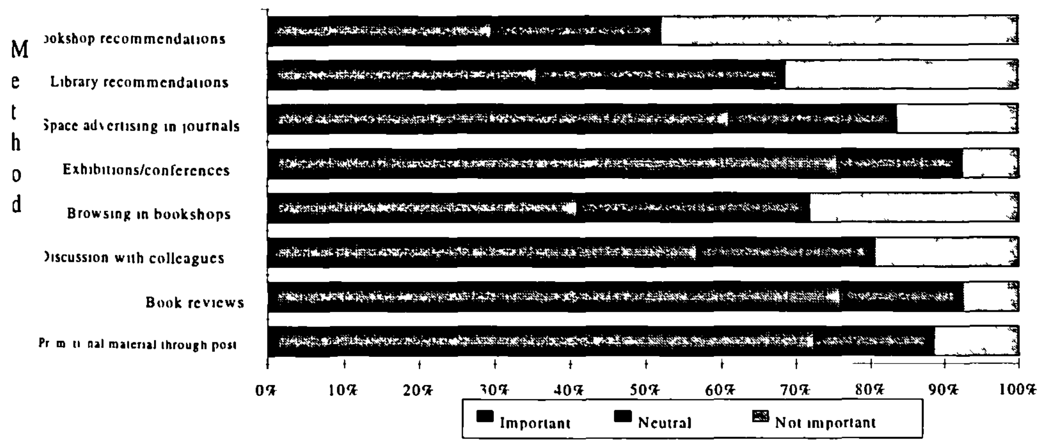
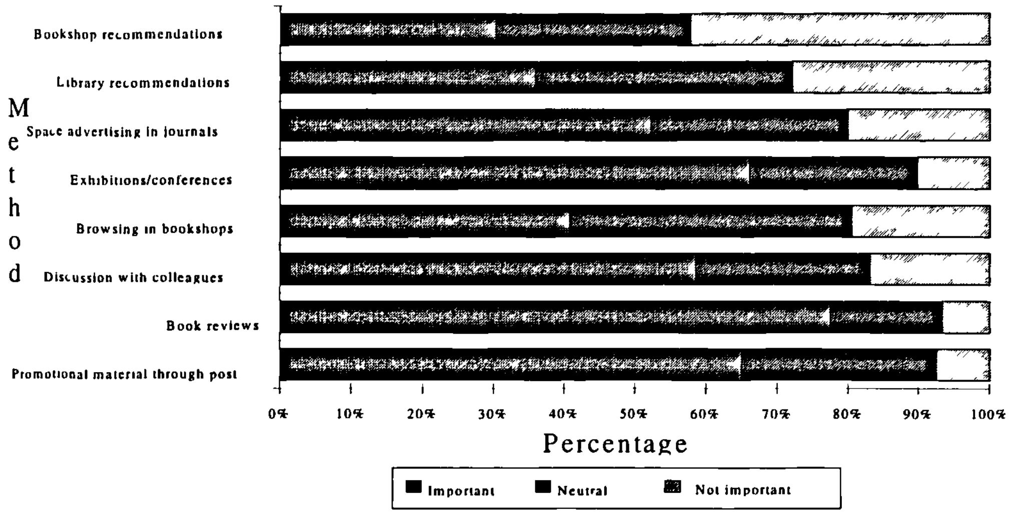


Fig 7.2.3 **Method (Information sources) of leading seriously to consider purchase.**



From two questions asked of academics on what **sources alerted them to recent publications** in their field and **led them seriously to consider buying** the publications (see figures 7.2.2 and 7.2.3), book reviews and promotional material through post and exhibitions/conferences seem to be the important sources. Other sources of information were secondary among the majority of the respondents. The pattern of answers for these two questions was homogenous which leads one to believe that the method of keeping them up to date with recent publications can also lead them seriously to consider purchase.

Although direct mail is highly recommended as an outlet to market scholarly publications, regrettably, nearly 32% stated that they had not received any direct mail in the last month from local publishers, while only 27.7% had not received any mailings from the multinational publishers (*KW test for number of direct mail received from local publishers by institute*: *KW* χ^2 *=5.04, DF = 5, Prob >* χ^2 *=0.0804 & multinational publishers KW* χ^2 *= 6.90, DF = 5 Prob >* χ^2 *= 0.2284*). The result shows that there was no difference in the number of mailings received by lecturers of different institutions from either local or multinational publishers, suggesting that publishers on the whole targeted institutions equally. Among the courses, Medical Sciences had the highest percentage of lecturers who received four or more pieces of direct mail from both groups of publishers, although there was no statistical difference among the courses *(KW* *test for number of direct mail received from local publishers by faculty: KW χ^2 =3.476, DF = 5, Prob > χ^2 = 0.6374).* Table 7.2.2 shows the detail of direct mail received by lecturers by courses.

Table 7.2.2 **Number of direct mailings received per month by faculties (in percentages)**

Courses	None	1 - 3	≥ 4
NS	❶27.3	68.2	4.55
	❷27.3	59.1	13.6
ENG	31.3	56.3	12.5
	25.0	62.5	12.5
AGRI	37.5	62.5	0.0
	42.7	57.1	0.0
MS	30.0	30.0	40.0
	10.0	50.0	40.0
SS	37.1	57.1	5.71
	22.9	68.6	8.57
HUMAN	27.6	58.6	13.79
	37.9	44.8	17.24
TOTAL	31.7	57.5	10.83
	27.7	58.0	14.28

Key:
❶ Direct mail received from local publishers
❷ Direct mail received from multinational publishers

Fig 7.2.4 **KW test of direct mail received from multinational publishers by status**

Population	N	Mean Score	Group	
Lecturers	77	53.45	A	
Other	6	59.92	A	B
Professors	37	75.26		B

N = 120, KW χ^2 approx. = 12.59, DF =2, Prob > χ^2 = 0.0018, Overall Mean Score = 60.5

It is interesting to highlight that academics from different grades received different numbers of direct mailings from multinational publishers. Professors received the highest amount of direct mail and were statistically different from lecturers or other ranks (*see figure 7.2.4 for KW result*). This might be due to the fact that this group of lecturers joined more professional societies (*see figure 7.1.5 of KW test and table 7.1.7*) and thus are more visible to publishers to obtain their contact address through the society mailing list, or that professors are believed to be more influential.

Those who held administrative posts received a similar number of direct mailings (although the percentages were slightly higher for those who hold post) either from local or multinational publishers compared to those who did not hold any post. (*Wilcoxon Test χ^2 approx. = 1.5984, DF =1, Prob > χ^2 =0.2061(multinational) & Wilcoxon Test χ^2 approx. = 0.02518, DF =1, Prob > χ^2 =0.8739 (local publisher)*)

Lecturers' attitudes towards promotional material they received are encouraging. Nearly 92% personally examined their mail and only just above 4% passed it on to a colleague, aide or opened it without reading. It seems that direct mailing can be a very effective way for publishers to draw attention to scholarly publications.

Concerning promotional material, a list of contents seemed to be the most important source of information in deciding purchases: nearly 33% rated this as the most important, followed by brief summary of the main features and detailed description of the contents. Few respondents, that is just above 1%, thought that a photograph of the cover (to aid recognition in book shops) is the most important information for them. Table 7.2.3 shows the rating of the type of information when deciding upon their purchases.

Table 7.2.3 **Importance of information in deciding the purchases (in column percentages)**

Type of information	❶ Highest	❷ High	❸ Average	❹ Low
List of contents	32.9	13.3	3.37	0.9
Brief summary of the main features	25.6	18.1	4.8	1.7
Detailed description of the contents	17.9	13.3	11.5	11.3
Designated readership and level	3.0	16.9	18.8	22.7
Extracts from review coverage	10.7	15.7	12.5	16.2
Information on the author	5.6	9.7	21.2	28.4
Sample pages	2.99	8.1	14.9	48.9
Photograph of cover (to aid recognition in book shops)	1.3	4.8	13.0	70.0
Total number of observations*	234	248	208	115

N.B.: Rating from ❶Highest to ❹ Low (Categories Low & Lowest combined)
* Number of observations do not refer to the number of respondents but to column frequencies.

Around 62% of the lecturers agreed that it was fair to compare the local journals with foreign ones. Regarding journal contents around 65% of respondents viewed local journals as very good or good, while only about 3% thought that local journals were of poor quality. However, in terms of frequency of publication, nearly 27% viewed this aspect of local journals negatively. Few believed that the foreign journals were poor either in contents or frequency of publication since just over 95% think positively about foreign journals. Some of the reasons given by the respondents for not being happy with local journals were poor frequency, editing and production, and a limited distribution. However, those who said that it was not fair to compare these two categories of journals have listed the following reasons: different situation of local journals and foreign, the established position of foreign journals, and the fact that some of foreign journals also have a peer review system. The researcher would like to highlight an interesting comment given by a respondent in Editor Survey (a survey conducted among academics in 1974) regarding local vs. international journals: "If you were reading the application form of a candidate for a lectureship at some other university, and he had a string of publications in (a local) journal, would you rate these publications as highly as those published in reputable international journals?" [440]

Overall, it seems that local scholarly publications are well appreciated by academics. However, scholarly publishers, particularly local ones, should improve their frequency and consistency, and meet the deadlines for publishing, as this is one of the main factors that affects sales.

Looking at total expenditure and number of **scholarly books** bought in the past year, table 7.2.4 shows that Medical and Social Sciences lecturers bought the most amount although this was not statistically different from other faculties (*Duncan Test: DF = 5, F Value = 0.97, Pr > F = 0.4378 for total expenditure: DF = 5, F Value = 1.71, Pr > F = 0.1380 for number of books bought).*

There was also higher mean expenditure, and more scholarly books bought, by those who had higher degrees (Ph.D. to non-Ph.D.), higher status (Professors to non-Professors) and administrative posts (holding post to non-post) but none was significantly different. However, older lecturers (aged 40 years or above) bought and spent more on scholarly books compared to younger lecturers (see figures 7.2.5 and 7.2.6 for Duncan's result on expenditure and number of books bought by age). This seems to suggest a connection with the salary of respondents, since

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[440] Edward Lim Huck Tee, 'Problems of Publishing Scholarly Journals in Malaysia' in *Scholarly Publishing in South-East Asia* ed. by Beda Lim (Kuala Lumpur: Association of Southeast Asian Institutions of Higher learning, 1975), p. 62.

older lecturers tend to earn more relative to younger lecturers (given a similar education profile). Those above 40 spent on average M$ 387 and bought nearly eight books per session while those below 40 managed to spend only M$ 224 and bought less than five books per session.

Fig 7.2.5 **Expenditure on books by age**

Age	Mean	N	Group
40 & above	387.30	50	A
Below 40	229.40	67	B

DF = 1, F Value =7.25, Pr > F = 0.0081

Fig 7.2.6 **Number of books bought by age in M$**

Age	Mean	N	Group
40 & above	7.667	51	A
Below 40	4.687	67	B

DF = 1, F Value = 5.03, Pr > F = 0.0268

Table 7.2.4 **Numbers and cost of journals and books bought by institute, faculty, qualification, status, gender and age (in percentages).**

Characters	Units			Amount of subscription/expenditure in M$					
	None	1 -3	≥ 4	None	1 - $50	$51- $150	$151- $250	$251- $500	Above $500
Institute	Books & Journals			Books & Journals					
UPM	❶52.9	35.3	11.8	❸32.3	12.9	29.0	6.5	16.1	3.2
	❷20.6	35.3	44.1	❹20.6	0.0	26.5	29.4	11.8	11.8
USM	33.3	58.3	8.3	19.6	10.9	23.9	13.0	23.9	8.7
	14.3	28.6	57.1	12.2	6.1	10.2	16.3	36.7	18.4
ITM	41.7	58.3	0.0	25.0	15.0	35.0	20.0	50.0	0.0
	16.7	45.8	37.5	17.4	4.4	30.4	4.4	30.4	13.0
Course									
Natural Sc	45.0	50.0	5.0	36.8	26.3	15.8	10.5	10.5	0
	27.3	31.8	40.9	22.7	0.0	22.7	13.6	27.3	13.6
Engineering	53.3	46.7	0.0	33.3	6.7	33.3	6.7	13.3	6.7
	18.8	37.5	43.8	18.8	12.5	18.8	31.3	12.5	6.3
Agricultural	50.0	37.5	12.5	42.9	14.3	28.6	0	14.3	0.0
	50.0	12.5	37.5	50.0	0.0	0.0	12.5	12.5	25.0
Medical Sc	10.0	80.0	10.0	0.0	0.0	0.0	11.1	55.6	33.3
	0.0	30.0	70.0	0.0	0.0	0.0	20.0	70.0	10.0
Social Sc	34.3	60.0	5.7	27.3	9.1	33.3	12.1	18.2	0.0
	17.1	25.7	57.1	17.7	5.9	11.8	14.7	32.4	17.7
Humanities	41.4	48.3	6.9	28	8.0	28.0	16.0	16.12	8.0
	3.7	48.2	48.2	3.7	0.0	44.4	11.1	29.6	11.1
Qualification									
Up to Master	39.6	56.3	4.2	34.9	9.3	30.3	14.0	7.0	4.7
	20.8	29.1	50.0	18.8	2.1	20.8	14..6	31.3	12.5
Ph.D. &	39.1	52.2	8.7	24.6	12.3	23.1	9.2	24.6	6.2
equivalent	14.3	35.7	50.0	14.5	4.3	20.2	17.4	29.0	14.5
Status									
Non-Professor	44.4	46.9	8.6	35.6	11.0	26.0	12.3	12.3	2.7
	21.0	31.0	48.1	20.0	3.8	21.3	20.0	21.3	13.8
Professor	27.8	69.4	2.8	14.3	11.4	25.7	8.6	28.6	11.4
	8.1	37.8	54.1	8.1	2.7	18.6	8.1	48.6	13.5
Gender									
Male	37.7	55.3	7.1	26.6	11.4	25.3	11.4	20.2	5.1
	17.2	32.2	50.6	16.1	4.6	20.7	19.5	26.4	12.6
Female	43.8	50.0	6.2	34.5	10.3	27.6	10.3	10.3	6.9
	16.1	35.5	48.4	16.7	0.0	20.0	6.7	40.0	16.7
Age									
Below 40	41.8	52.2	6.0	29.8	14.0	33.3	8.8	12.3	1.8
	21.7	38.3	40.0	20.0	5.0	25.0	20.0	16.7	13.3
40 +	36.0	56.0	8.0	17.5	10.0	20.0	17.5	25.0	10.0
	10.6	29.8	59.6	10.9	2.2	13.0	15.2	41.3	17.4
TOTAL	❶39.3	53.9	6.8	❸24.7	12.4	27.8	12.4	17.5	5.2
	❷16.8	34.6	48.6	❹16.0	3.8	19.8	17.9	27.4	15.1

Key: ❶Journals subscribed 1993 ❷ Books bought 1992
❸ Expenditure on journals 1992❹ Expenditure on books 1992

In term of expenditure on **scholarly journals**, for two years consecutively (the year the survey was undertaken and also the preceding year), Medical Sciences lecturers spent the most compared to lecturers from other courses (*see figures 7.2.7 and 7.2.8 for Duncan's test results*). Agriculture lecturers for example, spent about only 1/8 of the amount Medical lecturers spent during the survey year, and around 1/5 in the preceding year. On the whole, lecturers spent less during the year the survey was undertaken compared to the preceding year which is worrying.

The value of Gini Coefficient for the expenditure on scholarly books indicated large differences in the expenditure pattern of lecturers (see figure A16.1.1 of Appendix 16). Approximately 16% of lecturers spent nothing on purchasing books for their personal collection, while the last 20% of lecturers (the heavy spenders) were responsible for around 55% of the total expenditure of the sample. The largest inequalities existed in the Social Sciences faculty, although the largest proportion of non-spenders existed in the Agricultural Sciences faculty; approximately 50% spent no money (although it must be stressed that the sample was small for this subject class). None of the respondents from the Medical Sciences faculty were amongst the non-spending class, and the healthy Gini Coeefficient value of 0.1895 indicates a good buying behaviour at least from the perspective of participation, since the statistics can only measure this. Amongst the institutes, ITM lecturers had the highest inequality in expenditure on scholarly books, although the figures for the other institutes were no better. The lowest Gini value is for UM lecturers but the value is large enough to be a sign of large inequalities in expenditure (see detailed figures of Gini Coefficient and Lorenz Curves in Appendix 16a).

Fig 7.2.7 **Survey year total expenditure on scholarly journals by faculty**

Faculty	Mean	N	Group	
MS	401.11	9	A	
SS	155.94	33		B
HUMAN	145.15	27		B
NS	131.50	20		B
ENG	86.69	16		B
AGRI	49.38	8		B

DF = 5, F Value =4.19 , Pr > F = 0.0016

Fig 7.2.8 **Previous year total expenditure on scholarly journals by faculty**

Faculty	Mean	N	Group	
MS	456.7	9	A	
HUMAN	228.4	25	A	B
ENG	227.0	15	A	B
SS	139.6	33		B
NS	89.1	19		B
AGRI	88.6	7		B

DF = 5 , F Value =2.36 , Pr > F = 0.0450

As hypothesised earlier, the more societies lecturers belong to, the more likely they are to subscribe to journals. The evidence supports this on the basis of four different questions given to lecturers regarding the number of journals they currently subscribed to, the total paid subscription for the current and preceding year, and number of journals received from professional society membership. Those who did not join any society were the ones who subscribed and spent the least on scholarly journals (*see figures 7.2.9 to 7.2.12 for Duncan's tests*).

Lecturers who were above 40 years old purchased more (amount spent and the number of scholarly books) during the past year and also spent more on journal subscriptions for the current and preceding year (*see figures 7.2.5, 7.2.6 7.2.13 and 7.2.14 for detailed result of Duncan's tests*) compared to their younger colleagues. Lecturers with Ph.Ds or Professors statistically spent more on scholarly journals than their colleagues (*see figures 7.2.15 and 7.2.16*). It seems that those who hold administrative posts were likely to subscribe to more scholarly journals from professional societies than those who did not hold any administrative post (*see figure 7.2.17 of Duncan's result*). This is probably due to the fact that their contact addresses were easier to trace by the professional societies to send promotional kits. Those who reported direct mail as a common method of getting to know new publications (recategorising most common and common) had slightly higher means for the number of professional scholarly journals subscribed, (1.1841) and the total amount of subscriptions paid to societies (M$ 175.27) compared to those who viewed direct mail as a less common way of being informed (mean number of professional scholarly journals subscribed = 1.163, mean subscription paid = M$115.33), but these differences were not statistically different.

The percentages of lecturers who spent no money on journals at the time the survey was undertaken had increased to 38.8% from 28% in the previous year (see table 7.2.4 for detail figures). This is discouraging as it is hoped that the percentage of lecturers subscribing to scholarly journals should increase, even a small amount, each year. In terms of number of journals subscribed, around 6% of lecturers had decreased the number of subscriptions compared to the preceding year, mostly due to increases in subscription prices.

Generally, the means for :

i) Number of scholarly journal subscribed = 1.322

ii) Total paid subscriptions = M$ 141.21

iii) Cost of journals bought = M$ 166.47

iv) Cost of books bought = M$ 287.07

For detailed figures of maximum, minimum and standard deviation, qv table A17.1.1 of Appendix 17.

In summary, questions regarding professional reading on lecturers indicated several factors:

- Lecturers' attitudes toward reading and buying (and writing will be discovered in next section) are heavily influenced and interrelated to each other;
- There is a shortage of local journals, and those which exist are published only erratically; however their quality and content is more or less similar to international journals (as shown by their opinion towards the journals); and
- Minimal marketing techniques are used and are not fully exploited either by the local or the multinational publishers, although multinational publishers made more use of direct mail.

Fig 7.2.9 **No of journal currently subscribed by membership of society**

Society	Mean	N	Group
>1	1.613	75	A
None	0.927	41	B

DF = 1, F Value =4.44 , Pr > F = 0.0372

Fig 7.2.10 **Total subscription paid in M$**

Society	Mean	N	Group
>5	306.54	13	A
4 - 5	279.69	16	A
2 - 3	148.82	45	B
1	54.14	29	B
None	38.89	9	B

DF = 4 , F Value =7.55 , Pr > F = 0.0001

Fig 7.2.11 **No of journals by membership societies**

Society	Mean	N	Group		
4-5	3.667	15	A		
>5	2.615	13	A	B	
2-3	1.348	46		B	C
1	0.906	32			C
None	0.222	9			C

DF = 4, F Value =5.21 , Pr > F = 0.0007

Fig 7.2.12 **Expenditure on journals for past year (in M$) by membership of societies**

Society	Mean	N	Group		
4 - 5	456.67	15	A		
>5	335.38	13	A	B	
2 - 3	150.16	45		B	C
1	87.33	24			C
None	8.00	10			C

DF = 4 , F Value =6.33 , Pr > F = 0.0001

Fig 7.2.13 **Expenditure on journals for past year (in M$) by age**

Age	Mean	N	Group
40 & above	260.82	44	A
Below 40	135.42	64	B

DF = 1, F Value = 4.50, Pr > F = 0.0363

Fig 7.2.14 **Current expenditure on journals (in M$) by age**

Age	Mean	N	Group
40 & above	197.40	47	A
Below 40	118.32	66	B

DF = 1, F Value =4.51, Pr > F = 0.0360

Fig 7.2.15 **Current expenditure on journals (in M$) by status**

Status	N	Mean Score	Group	
Professors	36	244.76	A	
Lecturers	72	109.10	A	B
Other	5	84.0		B

DF = 2, F Value =6.50, Pr > F = 0.0021

Fig 7.2.16 **Current expenditure on journals (in M$) by qualifications**

Degree	N	Mean Score	Group
Ph. D	65	184.66	A
Non-Ph.D.	48	105.92	B

DF = 1, F Value = 4.49, Pr > F = 0.0363

Fig 7.2.17 **No. of scholarly journals subscribed by post held**

Admin. post	N	Mean Score	Group
Hold post	63	2.079	A
No post	53	0.962	B

DF = 1, F Value =6.07, Pr > F = 0.0152

7.3 Library Resources

Libraries play a central role in the development of a reading habit among societies. The findings of a survey done by Book Marketing Limited provide evidence for the hypothesis that borrowing books is not seen as a straightforward alternative to buying them; the more books people buy, the more likely they are to have library tickets, and the more likely they are to borrow books.[441] It is presumed that this assumption also holds true for lecturers as well as the general public. Students may be forced to look at library shelves since they have limited financial resources which restrict their ability to purchase books. If they can borrow from the library, photocopy or just make do with lecture notes than many will not purchase books. This restriction does not apply to lecturers who have funds, and should also not hold true for students once they have graduated and are in jobs. The fact that students are not always able to buy books but borrow them should not necessarily worry publishers as long as the reading habit is developed, as the restriction placed upon them by meagre funds will one day be lifted and they will again buy books in greater numbers.

On the basis of this assumption, the significance of the role played by the university library in catering to readers' need in terms of facilities and services, and technological advancements in the use of computer was investigated. The data collected in this section is important since it may provide a useful indicator to gauge if current library expenditure on books is adequate. An attempt is made to relate the answers given by lecturers with those from students and librarians.

A question covering 12 sub-topics was put to lecturers to ascertain their personal opinion of university libraries in catering to their needs. Figure 7.3.1 presents the overall view of lecturers regarding library facilities at their institution, see for detail table 7.3.1

[441] *Books and the Consumer* (London: Book Marketing Limited, 1993).

Figure 7.3.1 **Adequacy of Library facilities** (see table 7.3.1 for full details)

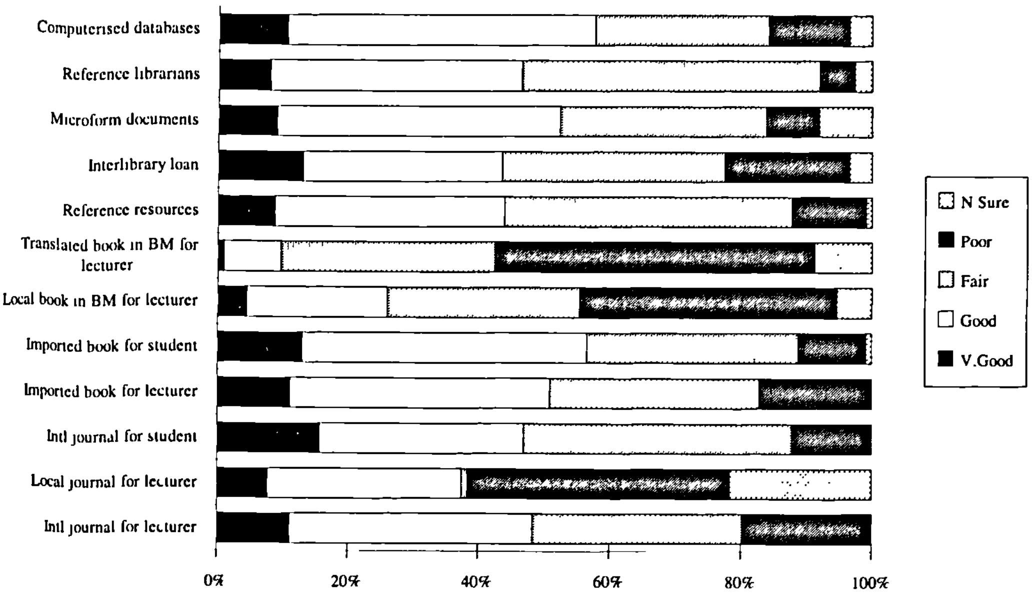

Table 7.3.2 **Adequacy of international and local journal holdings for the lecturers' needs by institute (in percentages)**

Institutes	V. Good	Good	Fair	Poor	Not Sure
USM	❶10.6	38.3	27.7	23.4	0
	❷4.4	13.0	41.3	39.1	2.2
UPM	5.9	35.3	38.2	20.6	0
	2.9	20.6	17.7	50.0	8.8
ITM	16.0	40.0	24.0	20.0	0
	0.0	12.0	20.0	56.0	12.0
UM	22.2	33.3	44.4	0.0	0
	22.2	33.3	22.2	22.2	0.0
TOTAL	11.2	37.1	31.9	19.8	0
	7.8	29.6	0.9	40.0	21.7

Key: ❶ International journals ❷ Local journals

Lecturers seemed to think poorly of the adequacy of local publications in the libraries in catering for their needs compared to the international ones. Around 40% of lecturers rated local journal holdings as poor and 39.3% for original local books, whereas only 20% and 17.2% gave poor ratings for the international journal holdings and imported books respectively. The situation is worse for translated books in bahasa Melayu as nearly 50% think poorly of their adequacy in meeting their needs (see table 7.3.2). Engineering lecturers were much less satisfied with the adequacy of international journal holdings for their needs compared to lecturers from other courses, see figure 7.3.2 of KW test.

Fig 7.3.2 **KW test of adequacy of international journals holding for lecturers by faculty**

Faculty	N	Mean Score	Group
Agriculture	8	38.5	A
Social Sc	34	55.62	A
Humanities	29	55.88	A
Medical Sc.	10	58.9	A
Natural Sc.	20	59.43	A
Engineering	16	81.63	B

N = 117 KW χ^2 approx. = 11.727 DF = 5 Prob > χ^2 = 0.0387 Overall Mean Score = 59.0

Out of the four institutions in the sample, ITM respondents rated their institution the lowest in terms of adequacy of both local journal and book holdings for their requirements, see figures 7.3.3 and 7.3.4 of KW results.

Fig 7.3.3 **Adequacy of local journal by institute**

Inst.	Mean	N	Group	
UM	32.89	9	A	
USM	53.32	46	A	
UPM	61.12	34		B
ITM	69.14	25		B

DF=3, KW χ^2 *approx = 10.453,*
Pr >χ^2 =0.0151, Overall Mean Score=57.5

Fig 7.3.4 **Adequacy of local book by institute**

Inst.	Mean	N	Group	
USM	46.07	43	A	
UM	47.22	9	A	
UPM	58.75	34	A	B
ITM	72.50	25		B

DF=3, KW χ^2 *approx =12.817*
Pr > χ^2 = 0.0050, Overall Mean Score=56

From the seven questions related to the adequacy of publications in the university library, generally a high percentage of lecturers think poorly about the adequacy of publication holdings, especially those locally produced. The survey showed that there were significantly more lecturers who believed that local publications were in shorter supply than the imported ones and are still far from sufficient to meet the needs of the academics. Although bahasa Melayu had been used as the official medium of instruction in higher institutions for over 10 years[442], the problems still remain unresolved and lecturers still have to rely heavily on imported publications. On the other hand, lecturers are asked to deliver lectures in bahasa

[442] See chapter two earlier on government policy on language and education.

Melayu.[443] This is a big problem especially for lecturers who went through the language policy (change of 1971).[444]

As a result of the shortage of local publications, many university presses have been only too eager to publish scholarly publications to cope with the shortage but have failed to market them efficiently. This has resulted in a waste of time and money not only for the publisher concerned but also the entire local scholarly sector. On the basis of the interviews with librarians[445], there was not much that they could do in order to get hold of publications if the publisher did not send any promotional lists to them. There were cases where publications published by one of the departments in the same university were not available at the university's library. Other problems such as budget cuts have forced librarians to cancel a number of existing journals subscribed in order to subscribe to a new journal.[446]

Regarding adequacy of reference resources and inter-library loan services, the majority of lecturers were satisfied with the facilities provided. However, their opinions on the availability of reference librarians, quality and availability of machines needed to read microfilm documents and computerised bibliographic databases varied between each university, but in general ITM respondents felt the worst about their institutional library, see figures 7.3.5 and 7.3.6 of KW results.

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443 This had caused problems to some lecturers in the early introduction of the policy since many terms used in science and technology remained untranslated and caused inconsistencies, see Chapter Two.

444 Many privates companies, especially the international ones, had expressed their concern that this group of graduates could not converse well in English. Dr Mahathir Mohammad, PM of Malaysia, has recently put pressure on schools and universities on the importance of English so as to overcome, though not cure, the problem.

445 Details of problems facing libraries are described in Chapter Eight.

446 Based on the interviews by the researcher with all the chief librarians/librarian in-charge in all the higher institutions involved in the survey; many faced some problems in buying/subscribing new titles due to the limited budget (the budgets allocated to some institutions had been static for several years and in some other institutions it had been cut).

Fig 7.3.5 **Quality and availability of microfilm documents**

Inst.	Mean	N	Group	
UM	46.41	33	A	
USM	51.34	44	A	B
UPM	62.06	9		B
ITM	73.17	24		C

DF =3, KW χ^2 approx.=12.613 , $Pr > \chi^2 = 0.0056$, Overall Mean Score=55.5

Fig 7.3.6 **Access to computerised bibliographic**

Inst.	Mean	N	Group	
USM	47.79	46	A	
UM	53.24	33	A	
UPM	59.61	9	A	B
ITM	76.50	24		B

DF = 3, KW χ^2 approx.=14.680, $Pr > \chi^2 = 0.0021$, Overall Mean Score = 56.5

Around two thirds of lecturers spent around 1 - 5 hours per week in the university library while nearly 8% spent no time in the library. Of all those who spent no time in the library, the highest percentages came from ITM, whereas all UM lecturers spent at least some time in the library, (see table 7.3.2) although there was no significant difference among lecturers from different institutes and faculties.[447]

Figure 7.3.7 presents mean amount of scholarly publications bought (in terms of number of copies and expenditure) by lecturers when classified by the number of hours spent per week in the library. Although there was no statistical evidence (using Duncan test) to support the hypothesis that those who spent more hours in the library also bought more publications, the means were certainly higher for those spending more hours in the library.

Fig 7.3.7 **Mean Amount of Scholarly Publications bought by hours spent in library**

Hours in library	Mean No of Scholarly Books	Mean Expenditure on Scholarly Books	Mean Expenditure on Scholarly Journals
>5	7.00	385	263.2
1-5	5.99	293.3	181.6
None	4.75	182.5	87.1
ANOVA Results DF = 2	F Value = 0.3 Pr > F = 0.74	F Value = 1.25 Pr > F = 0.2910	F Value = 0.95 Pr > F = 0.3897

447 Result for KW tests by institutes: KW χ^2 approx.= 2.2685, DF = 3, $Pr > \chi^2 = 0.5186$ and by faculties: KW χ^2 approx.= 2.0495, DF = 5, $Pr > \chi^2 = 0.8423$.

Table 7.3.2 **Number of hours spent in library by institutes and faculties (in percentages)**

Institute	Hour				
	None	1 - 5	6 - 10	11 - 15	> 15
UM	0.0	77.8	11.1	11.1	0.0
UPM	5.71	80.0	14.3	0.0	0.0
USM	4.26	78.7	14.9	0.0	2.1
ITM	19.2	65.4	3.9	11.5	0.0
Faculty					
NS	9.5	71.4	19.1	0.0	0.0
ENG	6.3	87.5	6.3	0.0	0.0
AGRI	0.0	75.0	25.0	0.0	0.0
MS	10.0	80.0	10.0	0.0	0.0
SS	8.8	76.5	5.9	8.8	0.0
HUMAN	6.9	72.4	13.8	3.5	3.5
TOTAL	**7.7**	**76.1**	**12.0**	**3.4**	**0.9**

Lecturers in general faced little unnecessary inconvenience while using their institutional library such as waiting in long lines for books or equipment, malfunctioning equipment, inadequate facilities for reading journals and inability to get help from librarians. Most of them seldom faced any of these problems and KW tests done on these variables show that there were no statistical differences among lecturers from different institutes.

Some lecturers (17%) did not know at all about the computerised searches of on-line databases that are accessed by using a computer terminal to produce a customised list of references or sources on topics chosen by the user. Another 26% admitted that they did not know very much on these method, while another 8% said they they did know but never used them. This situation could be justified by the fact that some university libraries still do not have such facilities or are in the process of installing them.[448] As for the case of ITM, the majority of the lecturers (75%) had either never used, or did not know very much or did not know at all about such facilities. Those who were familiar with such facilities may be the lecturers who have studied abroad and used such facilities while overseas or used them at other institutions.

[448] During the ITM interview (July 1993), the library was in the process of introducing such services as they had been recently installed and library staff had to be trained first before they could be introduced to other users.

It could be arguably justified that the lecturers might not know or have had the chance to use on-line databases if their institutional library did not provide such a facility. Unfortunately, when asked whether they were aware about the existence of such facility in the library, the importance of on-line databases seems to be neglected by the lecturers, as around 40% of them were not sure whether or not such facilities were available at their institutions. This finding is supported by another question asked to lecturers about computerised catalogues in the library: around 22% of them did not know whether their institution's library had computerised the catalogues or not.

Of those who had used computerised searches, 19% said it was done by the librarian in their presence while a further 29% said without their presence, around 22% said that they sometimes do it or sometimes by the librarian while only 21 % said they undertook the searches by themselves. The majority of the lecturers were quite satisfied with the result of their most recent searches. Most of them admitted that the introduction of computerised catalogues had increased their access to scholarly materials, improved their productivity as a lecturer, increased their research productivity and made the use of the library more enjoyable. Around 67% of the respondents said that their institution did provide opportunities such as seminars or tutorials for them to learn about new technical services available in the library. However in the case of ITM lecturers, around 58% said that their institutional library had not provided such an opportunity.

It seems that library materials were not as important as their personal materials in keeping them up to date about the developments in their field either for teaching or research (see table 7.3.3 for detailed result). As indicated earlier, quite a number of lecturers were unaware of technological advancements in their institutional library, which might have caused them to rely heavily on their personal materials instead of making use of library stock. Although the reason could partly be the insufficient materials and services given by their institutional library, the little time spent by the lecturers in the library or their 'ignorant' attitudes also provides the answer, since many of those who were unaware of technological advancements also spent the least time in the library.

Table 7.3.3 **Rating of importance of six various types of scholarly materials (in frequencies and row percentages).**

Types of scholarly materials	Rating 1 = Highest to 5 = Lowest					
	1	2	3	4	5	N
Materials already in personal library	❶72 ❷ 66.1 ❸ 34.6	28 25.7 11.0	6 5.5 5.7	2 1.8 6.5	1 0.9 3.2	109
Materials purchased in the past year	43 39.8 20.7	53 49.1 20.8	8 7.4 7.6	3 2.8 9.7	1 0.9 3.2	108
Colleagues' copies	16 14.7 7.7	44 40.4 17.3	35 32.1 33.3	9 8.3 24.0	5 4.6 16.1	109
Materials in institutional library	38 34.5 18.3	57 51.8 22.4	11 10.0 10.5	2 1.8 6.5	2 1.8 6.5	110
Materials through inter library loan	23 22.8 11.1	33 32.7 12.9	20 19.8 19.0	8 7.9 25.8	7 16.8 22.6	101
Materials through the use of computer literature search	16 15.5 7.7	40 38.8 15.7	25 24.3 23.8	7 6.8 22.6	15 14.6 48.4	103
No of observations	208	255	105	31	31	

Key:

❶ Frequency

❷ Row percentage

❸ Column percentage

Table 7.3.1 **Library facilities by institute, lecturer comments (in percentages)**

Characters	UM			UPM			USM			ITM		
	Good	Fair	Poor	Good	Fair	Poor	Good	Fair	Poor	Good	Fair	Poor
International journal for lecturers	55.6 (48.7)	44.4 (31.6)	0.0 (19.7)	41.2	38.2	20.6	48.9	27.7	23.4	56.0	24.0	20.0
Local journal for lecturer	55.6 (21.6)	22.2 (28.4)	22.2 (34.0)	23.5 *(16.0)	17.7	50.0 *8.8	17.4	41.3	39.1 2.2	12.0	20.0	56.0 12.0
International journal for student	77.8 (46.6)	22.2 (41.0)	0.0 (2.2)	32.4 *(0.9)	58.8	8.8	53.2	34.0	12.8	45.8	33.3	20.8
Imported book for lecturer	66.6 (51.3)	11.1 (31.6)	22.2 (17.1)	41.2	38.2	20.6	53.2	31.9	14.9	56.0	28.0	16.0
Local book for lecturer	33.3 (25.6))	33.3 (30.1)	33.3 (38.9)	17.7 (5.3)	35.3	44.1 *2.94	39.5	30.2	25.6 *4.7	12.0	16.0	60.0 *12.0
Imported book for student	55.6 56.9	22.2 31.9	11.1 (10.3)	44.1 *(0.9)	41.2	14.7	68.1	25.5	6.4	54.2	33.3	12.5
Translated book for lecturer	12.5 (9.6)	37.5 (33.3)	50.0 (48.2)	8.8 *(8.8)	35.3	44.1 11.8	8.9	35.6	46.7 8.9	12.0	20.0	60.0 8.0
Reference sources	33.3 (44.3)	66.7 (43.5)	0.0 (11.3)	37.5 *(0.9)	50.0	12.5	44.7	44.7	10.6	56.0	24.0	16.0 4.0
Interlibrary loan	55.6 (44.0)	44.4 (33.6)	0.0 (19.0)	42.9	37.1	17.1 2.9	43.5	37.0	15.2 4.4	41.7	16.7	37.5 4.2
Microform documents	44.4 (52.6)	33.3 (31.3)	22.2 (8.0)	66.7 (8.0)	33.3	0.0	56.8	29.6	4.6 *9.1	29.2	29.2	20.8 *20.8
Reference librarians	33.3 (46.9)	66.7 (45.1)	0.0 (5.3)	61.8 *(2.7)	38.2	0.0	45.5	45.5	6.8 *2.3	33.3	45.8	12.5 *8.3
Computerised database	55.6 (57.9)	33.3 (26.3)	11.1 (12.3)	63.6 *(3.5)	30.3	6.1	65.2	28.3	4.4 *2.2	37.5	12.5	37.5 *12.5

Note: Figure in brackets are for total and * figure for Not Sure

7.4 Research and Publications

Marketing scholarly publications is unusual in that the publisher does not solely market his products to the ultimate consumer, but also to an intermediary. In this respect, lecturers play an important part in marketing scholarly publications as they are not only one of the consumers but also act as intermediaries between the publisher and students/libraries. In a normal market the final consumer would have an ultimate power of authority over his decision, but in the market for scholarly publications (university textbooks particularly) this power is curbed by the fact that lecturers instruct students on which books to buy by sanctioning them in their reading lists; in other words, lecturers can be an additional influencing factor in buying books.

This type of marketing is analogous to the marketing of prescription medicines as defined by Chappell: "quite clearly, the marketing of prescription medicines is unique in that the manufacturer does not market his product to the ultimate consumer/patient, but instead to an intermediary (doctor)."[449] In scholarly publishing, apart from being one of the main target markets, lecturers also function as prospective writers of scholarly publications. However some important differences do exist, most notably patients have less choice than students, and cannot go against their doctor. In addition, doctors are not normally considered as a separate group of consumers of medicines, only an intermediary, while lecturers also provide a large market.

In this section therefore, lecturers were asked about their interest and involvement in writing publications. Their views on authorship of scholarly publications, peer review systems and technological advancement in the use of computers in the production and access to scholarly publications were sought.

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449 S. C. Chappell, 'Marketing Analysis' In *Principles of Pharmaceutical Marketing* (US: Lea & Febiger, 1983) quoted in A.M. el-Meniawy, 'Consumer Satisfaction with the Provision of Pharmaceutical products in the Egyptian Market: An Empirical Study' (unpublished Ph.D. thesis, University of Sheffield, 1991), p. 20.

Twelve questions relating to types of publications were asked of academics in order to find out the types of publications they had written. Around 13% of lecturers had never published a publication of **any sort** (see table 7.4.1 of detailed figures). More than two thirds of lecturers had never published a **university textbook.** Of the 23.3% of respondents who had published, around 44% came from UM, followed by around 37% from USM and 17% from UPM, while none of ITM's lecturers had ever published a university textbook. ANOVA test performed on this variable shows that there were some differences among the lecturers from different institutes but Duncan's test (post-adhoc test) shows that the differences were not significantly statistically different. However, in the sample **ITM lecturers published the least while UM lecturers published the most** (see figure 7.4.1 of Duncan's test).

Among the faculties, Medical Sciences had the highest percentages of lecturers who had published a university textbook (50%) which was by far the largest percentage (see figure 7.4.2 of Duncan's result for difference in mean number of university textbooks written by courses). Professor grades had published more university textbooks than non-professors which indicates that the status given to them was partly a reward/promotion for writing publications (see figure 7.4.3 of Duncan's result for difference mean of textbook written by status).

Fig 7.4.1 **Differences in Mean number of textbooks written, by institutes**

Courses	Mean	N	Group
UM	0.778	9	A
USM	0.776	49	A
UPM	0.314	35	A
ITM	0.000	26	A

(DF = 3, F Value = 2.85, Prob > F= 0.0405
Overall Mean Score = 0.47)

Table 7.4.1 **Percentages of lecturers who have ever published, by faculty and type of publications in percentages (see Q1 of Sec D for full title)**

Types of publications	Ever published	Faculty					
		NS	ENG	AGRI	MS	SS	Hum
University Textbook	❶23.3	36..4	18.8	12.5	50.0	17.1	17.2
	❷76.7	63.6	81.3	87.5	50.0	82.9	82.8
Sch. book or monograph	28.6	27.3	37.5	12.5	50.0	17.7	34.5
(editor or co-editor)	71.4	72.7	62.5	87.5	50.0	82.4	65.5
Sch. book or monograph	26.7	22.7	12.5	0.0	50.0	28.6	34.5
(author or co-author)	73.3	77.3	87.5	100.0	50.0	71.4	65.5
Chapter in scholarly book	29.2	27.3	18.8	25.0	50.0	25.7	34.5
	70.8	72.7	81.3	75.0	50.0	74.3	65.5
Article in a refereed journal	64.2	63.6	81.3	75.0	90.0	51.4	58.6
	35.8	36.4	18.8	25.0	10.0	48.6	41.4
Comment in a refereed	18.3	18.2	12.5	12.5	50.0	17.1	13.8
journal	81.7	81.8	87.5	87.5	50.0	82.9	86.2
Book review in a scholarly	14.2	4.6	18.8	0.0	50.0	17.1	6.9
journal	85.8	95.5	81.3	100.0	50.0	82.9	93.1
Sch. paper in a conference	64.2	63.6	75.0	75.0	90.0	60.0	51.7
proceedings	35.8	36.4	25.0	25.0	10.0	40.0	48.3
Book review in newspaper	9.2	9.1	6.3	28.6	20.0	11.4	0.0
or general magazine	90.8	90.9	93.8	71.4	80.0	88.6	100.0
Short story novel or poetry	10.0	4.6	12.5	0.0	30.0	8.6	10.3
	90.0	95.5	87.5	100.0	70.0	91.4	89.7
Nonfiction essay/article/op ed piece in newspaper or general magazine	24.2	22.7	25.0	0.0	50.0	17.1	31.0
	75.8	77.3	75.0	100.0	50.0	82.9	69.0
Translated works	34.2	36.4	43.8	25.0	70.0	22.9	31.0
	65.8	63.6	56.3	75.0	30.0	77.1	69.0
Total for overall	❸86.7	86.4	93.8	87.5	100	80.6	82.8
	13.3	13.6	6.2	12.5	0.0	19.4	17.2

	Institute			
	UM	UPM	USM	ITM
Ever published ❸	100	94.3	93.9	61.5
Never published	0.0	5.7	6.1	38.5

Key:
❶Those who did publish ❷Those who did not publish ❸ Published at least one type either university textbook, or scholarly book or chapter or etc.

Fig 7.4.2 **Differences in Mean number of university textbooks written by faculty**

Courses	Mean	N	Group
MS	1.600	10	A
NS	0.682	22	B
HUMAN	0.345	29	B
ENG	0.250	16	B
AGRI	0.250	8	B
SS	0.250	36	B

DF = 5, F Value = 2.510, Pr > F = 0.0341

Fig 7.4.3 **Differences in Mean number of university textbooks written by status**

Status	Mean	N	Group
Professors	1.054	37	A
Non-Professors	0.202	84	B

DF = 1, F Value = 14.26, Pr > F = 0.0002

Medical Sciences lecturers and Professors have higher mean number of scholarly books or monographs edited (editor or co-editor) although not statistically different. Those with Ph.D.s however were likely to be involved either as editor or co-editor in this type of publication (see figure 7.4.4 to 7.4.5 of Duncan's tests of differences in mean number of scholarly book or monograph (editor or co-editor)). ITM seemed to have the least number of lecturers that had edited any scholarly books, see figure 7.4.6 of Duncan's Test.

Fig 7.4.4 **Differences in mean number of scholarly books edited (editor or or co-editor) by faculty**

Courses	Mean	N
MS	1.200	10
HUMAN	0.593	27
ENG	0.500	16
NS	0.409	22
SS	0.324	34
AGRI	0.000	7

DF = 5, F Value = 1.84, Pr > F = 0.1115

Fig 7.4.5 **Differences in mean number of scholarly books edited (editor co-editor) by qualifications**

Degree	Mean	N	Group
Ph.D.	0.687	64	A
Non-Ph.D.	0.231	52	B

DF = 1, F Value = 6.89, Pr>F = 0.0098

Fig 7.4.6 **Differences in mean number of scholarly books edited by institute**

Courses	Mean	N	Group
UM	0.667	9	A
UPM	0.636	33	A
USM	0.617	47	A
ITM	0.000	25	B

DF = 3, F Value = 2.94,

Prob > F = 0.0365

Fig 7.4.7 **Differences in mean number of scholarly book published (author or co-author) by faculty**

Faculty	Mean	N
HUMAN	1.179	28
MS	1.000	10
SS	0.529	34
NS	0.318	22
ENG	0.250	16
AGRI	0.000	8

DF = 5, F Value = 0.70, Prob > F= 0.6240

Fig 7.4.8 **Differences in mean number of scholarly books written by institutes**

Courses	Mean	N
USM	1.000	48
UM	0.556	9
UPM	0.471	34
ITM	0.115	26

DF = 3, F Value = 0.95, Pr > F = 0.4195

Fig 7.4.9 **Differences in mean number of scholarly books edited (editor or co-editor) by status**

Status	Mean	N	Group
Professor	0.806	36	A
Lecturer	0.338	80	B

DF =1, F Value = 6.233, Pr > F = 0.01405

Fig 7.4.10 **Differences in mean number of scholarly books written (author or co-author) by status**

Status	Mean	N	Group
Professor	1.400	35	A
Lecturer	0.274	84	B

DF =1, F Value = 6.63, Pr>F = 0.0113

The percentages of respondents who had written a scholarly book or monograph (**author or co-author**) were slightly less than those who had served as editors or co-editors. Lecturers from Humanities had written the highest mean number of such publication, followed by Medical lecturers, but there was no statistical evidence to suggest any differences amongst courses (Duncan's result: DF = 5, F Value = 0.71, Pr>F = 0.6167; see figure 7.4.7). ITM lecturers again seemed to write less scholarly books or monographs but no evidence could be found to apply this finding to the larger population (see figure 7.4.8). Professors wrote significantly more scholarly books and **chapters in scholarly books** than ordinary lecturers (see figures 7.4.9 and 7.4.10 for Duncan's results).

In term of writing articles in refereed journals, lecturers with a higher degree, status and age wrote significantly more than those with lower qualifications, status and age(see figures 7.4.11 to 7.4.12 of Duncan's tests).

Fig 7.4.11 **Differences in mean number of chapter written in scholarly book by status**

Status	Mean	N	Group	
Professor	1.094	32	A	
Lecturer	0.354	82		B

DF = 1, F Value = 5.20, Pr > F = 0.0245

Fig 7.4.12 **Differences in mean number of articles written in a refereed journal by qualifications**

Degree	Mean	N	Group
Ph.D.	10.016	61	A
Non-Ph.D.	1.500	48	B

DF = 1, F Value = 15.94, Pr > F = 0.0001

Fig 7.4.13 **Differences in mean number of articles written in a refereed journal by age**

Age	Mean	N	Group
40 & above	10.889	45	A
Below 40	3.016	64	B

DF =1, F Value = 13.09, Pr>F = 0.0005

Fig 7.4.14 **Differences in mean number of articles written in a refereed journal by status**

Status	Mean	N	Group
Professor	15.5	32	A
Lecturer	2.429	77	B

DF = 1, F Value = 37.01, Pr > F = 0.0001

Regarding numbers of **book reviews in a scholarly journal** and **non-fiction essays/articles in a newspaper or general magazine**, Medical Sciences lecturers had higher mean (although not statistically significant) than their colleagues from other courses. Professors and Ph.D. holders were also more likely to write **scholarly papers in conference proceedings** rather than non-professors and non-Ph.D. holders. Professors also significantly wrote more book reviews in scholarly journal than non-Professors (see figures 7.4.15 to 7.4.19 for Duncan's results).

Fig 7.4.15 **Mean number of book review in newspaper by faculty**

Faculties	Mean	N
MS	1.111	9
SS	0.353	34
ENG	0.333	15
HUMAN	0.276	29
NS	0.045	22
AGRI	0.000	8

DF = 5, F Value =1.67 , Pr > F = 0.1473

Fig 7.4.16 **Nonfiction essay/article in newspaper or general magazine by faculty**

Faculties	Mean	N	Group	
MS	4.300	10	A	
HUMAN	1.346	26	A	B
NS	0.773	22	A	B
ENG	0.500	16		B
SS	0.219	32		B
AGRI	0.000	8		B

DF = 5 , F Value =4.19 , Pr > F = 0.0016

Fig 7.4.17 **Scholarly paper in conference proceedings by status**

Status	Mean	N	Group	
Professor	16.433	30	A	
Lecturer	3.933	75		B

DF = 1, F Value = 18.96, Pr > F = 0.0001

Fig 7.4.18 **Scholarly paper in conference proceedings by qualifications**

Status	Mean	N	Group	
Ph. D	11.780	59	A	
Non-Ph.D.	2.022	46		B

DF =1, F Value = 13.29, Pr>F = 0.00004

Fig 7.4.19 **Book review in scholarly journal by status**

Status	Mean	N	Group	
Professor	0.600	35	A	
Lecturer	0.183	82		B

DF = 1, F Value = 4.362, Pr > F = 0.0391

For most types of publications, less than 30% of the lecturers have published in each class of publication, with the exception of articles in a refereed journal and scholarly papers in a conference proceeding for which just above 64% have ever done so; and just above 34% have ever published translated works. Regarding the **translation works**, the involvement of lecturers in this category of work is improving (although slowly) as the government has put much effort into promoting this activity with the co-operation of Translation Unit (attached to DBP) and Malaysian Translation Association (PPM); and since September 1993, a consortium in charge of translation works including scholarly original works has been set up by the Ministry of Finance, known as Malaysian National Institute of Translation Bhd[450].

In order to obtain an overall view of publications written by the academicians and to assess their productivity vis-à-vis publications, a simple set of ratios using the number of publications undertaken and the number of years of service in current institution and years since obtaining highest degree was calculated as below. In addition, in order to show disparities in the contribution of individual lecturers to the total number of publications, Lorenz Curves and Gini Coefficients were calculated for the entire population, by courses and institutes. The Lorenz Curve and Gini Coefficient only show disparities not productivity; with this being left to the productivity ratios shown in equations (iv) and (v). The ratios should be seen as mean productivity ratios designed to show the average productivity of Malaysian scholars, while Lorenz and the gini coefficient show the spread of the total publications and can be seen as participation indicators.

[450] The establishment of the company had been a controversial issue as it overlaps somewhat with the function of PPM; a society established with the co-operation of Translation Bureau, DBP, see discussion in Chapter Two.

Summation of all publications for sample = Σ (university textbook + scholarly book (editor or co-editor) + scholarly book(author or co-author)+ chapter in scholarly book + article in refereed journal + comment in refereed journal + book review in scholarly journal + scholarly paper in conference proceedings + book review in newspaper etc. + short story etc. non-fiction essay/article/op ed. piece etc.+ translated works)

equation(i)

Total years serving current institution for sample = Σ (individual years in institution)

equation(ii)

Total years since highest degree for sample = Σ (individual years since qualification)

equation(iii)

Productivity ratio per year since joining current institution (n=82)

$$= \frac{\text{Summation of all publications}}{\text{Total years serving current institution}} = 1.98$$

equation(iv)

Productivity ratio per year since obtaining highest qualification (n=90)

$$= \frac{\text{Summation of all publications}}{\text{Total years since highest degree}} = 3.65$$

equation(v)

Both indicators are encouraging and show lecturer publication productivity per year across all publications as reasonable. The values should only be interpreted as summary statistics since a newspaper article is given the same weighting as a university textbook. Of course not all lecturers published material only while in their current institution; however as outlined before most lecturers in Malaysia join an institution and remain there, so this can serve as a useful surrogate for the academic life of respondents. In addition many academics joined their present institution long before they received their highest qualifications. Only recently has the government been able to channel funds into upgrading the qualifications of university staff, thus equation (iv) should be preferred over equation (v) as an indicator of average productivity during academic life; see table 7.4.1 for a detailed breakdown of the number of publications published . In order to assess whether there was a difference between those tenured with pension, comprising the vast majority of the sample, and those on other arrangements, the ratio for the mean number of publications of any type per year in current institution per lecturer, was calculated for these groups. **The mean number of publications per year while in current institution was 1.781 for those on tenure with pension (n=72) and 3.436 for those on other contracts (n=10).** The small sample size meant that a statistical difference could not be shown, but the difference shows that perhaps those on tenure with pension arrangements are less active. The mean number of publications of any type per respondent over the whole academic life was 19.8 (n=91), while exceptionally one respondent from the Humanities[451] faculty of USM had managed to published 221 works. Figures 7.4.20 and 7.4.21 showed the mean number of publications published by lecturers from different institutes and faculties.

Fig 7.4.20 **Mean number of publications of any type by institute**

Courses	Mean	N	Group
USM	24.06	49	A
UM	21.89	9	A
UPM	17.26	35	A B
ITM	2.04	6	B

DF = 3, F Value = 3.50, Prob > F = 0.0178

Fig 7.4.21 **Mean number of publications of any type by faculty**

Faculty	N	Mean
MS	10	35.70
NS	22	22.45
HUMAN	29	18.0
ENG	16	15.25
AGRI	8	11.75
SS	35	9.20

DF = 5, F Value = 1.58, Pr > F = 0.1718

Approximately 87% of lecturers have published at least one publication of any type in their life. However only 62% of ITM staff have ever published anything. All medical lecturers had written at least something while some 19% of social sciences lecturers had never published a

[451]The Gini Coefficient and Lorenz Curve calculated later on in this research for Humanities must be interpreted carefully since the addition of the respondent may distort the values and make the sample not representative of the actual population of Humanities and USM lecturers.

work, see table 7.4.1. Further in order to identify inequalities in the participation of lecturers in producing publications Lorenz curves and Gini coefficients were calculated. (These statistics are normally used by economists to gauge the contribution of individual economic units to the total observed value of a phenomenon e.g. the contribution of individual electronic firms to the total R&D expenditure within a country; see Chapter 5 on Research Methodology). The results have to be interpreted in light of what constitutes an optimal, in the case of the example above with R&D expenditure the optimal may not be an equal participation but rather by using the statistics economists are interested in just quantifying the disparities. But when applying the approach to this survey an ideal situation would exist if all lecturers participated equally in the writing of publications; the extent to which this is true will be examined. In the best scenario with maximum equality i.e. all lecturers contributing equally, the Gini coefficient takes the value zero and the Lorenz curve is a straight diagonal line at 45° to the horizontal. The maximum inequality exists when all publications are written by only one lecturer. In this case the Gini coefficient takes the value one and the Lorenz curve is a straight line perpendicular to the horizontal starting at 100 on the horizontal axis and this forms a right angled triangle with the diagonal line shown and the area of the shape is the maximum. Thus the Gini coefficient value should be seen as an indicator while the Lorenz curve is a graphical presentation of the inequality. Figures 7.4.22 to 7.4.32 show Lorenz Curves of all publications published by lecturers by institutes and faculties.

Figures 7.4.22 to 7.4.32 **Lorenz Curves** ***(Gini Coefficient Values)***[452]

Fig 7.4.22 **ALL** ***(0.6774)***

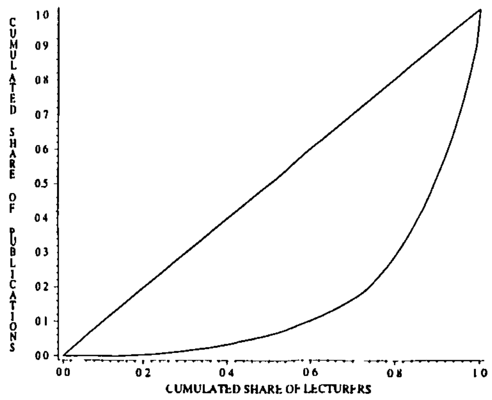


Fig 7.4.23 **UM** ***(0.6354)***

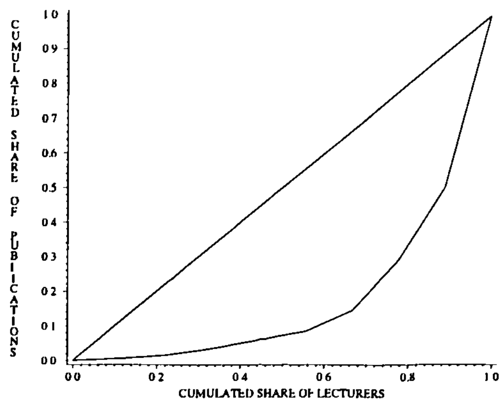


Fig 7.4.24 **UPM** ***(0.5885)***

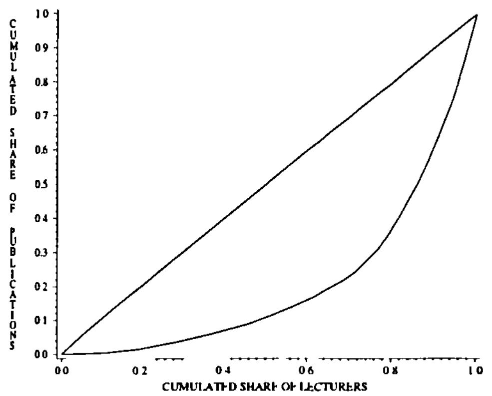


Fig 7.4.25 **USM** ***(0.6273)***

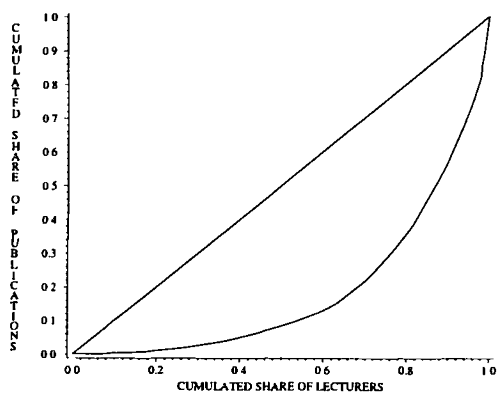


Fig 7.4.26 **ITM** ***(0.7113)***

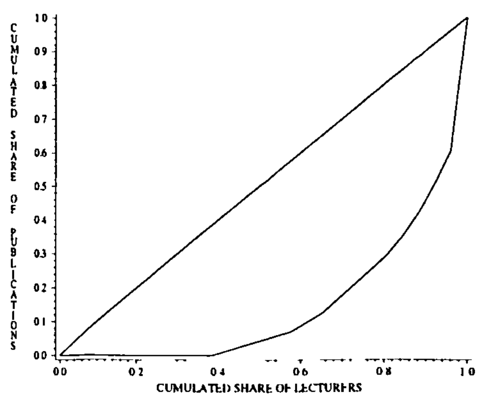
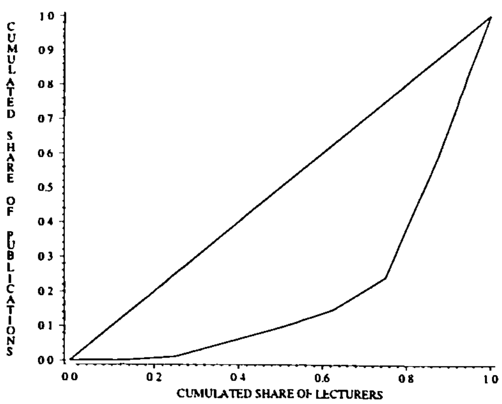


Fig 7.4.27 **AGRICULTURAL SC** ***(0.5908)***



[452] Questions regarding types of publications were asked in 2 parts, first respondents were asked whether they had undertaken a particular type of publication. If they answered 'YES', then they were asked to complete the second part stating the number of publications of that type. A few respondents answered 'YES' to the first part but left the quantity blank. In order to minimise inconsistencies the Lorenz Curves and Gini Coefficients were calculated by setting these missing values to 1, the rationale being that this was the mode for each type of publication.

Fig 7.4.28 **HUMANITIES** *(0.7579)*

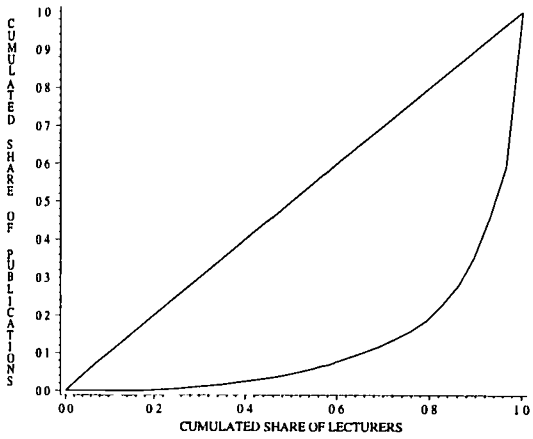


Fig 7.4.29 **SOCIAL SC.** *(0.6779)*

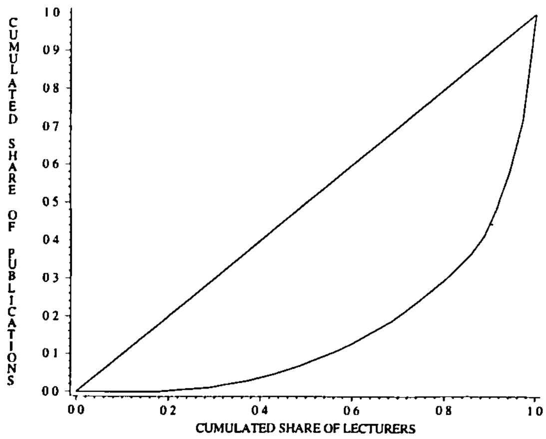


Fig 7.4.30 **NATURAL SC.** *(0.6485)*

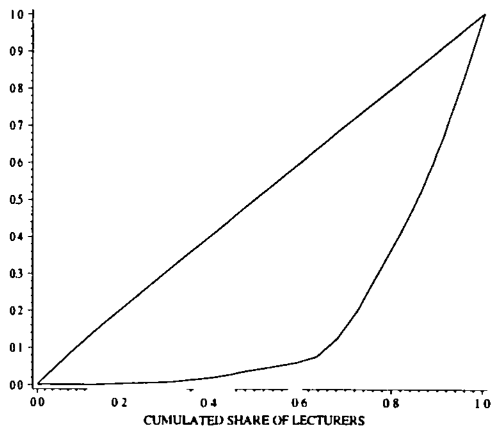


Fig 7.4.31 **MEDICAL SC.** *(0.2807)*

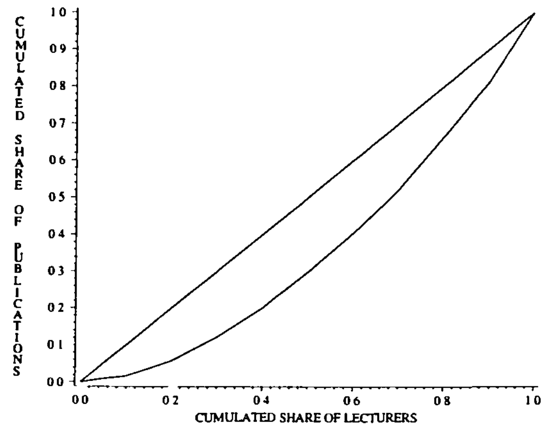


Fig 7.4.32 **ENGINEERING** *(0.5764)*

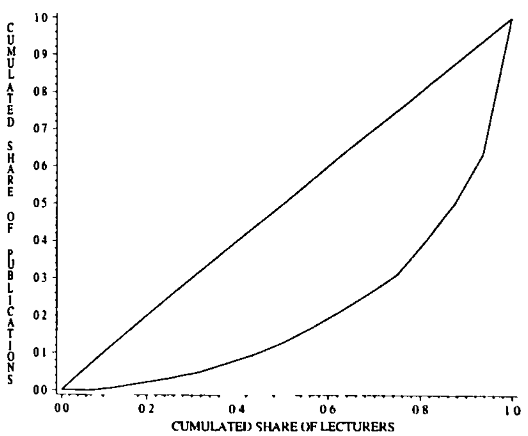


Figure 7.4.22 shows that approximately 13% of lecturers have never written a publication of any sort while approximately 80% of lecturers wrote 20% of the total and the last 20% wrote

80% of publications. The high value of the Gini Coefficient suggests the same thing i.e. a high degree of inequality. Although the indicators for productivity were encouraging, the indicators presented here for participation are very disturbing. They suggest that very few lecturers are contributing to the total publications, with some 13% of the survey sample producing nothing over the course of their academic lives; if this is representative of the true population of all lecturers than action must be taken to remedy this impotence in the Malaysian higher educational sector. Amongst the individual institutions, as expected, ITM staff had the highest inequality with 38.5% never having written a publication while UPM lecturers had the best participation ratio, while none of UM lecturers had failed to publish something. Although the UPM result was the best, the high value for the Gini coefficient leads one to conclude that it is the "best of a bad bunch". Turning to faculties, as categorised by the OECD standard classification of subjects, Medical Science lecturers are the most involved and Humanities lecturers the least. The low value of the Gini coefficient suggests that most Medical Science lecturers contribute and this is encouraging as well as the fact that all have written something during the course of their academic life.

On the whole, between 31% to 33% of respondents had **served as editor or associate editor** of a scholarly journal and have evaluated a scholarly book manuscript for a publisher. UM had the highest percentage of lecturers who had evaluated a scholarly book manuscript for a publisher and was statistically significant from the rest *(see figure 7.4.33 of KW test).*

Fig 7.4.33 **Served as editor for a scholarly journal by institute**

Courses	Mean	N	Group
UM	31.28	9	A
USM	53.98	47	B
UPM	63.8	33	B
ITM	67.15	26	B

$\chi^2 = 14.607$, DF = 3, Prob > $\chi^2 = 0.0022$
Overall Mean Score = 58, N= 115

Fig 7.4.34 **Evaluated scholarly journal article by status**

Status	N	Mean	Group
Non-professors	83	66.98	A
Professors	37	45.96	B

$\chi^2 = 12.68$, DF = 1, Prob > $\chi^2 = 0.0004$

About three quarter of Medical Sciences respondents had **evaluated scholarly book manuscripts** while on the other hand, only 13% Agricultural respondents had been evaluators. Professor (and equivalents) were more likely to have been offered chances to evaluate scholarly manuscripts and serve as referee compared to non-professors, (see figures 7.4.34 and 7.4.35 of Wilcoxon Test).

Fig 7.4.35 **Served as referee for a scholarly journal article by status**

Status	N	Mean score	Group	
Non-professors	81	66.85	A	
Professors	37	43.42		B

$\chi^2 = 18.185$, DF = 1, Prob > $\chi^2 = 0.0001$

About 33% of respondents had **never served** as **referee for scholarly journal article** and the highest percentage who **had served** came from UM and none from ITM. Again, nearly three quarter of Medical Sciences respondents had served as referee for a scholarly journal article while only 31% from their colleagues in Social Sciences (see table 7.4.2 for detail result in percentages of those who had ever served as referee by faculty and institute). Although about 58% of respondents had **received research grants** of some sort from an outside funding agency since they left graduate school (including grants to a team or group project), figures showed that only 54.2% of respondents had published a scholarly work of some sort, see table 7.4.2 for a detailed breakdown.

Table 7.4.2 **Lecturer who had ever served as a referee for a scholarly journal article, received research grant or published any scholarly publications, by institute, faculty status and qualifications (in percentages)**

Institute	Serve as referee	Receive research grant	Publish scholarly work	Evaluate a scholarly book	Serve as editor
UM	66.7	37.5	66.7	50.0	77.8
UPM	55.9	71.4	55.9	20.6	21.2
USM	55.1	75.5	66.0	45.8	38.3
ITM	0.0	11.5	28.0	19.2	15.4
Faculty					
NS	50.0	50.0	65.0	47.6	38.1
ENG	50.0	56.3	46.7	18.8	12.5
AGRI	62.5	87.5	50.0	12.5	28.6
MS	70.0	100.0	80.0	70.0	60.0
SS	30.6	44.4	48.6	28.6	23.5
HUMAN	35.7	57.1	51.7	25.9	35.7
Status					
Professors	62.5	70.0	77.8	20.0	20.3
Non-Professors	33.8	51.3	44.4	59.5	54.1
Degree					
Non-Ph.D.	14.6	46.9	30.8	22.0	18.0
Ph.D.	62.5	76.1	73.9	40.3	40.9
TOTAL	57.0	57.5	55.0	32.5	31.0

On average no more than two people in a respondent's department or organisation **shared the same interests** in research as the respondent himself. This figure is discouraging as the more colleagues academics have to share their research interest with, the higher the chances there are to co-operate on research and hopefully publish scholarly works as well. Around 46% of respondents had three and more colleagues who shared same interest as them. Unfortunately 5% of respondents had nobody in their department or organisation who shared the same interest as them. A similar situation exists in terms of the number of colleagues whom they regularly ask to give comments on their draft scholarly manuscript. There were a considerable number of lecturers (20%) who were unable to ask anybody for an opinion on their work. As a result of the shortage of colleagues who shared the same interest or could give an opinion on a draft scholarly manuscript, nearly 19% of respondents had never co-authored either any scholarly paper or publication with a colleague. Duncan's test done using this variable (colleague to ask opinion and give comments on scholarly draft) and the mean number of publications showed that those who have more people to ask for opinion write more but not statistically more: DF = 3, F Value = 2.54, Pr > F = 0.0605 while Pearson Correlation test showed a low correlation of

0.28 ; Pr > 0 = 0.0033 but was statistically significant.) Among all institutions, ITM respondents seemed to have the least number of people who shared the same research interest, to ask for opinion or to co-author any scholarly works (although not significantly statistically different from other institutions.)

Respondents were asked their opinion on five statements regarding the scholarly publishing process: i) whether the number of journal outlets in their fields were sufficient ii) whether the number of publishers who publish books in their areas were sufficient iii) whether they had enough information to decide where to submit scholarly articles for publications; iv) whether faculty tenure committees should consider refereed material published in non-traditional forms (such as microfilm, publication "on demand', electronic journals, etc.) other than material published in conventional forms; and v) whether the peer review system in their discipline needed reforming. Generally, more respondents agreed rather than disagreed with the above statements although the percentages for those who had neutral opinions were higher for the last two statements. UM lecturers were neutral about the first statement (whether number of journal outlets in their fields are sufficient or not) but disagreed with the second statement (whether the number of publishers who publish books in their area are sufficient). Whether lecturers had enough information to decide where to submit scholarly articles for publications seemed to be affected/controlled by their institutional policy, with ITM's lecturers having significantly more respondents who thought that they did not have enough information regarding the matter, compared to their colleagues from other institutions, see figure 7.4.36 of KW result. Duncan's test (fig 7.4.37) also provides evidence that those who felt there was not enough information on where to submit scholarly articles for publications are also those who wrote less - as this could be one of the element which discouraged from writing (see argument made in Chapters One and Two).

Fig 7.4.36 **Sufficient information to submit scholarly articles by institute**

Institute	Mean	N	Group	
USM	49.88	34	A	
UM	53.44	24	A	B
UPM	63.29	9	A	B
ITM	71.02	49		B

KW $\chi^2 = 7.94$, DF = 3, Prob > $\chi^2 = 0.0472$

Fig 7.4.37 **Differences in mean number of scholarly publications published by opinion on where to submit (Q4 Sec D)**

Sufficient Information	Mean	N	Group	
Agree	22.754	61	A	
Disagree	9.232	56		B

DF = 1, F Value = 698, Pr > F = 0.0094

A high percentages (42%) of respondents held neutral opinions on whether the faculty tenure committees should consider refereed materials published in non-traditional forms perhaps due to the fact that they themselves are not too familiar with this technology. It seems that many lecturers agreed (44.5% were in the categories of agree and strongly agree) that the peer review system in their discipline needed reform. Professors tended to be in less agreement with the suggestion that the peer review system is in need of reform compared to their colleagues (non-professors); perhaps they sit on peer review committees and gain the most the existing arrangement (although not statistically different: KW $\chi^2 = 0.00492$, DF = 1, Prob > $\chi^2 =$ 0.7346; note: those who ticked no opinion were deleted from the analysis).

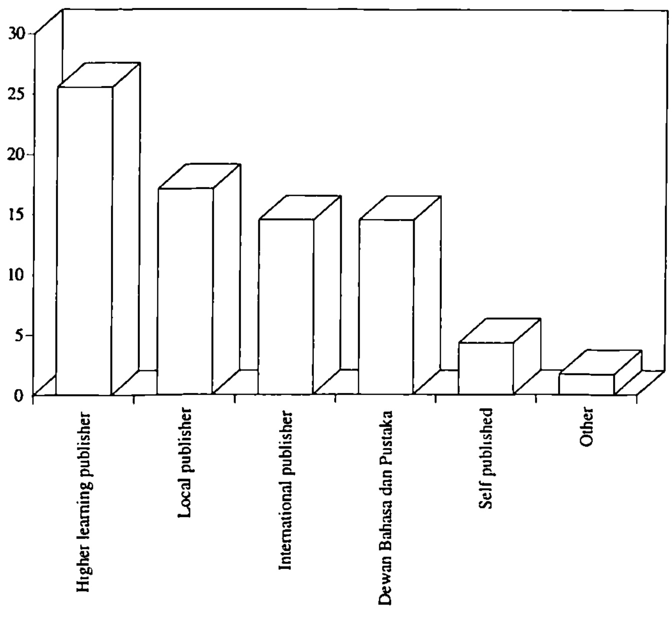
Of those who had published scholarly publications, 56.3% had never supplied manuscripts to publishers in the form of computer tape or diskette, or other machine readable form. It seems that technology used in the publishing process at large is still not yet widely used by academics.

Overall, 54% of respondents had published a **scholarly publication**, of which the highest percentages come from UM and Medical lecturers. Doctorate holders tended to publish more compared to non-doctorate holders: see table 7.4.2 for detail figures. Chi-square analysis done on this variable (whether lecturers had ever published any scholarly publications) showed that lecturers with Ph.D. qualifications, professors, these above 40 years old and those who had received research grant were more likely to write scholarly publications than their colleagues: see tables 7.4.3 to 7.4.6. Those who had written a scholarly work also spent more on journals

(M$ 200.78) than those who had not written (M$ 171.70), but the differences were not statistically significant *(DF = 1, F Value = 0.22, Pr > F = 0.6389).*

The importance of the institution of higher learning as a publisher and as the main scholarly publisher among various types of publishers was ascertained, as one third of the respondents had published their scholarly works through a university press. This was followed by nearly 22% with local commercial publisher, 19% with international publisher and DBP, while 6% were self-published with remaining 2% with some other type of publishers, see figure 6.4.38. Therefore, attention and encouragement should be given to all different outlets besides university presses so that academics have a variety of outlets and can fully use them to disseminate their scholarly works.

Fig 7.4.38 **Type of publishers used by respondents to publish scholarly publications (in percentages)**



Medical and Natural Sciences lecturers tended to publish more scholarly books (whether fully funded by themselves, partly funded or fully funded by others) compared to their colleagues. Those who have higher qualifications (Ph.D. holders), above 40 years old, significantly published more scholarly books partly funded by themselves, while Medical Sciences lecturers also published more scholarly books but were not significantly different from lecturers from other faculties. (See figures 7.4.39 to 7.4.41 of Duncan's Tests results). Professors and those who are above 40 years old also had more of their scholarly books published fully funded by others: see figures 7.4.42 and 7.4.43 of Duncan's Tests. This supports the hypothesis that Professors are more easily able to attract funding for their research and more importantly for the publication and dissemination of the results of their research.

Fig 7.4.39 **Differences in mean number of scholarly books published partly funded by qualifications**

Qualifications	Mean	N	Group
Ph. D	0.244	45	A
Non-Ph.D.	0.024	41	B

DF = 1, F Value = 4.52, Pr > F = 0.0363

Fig 7.4.40 **Differences in mean number of scholarly books published partly funded by faculty**

Faculty	Mean	N
MS	0.750	4
NS	0.176	17
SS	0.143	28
HUMAN	0.095	21
AGRI	0.000	5
ENG	0.000	11

Fig 7.4.41 **Differences in mean number of scholarly books published partly funded by age**

Age	Mean	N	Group
Above 40	0.300	30	A
Below 40	0.054	56	B

DF = 1, F Value = 18.96, Pr > F = 0.0001

Fig 7.4.42 **Differences in mean number of scholarly books published funded by others by age**

Age	Mean	N	Group
Above 40	3.972	36	A
Below 40	0.714	56	B

DF =1, F Value = 4.26, Pr>F = 0.0418

Fig 7.4.43 **Differences in mean number of scholarly books published by others by status**

Status	Mean	N	Group
Professor	5.000	29	A
Lecturer	0.613	62	B

DF = 1, F Value = 7.12 , Pr > F = 0.0091

The respondents were asked to give their opinion on several aspects of scholarly publications published by their own higher learning institutions. Generally, the answers given indicated that they felt satisfied with the aspects of publications which were to do with authorship, while on the other hand they felt unhappy about the publishers' capability to produce scholarly publications. Around 62% to 64% of respondents think positively regarding the quality of the contents and authorship (presentation of facts, analysis and conclusion), while aspects such as the format and the book making, the publisher's capability in term of editorial, design and manufacturing, promotion of the books to the target audiences (announcements, launches, advertising and reviews), pricing and distribution system had very low percentages of respondents who were satisfied, see table 7.4.7.

Table 7.4.7 **Opinions on several aspects of scholarly publications published by higher learning institutions (expressed as percentages)**

Aspects on book publishing	Positive	Neutral	Negative	Not Sure
Quality of content (facts, data, illustrations, tables, index)	63.5	26.2	8.4	1.9
Format and the book making (size, paper, ink, typeface, printing & binding)	61.1	23.1	12.0	3.7
Authorship (presentation of facts, analysis & conclusion)	60.2	28.7	7.5	3.7
Publisher's capability (editorial, design & manufacturing)	49.0	32.4	13.9	4.6
Promotion to target audience (announcements, launches, ads. & reviews)	23.4	34.6	35.6	6.5
Pricing	43.5	32.4	16.6	7.4
Distribution system	24.1	33.3	37.0	5.6

Key:
Positive : Those who were in the categories of very or mildly satisfied
Positive : Those who were in the categories of mildly or very unsatisfied

In order to determine what motivates writers to produce publications, a multiple regression model consisting of publications as a dependent variable (e.g. number of university textbooks published + number of scholarly books or monographs (editor or co-editor) + number of scholarly books or monographs (author or co-author) etc.)[453] was fitted against a full model consisting of 17 independent variables as shown in table 7.4.8.

[453] See Q 1 of Section D on lecturers' questionnaire

Table 7.4.8 **Multiple Regression table of factors which might influence in producing publications**

Variable	Parameter Estimate	Standard Error	T for Ho	Prob > :T:	Type
Intercep	35.3121	13.156	2.684	0.0085	-
Pressure to publish	-0.0840	4.242	-0.020	0.9842	Dummy
Share interest	-1.619	1.505	-1.076	0.2846	Metric
Askcomm	2.684	1.708	1.571	0.1193	Metric
Co-author	1.432	1.636	0.875	0.3835	Metric
Libhour	-5.341	5.053	-1.057	0.2931	Dummy
Tenur	-11.049	11.176	-0.989	0.3252	Dummy
Totsubs	0.0087	0.013	0.674	0.5017	Metric
Nooflang	-0.3234	3.897	-0.083	0.9340	Metric
Loadhour	0.0185	0.423	0.044	0.9653	Metric
Costskbj	0.0028	0.005	0.589	0.5573	Metric
NS	7.4188	5.851	1.268	0.2078	Dummy
ENG	1.8270	6.714	0.272	0.7861	Dummy
AGRI	-2.0691	8.754	-0.236	0.8137	Dummy
MS	11.3410	8.336	1.360	0.1768	Dummy
SS	-2.6736	5.486	-0.487	0.6271	Dummy
Masorles	-9.5411	4.396	-2.170	0.0324	Dummy
Noprof	-11.0215	4.967	-2.219	0.0288	Dummy

F Value = 2.948; R^2 = 0.3361; Prob > F = 0.0004; DF: Total = 116, Model = 17, Error = 99.

Through a process of backward selection, variables which did not add significantly or explain the underlying variation in the model were removed from the list. This iterative process resulted in the model as shown in table 7.4.9

Table 7.4.9 **Factors which influence in producing publications**

Variable	DF	Parameter Estimates	Standard Error	T for Ho: Parameter = 0	Prob > :T:
Intercep	1	31.7173	8.2212	3.858	0.0002
Coauthor	1	3.3641	1.6753	2.008	0.0470
Libhour	1	-12.1877	5.9433	-2.051	0.0426
Costskbj	1	0.0128	0.0046	2.766	0.0066
Masorles	1	-10.5231	5.1803	-2.031	0.0446
Noprof	1	-17.8357	5.3676	-3.323	0.0012

F Value = 10.804; R^2 = 0.3254; Prob > F = 0.0001; DF: Total = 116, Model = 57, Error = 1 .

The low R^2 of 0.3254 indicated that the independent variables were not able to explain a significant amount of the variation in the sample dependent variable. This leads us to conclude that there are perhaps other dependencies (factors) which were not covered in the survey. With regards to other variables which were dropped from the model, it does not mean that they were not important; it is just that after controlling for other effects they did not significantly contribute to the prediction of the model. Many variables were not included as some variables were correlated to each other.

The findings could be summarised as below:

1) Respondents who had somebody to co-author with were likely to write 3.36 (in total) **more** publications during their academic career to date, i.e. were encouraged to write.

2) Those who spent five hours or less per week in library were likely to write 12.19 publications **less** than those who spent more hours in library.

3) Those who **spent more** on scholarly journals were also likely to **write more**. An increase of M$100 in the expenditure on journals increased the publications written by 1.28.

4) Those who have Masters qualifications or less wrote 10.52 **less** publications than those with higher qualifications (Ph. D. and professional degrees).

5) Non-professors wrote 17.83 less publications than Professors.

Table 7.4.3 **Frequency table of ever published scholarly publications by qualifications**

	Yes	No	Total
Non - Ph.D..'s	16	36	52
	30.77	69.23	
Ph. D.	48	17	65
	73.85	26.15	
Total	64	53	117
	54.7	45.3	

$\chi^2 = 21.634$, DF = 1, Cramer = -0.430, $Pr > \chi^2 = 0.000$

Table 7.4.4 **Frequency table of ever published scholarly publications by status**

	Yes	No	Total
Non-Prof.	36	45	81
	44.44	55.56	
Prof.	28	8	36
	77.78	22.22	
Total	64	53	117
	54.70	45.30	

$\chi^2 = 11.176$, DF = 1, Cramer = -0.309 $Pr > \chi^2 = 0.001$

Table 7.4.5 **Frequency table of ever published scholarly publications by age**

	Yes	No	Total
Below 40	30	37	67
	44.78	55.22	
40 & above	34	16	50
	68.0	32.0	
Total	64	53	117
	54.7	45.3	

$\chi^2 = 6.232$, DF = 1, Cramer = -0.231, $Pr > \chi^2 = 0.013$

Table 7.4.6 **Frequency table of ever published scholarly publications by ever received research grant**

	Yes	No	Total
Yes	42	25	67
	62.69	37.31	
No	21	28	49
	48.86	57.14	
Total	63	53	116
	54.3	45.7	

$\chi^2 = 4.485$, DF = 1, Cramer = -0.197 $Pr > \chi^2 = 0.034$

7.5 Textbook Adoptions

This section investigates the flow of information on textbook adoptions at higher learning institutions by determining how well lecturers communicate with booksellers on textbook adoptions, whether lecturers notify local book shops about likely requirements and how booksellers chase lecturers for such information. A comparative analysis with students and booksellers on this issue is undertaken in Chapter Eight.

7.5.1 Preparing Lists

Around 96% of lecturers were involved in preparing book lists and around 71.1% offered both recommended books for purchase and supplementary reading on the list; around 24% assigned recommended books only while the remaining 5% or so offered only supplementary books.

The highest percentage of lecturers (29.6%) put on average six or more titles of books on "recommended for purchase" lists compared to 6.1% who put only one title (the least percentage). This is also true for "supplementary reading" lists in which the highest percentage of lecturers (33.9%) offered six or more titles while the least percentage of them (2.7%) offered only one title, see table 7.5.1 for detail breakdown.

Table 7.5.1 **Number of book titles appeared on recommended and supplementary lists**

	One	Two	Three	Four	Five	Six & above
Recommended	6.9	19.8	20.7	12.9	10.3	29.3
Supplementary	2.7	22.1	18.6	15.4	7.1	33.6

7.5.2 Informing Students

Lecturers on the whole gave alternatives to students on which text to choose, 35% recommended their students which books to buy while 10% of them did not suggest either one: see table 7.5.2. Nearly 81% of lecturers stated the campus book shop was the nearest site where students could purchase books. ITM has the lowest percentage (61.5%) of lecturers who think that the campus book shop is the nearest from which students can buy books, while all UM respondents were of the opinion that their students could get books from the UM campus book shop: see table 7.5.3 for a detailed breakdown. This might be due to the fact that UM book shop is well known to lecturers and they themselves prefer to go there to get books. Furthermore, in the case of ITM, as the survey included ITM's branch at Petaling Jaya, which is nearer to the UM book shop than the ITM main campus book shop, lecturers and students were likely to find it more convenient to get books there. Nearly 81% were of the opinion that apart from the campus book shop, there are other book shops where students can buy textbooks. Around 62% of them advise their students to visit the campus book shop for their books.

Table 7.5.2 **Methods of informing students regarding textbooks (expressed in percentages)**

Action	Percentage
Tell them to buy	35.3
Give alternative	52.1
Make no comment	10.1
Other	2.5

Table 7.5.3 **Nearest book shop for students to get textbooks (expressed in percentages).**

Institute	Campus shop	Others
UM	100.0	0.0
UPM	76.5	23.5
USM	89.8	10.2
ITM	61.5	38.5

7.5.3. Opinion on Book shop

A majority of lecturers (73%) agreed that students had problems in obtaining necessary books and more than half believed that the biggest problem was poor inventory control, i.e. the books were not in stock. When prompted to apportion blame for the books not being in stock (whether it is lecturers' fault, publishers' fault or booksellers' fault), a high percentage of lecturers laid the blame at the book shop's door. They thought that the book shop underestimated the demand and thus ordered too few books (poor inventory control). However about 15% of them blame themselves for failing to forward details to the book shop. While the percentages of lecturers who gave other reasons ranged around 4% to 9%: details given to book shop by lecturers late, publishers' reps didn't pass on details, problems with publishers and book shop has shortage of space to store many copies; see table 7.5.4 for detail frequency.

Table 7.5.4 **Lecturers' opinions why books are not in stock (in percentages)**

Reason	Percentage
Lecturers failed to give details	15.8
Details given to book shop by the lecturers late	9.5
Publishers rep didn't pass on details	7.4
Problems with publishers	6.3
Book shop ordered too few/underestimated demand	32.6
(Book shop found difficulty in judging/estimating number of books required)	
B/shop didn't order in time	8.4
B/shop didn't order at all	4.2
B/shop was unable to carry large stocks i.e. shortage of space/too expensive	6.3
Other	9.5

Note: The reasons in *bold* are related to poor inventory control.

Just over 16% of lecturers thought that students were seldom/never able to get the books they needed from the book shops, while nearly 37% said this happened quite often. Around 30% said that their students were occasionally unable to get the books, around 7% said it was rare while nearly 9% admitted that they did not know what problems their students faced. When considering different subject categories, Medical Sciences had the highest percentage (70%) of lecturers who think that their students are often unable to get books needed (often and quite often categories summed together), followed by Engineering (68.8%), Natural Sciences (61.9%), Humanities (44.5%), Agriculture (42.9%) and Social Sciences (41.9%), see table 7.5.5.

Table 7.5.5 **How often are students unable to obtain the books they need by institute and faculty (in percentages)**

Institute	Very Often	Quite Often	Not Very Often	Rarely	Don't Know
UM	0.0	62.5	25.0	12.5	0.0
UPM	15.2	33.3	24.2	9.1	18.2
USM	15.2	41.3	32.6	6.5	4.3
ITM	22.7	27.3	36.4	4.6	9.1
Faculty					
NS	23.8	38.1	28.6	12.5	4.8
ENG	12.5	56.3	12.5	0.0	18.8
AGRI	14.3	28.6	14.3	0.0	42.9
MS	0.0	70.0	30.0	0.0	0.0
SS	17.2	27.6	41.4	10.3	3.4
HUMAN	18.5	25.9	33.3	14.8	7.4
TOTAL	16.4	37.3	30.0	7.3	9.1

Some 23.6% of lecturers suggested their students use the library as an alternative when the students failed to obtain the books needed from the book shop, while around 18.2% of lecturers advised their students to use another book or borrow the book.

7.5.4 Informing Book shops

About 65.5% of lecturers said they informed book shops regarding books required for their courses while around 34.5% failed to do so. Compared to lecturers from other institutions, USM lecturers had a percentage of 77.5% of informers, followed by 57.2% from UPM, 55.6% from UM and 53.9% from ITM. Among non-informers, the highest proportion viewed the responsibility to inform book shops as not part of their job (42.1%). Most informers relayed students' requirements by visiting the book shop (33.3%), while the second most popular option was via a telephone call to the book shop (24.7%), followed by received a visit from the book shop (13.6%): see table 7.5.6 for detailed breakdown of methods for informing the book shop.

Table 7.5.6 **Method of informing book shop by institutes as expressed in percentages**

Method	UM	UPM	USM	ITM	Total
Visit the book shop	40.0	33.3	36.8	25.0	33.3
Telephone the book shop	20.0	28.6	23.7	25.0	25.0
Visit from bookseller	0.0	14.3	5.3	37.5	13.6
Letter to book shop with list	40.0	0.0	13.2	6.25	9.9
Letter/pro forma from book shop	0.0	9.5	13.2	0.0	9.9
Sent to bookseller with all list from different departments	0.0	4.8	7.9	0.0	4.9
Phone call from bookseller	0.0	4.8	0.0	6.25	2.4
Other	0.0	4.8	0.0	0.0	1.2

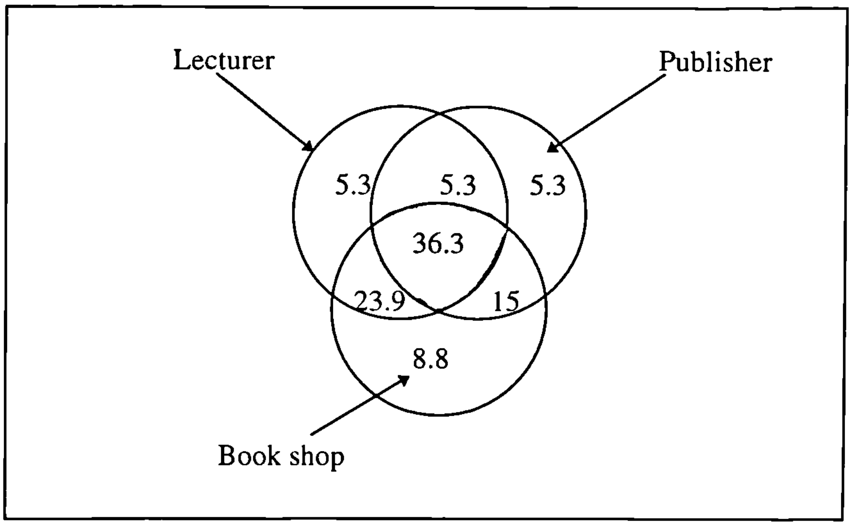
7.5.5 Request from Book shop

Overall 73% of lecturers received requests from their book shop for information on book recommendation, varying from 84.6% for ITM, 79.4% for UPM to 62.5% for USM and UM. For those who received a request from the book shop, the common methods used were: personal visit (38.3%), written request (21.8%) and on book shop pro forma (19.8%) while telephone call or a copy of last year's list to amend were less popular.

There seemed no calendral pattern for the requests from the book shop. Nevertheless, 72.2% felt that the time was appropriate. A majority of lecturers said that the sort of detail required by the book shop was relatively easy to provide. Regarding the deadline, more than half of the lecturers claimed that the book shop did not state a deadline for sending back information about recommended texts. Of those who claimed that the book shop gave a dead line to return the information needed, 71.8% claimed to meet the deadline.

More than half of the lecturers (50.9%) felt that lecturers should voluntarily provide information about recommended books to the book shops while nearly 26% thought that it should be requested by the book shops. This is supported by the fact that just over 49% thought that it was very important for lecturers to inform the book shop of book requirements while only 4.4% believed that it was not important. Some 36.3% seemed to agree that the responsibility in ensuring that recommended books are available in the book shop is a shared responsibility among the book shop, publisher and themselves; 23.9% thought it was the responsibility of the book shop and the lecturers while 15.0% thought it was the responsibility of the book shop and publisher, see figure 7.5.1 for Venn diagram.

Fig 7.5.1 **Responsibility to ensure books are available (in percentages)**



7.5.6 Relationship with Bookseller

Nearly 40% of lecturers interviewed said they did not know their book shop representative at all, 14.8% knew by sight only and 15.7% by name only. Only 2.6% knew the book representative very well and just above 27 % knew quite well. There were more lecturers (53.9%) who had never met the bookseller to discuss their students' needs compared to 46.1% who had met the bookseller. According to lecturers, such meeting took place once a year or

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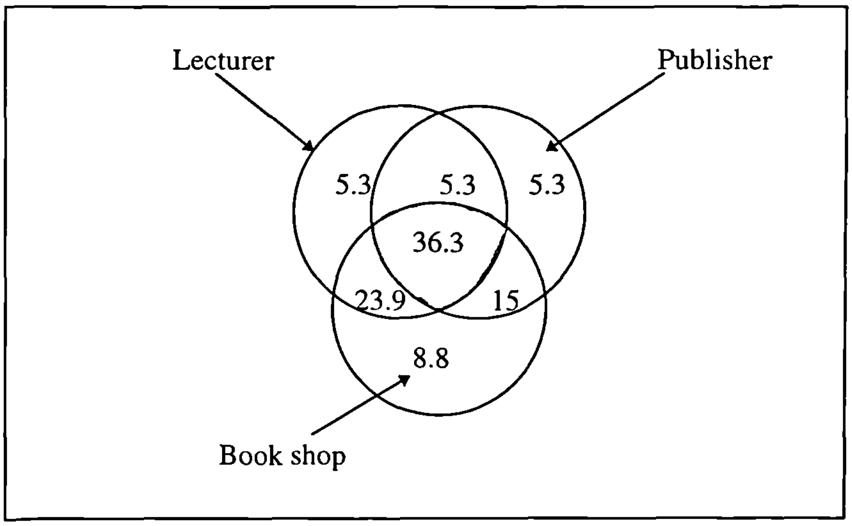

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Respondents were asked to tick the type of methods by which they normally get to know about the books they eventually recommend to their students. Catalogues/publishers lists seemed to be the most popular method, followed by book reviews, lecturers' personal knowledge by having used/read the book, inspection copies , recommendation by colleagues, seen in book shop, through library/librarians and etc., see table 7.5.7 for the methods used by lecturers (respondents were allowed to tick more than one answer).

Table 7.5.7 **Methods used by lecturers in getting to know books eventually recommended to students (percentage of total respondent indicating use)**

Method	Percentage
Publishers list/catalogues	42.2
Book Reviews	36.2
Personal knowledge/always used/read/write myself	33.6
Inspection copies	28.4
Recommended by colleague/staff	22.4
Seen in book shop	20.7
Through library/librarians	15.5
Conferences	12.9
Reps	4.3
Recommended by someone else	3.4
Request from students	1.7
Other	1.7

7.5.7 Do Booksellers Work Hard to obtain Details

Only 24.8% of lecturers thought that the effort made by the book shops to obtain information on recommendations was sufficient. Just over three-quarters of lecturers viewed the effort as inadequate since 53.1% felt that the efforts made were not sufficient, and 22% thought that book shop failed to make any effort at all. None of the respondents from UM or Medical Sciences thought positively about the effort taken by the booksellers, see table 7.5.8 for detail breakdowns. (Please note that the answer given by lecturers here will be compared with responses from book shops in Chapter Eight).

Table 7.5.8 **Opinion on whether booksellers made sufficient effort in getting to know books recommended by institutes and faculties (in percentages)**

Institute	Sufficient	Not Sufficient	No Effort at All
UM	0.0	66.7	33.3
UPM	30.3	57.6	12.1
USM	21.3	51.1	27.7
ITM	32.0	44.0	20.0
Faculty			
NS	35.0	50.0	15.0
ENG	18.8	56.3	25.0
AGRI	28.6	57.1	14.3
MS	0.0	70.0	30.0
SS	33.3	39.4	27.3
HUMAN	18.5	63.0	18.5
TOTAL	24.8	53.1	22.1

Not only were respondents dissatisfied with the efforts made by booksellers, about 40% of them had never been contacted by any representatives from publishers. UPM had the highest frequency of respondents (53%) whom had never been contacted compared to lecturers from other institutions, followed by UM (44.4%), USM (34.0%) and ITM (26.9%). Of the 60.0% of respondents who had been contacted by publishers, the most common method used was by a personal visit (46.5%), letter (36.6%), telephone (15.5%) and conferences (1.4%). There were more lecturers (68.8%) however, who seemed to take the initiative to contact publishers on books they recommended to students . Around 81% of respondents from ITM had contacted publishers, a figure far higher than lecturers from other institutions. Of those respondents whom had contacted publishers, around 66.7% of them thought that the publishers passed on the information they supplied to booksellers, and most (66%) agreed that it was the publisher's responsibility to pass on the information to booksellers. Lecturers were then asked their opinions on how to improve the communication between them and booksellers, suggestions made included: booksellers should take more initiatives to improve communication; more book promotion such as exhibition by booksellers; more initiative should be taken by lecturers, and some thought that more inspection copies would be helpful.

With regards to publishers, suggestions made by respondents to improve the supply of recommended books to book shops included giving discounts or credit on book use; book promotion and exhibition; publishers should be more efficient in the publishing process especially in the delivery of books; lecturers should be provided with more inspection copies, and increased initiative from lecturers themselves.

CHAPTER EIGHT

BOOKSELLERS, LIBRARIES AND PUBLISHERS

8. BOOKSELLERS, LIBRARIES AND PUBLISHERS

8.0 Introduction

Having analysed students and lecturers, the research would not be complete without a brief look at the other main participants in the marketing chain: booksellers, libraries and publishers. The researcher made an attempt to cover as many aspects as possible of participants in the publishing industry, in particular scholarly publishing, therefore all those involved in producing and disseminating scholarly publications are investigated. As has been mentioned earlier, the number of commercial publishers who can actually be categorised as scholarly publishers is minimal; however the researcher included all publishers who claimed to be scholarly publishers within the terms of reference of this study. With regard to booksellers and libraries, only the university campus bookshops and university libraries were interviewed. The National Library was also included to provide a global view of the publishing industry in Malaysia.

8.1 Booksellers/ Bookshops

Only six of the eight university bookshops were investigated (through personal interviews accompanied by a questionnaire) in order to ascertain to what degree booksellers are successful in obtaining the information they need and how they exploit this resource. An attempt was made to compare responses with those provided by students and lecturers with the following objectives: diagnosing the problems faced by students; ascertaining what lecturers did about textbook adoption; and finally what role booksellers and publishers played. Although all eight university bookshops were invited to participate in the survey, the researcher failed to obtain adequate responses from two bookshops: UKM and USM bookshops. Therefore, the analysis includes the remaining six bookshops: UUM, UIA, ITM, UM, UPM and UTM bookshops (referred to as UUM, UIA, ITM, UM, UPM and UTM in this study). It is hoped that some of the main findings are also applicable to the two bookshops excluded from the present research.

8.1.1 The Problems

All bookshops are situated on campus with the exception of UTM which is located off campus (just outside the campus). All bookshops stated that most students knew which books to purchase because of lists provided by lecturers although only the ITM bookshop managed to supply most of their requirements. UIA, UPM and UTM bookshops indicated they were only able to satisfy around 75% of requests while UUM and UM bookshops could only fulfil about half. Generally bookshops agreed that they had problems ordering from publishers, mostly because books were either out of stock at the publishers or out of print, but also because information from lecturers was defective e.g. details were incomplete leading to delays from the publisher, or the books recommended were out of print.

For UUM, the loss in unit sales resulting from the above problems was a staggering 50%, while it was 30-40% for UTM, 30% for UIA, 20% for UM, and 10% for ITM and UPM bookshops. The major reason provided by bookshops, with the exception of UPM bookshop, was that publishers were not able to supply adequately. The proportion of losses due solely to publishers not supplying books was around 50% for UUM and ITM, while UIA and UTM bookshops claimed it was in the region of 30 - 40% and it was only 5% for the UM bookshop. This seems to indicate a geographical effect since UM bookshop is located in the most strategic place compared to the rest of the bookshops. In addition its prestige is related to its parent body, University of Malaya, the oldest university which enables it to attract not only the students and staff of the university, but also customers working in professional fields who live and work in the greater KL area. UUM and UTM on the other hand are located in the northern and southern edges of the country respectively and are not as renowned as the UM bookshop. Although UIA and ITM bookshops are located in the vicinity of Klang Valley, as is UM bookshop, their attraction to publishers is not as strong as the UM bookshop. UIA bookshop was established only recently, while for ITM its parent body was initially set up as an institute catering for diploma courses. However, to an enterprising bookshop, distance need not present a problem. To draw a comparison[454] with a western country, the University of Stirling which is located in the north of UK while most publishers are located in the southern half of the country, was taken as an example; analysis showed that losses attributable to publishers accounted for only 5% of lost sales. Even this may be exaggeration when generalising for other university bookshops in the UK since the Stirling University bookshop is smaller than most university bookshops (as the number of students are only around 5,000) in other cities; better transport links in the UK may account for some of the differences.

8.1.2 Contact between Lecturers and Booksellers

A variety of channels were used by bookshops to request information from lecturers, the most common being personal visits by lecturers to bookshops, phone calls to lecturers, personal visit by and to lecturers, and letters to lecturers. ITM and UPM bookshops preferred to use personal visits followed up by a request letter; UIA, UM and UUM requested information when lecturers visited their premises, while UUM in addition to these, provided pro formas to lecturers, and UTM preferred telephoning lecturers. Out of six university bookshops, three: UUM, UIA and ITM, found personal visits to lecturers as the most efficient way to obtain information; UM and UPM were of the opinion that letters were more efficient while UTM indicated visists from lecturers. Table 8.1.1 presents the channel mixes used by bookshops to contact lecturers.

[454] The researcher interviewed the Manager of Stiling University bookshop using the same questionnaire used to interview the bookshops in Malaysia.

Table 8.1.1 **Bookshop contact with lecturers (see questions 5a, b and c in Appendix 13d)**

	Bookshops					
Type of contact (Q5a)	UUM	UIA	ITM	UM	UPM	UTM
Personal visit to lecturers	✓	✓	✓		✓	
Personal visit to shop by lecturers	✓	✓		✓	✓	✓
Invite lecturers to shop	✓					
Telephone				✓	✓	✓
Write letters			✓	✓	✓	
Others: • Send catalogues to lecturers		✓				
• Send pro forma	✓					✓
Type of contact used most frequently(Q5b)						
Personal visit to lecturers			✓		✓	
Personal visit to shop by lecturers	✓	✓		✓		
Invite lecturers to shop						
Telephone						✓
Write letters			✓		✓	
Others: • Send catalogues to lecturers						
• Send pro forma	✓					
The most effective method (Q5c)						
Personal visit to lecturers	✓	✓	✓			
Personal visit to shop by lecturers						✓
Invite lecturers to shop						
Telephone						
Write letters				✓	✓	
Others: • Send catalogues to lecturers						
• Send pro forma						

All bookshops with the exception of UTM bookshop requested reading lists from lecturers. UTM forwarded catalogues to librarians only and sent no request letters or pro formas to lecturers since they hardly ever returned requests. The type of request used by bookshops for the first time was different to the one used consequently. For this initial contact UM and UPM bookshops preferred pro formas while UUM phoned and asked for a list to be sent; UIA requested lecturers to forward lists, while visits to lecturers to procure details were preferred by ITM.

Given a series of eight activities relating to lecturers ability to supply information to bookshops, respondents were requested to rank the importance of each in generating lists from lecturers (see table 8.1.2). ITM, UM and UPM regarded pro formas as very useful, while UUM ranked this as not at all important (UIA bookshop did not respond to this activity). Both UIA and

UUM regarded written requests for details as very important, ITM and UPM regarded this as fairly important while UM viewed this as not very important. ITM, UM and UPM agreed that phone calls to lecturers to ascertain requirements were fairly important, while UUM regarded this as very important (again UIA did not respond). ITM, UM and UPM indicated sending a copy of last year's list to lecturers as not at all important, while UPM bookshop thought of this as not very important (UIA did not respond). Regarding visits to lecturers, ITM viewed this as very valuable while UIA and UM indicated this as fairly important (UPM and UUM did not respond for this activity). Most all bookshops considered visits from lecturers to be of crucial importance (UPM considered it as fairly important while UIA did not give any response). Book shops also regarded follow-up activities as fairly important while UPM regarded these as very important (UIA did not response).

ITM received the highest percentage (90%) of returned book lists after the initial request, followed by UPM and UIA around 70 - 80%, UUM received 50%, while the UM bookshop claimed to receive the least at 30%. In case of non-response, UM phoned and asked about requirements from lecturers as the follow-up activity, UUM bookshop phoned lecturers and requested lists to be forwarded, ITM bookshop mailed pro formas, while UPM visited the lecturers to procure details. UIA bookshop however sent the publishers' representatives as the follow-up activity. As a result of follow-up activities, overall response rates increased to 70% received for UUM, 100% for UIA and UPM received 80%. The UM respondent stated that response rates increased to only 35%. The ITM representative did not respond to this question.

Table 8.1.2 **Importance of methods of generating lists (Q7), percentages of returned lists (Q8), follow up activities (Q9) and percentage of returned list after follow up activities (Q9b)**

	Bookshops				
Activities of generating lists (Q7)	UUM	UIA	ITM	UM	UPM
Send pro forma (1)	xxx	X	✓✓✓	✓✓✓	✓✓✓
Write & ask for details (2)	✓✓✓	✓✓✓	+++	---	+++
Phone to send list (3)	✓✓✓	+++	xxx	---	+++
Phone and ask about requirements (4)	✓✓✓	X	+++	+++	+++
Send copy of last year's list (5)	xxx	X	xxx	xxx	---
Visit to lecturers to get detail (6)	xxx	+++	✓✓✓	+++	X
Visit from lecturers to give details (7)	✓✓✓	X	✓✓✓	✓✓✓	+++
Follow-up activities (8)	+++	X	+++	+++	✓✓✓
Percentage of returned list after the initial requests (Q8)	**50**	**70**	**90**	**30**	**70-80**
Follow up activities (Q9)	**3**	**8**	**1**	**5**	**6**
Percentage of returned list after follow up activities (Q9b)	**70**	**100**	**X**	**35**	**80**

Key: ✓✓✓ = Very Important; +++ = Fairly Important, --- = Not Very Important; XXX = Not at All Important; X = Non-response, 1 = Send pro forma; 2 = Write and ask for a list to be sent; 3 = Phone and ask for a list to be sent; 4 = Send a copy of last year's list; 5 = Phone and ask about requirements; 6 = Visit to lecturers to obtain details; 7 = Visit from lecturers to give details, 8 = Other

8.1.3 Request Deadlines

Most requests from booksellers were initially sent just before semester (between April to June for the first semester and November to December for the second semester) although the exact timing varied from university to university (dependent on the commencement of their semester) which is in accordance with responses from lecturers'. UUM bookshop set a two to four weeks deadline, ITM allowed four weeks and UPM three weeks, while UIA and UM did not specify a deadline. UTM no longer contacted lecturers directly and preferred liaising directly with the institutional library. The UUM bookshops stated that lecturers totally ignored deadlines since almost all lecturers missed them, while for ITM and UPM, about 1 in 10 lecturers responded after the deadline. The reasons put forward by bookshops as to why lecturers provided details late included: the decision on the course outline was late, decision on books to be used was late and number of students taking the course were not known in time (see table 8.1.3 for detail reasons).

Table 8.1.3 **Common reasons for delays in receiving requests**

Most common problem	**Bookshops** UUM	ITM	UPM	UTM
Decision on course late		✓✓✓		✓
Decision on books to be used late	✓✓✓✓	✓✓✓✓	✓✓✓	✓✓✓✓
New courses/syllabus			✓✓	✓✓
Number of students not known	✓✓✓			✓✓✓
Late appointment of lecturer to post	✓✓		✓	
Absence of lecturers			✓✓✓✓	
Others	✓	✓		✓✓

Key: In order of common: ✓✓✓✓ = Most common to ✓ = Least common
Others: No exact reasons could be provided other than lecturers purposely did not return lists.

8.1.4 Information from lecturers

All bookshops claimed that they informed lecturers of the action they took after receiving lists and providing details to the publishers' representatives. In addition, UM bookshop telephoned lecturers to reconfirm information and check past lists. If the books listed were not available, all bookshops informed the relevant lecturers. When asking booksellers whether they had noticed any improvements in recent years among lecturers regarding the provision of information on adopted texts, UM, ITM and UPM felt that the situation was improving while UIA, UM and UTM bookshops reported no noticeable improvements in behaviour.

8.1.5 Problems ordering adopted texts

Most bookshops, the exception being UUM and UM bookshops, did not face problems in ordering adopted texts. Problems indicated by UUM and UM included lack of information from lecturers; the books were out of stock with the publisher; book no longer in print, and the publisher failed to process the order correctly. The most common problem stated by UUM was books out of stock with the publisher, while for UM publishers failing to process order correctly was the primary problem.

8.1.6 Relationship with publishers

Booksellers were regularly visited by publisher representatives, and, with the exception of ITM, received catalogues from publishers. UM bookshop occasionally received visits from international publishers and visited the publishers' show rooms. Besides being regularly visited by representatives, ITM bookshop staff had visited an international publisher with a group of academics (see table 8.1.4 for details).

Table 8.1.4 **Bookseller contact with publishers**

Type of contact	Bookshop					
	UUM	UIA	ITM	UM	UPM	UTM
Regular visits from reps	✓	✓	✓	✓	✓	✓
Occasional visit from reps				✓		
Catalogues	✓	✓		✓	✓	✓
Inspection copies	✓	✓				✓
Invitation to exhibitions		✓	✓	✓		✓
Telephone						✓
Letter						✓

UIA, ITM, UM and UUM bookshops reported that up to half of the details on book adoption (35 - 50%) came from publishers rather than via lecturers, while UTM more disturbingly reported that almost all (90% or more) information came from publishers, and at the other end UUM reported the least (0 - 35%.) The information received via this channel can be categorised into three forms: copies of forms received from lecturers, letters from the publisher indicating likely needs, and advice during visits by publishers' representatives. Within each category there are many methods, and these varied from publisher to publisher. In the first category one can find copies of evaluation reports completed by lecturers after inspecting an evaluation copy, or copies of a pro forma completed by lecturers informing publishers of the books they use or intend to use, while the second category consists of a letter providing details of textbook adoptions completed from enquiries of the university staff undertaken by the publisher or a newsletter etc. Having received information from publishers, all bookshops contacted lecturers to confirm details and in addition, UM bookshop filed the information for future reference. Most bookshops, the exception being UM bookshop, indicated that a standard request form from publishers to lecturers (pro forma) was useful.

Table 8.1.5 **Information received from publishers on adopted texts**

	Institute					
Form of Information	UUM	UIA	ITM	UM	UPM	UTM
Copy of lecturers evaluation/list	✓		✓	✓		
Letter from publisher				✓		
Visits from sales reps	✓	✓	✓	✓	✓	✓
Letter from rep				✓		
Phone call from publisher				✓		
Phone call from rep						✓
Other(bookseller and publisher visit lecturers)				✓		

8.1.7 Responsibilities

Five of the bookshops interviewed placed responsibility equally on all the parties concerned; lecturers, publishers and themselves, in ensuring that adequate information is available on textbook adoption; only UM bookshop placed responsibility solely at the door of publishers and themselves, while lecturers could help by providing additional information.

8.1.8 General Comments

Booksellers were asked to comment on how sales of books to students might be improved through improved communication between themselves and lecturers. They had more to comment on lecturers than themselves. The comments are reproduced below:

UUM:
- Lecturers should give accurate details.
- Lecturers should respond immediately to requests.
- More commitment needed from lecturers.

UIA:
- Bookshop should visit lecturers more frequently.

ITM:
- Lecturers, booksellers and publishers should work harder to determine requirements.
- Booksellers/publishers should forward lists to the right person/lecturer.

UM:
- Lecturers should advise students regarding infringement of copyright and the proper use of photocopying facilities.

UPM:
- Increased communications among all parties involved in textbook adoptions.

UTM:
- Lecturers should encourage students to buy books.

- Lecturers should be more responsible regarding textbook adoption and respondquickly.

Below are comments made by bookshops regarding publishers:

UUM:
- Sales representatives (runners) dealing directly with lecturers have a detrimental effect on bookshop sales (direct sales receive a 40% discount from publishers).
- Some forwarding agents were incompetent causing delivery problems for booksellers which ultimately resulted in lost revenue.

UIA:
- Publishers should improve communication with lecturers.
- Publishers should provide more inspection copies to lecturers.

ITM:
- All parties involved should work hard for the benefit of all.

UM:
- Publishers should be more flexible with their price and returns policy.

8.1.9 Comparisons with other participants in the marketing chain

Problems facing students: The majority of lecturers (73%) were of the opinion that students faced problems in obtaining books (see 7.5.3/Qn. 9 Lecturer's Questionnaire), and more than half believed that the biggest problem was poor bookshop inventory control. Responses from bookshops were varied: UUM and UM bookshops reported that they can only supply half of the books needed by students; UIA, UPM and UTM were able to supply 75% of the demands whereas only ITM reported that they could supply most of the requirements. The response from ITM bookshop contradicts responses received from both the lecturers and students. This is due to the fact that ITM bookshop supplies more for matriculation students (according to the bookshop spokesman they managed to supply almost all the needs of this particular group of students) whereas the respondents from ITM (students) were those who were undertaking first degree only; they did not bother going to the shop because of geographical reasons and also because they felt that they were more likely to find their books somewhere else.

Reasons why books were not in stock: The reasons provided by booksellers contradict those supplied by lecturers: booksellers mostly blamed publishers for not being able to supply the books because they were out of stock/print, while the highest percentage of lecturers felt that it was due to booksellers underestimating demand and ordering too few (see section 7.5.3, table 7.5.2).

They managed to agree on one thing (the second most important reason), that lecturers had provided sufficient/accurate details. In blaming publishers the booksellers are justified to a certain extent given the evidence that publishers always complain that their books take a long time to be sold. It indicates that booksellers may not have had enough information regarding the text in question (qv Chapter Four). If the booksellers are to establish better communications with lecturers and publishers, they can start by informing lecturers of new books, or books that no longer exist, so that lecturers could revise their reading lists. In addition, publishers could manage stocks better and reduce the chances of a book being out of stock providing they are given sufficient lead-time. Of course co-operation from lecturers in this area is vital!

Informing Bookseller: About 65.5% of lecturers indicated that they informed bookshops regarding books needed for their courses while 49% viewed this activity as very important (qv 7.5.5). The most popular way to inform bookshops was by visiting bookshops premises (33.3%) but only 13.6% said they had been visited by booksellers (see table 7.5.3). Most bookshops admitted that lecturers visited their premises to inform them of their requirements, but they were less likely to visit, although ITM and UPM bookshops reported that they spent most time visiting lecturers (qv table 8.1.1).

Requests from booksellers: 73% of lecturers received requests from bookshops mostly in the form of a personal visit, written request or bookshop pro forma (see 7.5.5). More than half of lecturers stated that bookshops did not indicate any deadline, and when a deadline was given, 71.8% claimed to return requests within the allocated time. Responses were consistent with those received from most bookshops, the exception being UTM, since they indicated that the proportion of lecturers who missed deadlines was relatively low. Only UUM bookshop claimed that almost all the lecturers missed the deadlines; however, insufficient lecturer response rate meant that this statement could not be verified.

Responsibilities:

● Regarding the provision of information on recommended texts, more than half of the lecturers (50.9%) felt that it was primarily their responsibility to provide details of their adopted texts while 26% thought it was the job of the bookshop to request the relevant information from lecturers. Approximately 49% believed that it was important for lecturers to inform bookshops regarding potential requirements while only 4.4% thought that it was not important at all.

● In ensuring the books are available in bookshops - 36.3% of lecturers believed that it was the responsibilities of all (publishers, booksellers and lecturers) to ensure that recommended books were available in bookshops (see figure 7.5.1). Booksellers shared a similar opinion with lecturers that all share the responsibilities, UM bookshop in particular felt that lecturers help could be a very useful role in this area.

8.2 Libraries

One of the main channels for disseminating knowledge to the public is via libraries and for them to be effective they need to be sufficient in number, efficient in service and well stocked with books. Libraries are also one of the main buyers of publications therefore in this research their role, and in particular that of university libraries, is investigated. Hasrom estimated that there were about 450 libraries in Malaysia of which 111 were academic libraries, 70 state libraries and 265 specialised libraries.[455] Of all these libraries (with the exception of the National Library) UM has the biggest collection with some 1,058,988 volumes, see table 8.2.1 for the number of volumes in selected libraries.

Table 8.2.1 **Number of volumes in selected libraries (main library only)**

Institute	Periodicals	Total No of Volume
UM	12,467	1,058,988
ITM	NA	898,000
UKM	NA	734,000
UUM	3,827	81,295
UTM	5,100	298,000
USM	5,500	575,000
UPM	6,000	315,000
UIA	NA	155,383*
DBP	3,000	118,000
FRIM	NA	120,000

SOURCE: *The World of Learning 1995* (London: Europa Publications Limited, 1995), p. 1000
NB: * The Researcher, NA = Not Available

An investigation of all major university libraries and DBP showed that none had introduced advanced technological tools for accessing materials although some were experimenting with computerised database during the primary research period (February to June 1993). There is no library network linking universities (as far back as 1983 there was a network linking libraries - MALMARC - but it is not known why it was abandoned); therefore interlibrary loans or material searches have to handled manually which limits the ability of scholars to access reference materials for research/writing publications. However, during interviews some of the librarians indicated that developments in this area were forthcoming

Budget constraints imposed by universities on the respective libraries have limited the adoption of new technology: although exact figures were not provided by most chief librarians, from general discussions it was possible to conclude that budgets have been static in recent years while the demands on library resources have been increasing. Some chief librarians/persons in-

[455] Hasrom Haron, 'Towards a Vigorous Book Industry', a paper presented at National Book Industry Convention, August 1992, p. 10.

charge refused to supply exact figures of expenditure/budget citing the Secrecy Act; however certain librarians, for example the UKM Chief Librarian, was able to provide the relevant information with ease. The information is neither confidential internally nor covered by the Secrecy Act, but decisions tend to be based on personalities rather than on legal principles. As a result detailed comparisons cannot be undertaken, and it is only possible to conclude that budgetary problems have contributed to recent problems and curtailed spending plans on the purchase of new equipment.

Due to budget constraints (most of the budget had been stagnant since 1988), most libraries have not been able subscribe to new journals without cancelling existing subscriptions. On average, one copy is subscribed for each journal and a single copy for book purchases. However, if the book is an adopted textbook or highly demanded, the number of copies ordered depends on the number of students on the relevant courses (the order ratio ranged from 1:25 to 1:100 i.e. one copy for each 25 students to one copy for each 100 students).

Librarians used several methods to obtain required publications, although for some publications they were obliged to place orders through special agents/ government contractors. The information collected from lecturers during visits to the library, catalogues sent by publishers, brochures or newspapers is collated, and decisions are made by drawing a balance between available financial resources and the priority of each publication. Catalogues received are usually forwarded to deans/lecturers by those concerned to solicit their opinion prior to shortlisting titles. At times publishers mail catalogues directly to lecturers, an approval form is then forwarded via their department to the library requesting the purchase of a particular title.

Unfortunately most libraries did not systematically collect and document internal work such as theses and dissertations. Even internal publications published by their own departments were often not available; which makes research difficult since it is not easy to locate prior researches completed on a subject. To their credit, if librarians know of publications by the respective university departments a few copies are usually acquired, but often they are not informed by the publications unit.

There is no systematic mechanism to collect undergraduate dissertations; usually it is up to the relevant department to forward it to their library. In general, the systems are inefficient and staff not particularly helpful although it must be stressed that many staff were hampered by the poor systems rather than a lack of desire to help. It was difficult to obtain needed information on dissertations undertaken on the area of publishing for example, (see Appendix 1). Many libraries do not man a service help desk; users are obliged to either rely on their personal resources or to search the library for the appropriate librarian; needless to say the person is usually not available.

DBP although a centre for developing literature and language does not have a library with a well documented collection of materials. The researcher's own experience in researching and collecting materials, particularly unpublished seminar papers, was fraught with difficulties since no systematic records were kept. Not only does it lack technology but some of the materials are not documented even in catalogues; several seminar papers originating from seminars organised by DBP, in co-operation with DBP, or papers presented by DBP staff at seminars, were not available in the library, for the simple reason that "only if the person who participated in the seminar submits the paper to the library will the library have it" (quote from interview with DBP representative). A well documented cataloguing system would at least inform prospective researchers whether a particular article is available or not, and save considerable waste of time in manual searches. The situation may have somewhat improved recently as DBP was expected to be upgraded to a centre for housing publications on language, literature and publishing,[456] which would allow the public to undertake research more easily.

[456] Jumaat Mohd Nor, 'Towards a Vigorous Book Industry', a paper presented at National Book Industry Convention, Kuching, August 1992.

8.3 Publishers

All the university presses, together with some selected research institutes and commercial publishers, were interviewed to get an accurate picture of their in-house marketing structure, although it could be said that none (with the exception of commercial publishers) operated a professional marketing department. The interviews consisted of an informal discussions. Some of the information gained from the discussions were used in this research to provide a general picture of publishing situation in Malaysia in particular scholarly publishing. In order to indicate the state of scholarly publishing in Malaysia, a comparison was drawn with the UK situation. A list of publishers engaged in scholarly publishing (those involved fully of partly in scholarly publishing) in Malaysia and the UK together with a breakdown of the number of employees, number of titles published in 1992 and 1993 and annual turnover is shown in tables A4.1 & A4.2 of Appendix 4.

8.3.1 USM:

Background

The USM university press is a unit attached directly to the library with an editorial board manned by 28 scholars; the Chief Librarian sits on both the management and editorial boards. The unit is staff by: 4 editors, 3 typist/proof readers and one administrative assistant who also handles the marketing and sales function (in fact he is a librarian who devotes 80% of his time to the publication unit with the remainder to library business). The Chief Editor also deals with the budget and oversees training of staff. In addition to his normal duties, he also administers the annual grant received from the press's parent institution.

Production: The press prefers to receive manuscripts on diskette with an accompanying hard copy. After acceptance, editorial changes, layout and book design using freelance designers, the press prints copies using its in-house printing facilities. For an original book, 70% of the royalty is paid upfront once the manuscript is submitted, while the remainder is paid after publication. For translated book, 50% is given once the manuscript is received, 30% after the galley proof and the balance is paid after publication. An amount of $100 to $150 is paid as an evaluation fee, and editing fees are paid at the rate $1.20 per page for a translated book while translators receive eight to 10 cents per word. The press also buys copyrights which vary from publisher to publisher, the highest amount paid in 1993 was US $2000 to an American publisher.

Mailing List: The press handles all order processing and mailings in-house. The mailing list is classified according to institute, society membership and bookseller. It is press policy not to release database details to other organisations for commercial or non commercial use. The mailing list is maintained by a member of staff who is usually in charge of editorial work. Although there is no professional set up, average[457] response rates are achieved through promotional campaigns.

Marketing: As indicated above there is no professional marketing department and most publications are sold by direct mail or through book stores while some are sold through exhibitions such as the Kuala Lumpur and Penang Book Fairs. An average discount of 20% of the list price is given to the retailer/booksellers for most titles, while for translated books discounts can be up to 40%. Twice a year a book sale (of the unsold stock) is organised offering discount of up to 50% to buyers. Book stores enjoy a book return policy which does not place a limit on the maximum percentage of returns. 12 new titles were published in 1992, mostly in paperback form, with a print of between 500 to 750 copies. In 1992 only 337 orders were processed; no discounts were given for direct orders from libraries, while the same discount rate was given to both wholesalers and retail book dealers. On average 50 copies are stocked by wholesalers at one time which typically take one to three years to sell (normally only between 50% to 75% are sold with the difference being remainder stock). The press does not send advance notices to wholesalers informing them of forthcoming titles, however the press does publish catalogues of their publications and contact is maintained with booksellers by post and telephone and occasionally they are visited by representatives from booksellers.

[457] The term 'average' might differ from one respondent to another, therefore the researcher in unable to measure the differences due to the lack of precision indicated by respondents.

Comments: The press places the responsibility for ensuring sufficient information on adopted text books on lecturers and booksellers, and considers it helpful if booksellers were to provide a standard request form to lecturers.

8.3.2 UIA

Background: Although the press is an independent unit operating in its own right (previously it was attached to the library), both its structure and position are weak. At the time the primary research was being conducted, the press was headed by a non-publishing officer with little knowledge of how to manage such a concern; it was impossible to gain information on its publishing activities or even administrative details such as the titles of journals published previously and print run numbers. The researcher was obliged to search the library for the journals or solicit one of the librarians who had been previously seconded to the press. It was only possible to ascertain that the press published two journals during 1993: *IIU Law Journal* and *Journal of Islamic Economics.* The officer in charge was aided by two full time administration staff (typist and clerk) and three part time staff in charge of editorial work, who normally work as academics in the parent institution. Since reliable information was not available detailed analysis on the press was not possible, and this only serves to highlight the acute problem and inadequacies of Malaysian University Presses.

8.3.3 ITM

Background: ITM press operates as an independent unit/department (model A, see figure 4.2.2 in Chapter Four) with five employees (excluding editors seconded from various schools) handling administration. The press is partly financed from a grant from its parent institution, although the press actively pursues a policy of maximum self-generation of revenues through the sale of publications.

Production: Most manuscripts are received in typescript, some on diskettes and occasionally in CRC form. The press performs its own typesetting, which authors are allowed to examine before finalising print runs, but most book designs are obtained from freelance and staff designers. Around 60% of the publications are printed internally using the printing facilities of the parent university, while the rest are printed by external commercial printers. The press pays royalty based on the list price, a 12% honorarium rate, M$100 as an evaluation fee, three cents per word for editing, M$150 per piece for cover design and four cents per word for editing translation works, while the final product is marked up by between M$1.00 to M$5.00.

Marketing: According to the press head, the marketing 'section' was established in 1993 with one staff who also administers other units. The press does not market books published by other publishers, and publications are sold through sole distributors, wholesalers, direct mail and through ITM co-operative bookshop. The press has participates in the Kuala Lumpur Book Fair and even the Frankfurt Book Fair. An average discount of 35 to 40% is given for publications sold, but additional discounts are given for direct orders by libraries as the press believes this is under the authority of the ITM Co-operative Bookshop. On average 25 to 49% of books are sold within five years of publication. The press has not computerised tasks such as order processing, mailing list, accounting, or stock inventory since according to the head, the small size of the press makes this uneconomical. The press also did not operate a book return policy. The press was unable to provide the researcher with the total net sales volume, value of book inventory and the number of orders processed in 1992, while the average list price for paperbacks was $15.

Mailing List: The press has not constructed any mailing list at the time of the survey.

Comments: The press places responsibility for ensuring that publishers have sufficient information on adopted texts for students wholly on lecturers but is of the opinion that it would be a help if booksellers provided a standard request form to lecturers (the press itself has no standard request form). The press head highlighted many cases existed where the books published were not even acknowledged by the relevant schools at the parent institution, let alone other institutions, and that this made it difficult to sell publications.

8.3.4 UPM

Background: UPM press can be categorised as a typical model B (see figure 4.2.3) attached to the library with the Chief Librarian also acting as Head of Publications Unit. The unit is staffed by two editorial staff and five administration personnel. The press receives an annual grant from its parent university. Although it was stated that a formal budgetary mechanism existed to control costs, the press was unable to provide a profit and loss statement or balance sheet for the year 1992. In the absence of such information the researcher has tried to estimate figures based on the publication costs of each title published in that year (5 titles) and an average price of $30 per copy less an average 35% discounts: according to this the total loss was perhaps in the region of M$34,000 but this figure might not include other costs such as overhead cost, and is dependent on the estimated list price, see table 8.3.1.

Table 8.3.1 **UPM Estimated Profit & Loss Statement for Year End 31/12/92 figures expressed as % of revenue)**

Quantities sold	672 copies
If average list price	M$ 30.00
Then approximate total revenue	M$ 13,104.00
Less: All costs	M$ (46,890.66)
Profit (Loss)	M$ (33,786.66)

Production: Manuscripts are received in typescript or diskette form while freelance designers are used for most book designs. The parent university has its own printing facility but not all publications are printed internally (the percentage of publications printed in-house could not be obtained). Royalties are normally paid as 10% of the net price but no advance royalties are paid to authors. An amount of $150- $500 is given as an evaluation fee, $2.50 - $5.00 per page as an editing fee and $2.00 per page for proof reading. Although the editor in charge stated that the press had bought copyrights, no figures were made available to confirm this. A similar situation resulted for selling copyrights, although the press had reportedly sold copyrights.

Marketing: UPM press maintains no marketing department but is unusual in that it also markets books published by other publishers. The publications are sold through several distributors, and also through book fairs such as the Kuala Lumpur Book Fair. An average discount of 35% is given on books sold. Like other university presses, UPM press does not operate a book return policy. Mailing list and manuscript editing are computerised. The press was able to provide figures only on total net sales volume (after returns) but not for the value of its book inventory, (see table 8.3.2 for total net sales volume; in the opinion of the researcher the figures seem to be very low).

Table 8.3.2 **Total net sales volume (after returns), 1986 - 1992**

Year	M$
1986	846
1987	777
1988	943
1989	1335
1990	1192
1991	2334
1992	1123

Five new titles were published during 1992 along with a reprint with an average of 500 with an average list price of $30 for paperback (these figures were used to estimate profit statement figures). According to the editor in charge, on average 25 to 49% of the books are ultimately sold but this may take five years. The press mails advance notices to wholesalers advising them of forthcoming publications and publishes its own catalogue, which, along with inspection copies, are the two methods the press used to communicate to booksellers news on publications.

Mailing List: The press has its own mailing list differentiated by subject, institute and profession. The press does not provide information services or sell the mailing list to other publishers, and reported the response rate to mailings as very low. Although there is a person in charge of the mailing list, it is limited. It was not possible to provide the cost incurred in developing or maintaining the list, or how extensive the list is, indicating that the list was not fully utilised.

Comments: The press felt that publishers and lecturers were jointly responsible in ensuring that publishers have adequate information regarding adopted textbooks for students, but agreed that a standard request from booksellers could be of help.

8.3.5 UTM

Background: Although the press relatively young, it has published a large number of titles partly due to its good management structure, more along the lines of a publishing house then the rest of the university presses with the exception of UKM press. The press is managed by two editorial boards, book and journal, consisting of 11 and 10 academicians respectively with the head of the publication unit presiding over both boards. At the time of the survey there were four staff dealing with production, one dealing with marketing, one with sales, and five (including the head of the unit) for administration. The press receives the bulk of its financial resources from the university grant while the rest is self-generated. Table 8.3.3 illustrates the profit and loss account of UTM for 1992; around 3% of revenue is allocated to marketing activities.

Table 8.3.3 **Profit & Loss Statement for Year End 31/12/92 (figures expressed as % of revenue)**

	Percentages	**Actual Amount (M$)**
Total Net Revenue	100.00	210,198.90
Less: Cost of Sale	(142.7)	(300,000.00)
Gross Profit/ (Loss)	(42.7)	(89,801.11)
Less: Operational Costs		
Editorial	(4.5)	(9,458.95)
Production	(7.5)	(15,764.92)
Marketing	(3.0)	(6,305.97)
Net Profit/ (Loss)	(57.7)	(121,330.95)

Production: Manuscripts are received in both typescript and diskette forms. The press undertakes typesetting in-house and authors are shown typeset proofs before final printing, while staff and freelance designers are used for book designs. Since the parent university does not have printing facilities, all the publications are printed externally. A normal royalty rate of 15-20% is paid based on the list price. The press pays an advance royalty of 80% of the total amount; M$150- -$500 is given as an evaluation fee per title, and a two cents per word for editing and translation. An average rate of 6% - 7.5% of the sale price is given for copyrights bought and 6% - 10% for copyrights sold. The typesetting rate was around 40 cents per inch and the mark-up rate of one was used to price publications.

Marketing: The press does not maintain a marketing department; there is just one staff member in charge of sales. The press does not market books published by other publishers, and sells books through sole distributors, direct mail, exhibits, book stores and direct sales to students/staff. The press participates in exhibitions, both international and local: Frankfurt, Singapore, Kuala Lumpur and other local fairs. An average of 10% - 30% discount is given for books and, like other university presses, the press does not operate a book return policy. Wholesalers and retail book dealers receive the same amount of discount, and a maximum discount of 20% is allowed for direct orders from libraries. The press published 16 new titles in 1992 with an average print run of 875 copies (the minimum was 750 copies and maximum 1,000 copies), with an average list price (paperbacks only; there were no hardback) of M$16. Wholesalers on average take 50 copies at one time; for semi textbooks over 75% of copies are sold within a year, while for most other books it takes typically three to five years to sell 50 - 74% of initial print run, with the difference ending up as remainder stock. It is the press policy to send advance notices and catalogues of publications to wholesalers. The press contacts booksellers through catalogues and occasionally visits booksellers.

Mailing List: The press has constructed its own mailing list classified by institution and profession; orders are processed internally by two staff member in charge of the mailing list. The mailing list is available to anybody without payment, but the press does not provide other services. According to the head of the unit, the response rate to promotional mailing list was average; perhaps this could be improved but major problems were faced in maintaining the list due to a lack of staff and poor co-operation from some institutions in providing lists of their members.

Comments: The head of unit suggested that lecturers should advise students on the infringement of copyright and firm action should be taken on such infringements.

8.3.6 UM

Background: Due to its historical perspective, UM press is somewhat different from other university presses as it is an autonomous semi-government body. From 1960 to 1991, there were only two members on the editorial board, but this has since been increased to eight. Members of the editorial board are scholars and editors while the management board is manned by scholars and publishers; both boards are chaired by the press head. The press employed 19 persons in 1992, 12 dealing with production, five with administration and one each for marketing and editorial. The editors perform only editorial functions and are not required to undertake other duties. Unlike other university presses, UM press is self-sufficient with the parent university providing only the building and costs towards maintenance including utility bills. For the year 1992, the press gained a net profit of around M$16,300, see table 8.3.4 for the profit and loss account.

Table 8.3.4 **Profit and Loss for Year End 31/12/92 figures expressed as % of revenue)**

	Percentages	Actual Amount (M$)	
Total Net Revenue	100.00		98,100.00
Less: Cost of Sale	(37.5)		(36,771.00)
Gross Profit	62.5		61,329.00
Less: Operational Costs			
Administration overhead/ Editorial	(20.0)	(20,000.00)	
Production	(19.9)	(19,000.00)	
Marketing	(3.0)	(3,000.00)	
Others	(3.0)	(3,000.00)	
Net Profit/ (Loss)	16.6		16,329.00

Production: Manuscripts can be submitted in typescript, diskette or CRC format. The majority of books use standard designs, and the press uses its own printing facility to print all works internally. A normal royalty rate of 10% is given to authors based on the list price and it is press policy to pay no advance royalties. The press buys and sells copyrights with rates depending on the type of publication. An evaluation fee of M$250 per manuscript is paid and six cents per word for translations.

Marketing: The press maintains a marketing unit with two staff promoting only in-house publications, which are sold through its sole distributor (the UM Co-operative Bookshop), wholesalers, exhibits, bookstores and via direct mail. The press participates in a number of book fairs both local and international including the Frankfurt, London, Singapore, Jakarta, Kuala Lumpur book fairs as well as smaller state fairs. An average discount of 30% is given on books and the press does not operate a book return policy. Accounting, manuscript editing and stock inventory control functions have all been computerised. Five new titles were added in 1992 with an average print quantity of 300 for hard cover publications and 1,000 for paperbacks, with a minimum print run of 300 and a maximum of 1,000 copies, with average list prices of M$75 for hardbacks and M$20 for paperbacks respectively. Wholesalers and retail book dealers receive different discounts: wholesalers normally buy in 20 copies at one time and find that they can on average sell less than quarter during the first year. The press mails advance notices to wholesalers and publishes its own catalogues. Contact is maintained with booksellers using press representatives who regularly visit booksellers, in addition to the catalogues mailed to them.

Mailing List: The press makes use of its own mailing list and at times also uses the PEPET Mailing List (IDRC Project 1987 - 1990). The press mailing list is classified by subject and profession, while the PEPET database is categorised by subject and institution. All mailing list orders are processed internally, and response rates to promotional campaigns were reportedly fairly low. The press does not provide a mailing list service unless it is a part exchange for a similar return service, although database names are sold to interested parties. Although one person is in charge of the mailing list, major problems still exist in maintaining the list, including inaccuracy of addresses and the lack of a properly trained officer to deal with the list; in addition high postal charges limit the extent to which the press can afford to contact people on the mailing list.

Comments: In the opinion of the press, both the publisher and lecturers are jointly responsible for ensuring publishers have sufficient information on textbook adoptions, but stated that a standard request provided by booksellers to lecturers would be useful. It was suggested that sales of books to students could be improved if the university (through the Student Affairs Department) deduct the book scholarship allowance portion to ensure and encourage students to buy books and release this on proof of purchase of books or other educational materials.

8.3.7 MARDI (Malaysian Agricultural Research and Development Institute)

Background: MARDI was established in 1969 as a research institute enjoying the status of a semi-government body. There are nine persons who sit on the editorial and management boards including the directors of research divisions, research officers and editors, while the head of the publication unit presides over both boards. The unit has four editors, three persons in charge of marketing and sales, and 17 staff dealing with pre-press activities. Other than editing, editors also deal with administration work, sales and marketing and function as members of the Papers and Terminology Committee. MARDI receives financial support from the government by way of an annual grant, and although a detailed breakdown of profit and lost was not provided, the head of the unit quoted the **net profit for year 1992 as M$46,685.00.**

Production: Manuscripts are received in diskette form; the unit then typesets in-house and authors are presented with the typeset proofs prior to printing. Staff designers are used for book design while standard designs are used for serial publications. Almost all printing is undertaken internally as the institute has its own printing facility, although occasionally it subcontracts publications to commercial printers. According to the head of unit, no royalties were previously paid to authors, but the proposal to pay royalties had just been approved at the time the interview was conducted. An average discount of 10% - 15% of list price was offered, and the unit did not buy nor sell any copyrights, but should there be a request, the unit would consider selling copyrights. It is important to note that a number of publications published are not scholarly publications as they are addressed to farmers/laymen.

Marketing: The unit operates its own marketing section with three staff marketing only in-house books. Publications are sold through direct mail, commissioned sales reps, exhibits and book stores. The unit participates in the Kuala Lumpur Book Fair, state level fairs, and at some functions organised by its parent body MARDI, other agencies and by the Ministry of

Agriculture. An average discount of 10 -25% is given on books sold, while MARDI staff enjoy discount of up to 30%. The unit has computerised the mailing list, manuscript editing, stock control and its entire publishing programme. The total net sales volume (after returns) is illustrated in table 8.3.5. The value of the book inventory (at actual production costs) as at the end of 1992 was M$ 800,000.00.

Table 8.3.5 **Total net sales volume (after returns), 1986 - 1992**

Year	M$
1986	50,000
1987	52,114
1988	52,639
1989	58,599
1990	70,983
1991	135,208
1992	148,588

The minimum number of print run is usually 300 while the maximum print run can be up to 5,000 copies. Four titles were **reprinted** in 1992 with the average print of 3,000 copies. The average list price for paperback books ranged between M$10 to M$20, and no discounts were given for direct orders from libraries, while the discounts for wholesalers and retail book dealers were the same. A wholesaler normally stocks 30 copies of each publication at a time and to the press's credit 75% of these can be sold in less than a year. The unit mails advance notices to wholesalers advising them of new titles and follows this up with catalogues, inspection copies and regular visits to booksellers.

Mailing List: The unit has developed its own mailing list, maintained by one member of staff, which is classified according to institutions. The orders are processed by its marketing section. The unit does not provide mailing services nor sells names on the list to others. The major problems faced by the unit in maintaining the mailing list are the lack of trained staff to handle the list, and out of date personal details. In addition, delays in delivering the publications, particularly serials, has affected subscriber interest.

Comments: The unit head expressed the need to hire more professional marketing personnel for its marketing section and an increased budget to better equip itself to handle marketing activities.

8.3.8 FRIM (Forest Research Institute of Malaysia)

Background: FRIM was established in 1929 as semi-government research institute. In place of an editorial board, the publication unit has a Publication Committee consisting of editors and sub-editors. There are nine employees, three dealing with editorial works, two with production, one with sales and the rest have administrative duties. Besides undertaking editing works, editors also work in the library (the Head of unit is the Chief Librarian). The unit was unable to provide information on unit activities, in particular those relating to expenditure and publication sales.

Production: Manuscripts were acceptable in all forms although it had not received any in CRC form. The unit typesets in-house and the authors are shown the typeset proofs prior to printing. Staff designers and standard designs are most commonly used for book designs, and although the institute has its own printing facility, only 25% of the publications are printed internally.

Marketing: The unit operates its own marketing section with three staff, but unlike most presses, FRIM Publication Unit also markets books published by others. The unit has participated in several book exhibitions including Frankfurt, Singapore, Kuala Lumpur and smaller state level book fairs. An average discount of 30% is given on books to retailers, but no discounts are given for direct orders from libraries. The unit has computerised the mailing list and manuscript editing. There were three new titles published in 1992 with an average list price of M$80 for hardbacks and $60 for paperbacks. The unit publishes catalogues advising customers of recent publications and these, together with inspection copies, are used to maintain contact with booksellers.

Mailing List: The unit has constructed its own mailing list classified according to state/country and institution. Orders are processed by the unit itself, and although the unit provides a mailing list service to others, it does this purely on a non commercial basis. In the opinion of the press, with only a single person in charge of the mailing list, it was hard to maintain the list, particular difficulties were experienced ascertaining those who were no longer interested in receiving mailing, and this pushed up mailing list costs and resulted in a low response rate.

8.3.9 Utusan. (Utusan Publications & Distributors Sdn. Bhd.)

Background: Utusan was established as a commercial publisher in 1976 as a subsidiary of Utusan Melayu (M) Bhd. As a commercial concern all financial resources are self generated; due to reasons of confidentiality, a detailed breakdown of profit and loss statement is not given in the thesis. However net profit margins for the three commercial publishers interviewed were in the range of 14 - 20%. An amount of 4% of turnover was allocated for marketing activities.

Production: Manuscripts are accepted in various formats: typescript, diskette and CRC. The publisher performs its own in-house typesetting and the typeset proofs are shown to the authors prior to printing. Most book designing is by in-house staff but sometimes freelance designers are used for one off designs, while standard designs are used for serials. The organisation's printing facilities are mainly operated by a subsidiary company, Utusan Printcorp, which prints the majority of publications, while around 25% of the publications are printed internally. An average 10% royalty is paid to writers based on the list price; some of this is received as advance royalties from the publisher. Utusan pays an amount of $500 as evaluation fee and honorarium rate, $3 - $5 per page for editing, $2 - $3 per page for proof reading fee, $2 - $5 per page as the translation fee, and buys and sells copyrights at the rate of 6% - 8%.

Marketing: The publisher has its own marketing department with a staff of 10, marketing self-published publications and books published by others through various channels including sole distributors, wholesalers and sales representatives. The publisher participates in most major book exhibitions such as Frankfurt, London, Singapore, Jakarta, Sydney, Kuala Lumpur as well as minor state fairs. Both type of discounts are used, structured and average. The average discount rate is 30% and the highest discount rate given in 1992 was 40%. The publisher has computerised order processing, mailing list, accounting, manuscript editing, stock inventory and the publishing programme. The total net sales volumes (after return) for the years 1987 to 1992 are illustrated in table 8.3.6.

Table 8.3.6 **Total net sales volume (after returns), 1987- 1992**

Year	M$ (million)
1987	3.4 m
1988	4.5
1989	7.4
1990	9.8
1991	11.8
1992	10.1

One hundred new titles were published in 1992 with a minimum print run of 3,000 and maximum 50,000 copies (paperbacks only). Another 25 titles were reprinted in 1992 with the average print run of 3,000 copies. Based on the list provided by the General Manager, it was found that only one scholarly book was published in that year.[458] The average list price for a new paperback book was $7 to $10. The publisher provided a 10% discount for direct orders from libraries, and discounts given to wholesaler and retail book dealers were not the same. On average, wholesalers stocked between 10 - 20 copies at a time of which more than 75% can be sold within a year. The publisher sends advance notices to wholesalers as well as catalogues of its publications, publisher representatives regularly visit booksellers and catalogues and inspection copies are sent to booksellers.

Mailing List: The publisher had not developed its own mailing list at the time of interview.

Comments: The publisher felt that lecturers should assign more local books as textbooks rather than imports and there was a need for co-operation to be established and maintained among the universities.

[458] The title of the book is *Tamadun Islam*, ISBN: 967-61-01-87-7

8.3.10 Longman Malaysia Sdn. Bhd.

Background: Longman Malaysia in its present form was established in 1960 (although the original company dates back to 1924). The editorial board consists of six senior and two junior editors, there are 12 staff in charge of editorial work, and 40 to undertake production, 10 deal with sales, three work in marketing and seven in administration. As a limited company, all income is self-generated of which 12% is allocated for marketing/sales activities. Around 80% of books published are school books and very few scholarly titles. The reasons given by the Manager for not publishing more scholarly books were the lack of high calibre writers/scholars in most subjects (with the exception of Law), besides the length of time it took to sell these books (around 100 copies could be sold in a year).

Production: Manuscripts are accepted in typescript and diskette formats. The publisher performs its own in-house typesetting and the authors are shown the typeset proofs. Since the company does not have its own printing facility, all publications are printed by outside printers. An average royalty of 7 - 12% is paid to authors based on list price some of which is paid as advance royalties. An evaluation fee of $1,500 per manuscript is given by the company and eight cents per word as a translation fee.

Marketing: The publisher has its own marketing department with 13 staff (sales and marketing) marketing solely Longman publications. Books published by the publisher are sold through wholesalers, direct mail, sales reps, book stores and also at the Kuala Lumpur Book Fair. An average discount of 30% is given while the highest discount in 1992 was 40%. The publisher operates a book return policy but publications can be returned only in the first six months, and cannot amount to more than 2% - 3%. The company has computerised most functions including order processing, mailing list, accounting, stock inventory, publishing programme and some manuscript editing. The value of the book inventory held at the end of 1992 was around M$3.2 million. There were 120 new titles[459] published in 1992 with the maximum print run of 15,000 and minimum of 3,000 copies (for paperback book) and a further 100 titles were

[459] Based on 1993-94 catalogue provided by the Manager, there is no section on scholarly publication in the catalogue, hence the researcher concludes that there were no scholarly titles published in that year.

reprints. The average list price for the paperback book was $20, more than 75% of which were sold within one to three years of print. The annual turnover is around M$ 2m. Publisher representatives regularly visit booksellers to advice them of new titles and contact is also maintained through regular mailings.

Mailing List: The publisher has constructed its own mailing list classified by subject, institution and profession, which is maintained by one member of staff. The orders are processed by the marketing department. The company does not provide a mailing service to other publishers, and does not sell nor buy copyrights.

Comments: The publisher feels that it is their responsibility to ensure that they have enough information on textbook adoptions but it would be a help if booksellers provided a standard request form to be sent out to lecturers. According to the Marketing and Sales Manager, sales of books to students could be improved if the publisher could identify the need for books and details of consumers' requirements. He commented that most publishers did not have good communication and rapport with lecturers.

8.3.11 DBP (Dewan Bahasa dan Pustaka)

DBP was established in 1956 as a semi-government body: its organisational structure is presented in Appendix 12 (Fig A12.1). As at 1993, DBP had 1059 employees with 120 in the editorial department, 73 full time staff in marketing (and some part time), 318 in production, 429 in service department, 31 in corporate affairs and 88 in language and literature (for the detailed breakdown of the number of employees, see table A12.1 of Appendix 12). DBP's financial resources consists mainly of a government grant while the rest is self-generated. DBP publishing has made losses in every year since establishment: see table 8.3.7 for the profit and loss statement for year 1992.

Table 8.3.7 **Profit & Loss Statement for Year End 31/12/92 (figures expressed as % of revenue)**

	Percentages	Actual Amount (M$)
Total Net Revenue	100.00	56,324,000.00
Less: Cost of Sale	(71.0)	(40,000,000.00)
Gross Profit	29.0	16,324,000.00
Less: Operational Costs		
Administration	(10.0)	(5,632,400.00)
Publishing	(20.0)	(11,017,932.00)
Production	(119.0)	(66,808,154.00)
Marketing	(9.0)	(4,792,751.00)
Net Profit/ (Loss)	(127.7)	(71,927,237.00)

Production: Manuscripts are acceptable in typescript or diskette forms, and typeset in-house and shown to authors prior to printing. The majority of book designs in 1992 were by DBP staff and freelance designers, and although the publisher has its own printing facility only 50% of the works is printed internally. The normal royalty rate given to authors is between 12.5% to 20%, of 50% is normally paid in advance. The honorarium rate is between \$50 - \$1,000, evaluation fee \$500, editing fee three cents per word, proof reading fee \$2 per page and translation fee three cents per word (but a maximum of 12 cents is given for certain texts). The publisher both bought and sold copyright at the rate of 7.5% of the selling price.

Marketing: The publisher has its own marketing department with 140 staff (please note that in the appendix, number of employees in marketing department is stated as 73; this is because some staff have split duties). DBP does not market books published by other publishers, and sells its publications only through selected distributors appointed by DBP, exhibits, book clubs and direct mail. DBP had participated in various book exhibitions such as Frankfurt, London, Jakarta, Singapore, Beijing, Tokyo, Sydney, Cape Town and Teheran, besides numerous local fairs. Structured discounts are given on non-textbooks: 35% for below 35 copies, 40% for 51 - 100 copies and 45% for more than 100 copies, while an average of 25% is allowed for textbooks. The publisher operates a book return policy, 3% for journals and magazines, but for books this amount is regulated by government rules. The value of the book inventory at the end of 1992 (at sales price) was M\$ 85,417,877.00 (approximately 45% less at production cost). 622 new titles were published in 1992 with the minimum print run of 1,000 copies and maximum 5,000 copies for paperbacks. Another 563 titles were reprinted of which 100 were scholarly books. The average print quantity for hard cover books is 1,000 copies and 2,500 copies for the paperback versions, but for scholarly books the print run is lower with an average of 1,000 copies (paperback books only). The average list price for an original work is between $12 to $25 (for paperbacks) and $15 to $100 for translated work (price for hardback is about $10 higher than for the paperback version). A maximum discount of 15% is given for direct orders from libraries, while different discounts are given to wholesalers and retail book dealers. The publisher mails advance notices to wholesalers and publishes catalogues. DBP contacts booksellers through regular visits, catalogues and inspection copies.

Mailing List: The publisher has developed its own mailing list. The list is sorted according to alphabetical order and profession. There are two people to maintain the list. The major problem faced by the publisher in maintaining the list was the software system. The publisher does not provide a mailing list service to other publishers and neither does it sell names on the list. The response rate to mailshots was reported as fairly low. The mailing list has been organised developed by profession.

Comments: The publisher places the responsibility for ensuring that publisher has enough information on textbook adoptions on lecturers, and agreed that a standard request form from booksellers to lecturers would be clearly helpful.

8.3.12 PFB /OUP (Penerbit Fajar Bakti)

An in-depth interview was undertaken with the Managing Director of PFB regarding topics related to publishing industry in Malaysia. However, because the publisher was reluctant to fill in the questionnaire detailed analysis could not be undertaken but the information gained has been added to the thesis wherever appropriate. Unofficial sources however quoted the turnover for PFB as around M$20 m per year.

8.3.13 National University of Malaysia (UKM)

Although UKM press did not complete the questionnaire, several meetings and discussions with the head of unit show that the press can be regarded as the most productive of the University Presses in Malaysia. Established in 1981, the press had published 229 book titles up to 1993 and added a further 29 book titles in 1994, see table 8.7.8. It is a non-profit making organisation with the financial support coming from its parent university while its sales revenue helps to finance new publications. With 14 staff, the press manages its own mailing list and markets its publications through various channels including UKM bookshop and direct mail. Its publications are available at other university bookshops: UM, USM and UPM. UKM press also runs its own bookshop at the university precinct which functions as an additional outlet for its publications.

Table 8.7.8 **Number of titles published by UKM press, 1981 - 1994**

Year	Books/Monographs	Journals	Total
1981	4	7	11
1982	3	14	17
1983	11	12	23
1984	14	14	28
1985	20	16	36
1986	20	14	34
1987	23	12	35
1988	13	15	28
1989	24	23	47
1990	31	20	51
1991	18	17	35
1992	20	21	41
1993	28	13	41
1994	29	16	45

SOURCE: UKM Press.

CHAPTER NINE

CONCLUSION

9. CONCLUSION

9.0 Introduction

Having analysed the past, current and future situation of the publishing industry in Malaysia, in particular scholarly publishing, from both the macro- and micro-marketing perspectives, this chapter will conclude by summarising the main findings and forwarding recommendations. Although this research is focused on Malaysia, some findings and recommendations may also apply to other countries particularly those in the developing world.

9.1 Main Findings

9.1.1 General

1. There was evidence that some government agencies have contributed considerably to the development of publishing industries, while others have hindered progress through the domination of textbook production, high sales taxes on books and taxes on input raw materials such as paper, and inadequate controls on copyright infringement and censorship. An example of a hindering government is Indonesia and that one is generally recognised as supportive is Singapore (see Chapter Three)

2. Some developing countries such as Brunei, put forward an argument that the country is too small to support an indigenous publishing industry (see Chapter Three). However this argument is of limited value as each country should develop its own publishing industry, if only to bind the nation together and maintain its identity, otherwise its specific culture and history will be lost to posterity.

3. There is little reliable data on publishing industries (especially in most developing countries) - even basic statistics are often unobtainable. It is impossible for a Ph.D. researcher to establish this data and such research seems to be meaningless without basic reliable data. The researcher

has tried to collate all the available figures from various sources and has left detailed interpretation and judgement on quality to individuals.

4. Literacy can help to elevate a country out of poverty. In general, for a country to be rich, its people need to be well-educated. Thus if Malaysia is to aspire to be among the developed nations, books, as a print medium for gaining and transmitting knowledge, should be widely published and distributed, in particular in bahasa Melayu and English. Furthermore, steps need to be taken to ensure that these publications are distributed world-wide. Thus the use of English in publishing needs to be promoted since it allows publications to be exported to a wider audience throughout the world, while those in bahasa Melayu can be exported to Indonesia and Brunei. Differences between bahasa Indonesia and bahasa Melayu should be minimised and co-operation should be initiated between these countries with a development towards one accepted language of communication; this would allow these three countries to enjoy the benefits gained by putting aside national pride and prejudice. As bahasa Melayu is mother tongue to a large number of people, there is no doubt that it can function as an important international lingua franca of communication.

5. The continuous changing of language policy has not and will not solve Malaysia's educational problems and needs. Both bahasa Melayu and English should be accorded equal status. The example set by Scandinavian countries is both instructive and exemplary in this respect, since English is accorded a similar status to their own language. As a result, most Scandinavians are bi-lingual. Bahasa Melayu should be chosen as the mother tongue and impressed from childhood, but both languages should be used equally as the language of instruction at the tertiary level of education, while 60% bahasa Melayu and 40% English could be used from primary school levels. By contrast, at present English is taught only as a timetabled subject.

6. Co-operation at the ASEAN level has been thin although recently things have been improving, particularly in publishing. Joint recognition of academic qualifications, free movement of scholars, the removal of trade barriers in the import and export of books, protection of copyright, and increased co-ordination in terms of educational policies among those countries sharing a common language and cultural heritage would go a long way to solving many inherent problems. The need for regional co-operation in forming national, regional and international organisations to solve common problems is evident, as well as joint academic institutions. The establishment of a formal framework and the setting up of joint research centres would be beneficial in this respect; this strategy has been particularly useful in integrating western Europe through research projects funded by the European Commission. Examples of projects funded by the European Commission include SPRINT and DOSES (Development of Statistical Expert Systems - Eurostat) where funding is conditional on research teams having members from at least three EU states.

7. There is a need for improved distribution and marketing development; this is often dependent on adequate transport systems. Therefore co-operation in the field of telecommunication and transport policy at the ASEAN level would be useful, in addition to national initiatives to improve transport infrastructure.

8. In many developing countries, including Malaysia, there is lack of a deep-rooted book buying habit and reading ability is poor. The habit can only be developed by improving literacy but this requires that the problems of national poverty and low living standard are tackled, although it is not always possible to isolate whether education is the cause of increased wealth or its effect. But in Malaysia, where these two factors have been improved to some degree, the habit is still far from sufficient. This might be due to additional factors such as cultural, historical and climatic influences. Teachers and parents have tended to over-emphasise the benefits and privileges that reading would bestow upon those who master it. Thus, people have begun to see reading only in utilitarian terms; they read only for its economic potential, and

stop practising it as soon as they acquire the promised benefits. This has resulted in the slow development of reading habits not only in Malaysia, but in almost all developing countries. As they understand it, the value of reading is to pass examinations, gain employment or to achieve promotion at work. Once these goals have been achieved, many cease to read. As observed in the "Readership Survey", few continue to read or to buy reading material beyond the daily newspaper or magazine. This situation also occurs among educated people, who tend to spend minimal amounts of money on textbooks/compulsory books, and this has contributed to a 'non reading and buying habit'.

Socio-Cultural factors - reading is still regarded as alien to Malaysian culture, as it is an individual and private hobby. Reading does not compete against other activities such as conversing nor watching television. From the researcher's personal experience and observation, few read while travelling on the public transport - they are generally either talking or doing nothing. When the researcher experimented herself by taking a book and attempting to read it during a 45 minute bus journey, some passengers discouraged the researcher by passing remarks referring to those who read in public as 'show-offs'.

Educational factors - the problems created by " the passing exam and obtaining a better job" mentality still exist. The curriculum is so crowded that children do not find reading enjoyable but instead, burdensome, and forced upon them.

Economic factors - unlike most Third World countries, which are still fighting against poverty, war, and famine, and thus are unable to provide education for their children, let alone develop reading or buying habits, Malaysia is developing rapidly. When compared with other indexes of social development, Malaysia ranks lower on the UNDP (United Nations Development Project) human development index[460] than it does on the GDP index; as the reading habit is still far behind what is expected for a country such as Malaysia; economics is not the root of the problem.

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[460] United Nations Development Project (UNDP) introduced its alternative measure of economic and social progress, largely because it regarded gross domestic product (GDP) as an incomplete measure of relative living standards. The UNDP index is a coctail of life expectancy at birth, adult literacy, and the enrolment ratio in primary, secondary and tertiary education, see *The Economist,* August 26 - September 1, 1995.

Weather - directly and indirectly may influence people to choose reading as an activity. The researcher's observation indicates that in a cold climate people tended to stay indoors to keep warm and read for entertainment. In Malaysia and African countries, however, the warmer weather does not attract people indoors. In such conditions, people enjoy outdoor activities and talking, instead of reading for pleasure. The family structure and neighbourhood, which are made up of very close relations, make them spend time visiting and talking rather than allocating time for reading. Even where the family structure has started to change, due to large numbers of people migrating to urban areas, the reading habit has still failed to be nurtured. In the cities they turn to activities such as watching television or going to the cinema. Observing lecturers in the cafeterias at Stirling University, MARA Institute of Technology (ITM) and University Malaya (UM), the researcher found that lecturers linger for longer in the cafeterias at ITM and UM compared to Stirling University lecturers, and the situation is the reverse in the library.

9.1.2 Industry

1. Although the market for scholarly books is small in Malaysia, this is not the reason why academic/scholarly publications have not been well sold and profitable. There is evidence of publications with small markets becoming successful and profitable (see discussion in Chapter Four).

2. There was evidence that publishers and booksellers in Malaysia are only too eager to publish and promote school work books/school text books whereas they should co-operate towards promoting a healthy reading habit and not simply market ways to pass examinations.

3. The misunderstanding of the concept of 'social obligations' among the scholarly publishers results in an over-emphasis on the number of books produced, rather than extent of

dissemination; an emphasis on maximisation of social profit as defined in this research would help to target resources better.

4. DBP as one of the 'main' scholarly publishers has too large a mandate resulting in lost focus and slowness in decision making. The government should consider splitting its responsibilities over a number of organisations, while DBP should (re)focus on becoming a language and literary agency.

5. There exists a special need for programmes and facilities to train personnel in publishing skills. In this case, the establishment of publishing courses at two higher institutions is a welcome sign; however the syllabus should emphasise the professional skills needed in publishing, and some time needs to be devoted to aspects of scholarly publishing.

6. Although many publications have been published by local writers and publishers, both children's and adult books, the country is still being flooded with books from the West which have little meaning or relevance to the readers' lives. In the case of scholarly publications, until Malaysian scholars become as productive in terms of publications as their colleagues in the West, the reliance on imported books will remain.

Book shops - Most book shops lack adequate communication with publishers, and buyers. Similar to publishing houses, booksellers also lack professional expertise and capital.

9.1.3 Lecturers

1. Even though more than 80% of lecturers have published at least one work during the course of their academic life, only one third of them have managed to publish a university textbook (see section 7.4 of Chapter Seven); thus their productivity in general is considered to be very disappointing. And the 13% who had not published a work is still a significant proportion of

Malaysian academic staff, considering it should be second nature for scholars to undertake research and publish their results.

2. Some lecturers write many articles on the same research topic just to gain citations and in order to achieve promotion.

3. Some lecturers are very active and keen to write early in their careers in order to get a permanent job, or a promotion, but once they have achieve their goal, their productivity decreases. This 'civil servant mentality' with a guaranteed job does not motivate lecturers to be productive.

4. A few lecturers are very active in writing which pushes up the mean number of publications while others publish very little (see section 7.4 in Chapter Seven)

5. Lecturers' attitudes toward writing, reading and buying are interrelated; as there are big inequalities in reading, there are big differences in buying and writing. This situation also is reflected in expenditure, and those who buy less, also write less (see section 7.2 in Chapter Seven)

6. The research shows that constant changes in the language policy have had a detrimental effect on academics. Younger scholars (i.e. those in early 30s) find themselves in a difficult position to be prominent academics and gain recognition at the international level compared to their senior colleagues or those who graduated from overseas. Moreover, the limitation of language has led them to **buy less** (see section 7.2, younger lecturers join fewer professional societies that leads them to subscribe less), **read less, therefore how one could expect them to write more** (particularly for international publications). Although incentives have been given to academics to encourage them to write, the authorities concerned should pay attention to this self-inflicted problem.

The researcher is a progeny this language policy and has had to face many problems in gaining recognition as a scholar from senior local colleagues and at international level. Qualitative research done through in-depth discussions with the age group who were guinea pigs of this policy convinced the researcher that the policy has victimised this group through their experimental status. In the eagerness to give honour to the national language, ill planned implementation has caused more damage than good. Although the syllabus of teaching English for all levels has been repeatedly revised and improved, the damage has already taken place. Ten years after the implementation of the policy, the survey shows that the shortages of scholarly publications are seriously damaging the Malaysian scholarly world. Instead of attending to the problem, authorities concerned have not taken any concrete action.

7. There seems to be a connection with the salary of respondents and expenditure as those above 40 spent on average one third more than the amount spent by those who are below 40 and bought eight books per session compared with five.

8. The survey shows that although lecturers thought highly of the contents of local journals, they viewed their frequency of publication negatively, which supports the findings of previous studies regarding this matter (see section 4.2.5 in Chapter Four)

9.1.4 Libraries

1. Malaysian academic libraries are relatively well stocked (although there is a dearth of books published in bahasa Melayu); and this is not the reason why many lecturers and students are not attracted to use library facilities. However, the lack of modern technology can hinder those who are enthusiastic to do research, to get the latest information, exchange views or co-author articles from different locations. Therefore, the establishment of Language Information Centre for bahasa Melayu at USM with the co-operation of DBP is a welcome sign.

2. With regards to the use of libraries, it was found that some lecturers, instead of making use of the advanced computer based facilities available at their universities are still ignorant of such developments at their institutional libraries.. It could be argued that as these facilities were introduced quite recently, lecturers might not be too familiar with them, but the fact that lecturers were not even sure whether such facilities were available at the university library suggests that either they have not been informed by or they have not bothered to read mail from the library staff.

This is a worrying attitude since databases etc. provide a quick access to a rich source of information. Such sources could enable lecturers to improve and update syllabuses and also to get access to recent publications that could stimulate them to write. Librarians should take more initiatives in introducing such facilities to lecturers since academicians need to keep abreast of new developments in scholarly knowledge.

9.1.5 Students

1. The research shows that students had been taught using 'parrot learning' methods.

2. Among students, only Medical students tend to have a desire to own their own books (irrespective of the price - their demand for books was relatively price inelastic) rather than borrowing.

3. Guidance from lecturers is important in promoting the reading habit among students - if lecturers themselves do not buy, and instead rely on a collection of antiquated notes to teach from, students are not motivated to buy as they cannot see the advantage in buying.

4. Gender does not give rise to significant differences among students in determining characteristics such as hours spent in the library, amount of money spent on books etc.

9.2 Recommendations

How can government improve the environment?

9.2.1 Government/General

1. Set up co-ordinating bodies to dispense grants to people to undertake Ph.D. and other research along the lines of SERC and ESRC in the UK, which are independent from the universities and government. The bodies' task would be to prioritise research and channel funds from the government to areas which the economy needs. The bodies would then own the results of the research and use them for the betterment of the country. The researcher would have increased qualifications, but not be restricted by contract to any particular university. This would result in increased job market flexibility, with universities and other organisations bidding for the best people. The present contract system is inefficient since after qualifying the person is linked to an institution rather than being free to move to the place where his expertise can be best utilised.

2. A register of current and past researches needs to be established to list research (particularly higher degree research) done both at local and international level to prevent overlapping topics, smooth the access to the means of collecting and exchanging data, highlight priority topics for research and thus act as a database of prospective writers for scholarly publishers. As a result, the publishers can be helped to identify marketable books and publications to publish, and the researcher is guided to the right track. Such systems can encourage researchers to be productive by publishing their work.[461]

[461] Notes: Some of the findings/suggestions of this research were forwarded to the Prime Minister of Malaysia during his visit to London on 14 March 1995. He was in particular interested in the recommendation to set up a research council to co-ordinate research.

3. Setting up of a Malaysian University Press has been proposed by PEPET so as to utilise all the resources towards the benefits of all university presses in Malaysia. This should be seriously considered by the Ministry of Education.

4. The student grants system should be expanded to open up higher education so that more people will have the opportunity to further their studies.

5. Link subsidies in the industry to investment, for example for DBP and universities, should be linked to capital investment in new technologies rather than blanket subsidies. Ideally they should be self-financing through sales.

6. Upgrade ITM to a university or the lecturers' status so that it can recruit better staff, without the handicap of reduced prestige and privilege which results from it being an institute at present.

7. Promote both bahasa Melayu and English along the lines of Scandinavian countries so that people are fluent in both languages.

8. In preserving bahasa Melayu as the national language, Jawi script should be taught and used more widely, so that younger generations will maintain the bond to their culture and religion through reading old scripts written in Jawi.

9. The reading habit among school children should be improved by avoiding having a curriculum which is too crowded and burdensome. More reading materials should be made available for children through better equipping of school libraries. Habits begun in childhood will persist into adulthood.

10. As the economy of the country improves and more women become educated, it is hoped that reading habit will improve since mothers bear a heavy influence on children. "The spirit of a 3 year old child remains even to the age of 100 years" is a well-known saying in Japan. The reading habit therefore should be well established at an early age when the foundations of all aspects of a child's growth are laid.

11. It is generally assumed that the first years of life are critical for the individual's psychological development; it is recommended that pre-school education should be introduced and implemented in a wider scope. Children in rural areas in particular, are not being exposed to the pre-school education. Although the government has set up some pre-school education, the teaching method and facilities are far from satisfactory. It is also suggested that starting age for primary school is reduced to five from six as at present. This would allow greater time to dispense the overcrowded syllabus to children.

12. Money spent on books could be made tax-deductible, especially for the parents of students via a deed of covenant or another similar administrative procedure. Such a scheme would encourage people to read and buy more books.

9.2.2 Industry

1. The industry can best lobby the government as a united entity so effective organisations are a must, unfortunately these are lacking at present (see Chapter Four).

2. Improved market research, and better pooling of information resources would have beneficial results.

3. A reduction in the bureaucratic structure of many government publishers in favour of a project team approach would work much better. Each team would consist of members of staff from finance, production, editorial with marketing personnel in charge of co-ordination. The

team would be linked to individual titles and their success as a team measured against the success of the title.

4. The use of inventory control, cost control, quality management, marketing techniques, marketing know-how and financial decision making tools is needed. As a socio-cultural organisation aimed at providing maximum social benefit, the industry could employ socio-economic theory to attain an optimum profit.

5. A support programme educating those people involved in publishing in techniques of marketing, information and financial operation management would benefit the industry.

6. Publishers should tolerate some leakage in the Copyright Law in their long term interest (as long as the leakage does not become a haemorrhage).

9.2.3 Lecturers/students

1. The government should limit intervention in the industry to enforcement of regulations and be there to support the industry perhaps offering incentives to people to buy books, or help to open up new markets e.g. Indonesia, or pass legislation to make the life of publishers easier. Other recommendations include loans on favourable terms for purchasing publishing equipment and subsidies to allow researchers to publish and disseminate research findings. These subsidies, however, should be based on a selection of predefined priorities and objectives, rather than blanket subsidies which often result in inefficiencies.

2. The policy of promotion as a reward for writing publications should be enforced.

3. Guidance, encouragement and opportunity should be given to academics to publish more work based on the research they undertake as the invaluable information and findings from such research should be disseminated in a written work to other scholars in particular and to the

public in general as and when it is needed. The failure to require the publication of research findings means that the research itself is wasted.

4. The research indicated that a considerable number of lecturers were unable to ask anybody for an opinion on their work. Therefore, in order to remedy such a situation, lecturers should join more professional societies through which they could have the chance to meet and exchange opinions and ideas with people who shared similar interests, this is particularly useful in building the ties needed for co-authoring articles.

5. Very short contracts are undesirable since they introduce insecurity and perhaps a concentration on research, at the expense of teaching. Tenure, however, is equally bad since it creates a 'civil service mentality'. The ideal would be something equidistant between the two extremes, along the lines of the private sector, where you work on a job contract for as long as you are needed or would like to stay; alternatively a contract period can be stated after which the person is evaluated for his teaching and research and then offered tenure.

9.3 Summary

Publishing is too often considered primarily in economic terms and its political and cultural dimensions are not adequately considered. However, as shown in the research, political and cultural considerations also make it very important for developing countries to master the technology of information procedures. The economic contribution that publishing can make as an industry should be analysed and it should be recognised that reliance upon the provision of external information would lead to the erosion of the cultural values which bind people together to form a nation, through the imposition of an alien set of values, and a reduction in the intellectual vigour which stimulates a society to be both economically and politically strong. In developing countries, there needs to be a national printing and publishing industry, a national capacity to produce and disseminate knowledge, especially at the scholarly level, and not an over-dependence upon external infrastructure. Understanding the problems of all developing countries collectively can help diagnose the majority of ailments afflicting Malaysian publishing.

SWOT analysis (see Chapter Four) on publishers shows that despite weaknesses, such as the chaotic industry structure, interference from the government and poor reading habit (see Chapter One, Two, Six and Seven), and threats, such as the language policy and competition from the international publishers, there exist opportunities and strengths for the publishing industry. The steady increase in personal incomes, the rapid expansion of higher education both in numbers of students and the courses on offer, and increasing in co-operation, albeit from a low level, at the ASEAN level are some of the factors which herald better times for the publishing industry in Malaysia.

An investigation of the publishing situation in selected countries (ASEAN, India and an overview of the UK situation, see Chapter Three) reveals similar intrinsic problems afflicting the publishing industries of most Third World Countries. Many countries have managed to tackle these problems more successfully than the others. Their success may provide useful reference points for other countries wishing to come to grips with their problems. In addition, research links and collaboration are still weak at the ASEAN level. As emphasised earlier (see Chapter Three), there should be more collaboration and co-operation, particularly between Indonesia and Malaysia as they share a common language and heritage.

An empirical study (Chapter Six and Seven) from the consumers' point of view of the factors contributing towards the habits of reading, buying and writing of scholarly publications amongst students and scholars revealed that tinkering with one aspect and leaving the others can only lead to a short term solution which can damage long term objectives. Although the education system has expanded rapidly, it does not induce a sense of individual responsibility towards learning or belief that education is a liberation from ignorance rather than a passport to better career prospects. In the higher education sector, the use of antiquated notes by lecturers and the lack of guidance from certain lecturers take their toll on book purchases (see Chapter Six). Where the guidance is above average as in Medical subjects, the purchases are also higher, although it was noted that Medical students have distinct characteristics.

Regarding the nation's poor reading habit, within the limitation of data, expenditure on all forms of reading materials was estimated to be in the region of M$26 per person i.e. about 0.44% of personal income (see Chapter Two, section 2.3.1), while for books around M$19.16 per capita which is approximately 0.307% of personal income. Malaysians should be spending more (the government should take note of this and introduce measures to promote expenditure on books, or else Malaysia risks limiting its economic potential; already industry is reporting education and skills shortages), but to prove this fully one needs to look at expenditure patterns in a range of countries at different stages of economic development. However this was not possible due to the lack of data.

Inexperience among young academics and lack of exposure to the publishing process led to the waste of resources and efforts. Ironically, a researcher learns how to conduct research and write up findings, but rarely receives guidance on how to disseminate his findings, how to write articles and how to contact journals etc. The lecturer returns with his increased qualification but the fruits of his labour are rarely shared among the academic community. In fact they have been criticised for the lack of scholarly publications.

Prior to undertaking any major research (especially if it is their first work, for example in the case of doctoral students), the researcher should be given guidance on what is expected as an output (as university research is often very specialised that needs to be more accessible as a book), from scholarly publishers/university presses with help from the government, parent universities and authorities concerned. Otherwise the narrow objective of obtaining a qualification becomes the goal. Of course those with courage and conviction may still undertake writing up their research in book-form, but with little help or advice, they are likely to struggle. The resulting publication is likely to be below par, and if unsuccessful, discourage the author in future. What is need is a formal framework to nurture young academics, provide them with advice and to encourage them to develop their writing skills. The results of their research should be disseminated to the betterment of the individual and the academic community as quickly as possible. Otherwise with time the value of their findings deteriorates (at an exponential rate), i.e. "old news is no news."

All this development takes time, but nevertheless its establishment is a key component lacking in Malaysia at present and unless steps are taken, the problems will always remain. A non-partisan platform of co-operation and co-ordination needs to be adopted by all university presses to identify these academics. The university presses need to participate in this network and establish relationships with their future authors. Furthermore, this could help the publishers to augment their database of potential writers and buyers and avoid overlapping research titles. A joint university press or research council would be beneficial in this respect.

The scarcity and unreliability of data and statistics on publishing in most of the Third Word countries made it difficult to conduct research. The problem for this research is even more acute as it focuses on a particular type of publication: scholarly. The researcher had tried her best to collect as much data from primary research, but was hindered by non-harmonised classification systems in addition to the problems a researcher normally faces. This, for example, made it difficult to draw up statistically correct sampling frame: defining subjects, faculties or whether a publisher is a scholarly publisher or not and type of publications published. The primary data, although not completely reliable, is perhaps the first comprehansive attempt at collecting data of this type in Malaysia. The primary data was linked to secondary data to provide a description of the current publishing environment in Malaysia. The data indicated that Malaysian publishing still suffers the aftermath of being a colonial outpost and perhaps its publishing landscape will be scarred forever. But careful planning, co-ordination and execution of programmes would enhance the possibilities of achieving a vibrant and active indigenous publishing industry.

As far as scholarly publishing is concerned, the setting up of a joint university press, the free movement of academics, the official recognition of degrees by other ASEAN members, the co-ordination of educational policy and co-operation of joint government lobbying by all organisations concerned, and the use of modern marketing techniques would help to alleviate some of the symptoms inflicting the industry. The attempt of this applied research was to bring to the attention of the relevant authorities the problems as seen through the eyes of the researcher as a student, writer, lecturer and publisher. The research is by no means complete; it will have to continue and be regularly updated to take into account new developments so that new ailments are identified and improvements checked.

APPENDICES

APPENDIX 1

List of dissertations on publishing

Abdul Aziz Hussein, 'Penerbit Buku-buku dan Majalah-majalah Melayu di Singapura di antara bulan September 1945 dengan bulan September 1958' (Book and Magazine Publishers in Singapore, from September 1945 to September 1958) (unpublished B.A. degree dissertation, Malay Studies, University Malaya, Singapore, 1959).

Abdul Rahim Ahmad, 'Peranan DBP dalam Perkembangan Kesusasteraan Melayu Moden' (The Role of DBP in the Development of Malay Modern Literature) (unpublished B.A. degree dissertation, Malay Studies Department, University Malaya, 1968).

Abdul Ghani Ahmad, Ajijah Hj. Embran and Morni Hj Maidin, 'Penerbitan dan Pengedaran Buku Kanak-kanak di Malaysia' (Children's Book Publishing and Distribution in Malaysia), (unpublished project paper, Library Science, ITM, 1985).

Abidin Ahmad, 'Form Four Students' Perception of the design of their English Textbooks: A Survey in Malaysia' (unpublished Masters dissertation, University of Stirling, 1994).

Ahmad Sidin Ahmad Ishak, 'Malay Book Publishing and Printing in Malaya and Singapore, 1807 - 1949' (unpublished Ph. D. thesis, University of Stirling, 1993).

Akmal Md Salleh et. al, 'Laporan Projek Penyelidikan mengenai Peranan dan Sumbangan Persatuan Penerbit-penerbit, Pengimpot-pengimpot dan Penjual-penjual Buku Malaysia' (A Report on the Role and the Contributions of Publishers, Importers and Booksellers Association) (unpublished project paper, Library Science, ITM, 1985).

Ali Dina, 'Dewan bahasa dan Pustaka: The Contemporary Publishing of National Language Books in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1985).

Asiah Daud, 'Publishing of Adult Non-Fiction in Malaysia: A Case Study of Dewan Bahasa dan Pustaka' (unpublished M. Phil dissertation, University of Stirling, 1987).

Asma Ahmat, 'Malay Manuscript: Tradition and Documentation' (unpublished Master's dissertation, University of College London, 1986).

Azmuddin Ibrahim, 'The Malaysian Book Publishing Industry (unpublished Ph. D. thesis, University of Wales, 1994).

Azizah Hamzah, 'Scholarly and Academic Publishing in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1988).

Eng Hai, Ho, 'A Case Study of the Marketing Practices and Performances of Federal Publications Sdn. Bhd.', Diploma in Business Administration, University Malaya, 1980.

Firdaus Ahmad Azzam, 'Piracy and Legislative Copyright Problems in the Publsihing Industry: The Case of Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1991).

Halijah Mahmud, 'Dewan Bahasa dan Pustaka: Satu Tinjauan Tahun 1970-an' (Dewan Bahasa dan Pustaka: A View in 1970's' (unpublished B.A. degree dissertation, Language and Literature Institute, Universiti Kebangsaan Malaysia, 1976).

Hamedi Adnan, 'Pemasaran Buku: Kajian kes Dewan Bahasa dan Pustaka' (Book Marketing: A Case Study of DBP) (unpublished Masters dissertation, Writing Department, University Malaya, 1992).

Hashimah Johari, 'Early Book Publishing in Malay by Malay Publishers in Singapore and The Malay Peninsular until 1929' (unpublished Master's dissertation, University of College London, 1988).

Isma'il Salbidi, Shafiq Afendi and Wan Hassan Wan Omar, 'Perkembangan Penerbitan Buku-buku Islam di Malaysia dalam tahun 1980an' (Development of Islamic Book Publishing in Malaysia during 1980's) (unpublished project paper, Library Science, ITM, 1986).

Jama'yah Zakaria, ' Marketing Scholarly Publications in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1989).

Jamaluddin Abdul Rashid, 'Consortium of the Indigenous Book Publishers in Malaysia: A Case Study on Dasar Padu' (unpublished M. Phil dissertation, 1994).

Kamaliah Md. Shahid, 'Textbook Publication in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1990).

Kum Chee, Lim, 'A Study of the Preschool Book Market in the Petaling Jaya Area,' (unpublished dissertation for M.B.A., Faculty Economics and Administration, University Malaya, 1985).

Krishnan Ponnusamy, 'Publishing of Primary School Textbooks in Malaysia' (unpublished Masters dissertation, University of Stirling, 1994).

Lim Bee Ling, 'Satu Dekad Pesta Buku Malaysia' , (A Decade of Malaysian Book Fair), (unpublished B.A. degree dissertation, University Malaya, 1991/92).

Mahmud Sanusi, 'Publishing for Schools in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1984).

Mohd Jamin lebai Din, 'Percetakan Melayu Kuala Pilah sebagai Satu Institusi Kesusasteraan' (Malay Printing Kuala Pilah as a Literature Institute) (unpublished B.A. dissertation, Malay Studies Department, University Malaya, 1976).

Nasirah Mohd Ghazali, 'Penerbit Universiti Kebangsaan Malaysia: Obor penerbit Ilmiah' (UKM Press) (unpublished B.A degree, University Malaya, 1991/92).

Noor Azizah Taib, Ruzlina Abdul Ghani and Suzana hamzah, 'Penerbitan Buku Kanak-kanka di Malaysia dalam memenuhi keperluan Kanak-kanak Masakini' (Children's Book Publishing in Malaysia with respect to the perceived needs of children) (unpublished project paper, Library Science, ITM, 1986).

Noor Rizam, 'Intergrated Secondary School Curriculum Textbook Production by Private Publishers in Malaysia' (upublished M. Phil dissertation, University of Stirling, 1992).
Rabiatul Adawiah Arshad, 'Persatuan Penerbit-penerbit Buku Malaysia (MABOPA)' , (Malaysian Book Publishers Association) (unpublished B.A. degree dissertation, University Malaya, 1991/92).

Rasmah Yusof, 'Peranan DBP dalam Penerbitan Sastera Remaja' (The Role of DBP in Teenager's Literature) (unpublished B.A. dissertation, Creative and Descriptive Writing, University Malaya, 1987).

Rahimah Daud, 'Publishing of School Textbooks (under the new curriculum): Its Contribution to the Development of Book Industry in Malaysia' (unpublished M. Phil dissertation, University of Stirling, 1992).

Shah Ruddin Abbas, Azman Hashim and Siti Kamesah Bee Mohd. Hashim, 'Pembangunan Penerbitan Buku-buku Ilmiah Bahasa Kebangsaan dalam tahun 1980an' (Development of Scholarly Book Publishing in the National Language during the 80's) (unpublished project paper, Library Science, ITM, 1986).

Thomson, Rosemary, 'The Dewan Bahasa dan Pustaka of Malaysia: A Case Study of Publishing in a Developing Country' (unpublished Masters dissertation, Graduate School of Librarianship, Monash University, 1985).

Zainab Kassim, 'Social Obligations vs. Profit Making: A Review of the Policy of Dewan Bahasa dan Pustaka Malaysia', (unpublished Masters dissertation, University of Loughborough, 1991).

Zulkipli Abu Bakar, 'Scholarly Publishing in Malaysia: A Case Study on Biroteks ITM', (unpublished M. Phil dissertation, University of Stirling, 1992).

APPENDIX 2

Non-Seasonal ARIMA Model

In order to nowcast the number of titles published for the period 1993 - 1995, a Non-Seasonal ARIMA model[462] was fitted to data for the years 1966 - 1992, see figure 2.3 (in Chapter Two). Table A2.1 shows the figure for the titles, the nowcasted titles and a trend which provides a guide to the long term evolution of Malaysian publishing and thus avoids the erratic behaviour of the original series. The trend shows that number of titles has been increasing annually (taking a long-term view). The number of titles was nowcasted to continue increasing during the period 93 - 95 and to reach 5000 per annum by 1995. When viewing the year to year data it is usually difficult to gauge the likely future development, for one year's downturn may be temporary and reversed the next year; it may therefore be more important to look at the general trend to determine the likely long-term developments. The trend figure is more smooth and allows one to see that most probably the Malaysian publishing industry, as measured by the number of titles, is likely to have continued expanding over the forecast period.

[462] The model fitted was a non-seasonal ARIMA model with periodity set to annual using the automatic model detection facility of "Signal Extraction in Arima Time Series" (SEATS) and its accompanying program "Time Series Regression Models with Arima Errors, Missing Values and Outliers" (TRAMO). The programs were developed by Prof. Maravall, European University Institute, Florence and Victor Gomez, National Statistical Office of Spain and are currently use by Eurostat, the Statistical Office of the European Union, the Bank of Spain and National Statistical Office of Spain.

Table A2.1 **Number of titles and estimated trends**

Year	Titles	Estimated Trend	Year	Titles	Estimated Trend
1966	563	560	1981	2356	2382
1967	483	616	1982	2801	2731
1968	649	724	1983	3534	3050
1969	1184	863	1984	3975	3180
1970	874	975	1985	2554	3155
1971	1202	1069	1986	3397	3164
1972	1225	1141	1987	2988	3215
1973	1082	1189	1988	3004	3322
1974	1237	1254	1989	3348	3559
1975	1445	1323	1990	4578	3814
1976	1272	1375	1991	3748	3951
1977	1341	1448	1992	3695	4088
1978	1328	1597	1993	4309	4347
1979	2037	1825	1994	4632	4673
1980	1948	2084	1995	4980	4845

Figures for 1993 to 1995 are nowcasts.

APPENDIX 3

Table A3.1 **Import into Malaysia, 1991 (value in M$)**

1. Children's Picture, Drawing of Colouring Books			
Country	M$	Sub Total	Total
Australia	4,402		
China	9,219		
France	2,002		
Greece	9,608		
Hong Kong	3,152		
Indonesia, Rep. of	6,349		
Japan	17,430		
Korea, Rep. of	14,799		
Netherlands	1,268		
Singapore, Rep. of	883,316		
Taiwan	20,665		
Thailand	53,210		
United Kingdom	28,956		
USA	437,496		
		1,491,872	

2. Maps and Hydrographic or Similar Charts of All Kinds, in Book Form			
Country	M$	Sub Total	Total
Hong Kong	30,868		
Netherlands	613		
Singapore, Rep. of	4,473		
Taiwan	3,684		
United Kingdom	1,594		
USA	7,018	48,250	

3. Maps and Hydrographic or Similar Charts of All Kinds, Others			
Country	M$	Sub Total	Total
Australia	1,085,692		
Austria	7,629		
Belgium	1,923		
Denmark	977		
France	3,860		
Germany	14,689		
Hong Kong	2,784		
Japan	15,119		
Netherlands	6,263		
Singapore	305,172		
Sweden	1,562		
Switzerland	2,161		
Taiwan	1,769		
United Kingdom	215,000		
USA	177,368	1,841,968	

continue

4. Printed Books, Brochures, Leaflets and Similar Printed matter in Single Sheets, Whether of Not Folded			
Country	M$	Sub total	Total
Argentina	14,539		
Australia	1,590,866		
Austria	10,338		
Belgium	57,224		
Brazil	10,820		
Brunei Darussalam	8,718		
Canada	30,302		
Denmark	14,758		
Egypt	8,820		
Finland	18,213		
France	85,986		
Germany, Rep. of	1,930,450		
Hong Kong	943,676		
Hungary	2,175		
India	208,944		
Indonesia	25,138		
Iran	50,203		
Italy	6,962		
Japan	2,066,632		
Jordan	540,922		
Korea	53,467		
Libyan Arab Jamhiriya	25,256		
Mexico	5,176		
Netherlands	158,688		
New Zealand	19,605		
Norway	32,985		
Pakistan	2,524		
Saudi Arabia	8,604		
Singapore	11,287,645		
Spain	18,690		
Swaziland	11,155		
Sweden	138,746		
Switzerland	108,465		
Taiwan	256,333		
Thailand	3,004		
USSR	13,046		
United Arab Emirates	4,141		
United Kingdom	2,042,562		
USA	2,479,086		
		24,294,874	

continue

5. Dictionaries & Encyclopaedias & Serial Instalments Thereof			
Country	M$	Total	Sub Total
Australia	18,966		
Austria	1,726		
Hong Kong	697,120		
Ireland	4,463		
Italy	1,529		
Japan	97,125		
Netherlands	2,005		
Philippines	1,006		
Singapore	446,893		
Switzerland	1,654		
Taiwan	18,510		
Turkey	771		
United Kingdom	1,621,269		
USA	601,801		
		3,514,838	

6. OtherPrinted Matter			
Country	M$	Sub total	Total
American Samoa	2,469		
Angola	714		
Argentina	5,406		
Australia	1,560,699		
Austria	24,168		
Bahrain	2,113		
Belgium	112,837		
Bolivia	5,270		
Brazil	8,104		
Brunei	27,514		
Bulgaria	2,399		
Canada	173,696		
China	734,886		
The Czech & Slovak Fed Rep	2,474		
Denmark	73,206		
Dominica	29,090		
Egypt	835,447		
El Salvador	1,907		
Finland	22,630		
France	665,083		
Germany	1,207,431		
Greece	13,994		
Guadeloupe	1,762		
Hong Kong	11,086,399		
Hungary	2,437		
India	779,670		
Indonesia	435,695		
Iran	20,132		
Ireland	368,794		
Italy	901,005		
Japan	9,375,255		

Jordan	47,242
Kenya	1,906
Korea, Dem. People's Rep.	11,850

continue

6. Other Printed Matter Country	M$	Sub total	Total
Korea, Rep. of	176,975		
Kuwait	2,296		
Lebanon	123,304		
Liberia	1,808		
Libyan Arab Jamhiriya	9,938		
Malaysia, Peninsular	528		
Mali	1,025		
Mauritius	522		
Netherlands	1,252,283		
New Zealand	183,518		
Norway	1,210		
Oman	112,141		
Pakistan	4,435		
Papua New Guinea	723		
Philippines	37,935		
Puerto Rico	4,253		
Qatar	1,823		
Saudi Arabia	48,681		
Singapore	18,475,458		
Spain	62,170		
Sudan	660		
Swaziland	1,211,		
Sweden	229,577		
Switzerland	410,787		
Taiwan	4,707,811		
Thailand	867,401		
Turkey	95,980		
United Arab Emirates	1,730		
United Kingdom	21,955,625		
United States of America	28,159,962		
Yemen, Rep. of	14,811		
Yugoslavia	5,252	105,495,487	
GRAND TOTAL			**136,687,289**

SOURCE: *Malaysian Book Importers Association*

Table A3.2 **Export from Malaysia**

1. Children's Picture, Drawing of Colouring Books			
Country	M$	Sub Total	Total
Belgium	43,380		
Brunei	5,469		
Germany	30,043		
Japan	55,466		
Kuwait	3,940		
Saudi Arabia	9,513		
Singapore	52,920,679		
USSR	11,659		
United Kingdom	46,350		
USA	373,936		
		53,500,435	

2. Maps and Hydrographic or Similar Charts of All Kinds, in Book Form			
Country	M$	Sub Total	Total
Singapore	578		
United Kingdom	948		
		1,526	

3. Maps and Hydrographic or Similar Charts of All Kinds, Others			
Country	M$	Sub Total	Total
Australia	17,365		
Brunei	1,185		
Canada	26,798		
France	6,900		
Germany	4,773		
Netherlands	9,798		
New Zealand	3,000		
Singapore	40,150		
United Kingdom	6,241		
USA	17,170		
		133,380	

4. Printed Books, Brochures, Leaflets and Similar Printed matter in Single Sheets, Whether of Not Folded			
Country	M$	Sub total	Total
Australia	580,658		
Austria	5,400		
Brazil	125,499		
Brunei	219,549		
Canada	17,069		
Canary Islands	2,179		
China	6,414		
Ivory Coast	549		
Denmark	3,922		
France	16,142		
Germany	85,584		
Hong Kong	203,741		
Indonesia	33,011		

Japan	78,619		
Kampuchea	6,406		
Korea, Rep of	37,753		
Mauritius	4,091		
Netherlands	13,943		
New Zealand	40,447		
Pakistan	10,400		
Papua New Guinea	6,531		
Philippines	3,942		
Singapore	865,481		
Sri Lanka	27,060		
Switzerland	6,230		
Taiwan	147,102		
Thailand	31,495		
United Arab Emirates	3,841		
United Kingdom	93,420		
USA	303,795		
Venezuela	817		
		2,981,090	

5. Dictionaries & Encyclopaedias & Serial Instalments Thereof

Country	M$	Sub Total	Total
Australia	229,336		
Belgium	5,000		
Brunei	166,834		
France	1,910		
Germany, Federal Rep. of	10,774		
Hong Kong	58,882		
Indonesia	120, 855		
Italy	551		
Japan	7,392		
Philippines	108,965		
Singapore	131,116		
Taiwan	34,002		
Thailand	47,634		
UK	53,434		
USA	12,100		
		988,785	

6. Other Printed Matter

Country	M$	Sub Total	Total
Algeria	82,331		
Australia	4,562,798		
Austria	7,365		
Belgium	3,714		
Brazil	27,068		
Brunei	2,381,046		
Canada	443,494		
Canary Islands	840		
Chile	896		
China	40,279		

Cocos Islands	5,614
Colombia	865
Ivory Coast	6,264
The Czech & Slovak Fed. Rep.	545
Denmark	57,450
Egypt	191,938
Fiji	1,575
Finland	17,164
France	51,816
Germany	263,080
Ghana	1,148
Greece	4,862
Hong Kong	1,161,566
India	137,628
Indonesia	90,439
Iran	81,253
Ireland	1,852
Italy	10,836
Japan	156,338
Kenya	5,272
Korea	10,550
Kuwait	5,183
Lebanon	189,383
Malta	4,099
Mauritius	135,743
Mexico	37,427
Mongolia	2,025
Netherlands	118,017
New Zealand	683,725
Nigeria	1,148
Norway	7,894
Pakistan	103,644
Papua New Guinea	122,464
Peru	4,000
Philippines	20,092
Saudi Arabia	29,503
Senegal	1,000
Singapore	11,932,670
Spain	7,772
Sri Lanka	903,548
Swaziland	33,050
Sweden	32,289
Switzerland	319,246
Taiwan	293,835
Tanzania	575
Thailand	76,414
Turkey	4,535
USSR	9,211
United Arab Emirates	14,254
United Kingdom	1,385,017
United States of America	1,596,241

Vietnam	2,024		
Zimbabwe	1,150		
		27,885,064	
GRAND TOTAL			**85,490,280**

Appendix 4

Table A4.1 **List of British publishers engaged in academic and scholarly publications, number of new titles published, number of employees, annual turnover (in £) and overseas representative (South East Asia)**

Publishers	New titles		No. of employees	Annual turnover	Representative for South East Asia
	1992	1993			
1. Academic Press Ltd.					Singapore
2. Academy Books	6	6	1	100,000	
3. ACC Publications					
4.ACE Books	10	13	7	0.5m	
5.Adam Matthew Publications	20	20	3	200,00	
6.Adamantine Press Ltd.	7	10			
7.Addison-Wesley Publishers Ltd.					Singapore
8.Advisory Unit: Computers in Education	6	5		250,000	
9.Africana Publishing Co.	20	25			
10.Aldwych Press Ltd.					
11.Allborough Publishing Ltd.	132	921	22	420,000	
12.Peter Andrew Publishing Co.					
13.Anglo-German Foundation for the Study of Industrial Society	6	8	6		
14.Appletree Press Ltd.	30	34			
15.Archival Facsimilles Ltd.	3	4	2	175,000	
16.Aris & Phillips Ltd.	12		6		
17.Edward Arnold Ltd					Malaysia, Singapore
18.Ashgate Publishing Ltd.	200				Singapore
19.Ashmolean Museum Publications	8	12	5		
20.ASLIB					
21.The Association of Commonwealth Universities (ACU)	5	9	22	512,000	
22.The Athlone Press Ltd.					Singapore
23.Baha'i Publishing Trust	15	15	9	1m	
24.Bankers Book Ltd.					
25.B.T. Batsford ltd.	135	135	70	5m	Malaysia, Singapore
26.Bellew Publihsing	18	15	450,000		
27.Berg Publishers Ltd	37	70	8	800,000	Malaysia, Philippines
28.BFI Publishing	25	30	10	350,000	
29.Blackstaff Press Ltd	19	20	9		
30.Blackwell Publishers (Basil Blackwell Ltd)	270		100	13m	Philippines, Singapore
31.The Book Guild Ltd	100	100	12		
32.Marion Boyars Publishers Ltd	16	25	5		
33.Boydel & Brewer Ltd					
34.BPP Publishing Ltd					Malaysia, Singapore
35.Brassey's (UK) Ltd	30	25	11	1.023m	Singapore

36.British Agencies for Adoption & Fostering (BAAF)	4	6	75	1m	
37.British Library, Humanities % Social Science					
38.British Museum Press	38	39	15	2.1m	
39.British Psychological Society (BPS Books)	6	12	4		
40.Building Blocks Educational	2	2	4	3000	
41.Burns & Oates Ltd	8	9	13		
42.Business Education Publishers	6	10	10	350,000	
43.Butterworth-Heinemann					
44.Cambridge University Press	1600	1700	1050		Singapore
45.Carcanet Press Ltd					
46.Jon Carpentar Publishing	1	8	2	50,000	
47.Frank Cass & Co Ltd	32	35	22		
48.Cassell Plc	700	700		20m	Malaysia
49.Catholic Institute for International Relations					
50.The Catholic Truth Society	26	30	18	537,467	
51.Causeway Press Ltd	16	18	7	1.1m	Singapore
52.Cavendish Publishing Ltd	10	50	7	400,000	Malaysia, Singapore
53.Centre for Business & Public Sector Ethics Press		3	6		
54.Chadwyck-Healey Ltd					
55.Chalksoft Ltd	10	12			
56.Paul Chapman Publishing Ltd	30	30			Singapore
57.Chapman & Hall Ltd	380	450	170		Malaysia, Singapore
58.Chartwell-Bratt (Publishing & Training) Ltd.	20	20			
59.Checkmate Publications	8	12	4		
60.Churchill Livingstone	120	120	120		
61.& T. Clark	35	40	12		
62.James Clark & Co	6	5			Singapore
63.Clio Press Ltd	220	250	28		
64.Collets					
65.Computational Mechanics Publications	30	35	15		
66.Cranfield Press	2	3	2		
67.James Curry Publishers	22	22	3		
68.Curzon Press Ltd					Singapore
69.Dance Books Ltd	6	6	6	600,000	
70.Daniels Publishing	12	25	6		
71.Dartmouth Publishing	60	75	7		Singapore
72.Darton, Longman & Todd Ltd	45	50	12	1m	
73.J M Dent	49	193	11	2.7m	
74.John Donald Publishers					

Ltd					
75.Gerald Duckworth & Co Ltd	45	60	10		
76.Earthscan Publications Ltd		35			
77.Edinburgh University Press	80	90	20	800,000	
78.Edward Elgar Publishing Ltd	120	130	12		
79.Elsevier Advanced Technology	25	25	80		
80.European Research press (Ltd)	1	2			
81.University of Exeter Press	23	23			
82.Fabian Society					
83.Falmer Press Ltd	58	62		1m	Singapore
84.Forbes Publications Ltd		8	6		
85.W.H.Freeman & Co Ltd	45	30	6		
The financial Training Co	100	94	250		
Free Association Books	12	15	6	350,000	
86.Friends of the Earth	40	50	130		
87.David Fulton Publishers Ltd	32	42	3	350,000	
88.Gairm Publications	12	14	4	120,000	
89.GMP Publishers Ltd	20	28	7		
90.Golden Cockerel press Ltd	80				
91.Gomer Press	72	80	49	1.4m	
92.Gracewing/Fowler Wright Books Ltd	10	12	13		
93.Grant & Cutler Ltd	12	12	50,000		
94.Granta Editions	40	50	18	200,00	
95.Greenwood Publishing Group	650	700			
96.Gregg Publishing Co Ltd	80				
97.Grey Seal Books	3	6	2		
98.The Guildhall Press	6	6	20	10,000	
99.Peter Halnban Publishers	4	3	3		
100.The Hambledon Press	18	25	2		
101.Harcourt \brace & Co Ltd					Singapore
102.Harvard University Press	150	150	5		
103.Harvester Wheatsheaf	111	106	5	4m	
104.Hawthorn Press	7	7	3	250,000	
105.Headstart history					
106.Heritage Press	1	5			
107.HLT Publications	300		45	1.5m	
108.HMSO Books			100	70m	Singapore
109.Hodder & Stoughton Ltd					Singapore, Thailand
110.Holt, Rinehart & Winston					
111.Horton Publishing Ltd	18		3	130,000	
112.Ellis Horwood	97	112	14	2m	

113.Houghton Mifflin Co International					Singapore
114.Humna Kinetics Publishers (Europe)	60	60	6		Malaysia
115.C. Hurst & Co (Publishers) Ltd	15	18			Singapore
116.Hutton Press ltd	12	10	2	200,000	
117.ICA (Institute of Contemporary Arts)	5	5	1	65,000	
118.ICC Information Group Ltd	4	14	170	2.56m	
119.Institute for Fiscal Studies	24	30	22	1.1m	
120.Institute of Development Studies	34	30			
119.Institue of Education	10	10			
121.The Institute of Materials	12	20	75		
122.Institution of Electrical Engineers	40	45			
123.Inter-Varsity Press	40	39	32	1.1m	Philippines, Singapore
124.Intercept Ltd	25		8		Malaysia
125.Interlist Publishing Ltd	2	6	5	200,000	
126.IOP Publishing	59	50	127	9.71m	Malaysia, Singapore
1276.The Islamic Texts Society	6	8			
128.Ithaca Press	10	15	10		
129.JAI Press Ltd	130	150	3		
130.James & James (Publishers) Ltd		10	2	350,000	
131.James & James (Science Publishers) Ltd	8	15	6	250,000	
132.Karnak House	8	12			
133.Kegan Paul International Ltd					
134.Kershaw Publishing Co Ltd	3	4			
135.King's fund Publishing	20	20	5	250,000	
136.Jessica Kingsley Publishers	28	38			Singapore
137.Kogan age Ltd	240	260	62	5.5m	Singapore, Malaysia
138.Lawrence & Wishart Ltd	10	18	4	150,000	
139.Leicester University Press	30	35			Singapore
140.Libris Ltd	2	2			
Llanerch Publishers	22	30	3		
141.Littman Library of Jewish Civilization	3	6	6		
142.Liverpool University Press	18	18	4		Singapore
143.Longman Group UK Ltd	1750	1300	1200		Malaysia, Singapore
143.Lund Humphries Publishers Ltd					
145.McGraw-Hill Book Co Europe	108	127	143	16m	

146.The MacMillan Press Ltd	810	627			
147.Manchester University Press	120	120	26	1.3m	
148.Mansell Publishing	30	30			Hong Kong
1498.Maxwell macmillan International (Europe) Ltd			27		
150.Mechanical Engineering Publications	34	36	32	3.5m	
151.Merlin Books Ltd					
152.Merlin Press Ltd	18	16			
153.The MIT Press	175	175			
154.Multilingual Matters Ltd	21	25	6	500,000	
155.National Academy Press	100	100	3		
156.National Gallery Publications Ltd	4	8	82	4.87	
157.National Youth Agency	10	12	65	80,000	
158.Natural History Museum Publications	10	10	3	200,000	
159.University Press of New England					
160.New Era Publications UK Ltd	2	15	18	1m	
161.The Open University					Malaysia, Singapore
162.Open University Educational Enterprises Ltd	100	100	20	1.76	Singapore, Malaysia
163.Open University Press	98	96	26	2.3m	Malaysia, Singapore
164.Oxford University Press			2000	180m	Malaysia, Philippines, Singapore, Thailand
Packard Publishing Ltd	11	8	2	100,000	
165.Paramount Publishing International	95	88	287	42m	
166.Parthenon Publishing Group Ltd	50	50			
167.The Paternoster Press Ltd	4	12	5	300,000	Indonesia, Philippines, Singapore
168.Pavic Publications					
169.Penguin Books Ltd					Singapore
170..Peter Peregrinus Ltd					
171.Pergamon Press	134	150	500		
172.Phaidon Press Ltd	50	100	50	5m	
173.Phillimore & Co Ltd	39	53	14	950,000	
174.Pickering & Chatto (Publishers) Ltd	16	24	6		
175.Pinter Publishers Ltd	120	135	15		Singapore
176 Pion Ltd	1	1			
177.Plenum Publishing Co Ltd	304	300			
178.Pluto Publishing Ltd	35	40	500,000		
179.Policy Studies Institutes	20	20			
180.Polity Press					Singapore
181.Prism Press Book Publishers Ltd	6	10	2		
182.Prometheus Books UK	30	32	1		

183.Rapid Communications of Oxford Ltd	7	10	20		
184.Research Studies Press Ltd	10	12			
185.The Richmond Publishing Co Ltd	4	4	3	450,000	
186.Routledge	760	850	170		Malaysia, Singapore
187.The Royal Society	10	8	18	1.1m	
188.George Ronald Publisher Ltd	8	8	4	200,000	
189.Sangam books Ltd	40	30	2		
190. Sage Publications Ltd					
191. Scarthin Books	11	11	3		
192. W.B. Saunders					
193.School of Oriental and African Studies (University of London)	15	8	4		
194.Science Museum Publications					
195.Saus Publications	20	20	3	80,000	
196.Save The Children	25	25			
197.Scarlet Press	6	7	4		
198.Science Museum Publications	14	18	2		
199.SCM Press Ltd	40	40	15	1.1m	
200.Scolar Press	30	42			
201.Scottish Academic Press	14	18			
202.Seven Mirrors Semi-Circle Publications		7			
203.Shaw & Sons Ltd	9	10	24		
204.Sheed & Ward Ltd	6	8	3	200,000	
205.Sheffield Academic Press	39	50	40		
206.SLS Legal Publications (NI)	8	8	7	120,000	
207.Smith-Gordon & Co Ltd	12	20			
208.Colin Smythe Ltd	21	15	2	800,000	
209.Souvenir Press Ltd	55	50			
210.The Society of Metaphysicians Ltd	250	100	12		
211.Stainer & Bell Ltd	15	20	10	591,000	
212.Alan Sutton Publishing Ltd	180	280	68	2.5m	
213.I.B. Tauris & Co Ltd	67	75			
214.Taylor & Francis Ltd					Singapore
215.Taylor Graham Publishing					
216.Thames & Hudson Ltd	165	169			Malaysia, Singapore
217.University of Toronto Press					
218.Toucan Press	16	20			
219.Trentham Books	22	25	5	25,000	
220.Dyllansow Truran	6	6	3		
221.UCL Press Ltd	13	52	8		Singapore

222.Ulster Historical Foundation	5	7	10	200,000	
223.VCH Publishers (UK) Ltd			6		
224.Verso	38	40	9	1.3m	Malaysia, Singapore
225.Victoria & Albert Museum Publications	10	10	2		Singapore
226.Virago Press	100	100	21	2.75m	Singapore
227.Vision Press Ltd	5	6			
228.Volcano Press Ltd					
229.Voltaire Foundation					
230.University of Wales Press	50	60	15	330,000	
231.Waverly Europe Ltd	250	300	20		Hong Kong
232. WCB Publishers International					
233.Weidenfeld & Nicolson	101	150	17	8.8m	
234.Westview Press					
235.John Wiley & Sons Ltd	180	200	300	30m	
236.Windrush Press Ltd	12	12	4		
237.Yale University Press London					
238.Zed Books Ltd					

SOURCE: ***Directory of Publishing United Kingdom, Commonwealth and Overseas 1995*** **(Cassel &** The Publishers Association, 1994)

Table A4.2 **List of selected publishers engaged in scholarly publishing in Malaysia**

Publishers	**New titles**		**No. of employees**	**Annual turnover**
	1992	**1993**		
1. Arenabuku Sdn Bhd	17	70	21	500,000
2. Longman Malaysia Sdn Bhd	100	120	72	2m
3. UM	na	na	18	98,100
4. UPM	5	na	7	1123
5. UTM	15	11	11	210,198.90
6. MARDI	na	na	7	148,588
7. UTUSAN	100	na	na	10.1M
8. DBP	360	na	511*	56.324m
9. UKM	41	41	14	na
10. PFB	na	na	na	20m
11. ITM	7	17	20	42,485.25

SOURCE: The Researcher, with the exception of Arenabuku from *Directory of Publishing United Kingdom, Commonwealth and Overseas 1995*. * Related to publishing only.

APPENDIX 5

Table A5.1 **Publications Statistics (Standardisation and Differentials by Population)**

	TITLE			COPY (000s)	Population (000's)	Per Million Population			Copy
Country	Al l	Books	Textbooks	Books	Pop	All	Book	Textbook	Per capita⑧
Australia	10723				17090	627.44			
Brunei⑦	25	25	6	56	270	92.59	92.59	22.22	0.21
China	73923	73923	11107	5387020	1139100	106.49	64.90	9.75	4.73
France	41720				56080	743.94			
Germany③	61015			101901	79360	768.84			1.28
India	13937	11607	210		827060	16.85	14.03	0.25	
Indonesia	1518	1211	55		179300	8.47	6.75	0.31	
Japan②	39698				123540	321.34			
Korea	39330	35967	3878	227073	42870	917.42	838.98	90.46	5.30
Malaysia	4578	4370	1409	21526	17760	257.77	24.61	79.34	1.21
Netherlands	13691	13691			14950	915.79	915.79		
Norway	3712	2998			4240	875.47	707.08		
Philippines	1112	1112	142		61480	18.09	18.09	2.31	
Russia④	76711	54552		1658930	148290	517.30	36.79		11.19
Singapore⑤	2000				3003	666.01			
Spain	36239	31619	3003	161046	38960	930.16	811.58	77.08	4.13
Sweden	12034	9503			8560	1405.84	1110.16		
Thailand	7783	7684	579		56082	138.78	137.01	10.32	
UK①	86573	63870			57410	1515.10	1112.47		
USA⑥		62860			249924		251.50		

SOURCE: *UNESCO Statistical Yearbook*, 1992, 1993 & 1994

Note: Figures for: ① all titles are for 1992, while book titles are for 1990 derived from The Bookseller, 19 March 1993, p. 23. The 1991 title output was quoted as 67,700 an increase of 6% on the previous year, therefore the 1990 figure is approximately (67,700/1.06) = 63870 ② are for 1989, derived from *Publishing and Import of Books in Japan, (Tokyo: The British Council, 1990), p. 1;* ③ and ④ for copies of books are for 1989; ⑤ for population and GNP derived from *World Education Report 1993*, pp. 116 - 119 and number of titles from Straits Times, Singapore, 18 January 1986; ⑥ for all titles from The Bookseller, 19 March 1993, p. 23; ⑦ GDP per capita for year 1987 from Europa Word Report; ⑧ GNP for all countries derived from World Education Report, p. 116 - 119.

Blank represent unavailable data or statistic could not be calculated.

Table A5.2 **Publications Statistics (Standardisation and Differentials by GNP)**

Country	TITLE			COPY (OOO's)	GNP (billion US$)	Per billion US$ GNP			
	All	Books	Textbooks	Books	Total	All titles	Book	Textbook	Copy
Australia	10723				291.897	36.74			
Brunei	25	25	6	56	3.812	6.56	6.56	1.57	14689
China	73923	73923	11107	5387020	421.467	175.39	175.39	26.35	12781594
France	41720				1092.438	38.19			
Germany	61015			101901	1803.853	33.82			56491
India	13937	11607	210		289.471	48.15	40.10	0.73	
Indonesia	1518	1211	55		100.408	15.12	12.06	0.55	
Japan	39698				3141.622	12.64			
Korea	39330	35967	3878	227073	231.498	169.89	155.37	16.75	980885
Malaysia	4578	4370	1409	21526	41.558	110.16	105.15	33.90	517970
Netherlands	13691	13691			259.084	52.84	52.84		
Norway	3712	2998			98.029	37.87	30.58		
Philippines	1112	1112	142		44.890	24.78	24.78	3.16	
Russia	76711	54552		1658930					
Singapore	2000				36.967	54.10			
Spain	36239	31619	3003	161046	425.443	85.18	74.32	7.06	378537
Sweden	12034	9503			202.701	59.37	46.88		
Thailand	7783	7684	579		79.636	97.73	96.49	7.27	
UK	86573	79000			922.579	93.84	85.63		
USA	46743				5423.351	8.62			

Total GNP calculated by using GNP per capita and the population

Note: Direct comparison using trade statistics do not necessarily provide accurate indicators as to the health of the publishing industry, even though such indicators are very important, needed and useful, until the basis on which these are created is established.[1]

APPENDIX 6

Table A6.1 **GNP & Literacy Rate**

Country	REGION	GNP ($)	Literacy rate
Algeria	Arab	2060	57.4
Angola	Africa (excl. Arab)	620	41.7
Benin	Africa (excl. Arab)	360	23.4
Botswana	Africa (excl. Arab)	2040	73.6
Burkino	Africa (excl. Arab)	330	18.2
Burundi	Africa (excl. Arab)	210	50
Cameroon	Africa (excl. Arab)	940	54.1
Capre Verde	Africa (excl. Arab)	890	66.5
Central African Rep.	Africa (excl. Arab)	390	37.7
Chad	Africa (excl. Arab)	190	29.8
Congo	Africa (excl. Arab)	1010	56.6
Cote	Africa (excl. Arab)	730	53.8
Egypt	Africa (excl. Arab)	600	48.4
Equi. Guinea	Africa (excl. Arab)	330	50.2
Gabon	Africa (excl. Arab)	3220	60.7
Gambia	Africa (excl. Arab)	260	27.2
Ghana	Africa (excl. Arab)	390	60.3
Guinea	Africa (excl. Arab)	480	24
Guinea-Bis	Africa (excl. Arab)	180	36.5
Kenya	Africa (excl. Arab)	370	69
Libya	Arab	5310	63.8
Madagascar	Africa (excl. Arab)	230	80.2
Mali	Africa (excl. Arab)	270	32
Mauritania	Africa (excl. Arab)	500	35.7
Mauritius	Africa (excl. Arab)	2250	79.9
Morocco	Arab	950	49.5
Mozambique	Africa (excl. Arab)	80	32.9
Niger	Africa (excl. Arab)	310	28.4
Nigeria	Africa (excl. Arab)	270	50.7
Rwanda	Africa (excl. Arab)	310	50.2
Senegal	Africa (excl. Arab)	710	38.3
Sierra Leone	Africa (excl. Arab)	240	20.7
Somalia	Africa (excl. Arab)	150	24.1
Togo	Africa (excl. Arab)	410	43.3
Tunisia	Arab	1420	65.3
Uganda	Africa (excl. Arab)	220	48.3
Zaire	Africa (excl. Arab)	230	71.8
Zambia	Africa (excl. Arab)	420	72.8
Zimbabwe	Africa (excl. Arab)	640	66.9
Costa Rica	Latin America/Caribbean	1910	92.8
Cuba	Latin America/Caribbean	1940	94
Dominican Rep.	Latin America/Caribbean	820	83.3
El Salvador	Latin America/Caribbean	1100	73
Guatemala	Latin America/Caribbean	900	55.1
Haiti	Latin America/Caribbean	370	53
Honduras	Latin America/Caribbean	590	73.1

Jamaica	Latin America/Caribbean	1510	98.4
Mexico	Latin America/Caribbean	2490	87.6
Panama	Latin America/Caribbean	1830	88.8
Argentina	Latin America/Caribbean	2370	95.3
Bolivia	Latin America/Caribbean	620	77.5
Brazil	Latin America/Caribbean	2680	81.1
Chile	Latin America/Caribbean	1940	93.4
Colombia	Latin America/Caribbean	1240	86.7
Ecuador	Latin America/Caribbean	960	87.3
Guyana	Latin America/Caribbean	370	96.4
Paraguay	Latin America/Caribbean	1110	90.1
Peru	Latin America/Caribbean	1160	85.1
Suriname	Latin America/Caribbean	3050	94.9
Uruguay	Latin America/Caribbean	2560	96.2
Venezuela	Latin America/Caribbean	2560	88.1
Bahrain	Arab	6380	77.4
Bangladesh	South Asia	200	35.3
China	Other Asia	370	77.8
India	South Asia	350	48.2
Indonesia	South East Asia	560	81.6
Iran	Other Asia	2450	54
Jordan	Arab	1240	80.1
South Korea	South East Asia	5400	96.3
Malaysia	South East Asia	2340	78.4
Nepal	South Asia	170	25.6
Pakistan	South Asia	380	34.8
Philippines	South East Asia	730	89.7
Saudi Arabia	Arab	6020	62.4
Sri Lanka	South Asia	470	88.4
Syrian	Arab	990	64.5
Thailand	South East Asia	1420	93
Turkey	Other Asia	1630	80.7

SOURCE: *World Education Report 1993*, pp. 120-190

APPENDIX 7

Methodological Notes for Tables

Data Source

Data were extracted from the COMTRADE database of the United Nations Statistical Office (UNSO) in Geneva by staff of Eurostat - The Statistical Office of the European Community on behalf of the researcher. Trade data were taken mainly from the imports tables, but if import was not not available or declared by the reporting country, then exports tables data from the partner country was used. It must be noted that trade data are reported differently in the imports and exports tables even though they relate to the same goods. Reasons for the differences include[463];

(1) Exports are generally recorded on a freight on board (f.o.b.) basis while imports are normally reported in carriage, insurance and freight (c.i.f.) values.

(2) Time lag in shipment may cause discrepancies if imports and exports are recorded in different periods.

(3) Trade partners may report data under different revisions of the Standard International Trade Classification (SITC).

(4) Recording systems and procedures tend to differ due to legal reasons from one country to another.

(5) Recording systems in developing countries are far poorer in quality than for developed countries consquently their data are far less reliable, at times it better to look at the data as reported by a developed partner than the developing reporting country.

(6) Imports tend to be better recorded by customs people for tax and legal reasons than exports.

In the opinion of Eurostat staff imports data were more reliable for trade comparisons.

Country Groupings

See table A5

Classification Scheme and Definitions

All data have been classified according to the Standard International Trade Classification Revision 2 (STIC rev.2), used by the United Nations, OECD and The European Commission.

SITC rev.2 code	Description
8921	Printed Books, Brochures, Maps and Globes.
- 89211	Books, Brochures and similar printed materials.
- 89212	Picture Books including Colouring Books.
- 89213	Maps and Globes.
8922	Newspapers, Periodicals and Journals.

Table Key:

(1) = Printed Books, Brochures, Maps and Globes (SITC rev.2 code 8921).

(2) = Newspapers, Periodicals and Journals (SITC rev.2 code 8922).

463 Jerzy Rozanski and Alexander Yeats, 'On the (in)accuracy of Economic Observations: An Assessment of Trends in the Reliability of International Trade Statistics, unpublished seminar paper presented at Database of Development Statistics, a Ford Foundation Conference, Yale University, New Haven, 15 - 16 May 1992.

(a) = Books, Brochures and similar printed materials (SITC rev.2 code 89211).
(b) = Picture Books including Colouring Books (SITC rev.2 code 89212).
(c) = Maps and Globes (SITC rev.2 code 89213).
na = not available, * = Extracted from Exports tables of Partner Country, • = ASEAN excluding Brunei, + = ASEAN including Brunei.

Table A7.1.1 **International Trade in Printed Materials for Selected Regions in Thousands US$ in 1981**

		IMPORTERS											
		ASEAN*	ASIAX	ARAB	AFRICA	OCEAN	SAMER	CAMER	NAMER	UK	EUX	EURX	MALAYSIA
EXPORTERS	ASEAN+	11246 (1) 1029 (2)	3646 132	773 31	659 53	15140 526	271 0	363 0	5713 236	10161 165	3096 44	576 18	6612 318
	ASIAX	16762 16048	18167 7596	5817 682	5468 201	32586 15676	1372 36	256 0	76812 4593	51406 1457	22639 2614	3771 200	3854 3755
	ARAB	327 2	92 11	36546 3748	1204 69	195 0	57 4	0 0	4677 117	2293 158	2538 4697	296 62	40 1
	AFRICA	5 0	23 0	6 1	761 332	77 3	53 0	2 0	313 36	714 74	230 21	57 2	0 0
	OCEAN	2077 436	862 116	25 3	466 111	24291 11990	18 26	8 0	1698 272	2601 217	183 8	40 1	1376 14
	SAMER	32 0	259 10	6 0	32 1	348 1	28213 8334	24 0	11858 11265	1401 2	11444 7021	160 3	4 0
	CAMER	95 0	1 0	0 0	0 1	4 0	309 23	671 1185	171 10	39 2	59 13	5 1	0 0
	NAMER	26770 3382	56230 23290	15187 760	19374 2625	95400 29951	14445 10449	8599 1261	366524 309477	131284 13966	86614 19589	20036 7635	3519 650
	UK	16152 2618	33980 8120	10437 3268	48142 6720	107663 27986	2169 58	13353 350	116299 17173	-	111938 59423	27587 6504	5124 799
	EUX	3055 561	20256 13125	47575 27053	39479 13875	14355 4253	85699 8961	9475 3976	110163 30883	83345 27585	533604 362237	306314 207737	273 32
	EURX	641 37	3793 1320	3168 231	1025 201	1485 108	499 80	46 2	16365 1459	19698 3968	165785 39992	39158 27983	175 1
	XUUSR	27 0	380 4	461 97	53 33	183 34	125 9	0 0	255 2	736 6	1369 339	403 4	1 0
	MALAYSIA	2364 627	82 8	18 0	379 5	58 1	31 0	5 0	10 2	97 13	**12** **0**	**2** **0**	-
	WORLD TOTAL	**77209** **24177**	**139277** **53759**	**12149** **37528**	**118660** **24368**	**292477** **90559**	**133243** **27981**	**32855** **6775**	**710943** **375526**	**3044104** **47606**	**957570** **500211**	**400285** **250244**	**19662** **5571**

Source: COMTRADE Database, UNSO.

Note: See Methodological Notes to Appendix for definitions and key.

Table A7.1.2 **International Trade in Printed Materials for Selected Regions in Thousands US$ in 1984**

		IMPORTER											
		ASEAN*	ASIAX	ARAB	AFRICA	OCEAN	SAMER	CAMER	NAMER	UK	EUX	EURX	MALAYSIA
	ASEAN+	12491 (1) 2257 (2)	6772 815	496 93	370 2	15648 1136	40 0	367 0	14099 277	7748 178	2073 79	354 24	7604 897
	ASIAX	20120 16211	26380 10585	13269 959	5812 161	39636 14199	2211 1175	465 1	146794 6602	48057 1630	21379 3203	4394 514	5592 6364
E	ARAB	443 52	126 90	54592 18906	377 16	105 25	5 46	8 0	4805 158	2534 376	2243 9448	279 89	84 2
X	AFRICA	4 0	37 0	6 1	695 150	103 4	54 5	0 0	296 16	915 45	391 5	11 2	2 0
P	OCEAN	1753 503	617 305	70 1	334 573	23252 14441	4 0	14 0	3109 368	3610 264	370 57	119 4	204 59
O	SAMER	52 1	582 7	7 0	14 0	385 1	34339 9086	121 1	15586 8485	1383 2	7160 5057	152 3	3 0
R	CAMER	1 1	17 0	1 4	2 0	19 0	408 104	612 1546	680 1542	346 0	281 5	9 0	0 0
T	NAMER	29024 5899	67286 27973	18564 991	25528 1983	107832 36976	23596 29815	11760 4446	473545 433930	128624 11461	11481 31163	22830 8777	4239 1279
E	UK	20662 4592	39483 7331	18157 5771	43169 3697	119323 27093	2992 134	9526 404	169688 18213	-	133232 50240	28837 6859	6425 2083
R	EUX	3039 649	23012 14968	66567 25062	16235 5007	12779 2035	80282 9106	8687 5557	164082 41326	117321 31009	465814 383752	277993 217849	797 120
S	EURX	759 53	2482 1636	4621 796	1537 403	2407 109	1400 117	27 0	16641 1737	21988 3667	122714 40310	37730 22908	129 11
	XUUSR	15 0	1040 58	576 630	95 50	76 41	127 5	0 0	87 1	706 16	1089 259	501 6	0 0
	MALAYSIA	1639 740	180 11	44 0	2 0	41 5	0 0	0 0	514 3	112 16	**8** **1**	**1** **0**	-
	WORLD TOTAL	**88388** **30220**	**168131** **63887**	**179869** **53832**	**96384** **12074**	**322199** **96172**	**145527** **49615**	**31587** **11955**	**1009622** **512654**	**334639** **48656**	**882988** **525897**	**375129** **256866**	**25116** **10817**

Source: COMTRADE Database, UNSO.

Note: See Methodological Notes to Appendix for definitions and key.

Table A7.1.3 **International Trade in Printed Materials for Selected Regions in Thousands US$ in 1987**

		IMPORTER											
		ASEAN*	ASIAX	ARAB	AFRICA	OCEAN	SAMER	CAMER	NAMER	UK	EUX	EURX	MALAYSIA
EXPORTERS	ASEAN+	21178 (1) 7710 (2)	13775 4798	255 66	417 9	21299 5733	492 0	211 0	30201 271	12849 151	5896 210	925 76	8295 2380
	ASIAX	22531 14661	52582 22238	6158 560	1982 140	49421 19418	5303 3965	1423 40	266293 14353	75756 5453	48137 2496	9786 672	5499 4692
	ARAB	643 49	1378 26	28305 11344	767 11	146 2	30 18	9 0	6799 647	3349 581	3093 13223	805 471	170 0
	AFRICA	4 1	39 0	18 1	569 250	258 6	95 5	2 0	638 118	1072 55	418 8	43 2	0 1
	OCEAN	3504 494	1158 370	36 7	42 0	20849 16168	7 2	6 0	8043 830	4995 595	662 82	206 8	946 180
	SAMER	115 2	511 42	18 5	1 0	207 2	35723 9970	5888 1507	15241 8026	1760 15	14625 4910	270 30	29 0
	CAMER	2 0	26 1	5 0	16 0	19 0	740 235	2434 3185	1925 123	1096 1	188 36	96 1	0 0
	NAMER	38676 7976	99959 40450	13711 1955	1588 31	104759 37001	60990 25990	12713 6259	470625 511350	155976 31685	147973 43492	31292 12201	4504 2264
	UK	26757 4137	95360 18020	20458 5690	10456 614	143274 29458	15923 1992	12332 431	234907 20623	-	237163 133277	58676 15475	6921 1504
	EUX	5430 861	47986 33942	39757 22045	39892 20361	16454 3622	97587 19122	24078 10514	220803 44451	206497 73253	815621 734886	529029 414086	2063 121
	EURX	986 371	6819 4684	2015 349	1213 214	2262 157	2983 632	246 1	20173 2173	28933 4949	190076 88472	67925 45689	197 18
	XUUSR	21 0	2966 1317	232 11	704 0	207 3	617 344	3 0	1346 5	1239 19	1922 256	650 6	0 0
	MALAYSIA	7414 2894	942 1418	2 0	1 0	976 27	1 0	1 0	683 6	89 11	**154** **0**	**59** **0**	-
	WORLD TOTAL	**119859** **36257**	**322044** **126410**	**116719** **47813**	**57663** **21631**	**359981** **111642**	**222182** **62341**	**59622** **21944**	**1277125** **602990**	**496488** **117051**	**1490927** **1023653**	**704190** **488820**	**28700** **11161**

Source: COMTRADE Database, UNSO.
Note: See Methodological Notes to Appendix for definitions and key.

Table A7.1.4 **International Trade in Printed Materials for Selected Regions in Thousands US$ in 1990**

		IMPORTER											
		ASEAN*	ASIAX	ARAB	AFRICA	OCEAN	SAMER	CAMER	NAMER	UK	EUX	EURX	MALAYSIA
	ASEAN+	44045 (1)	24978	784	2008	32244	486	400	66000	34565	17905	3160	10718
		9768 (2)	6104	160	130	10497	2	0	481	481	676	134	3137
	ASIAX	36644	81904	2875	2242	61195	4559	1350	341500	109846	77639	17240	9313
		20020	32615	602	159	21466	2027	6	13341	6599	4024	611	6009
E	ARAB	916	344	31417	1085	158	3814	1	7223	5396	4913	1047	588
		17	52	5166	219	75	1	0	271	246	17742	231	14
X	AFRICA	8	58	10	1297	195	64	0	718	2231	565	56	2
		1	6	0	329	11	24	0	8	91	276	1	1
P	OCEAN	5703	6819	142	174	25353	51	13	8949	9634	2147	166	1904
		491	185	2	2	19050	0	0	255	157	81	6	60
O	SAMER	47	1020	15	1	342	65371	5580	24531	2352	18698	411	35
		1	59	1	0	2	14975	1118	8799	0	6170	43	0
R	CAMER	49	20	0	5	98	595	2811	4280	1814	432	274	0
		191	142	0	0	0	641	5052	372	1	1	3	16
T	NAMER	70923	133450	16821	2205	153411	81005	16875	720389	277228	218694	54088	11602
		8388	59216	999	89	49425	45813	6481	660101	50010	69719	21181	1944
E	UK	42319	105665	27248	9516	193847	15182	14086	282487	-	399487	89254	10444
		6722	29113	7472	845	60116	2025	456	31852		160947	28282	1469
R	EUX	8139	83442	57185	120759	20521	108266	38545	326011	326974	1243717	741887	1894
		1883	42849	26181	24805	5474	23141	8925	46965	149872	928729	569991	155
S	EURX	1626	9968	3760	437	3230	3565	121	34291	49065	261325	100859	207
		629	6282	271	72	298	954	31	2773	7184	132489	59078	108
	XUUSR	12	2935	692	122	547	311	350	894	1552	2995	2776	0
		12	967	5	8	4	141	0	298	4	748	59	5
	MALAYSIA	20827	1705	33	28	2368	0	2	2370	1513	**569**	**196**	-
		3352	1919	0	0	30	0	0	15	6	**3**	**0**	
	WORLD	**210496**	**451098**	**143888**	**139922**	**493114**	**284155**	**80716**	**1817974**	**822961**	**2320265**	**1014561**	**46901**
	TOTAL	**55229**	**178021**	**43505**	**26657**	**166494**	**89866**	**22150**	**765560**	**214609**	**1349719**	**679649**	**13179**

Source: COMTRADE Database, UNSO.

Note: See Methodological Notes to Appendix for definitions and key.

Table A7.1.5 **International Trade in Printed Materials for Selected Regions in Thousands US$ in 1993**

		IMPORTER											
		ASEAN*	ASIAX	ARAB	AFRICA	OCEAN	SAMER	CAMER	NAMER	UK	EUX	EURX	MALAYSIA
	ASEAN+	69025 (1)	32776	792	7468	31264	1718	163	112139	56019	42297	208371	12634
		7410 (2)	4438	155	141	9106	345	0	302	325	751	7547	2315
	ASIAX	46687	162013	2393	8786	57426	12882	406	399892	148534	100251	1664320	14268
		21346	48735	2170	112	15070	1696	2	17383	5685	5586	21301	5546
E	ARAB	1749	761	21192	377	254	1754	24	8848	4513	6532	194439	1184
		11	74	4426	17	86	6	0	441	220	13912	1302	1
X	AFRICA	94	200	35	2524	163	35	0	543	1732	417	14525	35
		0	185	1	684	133	8	0	10	148	99	255	0
P	OCEAN	7301	9286	48	1918	26734	2566	1	11313	11491	1344	16838	2479
		1820	1063	2	143	23260	18987	2	623	1412	89	415	208
O	SAMER	99	1419	43	148	242	136906	3871	54324	3782	19037	41601	77
		1	2279	0	4	1	49356	234	12986	1	6882	661	6
R	CAMER	32	19	4	5	11	1086	1827	1413	348	4852	13897	4
		15	0	0	0	0	179	8421	22	1	74	87	2
T	NAMER	96664	155962	15898	37918	163745	181723	9694	827246	351354	272296	1361723	14497
		12463	72775	3361	3326	64127	55354	2780	693018	45008	85355	74330	3306
E	UK	42401	96664	22006	72508	138830	21463	7274	264088	-	336842	966049	10519
		8580	33862	6675	3819	80864	1418	270	36895		253035	115914	1879
R	EUX	11231	61831	41746	29351	17864	174312	26180	327372	210850	1037492	851923	1916
		3435	50999	14803	11637	4798	41749	9316	61294	165416	873269	584237	8
S	EURX	2232	6302	2129	2057	2599	3860	150	17172	40471	219448	102583	818
		206	4838	450	497	236	3597	37	802	12295	115748	75047	11
	XUUSR	na	na	na	na	na	na	na	na	na	na	na	1
		na	na	na	na	na	na	na	na	na	na	na	0
	MALAYSIA	46679	1029	218	45	4105	44	2	3269	3976	**1192**	**471**	-
		2460	56	0	0	60	2	0	38	0	**13**	**18**	
	WORLD	**278252**	**528363**	**108253**	**163644**	**441118**	**539549**	**49619**	**2028501**	**839506**	**2118712**	**1200412**	**57275**
	TOTAL	**62382**	**219467**	**32655**	**20386**	**197726**	**172955**	**21072**	**824426**	**230745**	**1375740**	**733674**	**12247**

Source: COMTRADE Database, UNSO.

Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.2.1 **International Trade in Printed Materials for Selected Countries in Thousands US$ in 1981**

		IMPORTERS									
		INDONESIA	JAPAN	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	UK	USA	BRUNEI*	INDIA
	INDONESIA	-	0 0	140 8	0 0	0 0	1 1	2 0	1 3	0 0	0 0
E	JAPAN	193 (1) 195 (2)	-	735 132	492 110	3768 1825	726 137	999 925	51144 2507	0 0	1206 12
X	MALAYSIA	26 0	12 0	-	0 0	2229 627	109 0	97 13	10 0	245 411	0 0
P	PHILIPPINES	7 0	3 0	29 0	-	46 18	16 1	1 0	95 2198	0 0	0 0
O	SINGAPORE	846 51	703 10	6389 212	904 24	-	394 0	10037 151	5431 10	1467 433	1482 30
R	THAILAND	1 0	8 0	50 12	0 0	52 47	-	24 1	65 2	0 0	3 0
T	UK	419 1	21321 7076	5124 799	1085 11	8906 1780	619 27	-	96186 11347	12 3	6858 313
E	USA	3031 9	41983 20800	3493 650	3156 632	100096 1706	2659 335	125495 13848	-	21 0	5796 468
R	BRUNEI	0 0	0 0	4 86	0 0	6 4	0 0	1 0	0 0	-	0 0
S	INDIA	7 0	119 0	242 131	30 0	715 73	41 0	768 47	1801 6	0 0	-
	WORLD TOTAL	**6268** **890**	**92886** **42690**	**19662** **5571**	**3763** **1397**	**34254** **12925**	**6309** **670**	**304104** **47606**	**323513** **107025**	**na**	**16748** **2368**

Source: COMTRADE Database, UNSO.
Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.2.2 **International Trade in Printed Materials for Selected Countries in Thousands US$ in 1984**

		IMPORTERS									
		INDONESIA	JAPAN	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	UK	USA	BRUNEI*	INDIA
	INDONESIA	-	0	291	0	0	2	20	4	0	12
			0	14	0	0	0	0	1	0	0
E	JAPAN	310 (1)	-	1701	95	3768	1339	9927	91361	0	1201
		198 (2)		752	7	1825	196	1397	4499	0	95
X	MALAYSIA	6	12	-	6	2229	40	112	512	454	4
		0	2		0	627	1	16	3	489	0
P	PHILIPPINES	14	10	10	-	46	11	9	125	0	1
		0	0	1		18	0	18	206	0	0
O	SINGAPORE	2192	834	7069	56	-	742	7595	13110	1059	2779
		225	192	787	94		36	145	65	318	238
R	THAILAND	1	0	228	0	52	-	12	111	1	5
		0	3	33	3	47		0	1	0	17
T	UK	1606	19234	6425	79	8906	1156	-	144220	57	9915
		10	5753	2083	0	1780	18		15637	11	452
E	USA	4416	45212	4194	11232	13534	3516	125709	-	49	8432
		36	23428	1278	475	3191	745	44887		0	526
R	BRUNEI	0	0	6	0	6	0	0	0	-	0
		0	0	62	0	4	0	0	0		0
S	INDIA	0	135	198	0	715	25	1407	689	0	-
		0	9	198	0	73	0	93	128	0	
	WORLD TOTAL	**9855**	**94090**	**25116**	**13346**	**41485**	**8170**	**334639**	**540673**	**na**	**27610**
		1240	**47127**	**10817**	**2191**	**15509**	**1257**	**230745**	**152944**		**2917**

Source: COMTRADE *Database*, UNSO.
Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.2.3 **International Trade in Printed Materials for Selected Countries in Thousands US$ in 1987**

		IMPORTERS									
		INDONESIA	JAPAN	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	UK	USA	BRUNEI	INDIA
	INDONESIA	-	14 0	226 4	0 0	0 0	1 0	5 0	16 0	27 6	1 0
E	JAPAN	665 (1) 125 (2)	-	1825 679	491 24	4448 2785	905 339	20668 3953	148210 8122	38 11	943 249
X	MALAYSIA	8 4	10 2	-	15 9	6725 1496	44 1	89 11	683 6	626 1384	10 2
P	PHILIPPINES	17 0	3 2	19 1	-	45 11	53 1	13 1	225 96	3 13	2 0
O	SINGAPORE	1843 963	2074 1009	7877 2268	196 91	-	1452 58	12711 138	28500 161	1602 1060	4345 519
R	THAILAND	7 35	46 0	168 53	48 2	129 185	-	29 1	144 7	1 6	46 113
T	UK	517 13	41597 13889	6921 1504	619 0	15850 2484	2094 101	-	200615 15275	756 35	28861 515
E	USA	1845 202	55223 31366	4419 2259	11232 475	16824 4302	3919 605	151133 31096	-	184 104	12934 923
R	BRUNEI	0 0	0 0	5 54	0 0	43 6	0 0	1 0	0 0	-	0 0
S	INDIA	4 2	169 22	231 228	10 0	367 39	56 0	1039 148	981 187	0 0	-
	WORLD TOTAL	**6624** **1919**	**153291** **83506**	**28700** **11161**	**13346** **2191**	**57149** **16761**	**10290** **1410**	**496448** **117051**	**816839** **234640**	**3749** **2815**	**54824** **2846**

Source: COMTRADE Database, UNSO.

Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.2.4 **International Trade in Printed Materials for Selected Countries in Thousands US$ in 1990**

		IMPORTERS									
		INDONESIA	JAPAN	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	UK	USA	BRUNEI	INDIA
	INDONESIA	-	130 0	189 45	0 0	0 0	45 0	83 0	3 0	36 22	7 0
E	JAPAN	2262 (1) 349 (2)	-	2784 1019	502 41	5915 3770	1712 616	31269 6188	138195 8407	217 29	820 34
X	MALAYSIA	113 3	49 20	-	1 6	19555 1457	42 6	1513 6	2314 15	1116 1881	27 0
P	PHILIPPINES	10 2	105 3	51 2	-	152 53	4 0	25 0	126 86	1 5	39 4
O	SINGAPORE	7118 1127	3911 1321	10103 3051	977 137	-	1790 87	32668 445	59507 355	2130 1447	6199 267
R	THAILAND	13 30	53 7	366 24	0 11	136 295	-	264 30	907 19	4 40	177 5
T	UK	456 72	62897 20984	10444 1469	1143 3	26439 5020	3265 80	-	231945 24992	573 77	13813 226
E	USA	3561 86	81475 44455	11495 1942	9974 1243	36884 3791	7942 1070	268360 49714	-	406 171	17870 473
R	BRUNEI	0 0	0 0	9 15	0 0	84 12	0 0	12 0	0 0	-	0 0
S	INDIA	21 0	180 23	464 190	60 0	627 118	97 0	1408 140	1386 281	0 0	-
	WORLD TOTAL	**19500 2413**	**245024 112338**	**46901 13179**	**14636 4990**	**106387 21256**	**18282 9444**	**822961 214609**	**996323 193262**	**4789 3946**	**45597 1774**

Source: COMTRADE Database, UNSO.
Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.2.5 **International Trade in Printed Materials for Selected Countries in Thousands US$ in 1993**

		IMPORTERS									
		INDONESIA	JAPAN	MALAYSIA	PHILIPPINES	SINGAPORE	THAILAND	UK	USA	BRUNEI*	INDIA
	INDONESIA	-	77 0	440 9	7 0	0 0	25 0	181 0	582 0	0 0	27 0
E	JAPAN	1710 (1) 325 (2)	-	5077 885	981 13	9481 3878	2780 1423	20819 4885	103168 11030	6 0	500 42
X	MALAYSIA	358 1	115 30	-	119 6	46143 2451	59 2	3976 0	3131 38	901 312	37 10
P	PHILIPPINES	29 0	21 2	51 4	-	162 72	61 0	69 0	186 74	0 22	4 17
O	SINGAPORE	2394 1217	10656 774	11654 2187	1943 288	-	4708 283	49808 307	97318 170	2208 1090	4240 1652
R	THAILAND	23 62	210 281	469 115	3 14	341 699	-	1962 18	6263 14	4 5	152 227
T	UK	591 108	51773 29851	10519 1879	2357 159	25916 6239	3018 195	-	224500 27464	373 6	13300 1466
E	USA	4936 1052	91666 54759	14426 2052	17750 4155	48917 4232	9605 901	340742 44887	-	118 0	17653 1300
R	BRUNEI	0 0	0 0	20 0	0 0	15 0	0 0	23 0	0 0	-	0 0
S	INDIA	23 1	393 18	529 59	178 0	412 24	42 0	3069 190	1737 475	0 3	-
	WORLD TOTAL	**15460** **4961**	**235402** **142894**	**57275** **12247**	**26774** **7896**	**154335** **26782**	**24388** **10497**	**839506** **230745**	**1160522** **256435**	**na**	**42077** **5682**

Source: COMTRADE Database, UNSO.
Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.3.1 **Ratios of International Trade in Books, Brochures, Maps and Globes (SITC rev.2 code 8921) and Total Exports in 1993.**

REPORTER	8921 AS % OF TOTAL IMPORTS (1993)	8921 AS % OF TOTAL EXPORTS (1993)	CHANGE IN IMPORTS 1981-1993 (1981=100)	CHANGE IN EXPORTS 1981-1993 (1981=100)	8921 EXPORTS IN 1993 (000's US$)	8921 % EXPORT / IMPORT RATIO
INDONESIA	<0.1	<0.1	246.6	1,600.0	784	4.0
JAPAN	<0.1	<0.1	253.4	253.1	211,137	138
MALAYSIA	0.1	<0.1	291.2	1,216.6	41,463	72.4
PHILIPPINES	0.1	<0.1	249.8	425.3	638	2.4
SINGAPORE	0.1	0.3	450.6	436.8	195,883	126.9
THAILAND	<0.1	<0.1	386.5	4,206.3	14,014	57.5
UK	0.3	0.7	276.0	238.4	1,348,755	161.0
USA	0.1	0.4	358.7	251.7	1,839,470	158.5
BRUNEI[x]	0.4	<0.1	na	na	133	2.8
INDIA	0.1	<0.1	251.2	113.2	14,251	33.9
ASEAN[*]	0.1	0.1	360.4	494.4	340,911	123.0
ASIAX	<0.1	0.1	379.4	361.8	670,665	126.9
ARAB	0.1	0.1	89.4	189.0	49,822	46.0
AFRICA	0.6	<0.1	137.9	234.2	8,967	5.5
OCEAN	0.8	0.1	150.8	219.5	67,886	15.4
SAMER	0.3	0.1	404.9	380.1	250,497	46.4
CAMER	0.6	<0.1	151.0	136.8	2,043	4.1
NAMER	0.2	0.3	285.3	256.4	2,000,312	98.6
EUX	0.1	0.2	221.3	213.1	3,109,737	146.8
EURX	0.4	0.1	299.8	191.8	482,218	40.2

Source: COMTRADE Database, UNSO.
x = 1990 figures
Note: See Methodological Notes to Appendix for definitions and additional key.

Table A7.4 **Selected Malaysian Trading Partners for Books, Brochures, Maps and Globes for Selected Years from 1981 to 1993 (trade values in thousands US$)**

TRADING	IMPORTS FROM PARTNER					EXPORTS TO PARTNER[1]				
PARTNER	**1981**	**1984**	**1987**	**1990**	**1993**	**1981**	**1984**	**1987**	**1990**	**1993**
INDONESIA	140 (a)	291	226	184	430	26	6	8	110	353
	0 (b)	0	0	4	6	0	0	0	0	0
	0 (c)	0	0	1	4	0	0	0	2	5
JAPAN	709	1633	1738	2767	5047	12	12	10	49	115
	15	5	28	1	16	0	0	0	0	0
	12	63	60	16	14	0	0	0	0	0
PHILIPPINES	29	10	19	51	51	0	5	15	1	119
	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0
SINGAPORE	6369	7034	7684	9873	11238	1884	1584	2194	4443	10547
	12	29	161	158	371	344	31	4527	15078	35345
	8	6	33	72	45	1	9	4	35	251
THAILAND	50	225	168	353	469	109	39	44	35	53
	0	3	0	12	0	0	0	0	7	0
	0	0	0	0	0	0	1	0	0	6
BRUNEI	4	6	5	9	20	243*	453*	610	1041	897*
	0	0	0	0	0	1	0	3	65	4
	0	0	0	0	0	2	1	13	10	0
INDIA	230	198	229	456	529	65	4	10	27	37
	12	0	2	6	0	0	0	0	0	0
	0	0	0	1	0	0	0	0	0	0
UK	5089	6357	6831	10338	10442	96	108	89	1512	3976
	13	18	23	19	13	0	0	0	0	0
	22	50	66	86	64	1	4	0	1	0
USA	3479	4183	4358	11297	13942	10	512	683	1996	2936
	1	5	41	132	420	0	0	0	296	195
	13	7	20	66	64	0	0	0	22	0
WORLD	**19479**	**24850**	**28189**	**46216**	**56059**	**2955***	**2793***	**4786***	**9674***	**20703***
TOTAL	**94**	**109**	**277**	**358**	**859**	**450**	**53**	**2604**	**13575**	**20285**
	70	**157**	**234**	**328**	**357**	**4**	**10**	**11**	**92**	**475**

Source: COMTRADE Database, UNSO

[1] Export data are figures reported as imports by the partner country not exports as reported by Malaysia, see Methodological Notes for explanations.

Note: See Methodological Notes for definitions and additional key.

Table A7.5 **List of Definitions and Country Grouping**

Group Code (Researcher)	Group Title	CountryCode (UNSO)	Country Title
ASEAN(1)	ASEAN	45360	INDONESIA
		45458	MALAYSIA
		45608	PHILIPPINES
		45702	SINGAPORE
		45764	THAILAND
		45096	BRUNEI
ASIAX(2)	ASIA(excl. ASEAN,ARAB etc)	45344	HONK KONG
		41392	JAPAN
		45410	KOREA REP.
		45896	TAIWAN
		45004	AFGHANISTAN
		45050	BANGLADESH
		45064	BHUTAN
		45116	DM. KAMPUCHEA
		45626	EAST TIMOR
		45356	INDIA
		45418	LAO P.D.REP
		45446	MACAU
		45462	MALDIVES
		45104	BURMA
		45524	NEPAL
		45586	PAKISTAN ISL. REP.
		45650	RYUKYU IS
		45698	SIKKIM
		45144	SRI LANKA
		45156	CHINA
		45408	KOREA D P REP
		45496	MONGOLIA
		45704	SOC. RP. VIETNAM
ARAB	ARAB WORLD (+ ISRAEL)	13012	ALGERIA
		13818	EGYPT
		13434	LIBYA ARAB JM.
		13504	MOROCCO
		13736	SUDAN
		13788	TUNISIA
		13732	WESTERN SAHARA
		44048	BAHRAIN
		44364	IRAN
		44368	IRAQ
		41376	ISRAEL
		44400	JORDAN
		44414	KUWAIT
		44422	LEBANON
		44536	NEUTRAL ZONE
		44512	OMAN
		44634	QATAR
		44682	SAUDI ARABIA
		44760	SYRIA ARAB REP.
		44784	UNITED ARAB EMIR.
		44887	YEMEN
AFRICA	AFRICA (excl MAGHRIB)	16204	BENIN
		16854	BURKINA FASO (UV)
		16132	CAPE VERDE
		14148	CHAD

		16270	GAMBIA
		16288	GHANA
		16324	GUINEA
		16624	GUINEABISSAU
		16384	IVORY COAST
		16430	LIBERIA
		16466	MALI
		16478	MAURITANIA
		16562	NIGER
		16566	NIGERIA
		16686	SENEGAL
		16694	SIERRA LEONE
		16768	TOGO
		16024	ANGOLA
		16108	BURUNDI
		14140	CENT. AFRICAN RP.
		14178	CONGO
		16226	EQ. GUINEA
		14266	GABON
		16646	RWANDA
		16678	SAO TOME PRN
		16654	ST. HELENA
		14120	UNTD. REP. CAMER.
		16180	ZAIRE
		16086	BR.IND.OC.TE
		16174	COMOROS
		16262	DJIBOUTI
		16230	ETHIOPIA
		16404	KENYA
		16450	MADAGASCAR
		16480	MAURITIUS
		16508	MOZAMBIQUE
		16638	REUNION ISLANDS
		16690	SEYCHELLES
		16706	SOMALIA
		16800	UGANDA
		16834	TANGANYIKA
		16454	MALAWI
		11710	SOUTH AFRICA
		16894	RHOD NYAS
		16716	ZIMBABWE
OCEAN	OCEANIA	71036	AUSTRALIA
		71554	NEW ZEALAND
		72016	AMER. SAMOA
		72162	CHRISTMAS ISLAND
		72166	COCOS ISLANDS
		72184	COOK ISLANDS
		72242	FIJI
		72258	FR. POLYNESIA
		72316	GUAM
		72296	KIRIBATI
		72488	MIDWAY ISLAND
		72520	NAURU
		72540	NEW CALEDONIA
		72570	NIUE
		72574	NORFOLK ISLAND
		72582	PACIFIC ISLAND
		72598	PAPUA NEW GUIN.
		72612	PITCAIRN ISLAND

		72882	SAMOA
		72090	SOLOMON ISLANDS
		72772	TOKELAU
		72776	TONGA
		72798	TUVALU
		72548	VANUATU
		72872	WAKE ISLAND
		72876	WALLIS FUT.
		16260	FR. SO. ANT. TR.
		36080	BR. ANT. TERR.
SAMER	SOUTH AMERICA(inc MEXICO)	33032	ARGENTINA
		33068	BOLIVIA
		33076	BRAZIL
		33152	CHILE
		33170	COLOMBIA
		33218	ECUADOR
		33484	MEXICO
		33600	PARAGUAY
		33604	PERU
		33858	URUGUAY
		33862	VENEZUELA
		36238	FALKLAND ISL.
		36254	FRENCH GUIANA
		36590	PANAMA
		36740	SURINAME
CAMER	CENT. AMERICA(exc MEXICO)	34188	COSTA RICA
		34222	EL SALVADOR
		34320	GUATEMALA
		34340	HONDURAS
		34558	NICARAGUA
		35028	ANTIGUA
		35052	BARBADOS
		36084	BELIZE
		35212	DOMINICA
		35308	GRENADA
		36328	GUYANA
		35388	JAMAICA
		35500	MONTSERRAT
		35658	ST. KITTS NEV
		35662	SAINT LUCIA
		35670	ST. VINCENT
		35780	TRINIDAD
		35044	BAHAMAS
		35092	BR. VIRGIN ISLANDS
		35136	CAYMAN ISLANDS
		35192	CUBA
		35214	DOMINICAN REP.
		35312	GUADELOUPE
		35332	HAITI
		35474	MARTINIQUE
		35530	NETH. ANTILES
		35796	TURKS CAYMAN ISL
		35850	US VIRGIN ISLANDS
NAMER	NORTH AMERICA	22060	BERMUDA
		21124	CANADA
		22304	GREENLAND
		22666	ST. PIER. MIQU
		21840	USA & PUERTO RICO
UNTD KING	UNITED KINGDOM	53826	UNITED KINGDOM

EUX	EUROPEAN COMM. (excl. UK)	53056 53208 53250 53280 53276 53300 53372 53380 53528 53620 53724	BELGIUM-LUXEMB. DENMARK FRANCE GERMANY(pre-union) GERMANY(postunion) GREECE IRELAND ITALY NETHERLANDS PORTUGAL SPAIN
EURX	EUROPE (excl. UK, USSR, EC)	55040 55246 55352 55578 55752 55756 56203 56200 56616 56703 56008 59070 56100 59191 56348 59890 58498 56642 59705 59891 57020 57234 57292 57470 44792	AUSTRIA FINLAND ICELAND NORWAY SWEDEN SWITZERLAND CZECH REP.(post) CZECHOSLAV.(pre) POLAND SLOVAK REP.(post) ALBANIA BOSNIA HERZG. BULGARIA CROATIA HUNGARY YUGOSLAVIA(pre) REP. MOLDOVA ROMANIA SLOVENIA YUGOSLAVIA(post) ANDORRA FAEROE ISLANDS GIBRALTAR MALTA TURKEY
XUSSR	EX SOVIET UNION	58112 58233 58428 58440 68810 58643 58804 46051 46031 46268 46398 46417 46762 46795 46860	BELARUS ESTONIA LATVIA LITHUANIA USSR RUSSIAN FED. UKRAINE ARMENIA AZERBAIJAN GEORGIA KAZAKHSTAN KYRGYZSTAN TAJIKISTAN TURKMENISTAN UZBEKISTAN
MALAYSIA	MALAYSIA	45458	MALAYSIA
WORLD	THE WORLD	00000	ALL COUNTRIES

Appendix 8

Table A8.1 **Articles in Research Journals by Residents of Indonesia and Selected Countries by Field of Science: 1980, 1983, 1986**

	Indonesia			Malaysia			Thailand		
Field	1980	1983	1986	1980	1983	1986	1980	1983	1986
Clinical medicine	*24.2	16.9	18.3	48.2	44.4	49.3	61.6	80.6	82
Biomedical research	5	2.6	4	18	22.2	13.3	42.5	57.5	43.3
Biology	7.7	19.7	21.8	55.4	47.2	41.5	20.8	22.1	27.3
Chemistry	2	1.5	4.8	24.6	26.5	32.3	7.2	12.6	14.7
Physics	0	1.3	0.5	11.5	11	8.5	4	4.5	10.7
Earth & space sciences	4.4	2.9	8.1	3.5	8.8	9.8	11.8	10	11
Engineering & technology	4	7.5	2.5	2.5	11	5.7	15.5	15.8	15.8
Mathematics	0.5	0	0	7.5	8.3	2.3	1.5	0	1.3
All Fields Combined	47.8	52.4	60	171.2	179.2	162.7	164.4	203.1	206.1
	Singapore			S. Korea			Brazil		
Clinical medicine	24.9	52.4	114	14.8	21.7	36.2	292	329.9	380.5
Biomedical research	10	14.6	27.9	11.5	23.3	27.2	297.8	308.1	266.9
Biology	7	12.7	18.8	7.5	15.3	17.8	148.3	191.5	180
Chemistry	8.5	16.3	29.2	11	100.7	193.6	212.5	186.6	190.7
Physics	7	26	44.3	26.9	56.7	76.6	259.5	298.1	335.8
Earth & space sciences	6.7	5.3	15.5	2	4.5	13.3	52.6	63.1	138.6
Engineering & technology	16.5	33	52.3	15.3	74	113.2	47.3	77.4	70.5
Mathematics	8	8.5	12.5	3.3	3.5	12	44.5	40.3	56.9
All Fields Combined	88.6	168.8	314.5	92.3	299.7	489.9	1354.5	1495	1619.9

SOURCE: *Science and Technology Indicators 1993*, p. 154.

* Number of articles were counted as "fractional counts" in which an article with author addresses in several countries was allocated fractional to each country (1/N articles were counted for each of N authors).

Table A8.2 **Internationally Couthored Articles Involving Residents of Indonesia and Other Selected Countries, by Nationality of Couthor, 1983 - 1986**

Country of Coauthor	Indonesia	Malaysia	Thailand	Singapore	South Korea	Brazil
			(Total Articles)			
Indonesia	56	4	7	3	2	2
Malaysia	4	110	12	17	3	0
Thailand	7	12	285	5	4	8
Singapore	3	17	5	147	0	3
South Korea	2	3	4	0	330	0
Brazil	2	0	8	3	0	1,897
Taiwan	1	0	0	4	2	6
Japan	43	19	71	14	131	51
Australia/NZ	33	39	29	48	4	20
United States	73	73	156	64	351	782
Other OECD	84	107	212	115	968	968
Other	27	14	45	44	17	285
Total International	228	264	466	282	549	1,921
Total Coauthored	256	355	661	412	837	3543
Total Publications	373	810	1,062	1,190	1,850	7,235

SOURCE: *Science and Technology Indicators 1993*, p. 158.

Table A8.3 **Institutional and International Coauthorship Involving Residents of Selected Countries by Field of Science, 1983 - 1986**

Field	Indonesia	Malaysia	Thailand	Singapore	South Korea	Brazil
Clinical medicine	127	227	432	405	177	1,572
Biomedical research	33	77	232	115	127	1,400
Biology	119	191	149	73	87	911
Chemistry	15	159	70	108	566	777
Physics	9	39	39	154	335	1,534
Earth & space sciences	40	41	49	45	51	445
Engineering & technology	30	44	82	221	465	342
Mathematics	0	32	9	69	51	254
All Fields Combined	373	810	1,062	1,190	1,859	7,235
Field	Total Coauthored (2)					
Clinical medicine	87	120	301	165	105	886
Biomedical research	30	33	137	41	70	710
Biology	78	80	109	23	69	460
Chemistry	9	55	38	27	173	307
Physics	6	7	19	31	158	664
Earth & space sciences	33	21	13	17	37	209
Engineering & technology	13	26	40	81	195	172
Mathematics	0	13	4	27	30	135
All Fields Combined	256	355	661	412	837	3,543
Field	Foreign Coauthored (3)					
Clinical medicine	71	68	187	80	78	353
Biomedical research	28	18	94	27	58	314
Biology	75	66	93	18	53	269
Chemistry	8	49	32	21	71	155
Physics	6	6	9	26	104	429
Earth & space sciences	29	19	12	15	30	177
Engineering & technology	11	25	35	69	133	115
Mathematics	0	13	4	26	22	109
All Fields Combined	228	264	466	282	549	1,921

cont.

Field	Indonesia	Malaysia	Thailand	Singapore	South Korea	Brazil
	Domestic Coauthored					
Clinical medicine	16	52	114	85	27	533
Biomedical research	2	15	43	14	12	396
Biology	3	14	16	5	16	191
Chemistry	1	6	6	6	102	152
Physics	0	1	10	5	54	235
Earth & space sciences	4	2	1	2	7	32
Engineering & technology	2	1	5	12	62	57
Mathematics	0	0	0	1	8	26
All Fields Combined	28	91	195	130	288	1,622

SOURCE: *Science and Technology Indicators 1993*, p. 156.
Note:
(1) Each article with at least one author from the specified country is included once in the country's tabulations.
(2) An article is counted as coauthored if its authors are from more than one institution.
(3) An article is counted as foreign coauthored if it has at least one foreign coauthor. It may also have domestic coauthors.

APPENDIX 9

Table A9.1 **Breakdown of the Value and Composition of the Publishing Industry in Thailand**

Category of Books	Value (in m baht)	Value (in %)	Type (in no.)*	Type (in %)
General & Trade	**963.74**	**31.4**	**45**	**30.4**
General	399.33		30	
Fiction	564.41		15	
Professional & Reference	**975.18**	**31.8**	**26**	**17.6**
Professional	316.68		20	
Dictionary & Reference	658.50		6	
Children & Comics	**265.61**	**8.6**	**26**	**17.6**
Children	252.53		24	
Comics	13.08		2	
School text & Supplementary Reading	**608.95**	**19.8**	**27**	**18.2**
School Textbook	273.79		9	
Supplementary Readers	335.16		18	
Translated	**84.75**	**2.8**	**13**	**8.8**
Religious	**159.36**	**5.2**	**8**	**5.4**
Others	**11.22**	**0.4**	**3**	**2.0**
TOTAL	**3,068.81**	**100.00**	**148**	**100.00**

SOURCE: *K. Karnchanachari, Unpublished Ph. D thesis, Loughborough University, 1990, Appendices 3.5 & 3.6.* Note *: Number of publishers engaged in different type of publishing.

Appendix 10

Table A10.1 **Scholarly journals published by various organisations/publishers (in Malaysia)**

Organisation	Title
1. Malaysian institute of Architects	1. Majalah Akitek (Architect Journal); Quarterly
2. Library Association	1. Majalah PPM; annually
3. Malaysian Economic Association	1. Malaysian Journal of Economic Studies (twice per annum) 2. Ekonomika (quaterly newsletter)
4. Malaysian Agricultural Economics Association	The Malaysian Journal of Agricultural Economy
5. Malaysian Historical Society	Malaysian in History
6. Tamil Language Society	Tamil Oli
7. The Malaysian Mathematic Society	Discovering Mathematics
8. College of General Practitioners of Malaysia	The Family Physician; thrice a year
8. Malaysian Medical Association	Medical Journal of Malaysia
9. Malaysian Society of Health, MMA	Journal of the Malaysian Society of Health
10. Royal Asiatic Society, Malaysian Branch	JMBRAS
11. Persatuan Sains Sosial Malaysia	Ilmu Masyarakat
12. Malaysian Nature Society	1. The Malayan Nature Journal; quarterly 2. The Naturalist; quarterly
13. Malaysian Biochemical Society	Proceedings of Annual Conference
16. Malaysian Applied Biology Society	Malaysian Applied Biology
17. Malaysian Bar	INSAF
18. Earth Management Society	Journal Tanah
19. Engineering Institute	Jurnal Institut Kejuruteraan Malaysia
20. Science and Mathematics Teachers Association, Sarawak	Jurnal Persatuan Guru-guru Sains & Matematik
21. The Malaysian Plywood Manufacturers Association 22. Malaysian Plant Protection Society	Journal of The Malaysian Plywood Manufacturers Association Journal of Plant Protection in the Tropics
23. Ikatan Ahli Archeologi Malaysia	Journal Archeology Malaysia
24. Malaysian Rubber Research & Development Board & Malaysian Rubber Producers' Research Association	Journal of Natural Rubber Research
25. Malaysian Vocational Guidance Association (MAVOGA)	Jurnal Panduan
26. Muslim Scholars Association	Suara 'Ulama
27. Malaysian Oil Scientific & Technologists' Association	Journal of Malaysian Oil Science & Technology (MOST)
29. Pusat Dokumentasi Melayu DBP 30. National Museum of Malaysia	1. Mutiara Pustaka (four per annum) Federation Museums Journal
31. Sabah Museum	Journal (annually)
32. Sarawak Museum	Sarawak Museum Journal
33. INTAN	Intan Management Journal
34. Ministry of Education	Jurnal Pendidik
35. Ministry of Science & Technology Environment	Buletin Sains & Teknologi Malaysia

36. Pusat Remote Sensing Negara	Berita Remote Sensing
37. UKM	1. Jurnal Antropologi & Sosiologi 2. Jurnal Sari 3. Jurnal Ilmu Alam 4. Jurnal Islamiyyat 5. Jurnal Jebat 6. Jurnal Pendidikan 7. Jurnal Personalia Pelajar 8. Jurnal Sumber 9. Jurnal Pengurusan 10. Jurnal Psikologi Malaysia 11. Jurnal Kejuruteraan 12. Jurnal Ekonomi Malaysia (twice per year) 13. Jurnal Perubatan UKM (annually) 14. Jurnal Akademika Sains Malaysiana; quarterly 15. Jurnal Komunikasi
38. UIA	1. Journal of Islamic Economics 2. IIU Law Journal
39. UPM	1. University Scientific JOurnal 2. Buletin Maklumat Pertanian Malaysia 3. Informan 4. Jurnal Keempat Hal Ehwal Pelajar Universiti & ITM 5. Malaysian Agriculture Research 6. Buletin Pengajian Siswazah
40. USM	1. MIDAS (monthly industrial & scientific information) 2. Jurnal Kewartawanan Malaysia (Malaysian Journalism Review) 3. Jurnal Pendidik & Pendidikan (Educator & Education Journal) 4. Journal of Physical Science 5. Journal of Bioscience 6. Buletin Penyelidik USM
41. UTM	1. Satelit; quarterly 2. Jurnal Elektrik 3. Jurnal Kejuruteraan Awam
42. UM	1. Jurnal Budaya Melayu 2. Jurnal Fizik Malaysia (formerly Bulletin Physics) 3. The Journal of Tropical Geography 4. Jurnal Budaya Moden 5. Journal of the Department of Engineering 6. Journal Geographica 7. Jurnal Undang-undang (Journal of Malaysian & Comparative Law) 8. Jurnal Pentadbir
43. ITM	1. Journal of Urban Design 2. Journal of Industrial Chemistry 3. Jurnal Maklumat 4. Jurnal Utama Teknologi & Pengurusan

	5. Santubong 6. Suara Perniagaan 7. Forum Komunikasi
44. Maktab Perguruan Temenggung Ibrahim	Jurnal Akademik
45. Maktab Perguruan Trengganu	Jurnal Pendidik
46. Institute of Mining & Metallurgy	Journal of Institute of Mining & Metallurgy
47. Maktab Pertahanan Angkatan Tentera	Journal of Strategic Studies & Institution Relation
48. Institut Kajian Pembangunan Sabah	Journal of Institute for Development Studies
49. Hospital Besar Alor Star	Media
Ministry of Education (Makamal Teknologi Komputer)	Media Comil
50. Asian & Pacific Development Centre	1. Issues in Gender & Development 2. Journal of Development Communication
51. Department of Agriculture, Ministry of Agriculture	1. Malaysian Agricultural Journal ;twice 2. Technical Bulletin 3. Statistical Digest
52. Forest Research Institute (FRIM)	Journal of Tropical Forest Science
53. Geological Survey of Malaysia	Economic Bulletin
54. Geological Survey of Malaysia	Bulletin
55. Institute for Medical Research (IMR)	1. IMR Quarterly Bulletin 2. Bulletin of the Institute for Medical Research 3. Study of the Institute for Medical Research
56. Malaysian Agricultural Research & Development Institute (MARDI)	1. MARDI Research Journal 2. Komunikasi MARDI
57. Malaysian Institute of Microelectronic Systems (MIMOS)	1. MOSMEDIA; quarterly
58. Malaysian Rubber Research & Development Board	1. Malaysian Rubber Review; quarterly 2. Getah Asia; quarterly 3. Rubber Developments; quarterly
59. Rubber Research Institute (RRI)	1. Journal ;thrice per year 2. Jurnal Sains
60. Standards & Industrial Research Institute (SIRIM)	Malaysian Standards
61. Regional Centre for Education in Science & Mathematics (RECSAM)	Journal of Science & Mathematics Education in SEA
62. Butterworth	Malaysian Law JOurnal
63. ASIAREP Co.	Medical Management
64. The Malaysian Current Law Journal Sdn. Bhd.	Current Law Journal
65. Far East Media	Malaysia Trade LInk
66. BT Informations Sdn. Bhd.	Malaysian Engineering Supporting Industries
67. DBP	1. Jurnal Dewan Bahasa 2. Kanun: Jurnal Undang-undang Malaysia 3. Malay Literature 4. Pelita Bahasa
67. Unknown	1. Telekom Journal

	2. Jurnal Maklumat Pengurusan 3. Jurnal AZAM 4. Infofish 5. Buletin IKS 6. Berita Akademi

Appendix 11 Number of titles published by university presses since their establishment. Main sources were from *Publications List 1989* (UKM: PEPET, 1989) and internal report from each press.

Table A11.1.1 **Number of titles published by UM Press since establishment to 1988**

	Up to 1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
Biology						1	1				
Chemistry											
Computers											
Culture, Art & Craft	1				1	2					
Economics	5	1			1	2	2		1		
Education	1						2	1		4	1
Forest & Forestry					1						
History	2							1			1
Islam											
Law											
Literature	2		1	1	1	5	1	1	4		1
Medicine	1										
Physics											
Politics					1		2		1	2	1
Science											1
Social Science											
TOTAL	12	1	1	1	5	10	8	3	6	6	4

cont Table A11.1.1

	1981	1982	1983	1984	1985	1986	1987	1988
Biology						1	1	
Chemistry				1				
Computers				1				
Culture, Art & Craft					2	2	2	
Economics					1	2		1
Education								
Forest & Forestry								
History					1			
Islam								1
Law							1	
Literature				2				2
Medicine	1				1	2	1	2
Physics					1			
Politics						1		
Science								
Social Science								1
TOTAL	1	0	0	4	6	8	5	7

Table A11.1.2 **Number of titles published by Biroteks ITM since establishment (1981) to 1991**

Subjects	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993
Accounting				1					1				
Business				3				1			2		2
Construction/ Architecture					1			1				1	1
Economics								1					2
Engineering								2			1		2
English Language			1			3	6			2			2
History								1			1		
Library Science				1	2								
Marketing								1					
Mathematics				1		1							1
Politics						1							
Property evaluation							1						
Public Relations/ Broadcasting							1			2			
Secretarial Science				1									
Humanities											1	1	1
Malay Language													4
Law													2
Applied Science					1			1					
TOTAL		1	1	7	4	5		8	1	4	5	7	17

Table A11.1.3 **Number of titles published by UUM Publications Committee, 1985 - 1989**

Subjects	1985	1986	1987	1988	1989	TOTAL
Accounting		1				1
Business			1			1
Computers			3	1	2	6
Culture		1				1
Economics		2	3	2	1	8
Education			1			1
History	1		2			3
Industries				1		1
language				1		1
Management					1	1
Race Relation			1			1
Social Science		1				1
TOTAL	1	5	11	5	4	25

Table A11.1.4 **Number of titles published by UTM, 1985 - July 1993**

Year	Number of titles
1985	-
1986	-
1987	1
1988	1
1989	10
1990	20
1991	20
1992	15
1993	11

Table A11.1.5 **Number of titles published by UPM, 1977 - 1988**

Subjects	1977	1978	1979	1980	1981	1982
Accounting						1
Agricultural Engineering					1	
Agricultire						1
Biology						
Construction						
Education						
Engineering						
Fisherman						
Fish						
Food preservation						
Food technology						1
Forest & forestry	1					1
Geography						
Home economics						
Home management						
Management						
Mathematics						
Natural resource						
Physics						
Recreation						
Seafood					1	
Social Sciences						
Soil						
Veterinary			2			
TOTAL	1	0	2	0	2	4

cont Table A11.1.5

Subjects	1983	1984	1985	1986	1987	1988	TOTAL
Accounting							1
Agricultural Engineering	1						2
Agriculture							1
Biology	1			3		1	5
Construction						1	1
Education						1	1
Engineering	1						1
Fisherman					1		1
Fish	1		1			1	3
Food preservation						1	1
Food technology							1
Forest & forestry							2
Geography				1			1
Home economics						1	1
Management				1			1
Mathematics		1			1		2
Natural resource	1						1
Physics				1			1
Recreation	1						1
Seafood							1
Social Sciences		1					1
Soil	1		1		1		3
Veterinary							2
TOTAL	7	2	2	6	3	6	35

Table A11.1.6 **Number of titles published by USM, 1972 - 1988**

Subjects	1972	1973	1974	1975	1976	1977	1978	1979	1980
Accounting									
Anthropology									1
Architecture									
Biochemistry									
Biology						1	1		
Chemistry							3	1	
Communication							1		
Computers							1		
Culture, art & craft						1			
Economics					1		1		
Education					1				
Engineering									
Geography				1					
Islam									
Literature			1						
Logic									
Management									
Mathematics									
Medicine									
Music									
Organisation									
Pharmacy						1			
Physics						1			1
Planning									
Politics									
Social sciences									
Statistics									1
Technology									
TOTAL	0	0	1	1	2	4	7	1	3

cont Table A11.1.6

Subjects	1981	1982	1983	1984	1985	1986	1987	1988	TOTAL
Accounting								1	3
Anthropology									1
Architecture					1	1		1	3
Biochemistry							1		1
Biology			1	1	1	2			7
Chemistry	1	3		2	1		6	3	20
Communication				1				1	3
Computers							1		2
Culture, art & craft		1							3
Economics									2
Education	1			2			1		5
Engineering								1	1
Geography					1				2
Islam								1	1
Literature							1		2
Logic					1				1
Management							1		1
Mathematics				1	1		4	1	7
Medicine						1	1		2
Music				1					1
Organisation		1							1
Pharmacy				1	1	2			5
Physics		1	1	2	2	1	2	3	13
Planning			1		2				3
Politics			1						1
Social sciences		1			2				3
Statistics									1
Technology				1	1				2
TOTAL	2	7	4	12	14	7	18	12	97

Table A11.2 **Number of employees at selected publishers as at 1993**

Publisher	Editor	Total
USM	4	9
UIA	n/a	3
ITM	6	20
UPM	2	7
UTM		11
UM	1	18

Publisher	Editor	Total
UKM	5	14
UUM	1	2
MARDI	4	7
FRIM	3	9
Longman	12	72
DBP	120	1059

Appendix 12

Table A12.1 **Dewan Bahasa dan Pustaka: Number of Employees as at 1993**

Editorial	Number of Employee
Educational/Text Book/Higher Learning Text Book	39
Translation	23
General/Children's Book	31
Magazines	21
Encyclopedia	6
Total	120

Marketing	
Sales	11
Marketing/promotion	12
Store & Distribution	50
Total	73

Editorial	Number of Employee
Production	
Pre-publication	83
Designer/graphic	54
Printing	181
Total	318

Service Department	Number of Employee
Maintenance	37
Personnel	38
Purchasing	8
Computer	34
Library	36
Finance	46
Copyright	8
Security	30
Administration	182
Training	10
Total	429

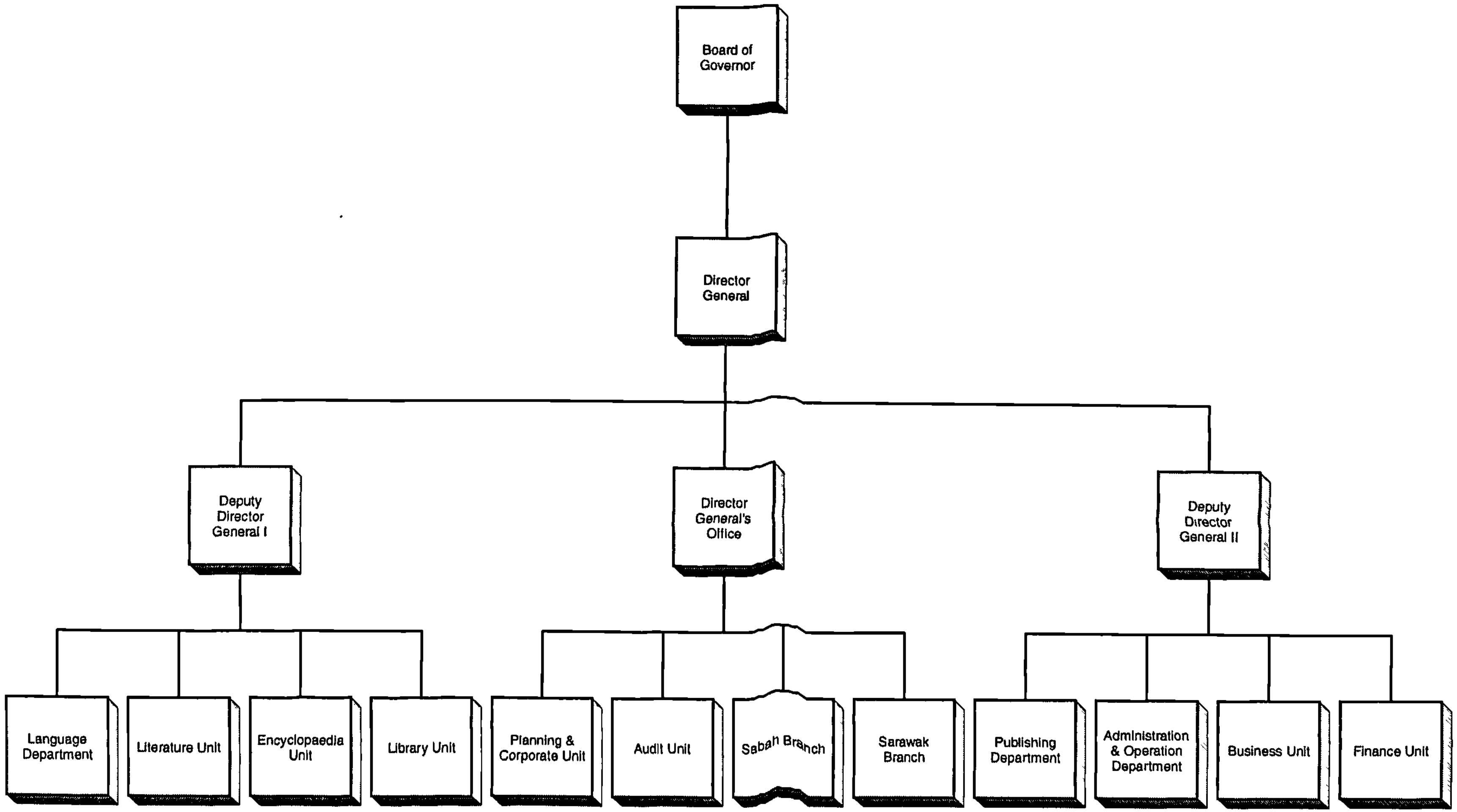
Corporate Affairs	Number of Employee
Planning	23
Public Relations	4
Legal Matters	2
Internal Auditing	2
Total	31

Language & Literature	88
TOTAL	1059

Table A12.2 **Number of titles published by categories, 1985 - 1990**

Categories	1985	1986	1987	1988	1989	1990
University	32	67	74	81	152	225
Primary	12	34	4	0	7	11
Secondary/Vocational	6	8	12	10	26	21
General (Adult)	17	47	72	45	74	90
General (Teenagers)	27	20	33	23	49	20
General (Children)	18	28	18	22	4	15
Others						73
Total	112	204	213	251	312	455

Dewan Bahasa dan Pustaka: Organisational Chart, 1992



SOURCE: *DBP, 1993*. Take note that there are some subdivisions/units under each department (fourth level)

APPENDIX 13 QUESTIONNAIRES OF STUDENTS, LECTURERS, PUBLISHERS AND BOOKSELLERS

13a) QUESTIONNAIRE TO STUDENTS
(English version)

General Information

This part of questionnaire is important for statistical purposes, and it would be appreciated if the respondent could complete the questions as accurately as possible.

1. Institution:

2. Course:

3. Year:

4. Do you live

Uni. Res.	-1
Private Digs	-2
Parental Home	-3

5. Sex of respondent:

Male	-1
Female	-2

6. What is your marital status?

Single -	1
Married -	2
Divorced/ Separated-	3
Widowed-	4

7. Which of the following age group do you belong to?

Below 20-	1
20 - 30 -	2
31 - 40 -	3
41 - 50 -	4
Over 50 -	5

8. How much grant do you receive for one academic session?

If you do not receive any grant, do not answer this question.

____

(B) The Use of Books

Guidance from lecturers

Q9 In general do you think the guidance about reading which you receive from the lecturers
on your course is

Very Good-1
Fairly Good-2
Average -3
Poor -4
Very Poor-5

Q10 In general do you receive printed (duplicated) reading lists for the courses you take?

All -1
Most -2
Some -3
Few -4
None -5

Q11 In general do you think the reading lists you do receive are

Very Good-1
Good -2
Average -3
Poor -4
Very Poor-5

Q12 How many lecture courses are you taking this year?

____ courses

Q13a Are there any courses for which you think the guidance about reading is inadequate?

Yes -1
No -2

Q13b If yes, how many courses? _______ courses

Q14 Are there any courses for which you do not receive any printed (duplicated) reading lists?

Yes - 1
No - 2

Q14b If yes, how many courses? _______ courses

Q15 Do you receive guidance from your lectures about what books to buy?

All -1
Most-2
Some-3
Few - 4
None- 5

Q16 Do you consider the guidance on what books to buy is

Very Good-1
Good -2
Average -3
Poor -4
Very Poor-5

Q17 Please give any comments on the guidance you get from lecturers on reading and book buying which you feel would be very helpful.

____

____

____

____

(C) **(Use of the library)**

Q18 How many hours a week are you normally in classes of any sort?

1 - 5 hours.	- 1	11 - 20 hours	- 3
6 - 10hours	- 2	More than 20 hours	- 4

Q19 How many hours a week do you usually spend in a university library?

None	- 1	11 - 20 hours	- 4
1 - 5 hours	- 2	More than 20 hours	- 5
6 - 10hours	- 3		

Q20 So far this term/semester how many times have you used a book in the main library Reserve Book Room (RBR/Red Spot)?

None	- 1	21 - 30 times	- 4
1 - 10 times	- 2	More than 31 times	-5
11 - 20 times	- 3		

Q21 How many university library books have you out now?

None	- 1	11 - 15 books	- 4
1 - 5 books	- 2	More than 16 books	- 5
6 - 10books	- 3		

Q22 Do you have difficulty in getting books in the library for essays or projects for your courses?

Very Much -1
Fairly Much -2
So-so -3
Not Much -4
None At All -5

Q23 Do you have any difficulties because of lack of multiple copies of particular books?

Yes - 1
No - 2

Q24 In general do you consider the university library stock in your subject(s) is

Very Good - 1
Fairly Good - 2
So-so - 3
Fairly Poor - 4
Very Poor - 5

Q25 Have you ever suggested to a lecturer a book that you think ought to be in the library?

Yes - 1
No - 2

Q26 Please give any suggestions for the improvements of the university library service.

____

____

____

____

____

(D) (University/main bookshop)

Q27 Which bookshop do you normally buy your course books from?

University bookshop - 1
Others - 2

Q28 If others, please say what shop, if any, you use

____

Q29 At the shop you ticked in Q.27, do you think the stock in your subject(s) is

Very Good	-1
Fairly Good	-2
Average	-3
Poor	-4
Very Poor	-5
Don't know	-6

Q30 Have you ever ordered a book not in stock?

Yes	-	1
No	-	2

IF YES,

(a) about how many books altogether have you ordered?

_______ books.

(b) in general, was delivery

Very Quick	-1
Fairly Quick	-2
Average	-3
Fairly Slow	-4
Very Slow	-5

(c) can you give a time for your fastest delivery?

____

Q31 When did you buy the text books from the University bookshop last semester?

Beginning of the semester	-1
Mid of the semester	-2
Just before the examination	-3

Q32 Do you find the staff at university bookshop

Very Helpful	-	1
Fairly Helpful	-	2
Average	-	3
Fairly Unhelpful		-4
Very Unhelpful		-5

Q33 About how much money do you reckon you have spent on books for study this session?

M$ _____

Q34 What was the highest price that you have paid for a textbook from the University bookshop?

M$ _____

Q35 Allowing for differences between hard-cover and paper back editions do you think in general that the prices of books in your subject(s) are

Very Expensive	-1
Expensive	-2
Average	-3
Cheap	-4
Very Cheap	-5

Q36 Can you give any examples of books you have bought which you consider to be very expensive?

Imported books	-1
Local books	- 2
Other	- 3

Q37 Please give any suggestions for improving the service of the university bookshops.

____

____

____

____

Q38 On the whole how would you describe the level of your satisfaction towards the university bookshop?

____

____

____

END OF QUESTIONNAIRE

Thank you very much for your cooperation.

MARKETING OF SCHOLARLY BOOKS : A SURVEY OF ACADEMICIANS' ROLES AND VIEWS

Dear Respondent,

I am working on a doctoral thesis on the marketing of scholarly books in Malaysia. As part of my research, I am conducting a survey amongst academicians in all eight institutions of higher learning in the country as one of the groups of the people most closely involved with the process of producing the scholarly books. As academicians number in the thousands, it would not be practical to reach them all, nor it is necessary for the purpose of this study. Even my target sampling of 10 per cent is tantamount to reaching the not inconsiderable amount of a few hundred. This figure I feel is sufficient to provide a reasonably accurate picture, inter alia, of the problems and experiences of producing scholarly books in this country.

The answers sought in this questionnaire touch on types of publication, authorship and readership profiles, library access, research and publication, and textbooks adoption.

The survey, which I believe is the first of its kind conducted in this country, will contribute to the understanding of the marketing mix of the scholarly books and unravel the ramifications underlying the whole process from its inception in the minds of writers to its reception by readers. The marketing of scholarly books, not the most saleable of products at the best of times, has to be seen as operating with a competitive environment, not only in terms of other attractions and among its own kind but also in terms of the purchasing power of its targeted audience.

The information given will be treated with the strictest confidentiality and is strictly for statistical purposes of the study.

Thank you for your kind cooperation.

Firdaus Ahmad Azzam
Ph.D Student
Publishing Studies
University of Stirling
FK9 4LA Stirling
Scotland

May 1993

For official use

1 4

MARKETING OF SCHOLARLY BOOKS :
A SURVEY OF ACADEMICIANS' ROLES AND VIEWS

A. PERSONAL AND INSTITUTIONAL BACKGROUND

Instruction: Please circle the number next to the most appropriate answer. Here as elsewhere, please skip questions which are not applicable to your situation.

Q.1 Name of Institution : ______________________ 5

Q.2 Faculty : ______________________ 6

Q.3 Department : ______________________ 7

Q.4 What subjects are you teaching in session 1992/93? (If you need more space, please use the space at the end of the questionnaire).

1 ______________________

2 ______________________

3 ______________________

4 ______________________

5 ______________________

6 ______________________

7 ______________________

8 ______________________

9 ______________________

10 ______________________

Q.5 Gender : Male - 1 Female - 2 8

Q.6 What is your marital status? 9

Single	- 1	Married	- 2
Divorced/separated	- 3	Widowed	- 4

Q.7 Which of the following age group do you belong to? 10

20 to 29 years old	- 1
30 to 39 years old	- 2
40 to 49 years old	- 3
50 to 59 years old	- 4
More than 60 years old	- 5

Q.8 What is the highest academic degree you have completed?

Diploma	- 1
Bachelor (B.A., B.S., etc.)	- 2
Master (including work towards the Ph.D.)	- 3

11

Professional degree (LL.B., etc.) - 4
Doctorate (Ph.D., Ed.D., etc.) - 5
Other (please specify) ________________
________________ - 6

Q.9 What is your present grade/status? 12

Instructor - 1
Tutor - 2
Lecturer - 3
Assistant professor - 4
Associate professor - 5
Full professor - 6
Other rank, (please specify) - 7
____

Q.10 Do you hold any administrative post together with the above job? 13

Yes - 1
No - 2

Q.11 What is your status of tenureship? 14

Tenured with pension - 1
Tenured without pension - 2
Contract - 3
Part time - 4
Other (please describe): ________________
________________ - 5

Q.12 Based on your job tenureship status, when you will be terminated/retired? 15

Within a year - 1
Within two years - 2
Within three years - 3
Within four years - 4
Within five years - 5
More than five years - 6

Q.13 Please give the date (year) of the following: 16 17

Year received highest degree now held 19__
Year joined present institution 19__ 18 21
Year obtained current status 19__

Q.14 Please indicate the order of preference (1 - 4) in performing the duties below (according to priority). 22 25

Teaching __
Research work __
Consultation __
Administration __
If it is not your duty, please indicate 0

Q.15 Please tick languages used for the purpose of scholarly communication. 26 30

Bahasa Malaysia - 1
English language - 2

Arabic - 3
French - 4
Other (please specify):
________________________________ - 5

Q.16 How many professional societies related to your discipline, research interest, or work do you currently belong to? Include all regional societies and specialist societies to which you currently pay dues. 31

One - 1
Two to three - 2
Four to five - 3
More than five - 4
None - 5

Q.17 What is your regular or normal annual teaching load? 32 33

_____ courses per semester (counting each section of a large course you teach separately as a course). 34 35
_____ hours per week.

Q.18 Overall, how satisfied are you with your current job as a lecturer or administrator? 36

Satisfied - 1
Unsatisfied - 2
Mildly unsatisfied - 4
Very unsatisfied - 5
Not sure - 6

Q.19 How strong is the pressure at your institution for you to publish articles in scholarly journals and scholarly books? 37

Extremely strong - 1
Strong - 2
Moderate - 3
Weak - 4
Very weak - 5
Not sure - 6

B. PROFESSIONAL READING

Q.1 How do you get to know about new publications?
(Rating: Most common way (1), Common (2), Less common, Least common (4) 38 41

a. Review articles	1	2	3	4
b. Direct mail	1	2	3	4
c. Advertisement	1	2	3	4
d. Representation from the publisher	1	2	3	4
e. Bookshop promotion	1	2	3	4

Q.2 How valuable are the following sources of information in keeping you up to date with what is being published in your field?
{Rating: Very Important (1), Fairly Important (2), So-so (3), Not very important (4), Not at all important (5)}

a. Promotional material through post	1	2	3	4	5	42 – 45
b. Book reviews	1	2	3	4	5	
c. Discussion with colleagues	1	2	3	4	5	46 – 49
d. Browsing in bokshops	1	2	3	4	5	
e. Exhibitions/conferences	1	2	3	4	5	
f. Space advertising in journals	1	2	3	4	5	
g. Library recommendations	1	2	3	4	5	
h. Bookshop recommendations	1	2	3	4	5	

Q.3 How effective do you believe the following sources of information are in leading you seriously to consider buying books?
{Rating: Very Important (1), Fairly Important (2), So-so (3), Not very important (4), Not at all important (5)}

a. Promotional material through post	1	2	3	4	5	50 – 53
b. Book reviews	1	2	3	4	5	
c. Discussion with colleagues	1	2	3	4	5	
d. Browsing in bokshops	1	2	3	4	5	54 – 57
e. Exhibitions/conferences	1	2	3	4	5	
f. Space advertising in journals	1	2	3	4	5	
g. Library recommendations	1	2	3	4	5	
h. Bookshop recommendations	1	2	3	4	5	

Q.4 How many direct mail do you received in a month from the local publisher? 58

None	-	1	1 - 3	-	2
4 - 6	-	3	7 - 9	-	4
More than 10	-	5			

Q.5 How many direct mail do you received in a month from the multinational publisher? 59

None	-	1	1 - 3	-	2
4 - 6	-	3	7 - 9	-	4
More than 10	-	5			

Q.6 What is your reactions when you received the direct mail? 60

Personally examining the mail promotion	-	1
Pass it on to a colleague/aide	-	2
Only open without reading	-	3
Throw without opening	-	4

Q.7 How do you rate the value of the type of information in deciding on your purchases? {Rating: High (1) ... Low (5)}

a. List of contents	1	2	3	4	5	61 64
b. Brief summary of the main features	1	2	3	4	5	
c. Detailed description of the contents	1	2	3	4	5	
d. Designated readership and level	1	2	3	4	5	
e. Extracts from review coverage	1	2	3	4	5	65 68
f. Information on the author	1	2	3	4	5	
g. Sample pages	1	2	3	4	5	
h. Photograph of cover (to aid recognition in bookshops)	1	2	3	4	5	69 70

Q.8 Here, I would like to know:

a. Number of scholarly journals (do not count journals which publish only book reviews) you currently subscribe _________ 71 73

b. Total paid subscriptions (including memberships) M$_________ 74 76

c. Number of scholarly journals you received from professional society memberships _________

Q.9 Is this the same number of journals you subscribed to during the preceding year, or have you increased or decreased the number of your subscriptions? 77

Same number	- 1
Increase	- 2
Decrease	- 3
Currently have no subscriptions	- 4

IF DECREASE:
Which one of the following best describes why you decreased the number of your journal subscriptions? 78

Not enough time to read all the material I now receive	- 1
No longer interested in the field the journal(s) cover	- 2
Subscription price(s) was increased	- 3
Needed to cut my expenses	- 4
Other (please specify): ____________________	- 5

Q.10 During this past year approximately how many scholarly books (excluding textbooks) did you purchase from your own funds for your personal library?

Approximately _______________ books, which
included ___________________ paperbacks

RR1 1 4

5 8

Q.11 Please make a rough estimate of the approximate total cost of the following to you during the past year.

Scholarly books I purchased. (Total cost for past year):
Approximately M$________

9 11

Scholarly journals, including society dues for membership.
(Total cost for past year): Approximately M$________

12 14

Q.12 Do you think it is fair to compare the Malaysian journals with the foreign journals?

Yes, it is fair - 1
No, it is unfair - 2

15

IF YES,

What is your opinion on Malaysian journals?
(Rating: Very Good (1), Good (2), Fair (3), Poor(4), Not sure (5)

The contents	1	2	3	4	5
The frequency	1	2	3	4	5

16 17

What is your opinion on foreign journals?
(Rating: Very good(1), Good (2), Fair (3), Poor (4), Not sure (5)

The contents	1	2	3	4	5
The frequency	1	2	3	4	5

18 19

If you think the quality of the Malaysian journals are poor compared to the foreign ones, please tick the most appropriate reason for that.

The quality of the contents are poor - 1
The quality of editing and production are poor - 2
Limited distribution - 3
Not written in English - 4
Other reason (please specify):
____ - 5

20

IF NO,

please give your own reason for that:

____

____

C. LIBRARY RESOURCES

Q.1 Please give your personal rating of your institution's library (or library arrangements, if your institution gives you direct access to other libraries without going through interlibrary loan) on the following aspects. If your institution has more than one library, give your rating of the overall library situation. Here as elsewhere, please skip questions which are not applicable to your situation. (Rating: Very good (1), Good (2), Fair (3), Poor (4), Not sure (5)

a. Adequacy of international journal holdings for my fields needs	1	2	3	4	5
b. Adequacy of international journal holdings for STUDENTS' needs	1	2	3	4	5
c. Adequacy of imported book holdings for my field needs	1	2	3	4	5
d. Adequacy of imported book holdings for my STUDENT needs	1	2	3	4	5
e. Adequacy of reference resources	1	2	3	4	5
f. Ability to meet my needs for articles and books by borrowing them through interlibrary loan	1	2	3	4	5
g. Quality and availability of machines needed to read microform (microfilm and microfiche) documents	1	2	3	4	5
h. Availability of reference librarians	1	2	3	4	5
i. Access to computerized bibliographic data bases	1	2	3	4	5
j. Adequacy of original local books in Bahasa Malaysia	1	2	3	4	5
k. Adequacy of translated books (in Bahasa Malaysia) holdings for my field needs	1	2	3	4	5
l. Adequacy of local journal holdings for my field needs	1	2	3	4	5

21 25

26 30

31 32

Q.2 How many hours a week do you usually spend in a university library?

None	-1	11-15 hour	-4
1-5 hour	-2	more than 16 hour	-5
6-10 hour	-3		

33

Q.3 In using your institution's library, how often are you unnecessarily inconvenienced; (Rating: Very often (1), Often (2), Moderately (3), Seldom (4), Very seldom (5), Do not use (6)

a. By waiting in long lines for books or equipment	1	2	3	4	5	6
b. By malfunctioning equipment	1	2	3	4	5	6
c. By inadequate facilities for reading journals	1	2	3	4	5	6
d. By inability to get help from librarians	1	2	3	4	5	6

34 37

Q.4 How familiar are you with computerized searches of online data bases such as ERIC, FAME, ABI, MLA Bibliography, ABC/CLIO, Sociological Abstracts and so on, which are accessed by using a computer terminal to produce a customized list of references or sources on one or more topics chosen by the user. 38

Do not know at all	- 1
Do not know very much about them	- 2
Am familiar with them, but never have used them	- 3
Have used them once or twice	- 4
Have used them several times	- 5
Have used them frequently	- 6

Q.5 Are such searches currently available to you at your institution (either free or for a fee) through your library, computer centre, or your computer terminal. 39

Yes	- 1
Probably yes	- 2
Probably not	- 3
No	- 4
No idea	- 5

Q.6 Does a librarian do the search for you or do you do the search directly on computer terminal (whether in the library or not?) 40

A librarian always does it, but I am usually present during the search	- 1
A librarian always does it without my being present	- 2
Sometimes I do it, sometimes a librarian does it	- 3
I always do it	- 4
Other	- 5

Q.7 How satisfied were you with the results of your most recent searches? 41

Very satisfied	- 1
Mildly satisfied	- 2
Neutral	- 3
Mildly unsatisfied	- 4
Very unsatisfied	- 5
Not sure	- 6

Q.8 Some libraries have put some or all of their card catalogues in computers so that patrons may use computer terminals to search for books they want. Has part or all of the catalog in your institution's library been computerized? (If you use one of several libraries, answer for the library that you use the most). 42

Yes	- 1
No	- 2
Don't know	- 3

IF YES:
Have you had the opportunity to use the computerized catalog? 43

Yes	- 1
No	- 2

IF YES:
Thus far has your library's present application of this technology:

(Rating: Significantly (1), Moderately (2), A little (3), Not at all (4), Don't know (5)

a. Decreased your use of the card catalog?	1	2	3	4	5	
b. Increased your access to scholarly materials?	1	2	3	4	5	44 48
c. Increased your productivity as a lecturer?	1	2	3	4	5	
d. Increased your research productivity?	1	2	3	4	5	
e. Made the use of the library more enjoyable?	1	2	3	4	5	

Q.9 Has your institution or organization provided an opportunity, such as seminars or tutorial for you to learn about the new technical services available in the library?

49

Yes - 1
No - 2

Q.10 Listed below are various types of scholarly materials which you may or may not have used - read, browsed, copied, etc. - during the past year for keeping up in your field, your teaching, or your research. Please rate the importance of each of the following sources of such materials. (Do not include textbooks in answering this question). (Rating: Great importance (1), Moderate importance (2), Slight importance (3), No importance (4), Did not use (5)

50 52

a. Materials (books, journals, etc.)that were already in my personal library	1	2	3	4	5	
b. Materials that I purchased during the past year	1	2	3	4	5	53 55
c. Colleagues' copies	1	2	3	4	5	
d. Materials in my institutional's library	1	2	3	4	5	
e. Materials obtained through interlibrary loan	1	2	3	4	5	
f. Materials identified through the use of computerized literature search	1	2	3	4	5	

D. RESEARCH AND PUBLICATION

Q.1 Have you (with or without coauthors) ever published any of the following? If yes, please give the approximate total number that have appeared in print (Please do not include items which have not yet appeared in print, even if they have been accepted for publication.)

	Ever published Yes(1)	No (2)	Approximate total number of titles	
				56 59
a. University textbook	1	2	_______	
b. Scholarly book or monograph (editor or co-editor)	1	2	_______	

	Ever published Yes(1)	No(2)	Approximate total number
c. Scholarly book or monograph (author or co-author)	1	2	______
d. Chapter in scholarly book	1	2	______
e. Article in a refereed journal	1	2	______
f. Comment in a refereed journal	1	2	______
g. Book review in a scholarly journal	1	2	______
h. Scholarly paper in conference proceedings	1	2	______
i. Book review in newspaper or general magazine	1	2	______
j. Short story, novel or poetry	1	2	______
k. Nonfiction essay/article/op ed piece in newspaper or general magazine	1	2	______
l. Translated works	1	2	______

60 63
64 67
68 71
72 75
76 78

Q.2 Have you ever:

	Yes (1)	No (2)
a. Served as referee for a scholarly journal article	1	2
b. Evaluated a scholarly book manuscript for a publisher	1	2
c. Served as an editor or associate editor of a scholarly journal	1	2
d. Received a research grant from an outside funding agency since leaving graduate school (including grants to a team or group project)	1	2

RR2 1 4
5 8

Q.3 How many people in your present department or organization:
(Rating: None (0), One (1), Two (2), Three (3), Four (4), Five or more (5))

a. Do you regard as sharing one of your research interests?	1	2	3	4	5
b. Do you regularly ask to give comments on your draft scholarly manuscript?	1	2	3	4	5
c. Have you co-authored a scholarly paper or publication with?	1	2	3	4	5

9 11

Q.4 Please give your opinion on the following statements about the scholarly publishing process. (Rating: Strongly agree (1), Agree (2), Neutral (3), Disagree (4), Strongly disagree (5), No opinion (6))

a. The number of journal outlets in my field is sufficient for my needs.	1	2	3	4	5	6
b. The number of publishers who publish books in my area of specialization is sufficient for my needs.	1	2	3	4	5	6
c. I feel I have enough information to decide where to submit scholarly articles for publication.	1	2	3	4	5	6

12 14

d. Faculty tenure committees should consider refereed material publisher in nontraditional forms (such as microform, publication "on demand," electronic journals, etc.) as comparable to material publishes in conventional forms. 1 2 3 4 5 6

e. The peer review system in my discipline needs reform. 1 2 3 4 5 6 — 15 16

Q.5 Have you ever supplied book or article manuscript to a publisher direct from your computer in the form of a computer tape diskette or other machine readable form?

Yes - 1
No - 2
Don't know, not sure - 3

17

0.6 Have you ever published scholarly publication?

Yes - 1
No - 2

18

If yes, who is the publisher ?

19

Self published - 1
Local private publisher - 2
International private publisher - 3
Dewan Bahasa dan Pustaka - 4
Higher learning publisher - 5
Other, (please specify): - 6

____

20 22

Q.7 If your scholarly works have been published, please indicate the source of fund:

a. Number of titles of scholarly books published funded by myself_______
b. Number of titles of scholarly books published partly funded by myself _______
c. Number of titles of scholarly books published fully funded by others_______

23 26

Q.8 Please give your opinion on the following statement about the sch.publications published by your higher learning institution.(Rating: Very satisfied (1), Mildly satisfied (2), Neutral (3), Mildly unsatisfied (4), Very unsatisfied (5), Not sure (6)

27 29

a. The quality of the contents (facts, data, illustrations, tables/diagrams, index)	1	2	3	4	5	6
b. The format and the book making (size, paper, ink, typeface, printing and binding.	1	2	3	4	5	6
c. Authorship (presentation of facts, analysis and conclusion)	1	2	3	4	5	6
d. Publisher's capability (editorial, design and manufacturing)	1	2	3	4	5	6
e. Promotion of the books to the target audiences (announcements, launches,advertising and reviews).	1	2	3	4	5	6
f. Pricing	1	2	3	4	5	6
g. Distribution system	1	2	3	4	5	6

E. TEXTBOOKS ADOPTION

Q.1 Do you decide which books that should be recommended for your courses? 30

Yes	- 1
No	- 2

Q.2 Do the lists contain either books recommended for purchase or supplementary reading or both? 31

Recommended	- 1
Supplementary	- 2
Both	- 3

Q.3 On average, how many titles appear on the recommended list? 32

1	-	1	2	-	2
3	-	3	4	-	4
5	-	5	More than 6	-	6

Q.4 On average, how many titles appear on the supplementary list? 33

1	-	1	4	-	4
2	-	2	5	-	5
3	-	3	More than 6	-	6

Q.5 Do you strongly recommended which books to buy, or do you suggest alternative standard texts they could choose from? 34

Tell them to buy	- 1
Give alternatives	- 2
Make no comment either way	- 3
Other, (please specify): ______________	
______________________________	- 4

Q.6 Where is the nearest bookshop where students can buy the textbooks? 35

Campus bookshop	- 1
Other shop in town centre	- 2
Other shop in town	- 3
Other, (please specify):______________	
______________________________	- 4

Q.7 Is there any other bookshops where students can buy the textbooks? 36

Other shop in town centre	- 1
Other, (please specify): ______________	- 2
______________________________	
No other shop	- 3

Q.8 Where do you advise your students to go for their books?

Campus bookshop	- 1
Other shop in town centre	- 2
Other, (please specify):	- 3
______________________________	

484

Buy second hand - 4 37

Don't give advice - 5

Q.9 Do your students ever have problems with the availability of the books in the bookshop?

38

Yes - 1

No - 2

IF YES,

What sorts of problems do your students have?

39

Book not in stock in bookshop - 1

Book out of print/not supplied by publishers - 2

Do not supply fast enough - 3

Other, (please specify): ________________

______________________________ - 4

Q.10 Why are the books not in stock in bookshop? Please tick the most accurate reason for that.

40

Lecturers failed to give details - 1

Details given to bookshop by the lecturers late - 2

Publishers rep didn't pass on details - 3

Problems with publishers - 4

Bookshop ordered too few/underestimated demand - 5

Bookshop didn't order in time - 6

Bookshop didn't order at all - 7

Bookshop found difficulty in judging/estimating number of books required - 8

Bookshop was unable to carry large stocks i.e. shortage of space/too expensive - 9

Other, (please specify): ____

____ - 10

Q.11 How often are the students unable to get the books they want?

41

Very often - 1

Quite often - 2

Not very often - 3

Rarely - 4

Don't know - 5

Q.12 What do you suggest your students do in these situations when they can't get the recommended book?

42

Don't advise anything - 1

Advise another book - 2

Borrow the book - 3

Order the book - 4

Share a book - 5

Try other shops - 6

Use library - 7

Buy second hand book - 8

Other, (please specify): ________________

______________________________ - 9

Q.13 Do you inform the bookshop about the books you recommend to your student?

Yes - 1
No - 2 43

IF NO,
give the reasons for not informing the bookshop

It is not my responsibility - 1
Not enough time due to pressure of work - 2
Not enough time after decisions have been taken - 3
Bookseller doesn't take any action - 4
Other, (please specify): ____________________
____________________ - 5 44

Q.14 How do you inform the bookshop?

Visit the bookshop - 1
Visit from the bookseller - 2
Telephone the bookshop - 3
Telephone call from the bookseller - 4
Letter to bookseller with list - 5
Letter/pro forma from bookseller - 6
Sent to bookseller with all list from different departments - 7
Other, (please specify): ____________________ - 8 45

____

Q.15 Do you get request from local bookseller for information about books you recommend?

Yes - 1
No - 2 46

Q.16 In what way do the requests come from the local bookseller?

On bookshop pro forma - 1
Written request - 2
Telephone - 3
Personal visit - 4
Get copy of last year's list to ammend - 5
Other, (please specify): ____________________
____________________ - 6 47

Q.17 When do they ask for the information?

January	- 1	July	-	7	
February	- 2	August	-	8	
March	- 3	September	-	9	
April	- 4	October	-	10	
May	- 5	November	-	11	
June	- 6	December	-	12	
Other, (please specify): ____________________			-	13	48

Q.18 Is this an appropriate time?

Yes - 1
No - 2 49

If no, when would be preferable?

January	-	1	August	-	8
February	-	2	September	-	9
March	-	3	October	-	10
April	-	4	November	-	11
May	-	5	December	-	12
June	-	6	Other, (please specify):		
July	-	7	____________________		13

50 ☐

Q.19 Can you give the information they need relatively easily?

Yes - 1
No - 2

51 ☐

Q.20 Does the bookseller give you any deadlines for sending back information about recommended texts?

Yes - 1
No - 2

52 ☐

If there is a deadline, do you meet the deadline?

Yes - 1
No - 2

53 ☐

Q.21 What follow-up method does the bookseller use to chase you?

Personal visit - 1
Telephone call - 2
Letter - 3
Other, (please specify): ____________
________________________ - 4
None/nothing - 5

54 ☐

Q.22 Do you feel information about recommended book should primarily be ...

Requested by bookshops - 1
Given by lecturers to bookshops - 2
Conveyed by publishers to bookshops - 3
Conveyed by students to bookshops - 4
Given by department to publishers - 5
Other, (please specify): ____________
________________________ - 6
No preference - 7

55 ☐

Q.23 How important do you think that you should inform the booksellers of your requirements?

Very important - 1
Fairly important - 2
Not very important - 3
Not at all important - 4

56 ☐

Q.24 Whose responsibility is it to ensure that recommended books are available in local bookshops? 57

Lecturer only	- 1
Bookseller only	- 2
Publisher only	- 3
All	- 4
Bookseller and lecturer	- 5
Bookseller and publisher	- 6
Lecturer and publisher	- 7

Q.25 Do you know your local bookshop representative (the person responsible for your subject)? 58

Don't know at all	- 1
Know by sight only	- 2
Know by name only	- 3
Know quite well	- 4
Know very well/personal friend	- 5

Q.26 Do you ever meet with the bookseller to discuss books your students will need? 59

Yes	- 1
No	- 2

IF YES,
how often? 60

Less than once a year	- 1
About once a year	- 2
About twice a year	- 3
About once a term	- 4
More often	- 5

Q.27 How do you get to know the books you eventually recommend? 61

Book reviews	- 1
Publishers lists/ catalogues	- 2
Seen in bookshop	- 3
Recommended by colleague/staff	- 4
Recommended by someone else	- 5
Request from students	- 6
Inspection copies	- 7
Through library/ librarians	- 8
Reps	- 9
Conferences	- 10
Personal knowledge/ always used/read/ write myself	- 11
Other, (please specify): ____________________ ____________________	- 12

Q.28 Overall do you feel booksellers have made sufficient effort to find out what books you recommend to students? 62

Sufficient	- 1
Not sufficient	- 2
Make no effort at all	- 3

Q.29 Do you ever get called on by any representatives from the publisher?

Yes - 1 63
No - 2

IF YES,
mainly what type of contact is that?

Letter - 1 64
Telephone - 2
Personal visit - 3
Conferences/exhibitions - 4
Other, (please specify):________________
______________________________ - 5

Q.30 Do you tell publishers or their representatives what type of books do you recommend to the students?

Yes - 1 65
No - 2

IF YES,
to the best of your knowledge, do you think the publishers pass on that information to the booksellers?

Yes - 1 66
No - 2

Q.31 Do you feel it is the publisher's responsibility to pass on the information ?

Yes - 1 67
No - 2

Q.32 Can you give any comments on how to improve the communication between lecturers and the booksellers?

____

____

____

____

Q.33 Can you give any comments on how publishers can improve the supply of recommended books in the bookshops?

____

____

____

____

END OF QUESTIONNAIRE

ONNAIRE TO PUBLISHER

ORGANIZATIONAL STRUCTURE

Organization:

Year of Establishment:

Type of Publishing organization:

University press	-1
Research Institute	-2
Commercial	-3
Learned Societies	-4
DBP	-5
Other, WRITE IN	-6

____

What is the status of your organization?

Subsidiary	-	1
Department	-	2
Autonomous	-	3
Non-profit	-	4
Wholly govt. Owned	-	5
Semi-govt.	-	6
Other, WRITE IN	-	7

____

Editorial and Management Boards

How many Editorial Boards exist in your organisation?

WRITE IN NO. OF PEOPLE

____

If more than one, how are they structured?
(If possible, please supply your organisational chart)

____

____

____

5.3 Who sit on the editorial boards?

5.4 Who sit on the management board?

		5.3	5.4
Professionals	-	1	1
Scholars	-	2	2
Publishers	-	3	3
Editors	-	4	4
Others, WRITE IN	-	5 ________	5 ________

5.5 Does the Director/Head of the press sit on the management and editorial boards?

Management	-	Yes	-	1
	-	No	-	2
Editorial	-	Yes	-	1
	-	No	-	2

Q.6 Number of employees

Editorial - ________

Marketing - ________

Production- ________

Sales - ________

Administration-____

Q.7 Do/does your editor(s) deal with other job than editing?

Yes - 1 GO TO Q.7b
No - 2 GO TO Q.8

Q.7b If yes, please write in

____

____

____

____

Q.8 What are your financial resources?

Univ. grant	-	1
Govt. funds	-	2
Self generating	-	3
Others, WRITE IN		
____________		4

Q.9 Do you have a formal budget?

Yes	-	1
No	-	2

Q.10 Percentage of total expenditure in 1992

	(%)	*Actual amount (optional: $)*
Total Income	100	______
Less Expenditure:		
Overhead	___	______
Editorial	___	______
Production	___	______
Marketing	___	______
Others:		
______	___	______
______	___	______
Net Profit	___	______

B. PRODUCTION

Q.11 In what form do you accept your manuscript?

Typescript	-	1
Diskette	-	2
CRC	-	3
Other, WRITE IN		4
____________		

Q.12 What was your major method of obtaining book designs in 1992?

Staff designers(s)	-	1
Follow previous on standard designs	-	2
Freelance designers	-	3
Left to suppliers (printers, t/setters)	-	4
Other, WRITE IN	-	5

____

Q.13 Do you have your own printing facilities?

Yes	-	1	GO TO Q.14
No	-	2	GO TO SEC. C

Q.14 How many percent of publications are printed internally?

WRITE IN NO. OF % ______

C. MARKETING

Q.15 Do you have your own marketing department?

Yes	-	1	GO TO Q.15b
No	-	2	GO TO Q.16

Q.15b How many staff in this unit?

WRITE IN NO. OF STAFF ______

Q.16 Do you market books published by others?

Yes	-	1
No	-	2

Q.17 Do you sell your books through

Sole distributor	-	1
Wholesaler	-	2
Direct mail	-	3
Sales reps.	-	4
Commissioned sales reps.	-	5

Field sales trips by your staff	-	6	
Exhibits	-	7	GO TO Q.17b
Bookstore	-	8	
Bookclubs	-	9	
Other, WRITE IN-		0	

____

Q.17b Which book exhibition did you participate?

ABA	-	1
ALA	-	2
Frankfurt	-	3
London	-	4
Singapore	-	5
Jakarta	-	6
Kuala Lumpur	-	7
Other, WRITE IN-		8

____

Q.18 What type of discount do you use?

Structured	-	1	GO TO Q.18b
Average	-	2	GO TO Q.19

Q.18b What is the discount rate for

Below 50 copies = ____%

51- 100 copies = ____%

More than 100 = ____%

Q.19 What is your average discount? ______%

What was the highest discount you gave in 1992?____%

Q.20 Do you have a book return policy?

Yes	-	1	GO TO Q.20b
No	-	2	GO TO Q.21

Q.20b If yes, how many per cent?

WRITE IN NO. OF % ____

Q.21 Which of the following have you computerised?

Order processing	-	1
Mailing list	-	2
Accounting	-	3
Manuscript editing	-	4
Stock inventory	-	5
Publishing programme	-	6
Other, WRITE IN	-	7

____

Q.22 What was your total net sales volume (after returns)?

1986 = ____________	-	1
1987 = ____________	-	2
1988 = ____________	-	3
1989 = ____________	-	4
1990 = ____________	-	5
1991 = ____________	-	6
1992 = ____________	-	7

Q.23 What was the value of your book inventory (at actual production costs) at the end of 1992?

WRITE IN THE COST IN $ ____

Q.24 How many new titles did you publish in 1992? ______

What was your average print quantity?

Hardcover __________

Paperback __________

What was your print run?

Minimum __________

Maximum __________

Q.25 How many titles did you reprint in 1992? ____________

What was your average print quantity?

H/cover ____________

P/back ____________

Q.26 How many orders did you process in ~~1986~~ 1992? ____________

How many units shipped? ____________

Q.27 What is your average list price for

a new hardcover book: $ ____

a new paperback book: $ ____

Q.28 Do you give discounts on direct orders from libraries?

Yes - 1 GO TO Q.28b
No - 2 GO TO Q.29

Q.28b What is the maximum discount you would give? _____%

Q.29 Do you give the same or different discount to wholesale and retail book dealers?

Yes - 1
No - 2

Q.30 How many copies the wholesaler keeps the publication at one time?

______ copies

Q.30b In average, how long does it takes

to sell?

Less than a year -1
1 - 3 years -2
3 - 5 years -3
More than 5 years -4

and how many copies (in percentage?)

More than 75% - 1
50 - 74% - 2
25 - 49% - 3
Below 24% - 4

Q.32 Have you ever send advance notice (detail of the books) to wholesaler?

Yes	-	1
No	-	2

Q.33 Who publish the catalogue?

Publisher	-	1
Wholesaler	-	2
Bookshop	-	3
Other, WRITE IN	-	4

____

Q.34 What sort of contact do you have with booksellers?

Regular visits from your reps.	-	1
Occasional visits from your reps.	-	2
Catalogues	-	3
Inspection copies	-	4
Other, WRITE IN	-	5

____

Letter or no contact	-	0

D. PRODUCTION

Q.30 Do you pay royalties?

Yes	-	1 GO TO Q.30b
No	-	2 GO TO Q. 32

Q.30b If yes, are they based on

Net price	-	1
List price	-	2

Q.30c What is your normal royalty rate?

____%

Q.31 Do you pay royalty advances?

Yes	-	1 GO TO Q.31b
No	-	2 GO TO Q.32

Q.31b What was the average royalty advance you paid to authors in 1992?

$_____ (£___)

Q.32 What is the

honorarium rate: $_____

evaluation fee: $_____

editing fee: $_____

prrof reading fee:$____

Q.33 Do you buy copyright?

Yes - 1 GO Q.33b
No - 2 GO TO Q.34

Q.33b If yes, what is the rate?

$____ (£___)

Q.33c Do you sell copy rate?

Yes - 1 GO TO Q.33d
No - 2 GO TO Q.34

Q.33d If yes, what is the rate?

$____ (£___)

Q.34 What is the

Translation fee: $____

T/setting rate: $____

Printing/Imposition rate: $____

Mark up rate: $____

E. MAILING LIST

Q.35 Do you construct/develop your own mailing list?

Yes - 1 GO TO NEXT Q.
No - 2 END OF QUESTION

Q.35b If yes, how do you classify your mailing list?

By subject	-	1
By country	-	2
By institutution	-	3
By profession	-	4
Other, WRITE IN	-	5

____

Q.36 How do you process your orders via your Mailing List?

General Post Office	-	1
Clearing House	-	2
Mailing List Company	-	3
Own marketing dept.	-	4
Other, WRITE IN	_	5

____

Q.37 Do you provide service to others?

Yes	-	1
No	-	2

Q.38 Do you sell your Mailing List?

Yes	-	1 GO TO Q.37b
No	-	2 GO TO Q.38

Q.38b What is the rate for

Overseas: $_____

Local: $_____

Q.39 What is the response rate to your mailing list?

Very High	-	1
Fairly High	-	2
So-so	-	3
Fairly Low	-	4
Very Low	-	5

Q.40 How many personnel are in charge of the mailing list?

________ staff.

Q.41 If possible, can you tell what is the cost incurred in

developing the mailing list: $______

maintaining and updating the mailing list: $______

Q.42 How extensive is your mailing list?

By subject	-	1
By profession	-	2
By countries	-	3
By institutions	-	4
Other, WRITE IN	-	5

____

Q.43 What are the major problems faces in maintaining the mailing list?

____

____

____

____

F. **GENERAL**

Q.44 Do you feel that the responsibility for ensuring you have enough information about adopted texts for students, is primarily yours, or lecturers, or booksellers?

Publisher	-	1
Lecturer	-	2
Bookseller	-	3
All	-	4
Can't say	-	5

Q.45 Would it help if booksellers provided a standard request form to send out to lecturers?

Yes	-	1
No	-	2

Q.46 Would you let me have an example of your own request form (if any possible)
ATTACH TO QUESTIONNAIRE

Q.47 Is there anything you would like to say about how sales of books to students might be improved with regard to publishers communicating with lecturers or colleges?

Q.48 Is there anything you would like to say about this with regard to communications from publishers? WRITE IN

END OF QUESTIONNAIRE

Questionnaire to bookshops

Name:
Address:
Tel. No.:
Date of interview:

Classification

BOOKSHOP:

On Campus - 1
In Town Centre - 2
Elsewhere - 3

RELATIONSHIP TO UNIVERSITY

Main bookseller - 1
Not main bookseller -2

TURNOVER: What % of your annual turnover is in student textbooks/scholarly books?

WRITE IN: _____ %

Q1 When student from ____ (Uni) come into the shop at the start of the academic year, how many of them know what books they need based on any book lists or recommendations made by their lecturers?

Most of them --- 1
About 3 in 4 --- 2
About half --- 3
About 1 in 4 --- 4
Less than 1 in 4 - 5
Can't say --- 6

Q2 Of those who do have their book requirements from such lists how many of these books can you supply to them from your stock?

Most of them --- 1
About 3 in 4 --- 2
About half --- 3
About 1 in 4 --- 4
Less than 1 in 4 - 5
Can't say --- 6

Q3a Thinking of those you are unable to supply for stock - why is that?
RECORD BELOW

Q3b IF MORE THAN ONE ANSWER AT Q3a: which of these occur more/most often? And next most often? And next most often? etc?

		Q3b			
	Q3a	Most	Next	2nd	4th
Knew of adoption but failed to order	1	1	2	3	4
Didn't know of adoption	2	1	2	3	4
Ordered but publisher out of stock/print	3	1	2	3	4
Lecturer gave wrong/inadequate details	4	1	2	3	4
Other (write in/or ring) ______________________________	5	1	2	3	4

Q4a Roughly, in your estimation, what % of textbook sales in units and revenue do you feel you might lose each year because you are unable, for one reason or another, to meet supply? IF DON'T KNOW - what would your best guess be?

	UNITS	REVENUE
WRITE IN:	_____ %	______%

Not guessed - 1 **ASK**
Guessed - 2 **Q4b**

Don't know - 3 **GO TO Q.5a**

Q4b IF FIGURE GIVEN AT Q4a: Does that include those that publishers are unable to supply to you?

Yes - 1 **ASK Q4c**
No - 2 **GO TO Q5a**

503

Q4c IF YES: How much is the loss due to publishers not supplying books (as % of total loss at Q4a)

WRITE IN : _ ____________________

Don't know _ x ____________________

Q5a What sort of personal contacts do you have throughout the year with lecturers who are adoption decision makers at ___(Uni)?

RECORD BELOW

IF MORE THAN ONE ANSWER AT Q5a - ELSE GO TO Q5d

Q5b Which of these do you spend most time on? RECORD BELOW

Q5c Which do you find most effective in getting lecturers to provide you with information about book requirements?

ASK ALL - FOR EACH WAY AT Q5a

	Q5a Do	Q5b Most Time	Q5c Most Eff.	% Q5d All Most	Half	Few
Make a personal visit to lecturers	1	1	1	1	1	1
Have a personal visit to shop by lecturers	2	2	2	2	2	2
Invite lecturers to the shop	3	3	3	3	3	3
Telephone lecturers	4	4	4			
Write letters to lecturers	5	5	5			
Other (write in & ring)	6	6	6			

____

____

____

Q6a Do you request reading lists from lecturers?

Yes	-	1	Ask Q 6b
No	_	2	GO TO 11

Q6b What form does this request take first time you do it?

Send pro from	-	1
Write and ask for a list to be sent	-	2
Phone and ask for a list to be sent	-	3
Send a copy of last year's list	-	4
Phone and ask about requirements	-	5
Visit to them to get details	-	6
Visit from them to give details	-	7
Other (write in & ring)	-	8

____

Q7 How important are the following to you as ways of generating lists from lecturers? ROTATE ORDER OF ASKING & TICK START.

	VERY IMP.	FAIRLY IMP.	NOT VERY IMP.	NOT AT ALL IMP.
Send pro form	1	2	3	4
Write and ask for details	1	2	3	4
Phone for a list to be sent	1	2	3	4
Phone and ask about requirements	1	2	3	4
Send a copy of last year's list	1	2	3	4
Visit to them to get details	1	2	3	4
Visit from them to give details	1	2	3	4
Follow-up activities	1	2	3	4

Q8 What percentage of book lists do you receive back after this initial request?

WRITE IN: _____ %

Don't know - x

IF ALL (100%) GO ON TO Q.10 - ELSE ASK Q.9

Q9 What else do you then do to try to get lists from lecturers? What else?

Send pro form	–	1
Write and ask for a list to be sent	–	2
Phone and ask for a list to be sent	–	3
Send a copy of last year's list	–	4
Phone and ask about requirements	–	5
Visit to them to get details	–	6
Visit from them to get details	–	7
Other (write in & ring)		
________________________		8

Q9b After all this what percentage of book lists will you have received back? WRITE IN: ___%

Don't know – x

Q10 When do you usually send out your initial request for lists?

January	–	1
February	–	2
March	–	3
April	–	4
May	–	5
June	–	6
July	–	7
August	–	8
September	–	9
October	–	0
November	–	x
December	–	y

Q11 Do you set a deadline for response? IF YES: How long do you give them?

WRITE IN
No. OF WEEKS ___

No deadline – x GO TO Q 14

Q12 IF DEADLINE SET: What proportion of lecturers miss the deadline?

No		- GO TO Q14
1 - 10	-	2
11 - 20	-	3
21 - 30	-	4
31 - 40	-	5
41 - 50	-	6
51 - 60	-	7
61 - 70	-	8
71 - 80	-	9
81 - 90	-	0
91 - 99	-	X
All	-	Y

Q13a IF ANY LATE: Why do you think lecturers give you details late? Would it be ... READ OUT:

Q13b Of these, which is the most common problem? Which next? etc.

	Q13a	Q13b					
	APPLIES	MOST COMMON	NEXT	3rd	4th	5th	6th
Decision on course late	1	1	2	3	4	5	6
Decision on books to be used was late	2	1	2	3	4	5	6
New courses/syllabus	3	1	2	3	4	5	6
Number of students taking course not known in time	4	1	2	3	4	5	6
Late appointment of lecturer to post	5	1	2	3	4	5	6
Absence of lecturer	6	1	2	3	4	5	6
Other reasons (write in & ring)							
____________________	7	1	2	3	4	5	6
____________________	8	1	2	3	4	5	6
____________________	9	1	2	3	4	5	6
No reason given/just don't return lists	0						

Q14 What do you do with the information you receive - do you

--- READ OUT:

	YES	NO
Confirm with the lecturers what action you have taken	1	2
Order the books but don't inform the lecturers	1	2
Give details to publishers representative	1	2

What else do you do? (WRITE IN)

____

____

____

Q15 Do you inform the lecturer if you can not obtain a book because it was unavailable?

Yes -1
No -2

Q16 Do you feel lecturers are becoming better or worse or remaining much the same in providing information about adopted texts?

Better - 1
Much the same- 2
Worse - 3

Q17a Do you actually have problems in ordering adopted texts?

Yes - 1 ASK Q17b
No - 2 GO TO Q.18

Q17b What kinds of problems? RECORD BELOW

Q17c IF MORE THAN ONE AT Q17b: Which is the most common problem?

	Q17b	Q17c
Lack of information from lecturer	1	2
Book out of stock with publisher	2	2
Book out of print	3	3
Publisher fails to process order correctly	4	4
Other (write in & ring) ____________________	5	5

RELATIONS WITH PUBLISHERS

Q18 Thinking now about publishers, what sort of contact do you have with publishers?

Regular visits from reps	-	1
Occasional visits from reps	-	2
Catalogues	-	3
Inspection copies	-	4
Invitations to exhibitions	-	5
Other (write in & ring)		
______________________	-	6
Letter or no contact	-	Y

Q19 What proportion of the details about adopted books comes from publishers rather than lecturers?

All/most (90% or more)	- 1	
Quite a lot (65 - 90%)	- 2	
About half (35 - 50%)	- 3	ASK Q 19b
A little (10 -35%)	- 4	
Very little	- 5	
None	- 6	GO TO Q21

Q19b IF ANY: What form does this information take?

Copy of lecturers evaluation/list	- 1
Letter from publisher	- 2
Visit from sales rep.	- 3
Letter from rep.	- 4
Phone call from publisher	- 5
Phone call from rep.	- 6
Other (write in & ring)	
______________________	- 7

Q20 What do you do with this information from the publishers?

Contact lecturer to validate it	- 1
Go ahead & order without validating it	- 2
File information	- 3
Disregard the information	- 4
Other (write in & ring)	
______________________	- 5

ASK ALL

Q21 Do you feel that the responsibility for ensuring you have enough information about adopted texts for students, is primarily yours, or lecturers, or publishers?

Bookseller	-	1
Lecturer	-	2
Publisher	-	3
All	-	4
Can't say	-	5

Q22a Would it help if publishers provided a standard request form to send out to lecturers?

Yes	-	1
No	-	2

Q22b Would you let me have an example of your own request form (if any possible)
ATTACH TO QUESTIONNAIRE

Q23 Is there anything you would like to say about how sales of books to students might be improved with regard to booksellers communicating with lecturers or colleges? WRITE IN

____

____

____

____

____

Q24 Is there anything you would like to say about this with regard to communications from publishers? WRITE IN

____

____

____

____

____

END OF QUESTIONNAIRE

APPENDIX 14

Table A14.1 OECD CLASSIFICATION OF SUBJECTS

1. NATURAL SCIENCES

1.1 Mathematics and computer sciences
Mathematics and other allied fields: computer sciences and other allied field subjects (software development only; hardware should be classified with the engineering fields).

1.2 Physical sciences
(Astronomy and space sciences, physics, other allied subjects).

1.3 Chemical sciences
(Chemistry, and other allied subjects).

1.4 Earth and other environmental sciences
(Geology, geophysics, mineralogy, physical geography and other geosciences, meteorology and other atmospheric sciences including climatic research, oceanography, vulcanology, palaeoecology, other related sciences).

1.5 Biological sciences
(Biology, botany, bacteriology, microbiology, zoology, entomology, genetics, biochemistry, biophysics, other allied sciences, excluding clinical and veterinary sciences).

2. ENGINEERING AND TECHNOLOGY

2.1 Civil engineering
(Architecture engineering, building science and engineering, construction engineering, municipal and structural engineering and other allied subjects).

2.2 Electrical engineering, electronics
[Electrical engineering, electronics, communication engineering and systems, computer engineering (hardware only) and other related subjects.]

2.3 Other engineering sciences
(Such as chemical, aeronautical and space, mechanical, metallurgical and material engineering, and their specialised subdivisions; forest products; applied sciences such as geodesy, industrial chemistry, etc.; the science and technology of food production; specialised technologies of interdisciplinary fields, e.g. systems analysis, metallurgy, mining, textile technology, other related subjects).

3. MEDICAL SCIENCES

3.1 Basic medicine
(Anatomy, cytology, physiology, genetics, pharmacy, pharmacology, toxicology, immunology and immunohaematology, clinical chemistry, clinical microbiology, pathology).

3.2 Clinical medicine
(Anaesthesiology, paediatrics, obstetrics and gynaecology, internal medicine, surgery, dentistry, neurology, psychiatry, radiology, therapeutics, otorhinolaryngology, ophthalmology).

3.3 Health sciences
(Public health services, social medicine, hygiene, nursing, epidemiology).

4. **AGRICULTURAL SCIENCES**

4.1 Agriculture, forestry, fisheries and allied sciences
(Agronomy. animal husbandry, fisheries, forestry, horticulture, other allied subjects).

4.2 Veterinary medicine

5. **SOCIAL SCIENCES**

5.1 Psychology

5.2 Economics

5.3 Educational sciences
(Education and training and other allied subjects).

5.4 Other social sciences
[Anthropology (social and cultural) and enthnology, demography, geography (human, economic and social), town and country planning, management, law, linguistics, political sciences, sociology, organisation and methods, miscellaneous social sciences and interdisciplinary, methodological and historical S&T activities relating to subjects in this group. Physical geography and psychophysiology should normally be classified with the natural sciences.]

6. **HUMANITIES**

6.1 History
(History, prehistory and history, together with auxiliary historical disciplines such as archaeology, numismatics, palaeography, genealogy, etc.).

6.2 Languages and literature
(Ancient and modern languages and literatures).

6.3 Other humanities
[Philosophy (including the history of science and technology), arts, history of art, art criticism, painting, sculpture, musicology, dramatic art excluding artistic "research" of any kind, religion, theology, other related fields and subjects pertaining to the humanities, methodological, historical and other S&T activities relating to the subjects in this group.]

Table A14.2 **Breakdown of students respondents (actual numbers)**

OECD CLASSIFICATION	DETAILED BREAKDOWN	OBS
NATURAL SCIENCES	Mathematics, Computer Science	79
	Physical, Chemical, Biological Sciences	196
	Earth, Related Environmental Sciences	2
ENGINEERING AND TECHNOLOGY	Civil Engineering	37
	Electrical Engineering, Electronics	66
	Other Engineering Sciences	104
AGRICULTURAL SCIENCES	Agriculture, Forestry, Fishery	78
	Veterinary Medicine	24
MEDICAL SCIENCES	Dentistry	25
	Medical Sciences	99
SOCIAL SCIENCES	Social And Behavioural Sciences	341
	Law	66
	Education Science And Teacher Training	258
	Commercial And Business Admin.	589
	Mass Communication And Documentation	76
	Architecture And Town Planning	75
	Domestic Science	48
HUMANITIES	Humanities	235
	Religion And Theology	186
	Geography And Archaeology	2
	Fine And Applied Arts	7
TOTAL RESPONDENTS		2593

DIRECTORY TO SUBJECTS OF STUDY

at Malaysian Universities

(first degrees, diplomas, certificates)

[Source: Higher Education Division, Ministry of Education Malaysia]

○ = may be studied as part of course leading to first degree
● = may be studied as part or as main part of course leading to first degree
▲ = may be studied only as main part of course leading to first degree
• = leads to diploma or certificate

Subject	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Actuarial Studies				●			
Agriculture	●•						
Agric Economics & Business	●•			●			
Agric Engineering	●•						
Agric Extension	●•						
Agronomy	●•						
Animal Science	●•			○			
Food Science	●			●		●	
Horticulture	●			○			
Plant Science / Protection	●			○		○	
Research Methods	●			○		○	
Soil Science	●			○		○	
Anthropology	○		●	●		●	
Architecture						●	▲•
Biochemistry	●		●	●		○	
Biological Sciences				●		●	
Biology	●		●	●		●	
Applied						●	
Botany / Genetics	○		●	●		○	
Ecology	○		●	○		○	
Physiology	○		●	○		○	
Virology	○		○	○			
Zoology			●	●		○	
Biotechnology	▲						
Business Admin / Management	○	▲	●	●	●	●	
Chemistry	●		●	●		●	○•
Analytical Industrial						●	
Chinese Studies			●				
Commerce				●			
Communications	○			●	○	●	
Computer Science	●		●	●	○	●	▲•
Creative & Descriptive Writing			●				
Creative Arts						•	
Dentistry			▲				
Development Science				▲			

Subject	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Economics[1]	●	●	●	●	●	○	○
Accounting	●	●	●	●	●		
Public Administration	●		●	○	●	○	
Rural Development	●		●				
Education	●	○	●	●		▲	▲
Educational Technology	○					•	●
Engineering Aeronautical							▲•
Chemical	▲		▲	▲			▲•
Civil	▲		▲	▲			▲•
Electrical			▲	▲			▲•
Electronics Computer	▲			●		▲	○•
Gas							▲
Industrial, Material, Mineral Resource				○		▲	
Laboratory Technology						•	
Marine							▲•
Mechanical	▲		▲	▲			▲•
Petroleum							▲•
English Language Studies	●			●		●	○
English Literature	○		●			●	
Environmental Studies	●			○			
Fine Arts					●		
Fisheries	▲•			○			
Food Technology	●					●	
Forestry	▲•						
Geography			●	●		●	
Geology			●	●		○	○
Geophysics						▲	
History			●	●	○	●	
Human Development	●•						
Indian Studies			●				
Information Technology					▲		
Interpretation			○				
Islamic Studies		○	●	▲	○	○	○•
Languages[2] Arabic	○	○	○	○		○	

[1] Also Analytical Economics and Applied Economics

[2] Also at Univ of Malaya (○•) Burmese, Filipino, Italian, Portuguese (•only), Russian, Spanish, Tamil, Urdu

○ = may be studied as part of course leading to first degree
● = may be studied as part or as main part of course leading to first degree
▲ = may be studied only as main part of course leading to first degree
• = leads to diploma or certificate

Subject	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Bahasa Melayu	○		●		○		
Dutch			○	○			
English	○	○	○	○	○	○	○
French	○		○	○		○	
German			○	○		○	
Japanese			○	○		○	
Korean			○	○			
Malay	○		○	○		○	
Mandarin	○		○	○		○	
Tagalog			○	○		○	
Thai			○	○			
Law		▲	▲	▲			○
Malay Literature / Malay Studies	●		●	●		●	
Malaysian Affairs				○			○•
Management				●	●	▲	○•
Marine Science	▲			●			●
Mass Communications	○			○		●•	
Mathematics	●	○	●	●		●	○•
Medicine & Surgery			▲	▲		▲	
Missionary Studies				●			
Operations Research				●	○	●	
Optometry				▲			
Performing Arts						●	
Pharmaceutical Sciences			○	○		▲	
Philosophy	○			○		○	

Subject	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ
Physical Education	●			○	
Physics	●		●	●	
Planning (Urban & Regional)			○	○	
Political Science	○			●	○
Polymer Science/Technology				○	
Property Management					
Population Studies	○	●	○		
Psychology	○		○	●	○
Quality Control					
Race Relations	○			○	
Regional Studies				●	
Rural Studies	○			○	
Social Development & Admin					
Sociology	○		●	●	○
Southeast Asian Studies	○		●	○	
Statistics	○	○	●	●	○
Surveying, Land			○	○	
Quantity					
Syariah		●	▲	▲	
Teaching English as 2nd Language	●	●	▲		
Urban Studies				○	
Usuluddin		●	▲	▲	
Valuation					
Veterinary Medicine	▲				

DIRECTORY TO SUBJECTS OF STUDY

at Malaysian Universities

(First degrees, diplomas, certificates)

[Source: Higher Education Division, Ministry of Education Malaysia]

○ = may be studied as part of course leading to first degree
● = may be studied as part or as main part of course leading to first degree
▲ = may be studied only as main part of course leading to first degree
• = leads to diploma or certificate

	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Actuarial Studies				●			
Agriculture	●•						
Agric Economics & Business	●•			●			
Agric Engineering	●•						
Agric Extension	●•						
Agronomy	●•						
Animal Science	●•			○			
Food Science	●			●		●	
Horticulture	●			○			
Plant Science Protection	●			○		○	
Research Methods	●			○		○	
Soil Science	●			○		○	
Anthropology	○		●	●		●	
Architecture						●	▲•
Biochemistry	●		●	●		○	
Biological Sciences				●		●	
Biology	●		●	●		●	
Applied						●	
Botany / Genetics	○		●	●		○	
Ecology	○		●	○		○	
Physiology	○		●	○		○	
Virology	○		○	○			
Zoology			●	●		○	
Biotechnology	▲						
Business Admin / Management	○	▲	●	●	●	●	
Chemistry	●		●	●		●	○•
Analytical, Industrial						●	
Chinese Studies			●				
Commerce				●			
Communications	○			●	○	●	
Computer Science	●		●	●	○	●	▲•
Creative & Descriptive Writing			●				
Creative Arts						•	
Dentistry			▲				
Development Science				▲			

Also Analytical Economics, and Applied Economics

	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Economics	●	●	●	●	●	○	○
Accounting	●	●	●	●	●		
Public Administration	●		●	○	●	○	
Rural Development	●		●				
Education	●	○	●	●		▲	▲
Educational Technology	○					•	●
Engineering, Aeronautical							▲•
Chemical	▲		▲	▲			▲•
Civil	▲		▲	▲			▲•
Electrical			▲	▲			▲•
Electronics/Computer	▲			●		▲	○•
Gas							▲
Industrial, Material, Mineral Resource				○		▲	
Laboratory Technology						•	
Marine							▲•
Mechanical	▲		▲	▲			▲•
Petroleum							▲•
English Language Studies	●			●		●	○
English Literature	○		●			●	
Environmental Studies	●			○			
Fine Arts					●		
Fisheries	▲•			○			
Food Technology	●					●	
Forestry	▲•						
Geography			●	●		●	
Geology			●	●		○	○
Geophysics						▲	
History			●	●	○	●	
Human Development	●•						
Indian Studies			●				
Information Technology					▲		
Interpretation			○				
Islamic Studies		○	●	▲	○	○	○•
Languages[1] Arabic	○	○	○	○		○	

[1] Also, at Univ of Malaya (O*) Burmese, Filipino, Italian, Portuguese (*only), Russian Spanish, Tamil Urdu

DIRECTORY TO SUBJECTS OF STUDY (contd)

○ = may be studied as part of course leading to first degree
● = may be studied as part or as main part of course leading to first degree
▲ = may be studied only as main part of course leading to first degree
• = leads to diploma or certificate

	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ	Univ of Science	Univ of Technology
Bahasa Melayu	○		●		○		
Dutch			○	○			
English	○	○	○	○	○	○	○
French	○		○	○		○	
German			○	○		○	
Japanese			○	○		○	
Korean			○	○			
Malay	○		○	○		○	
Mandarin	○		○	○		○	
Tagalog			○	○		○	
Thai			○	○			
Law		▲	▲	▲			○
Malay Literature Malay Studies	●		●	●		●	
Malaysian Affairs				○			○•
Management				●	●	▲	○•
Marine Science	▲			●			●
Mass Communications	○			○		●•	
Mathematics	●	○	●	●		●	○•
Medicine & Surgery			▲	▲		▲	
Missionary Studies				●			
Operations Research				●	○	●	
Optometry				▲			
Performing Arts						●	
Pharmaceutical Sciences			○	○		▲	
Philosophy	○			○		○	

	Univ of Agriculture	Internat Islamic Univ	Univ of Malaya	National Univ	Northern Univ
Physical Education	●			○	
Physics	●		●	●	
Planning (Urban & Regional)			○	○	
Political Science	○			●	○
Polymer Science Technology				○	
Property Management					
Population Studies	○	●	○		
Psychology	○		○	●	○
Quality Control					
Race Relations	○			○	
Regional Studies				●	
Rural Studies	○			○	
Social Development & Admin					
Sociology	○		●	●	○
Southeast Asian Studies	○		●	○	
Statistics	○	○	●	●	○
Surveying, Land			○	○	
Quantity					
Syariah		●	▲	▲	
Teaching English as 2nd Language	●	●	▲		
Urban Studies				○	
Usuluddin		●	▲	▲	
Valuation					
Veterinary Medicine	▲				

APPENDIX 15

Table A 15.1 **Frequency of opinion regarding reading list by institutions and courses**

Institute	Good	Average	Poor
UM	54.92	35.42	9.66
UKM	63.85	29.32	6.83
UPM	56.22	36.97	6.81
UIA	54.21	37.35	8.43
UTM	35.19	56.42	8.38
USM	44.71	40.0	15.29
UUM	57.21	37.72	5.06
ITM	60.96	36.19	2.86
Courses			
NS	52.02	41.39	6.6
ENG	48.77	40.39	10.84
AGRI	56.86	38.24	4.90
MS	65.85	26.02	8.13
SS	56.41	37.88	5.72
HUMAN	52.33	35.28	12.38
TOTAL	55.13	37.47	7.41

APPENDIX 16

a) Expenditure on scholarly books by lecturers

Fig A16.1.1 All Gini Values = 0.5395

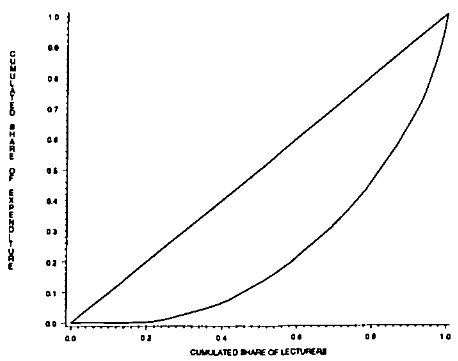


Fig A16.1.2 Natural Sciences Gini = 0.5418

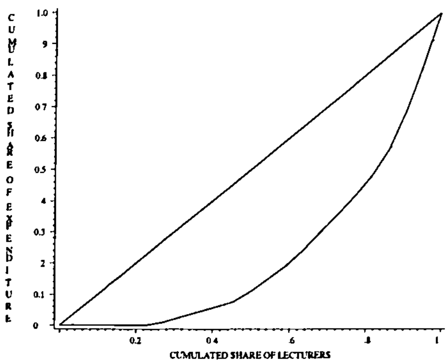


Fig A16.1.3 Engineering; Gini = 0.5365

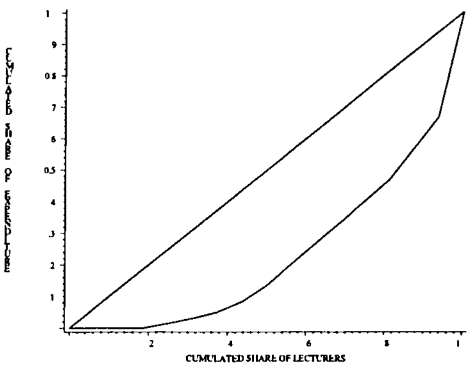


Fig A16.1.4 Agricultural; Gini = 0.5855

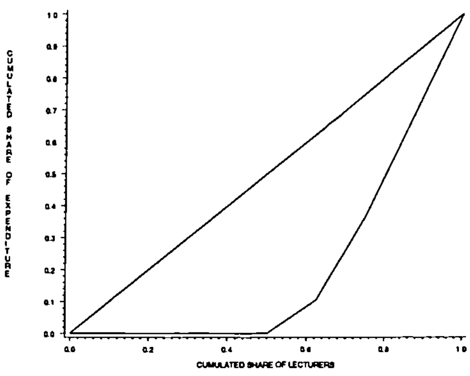


Fig A16.1.5 Medical Science; Gini = 0.1895

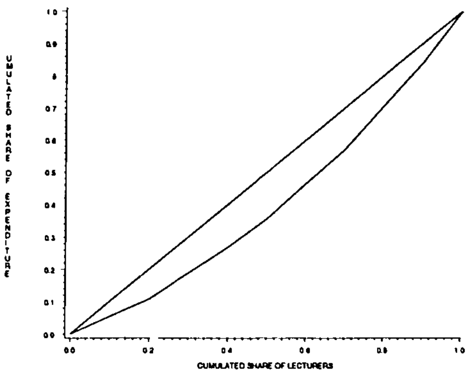


Fig A16.1.6 Social Science; Gini = 0.5885

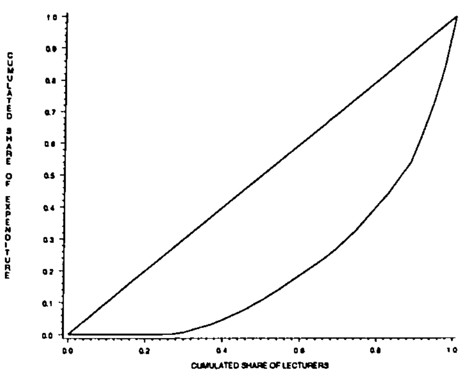


Fig A16.1.7 Humanities; Gini = 0.4755

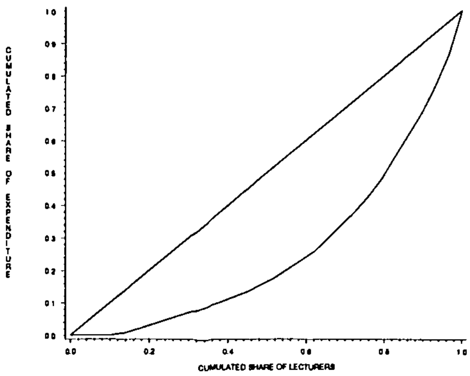


Fig A16.1.8 UM; Gini = 0.3078

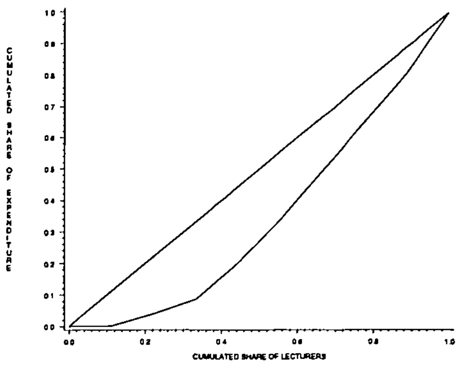


Fig A16.1.9 UPM; Gini = 0.5216

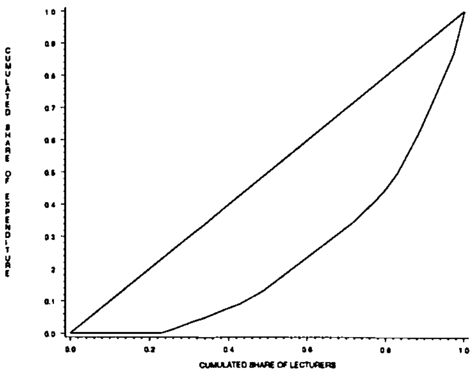


Fig A16.1.10 USM, Gini = 0.5196

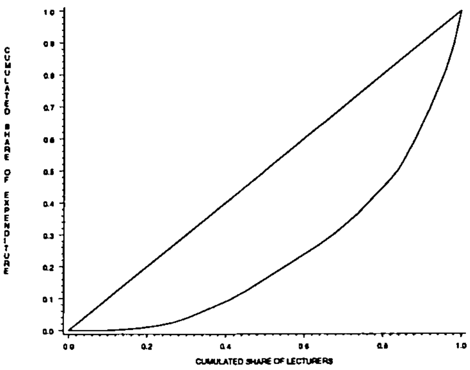
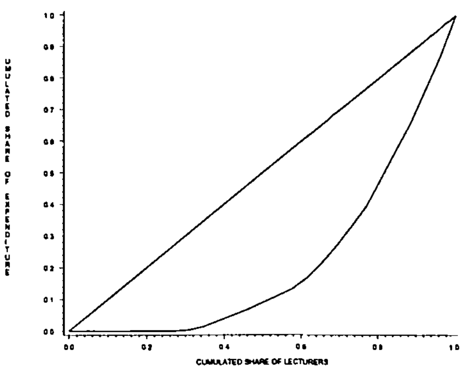


Fig A16.1.11 ITM; Gini = 0.5591



b) Expenditure on books by students

Fig A16.2.1 All; Gini = 0.4553

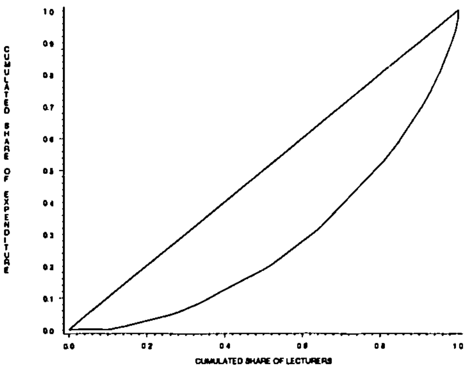


Fig A16.2.2 UM; Gini = 0.4597

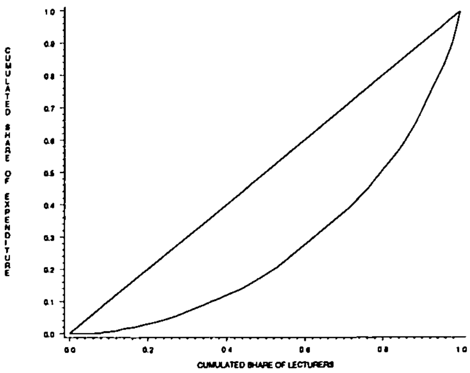


Fig A16.2.3 UKM; Gini = 0.3968

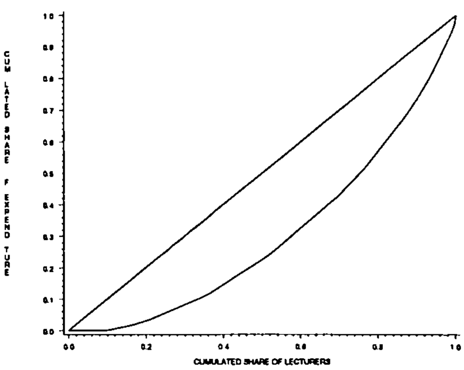


Fig A16.2.4 UPM; Gini = 0.4511

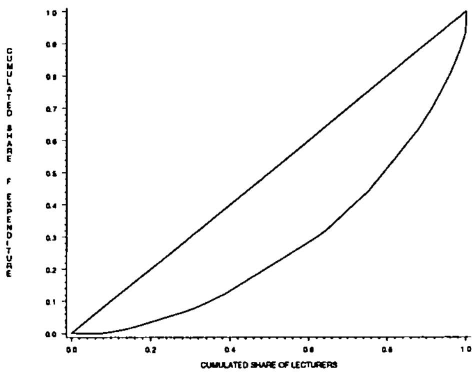


Fig A16.2.5 UIA; Gini = 0.4173

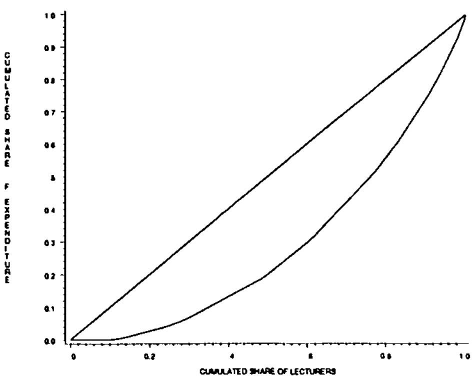


Fig 16.2.6 UTM; Gini = 0.4631

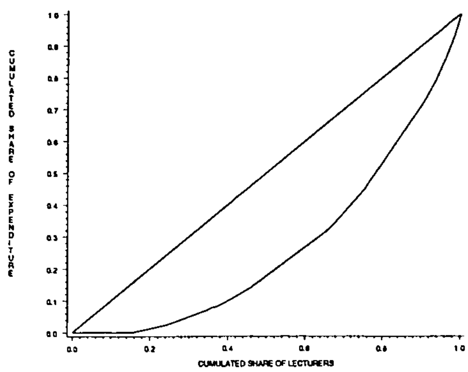


Fig A16.2.7 USM, Gini = 0.6106

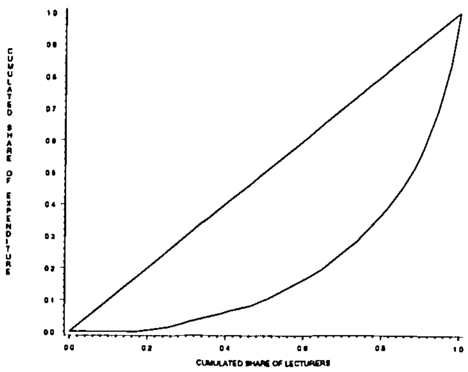


Fig A16.2.8 UUM; Gini = 0.3525

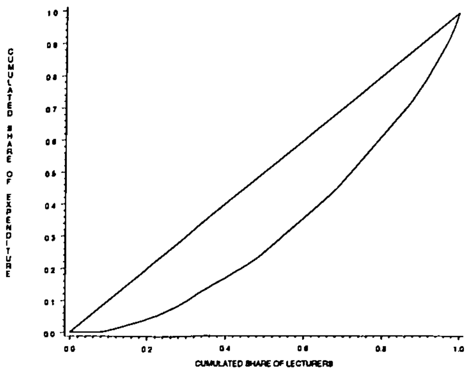


Fig A16.2.9 ITM; Gini = 0.5251

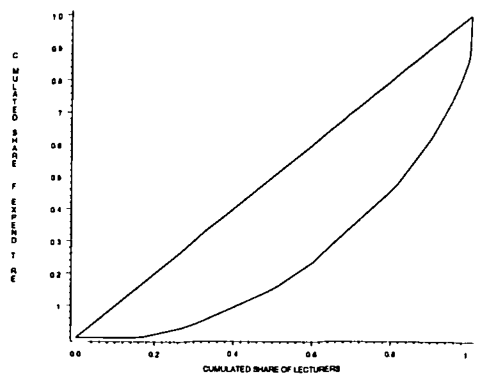


Fig A16.2.10 Natural Science; Gini = 0.4361

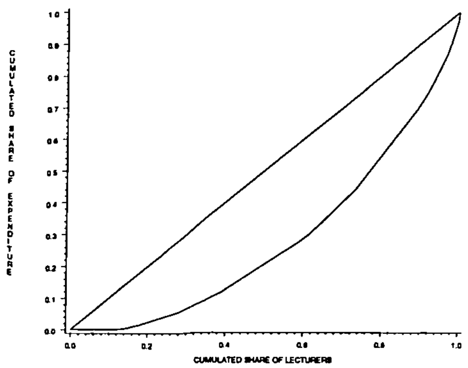


Fig A16.2.11 Engineering; Gini = 0.4148

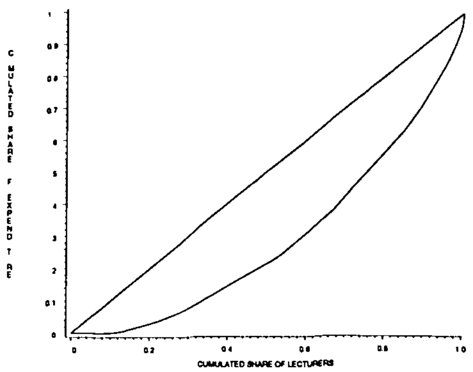


Fig A16.2.12 Agriculture; Gini = 0.4552

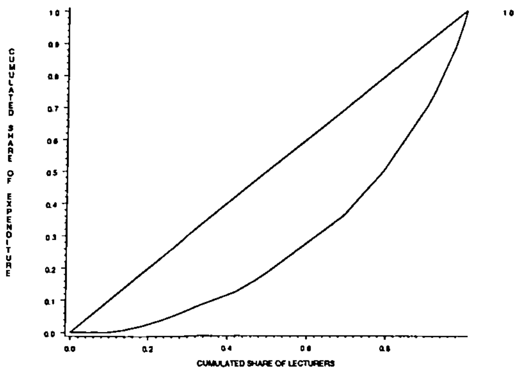
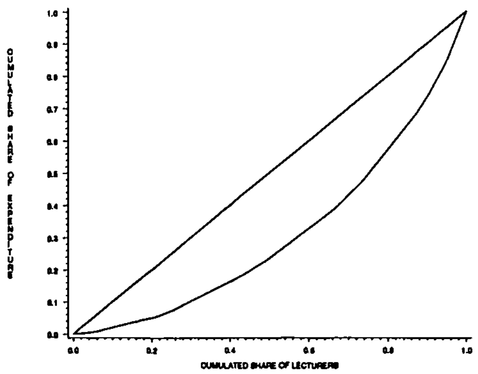


Fig A16.2.13 Medical Science; Gini = 0.3794 Fig A16.2.14 Social Science; Gini = 0.4444



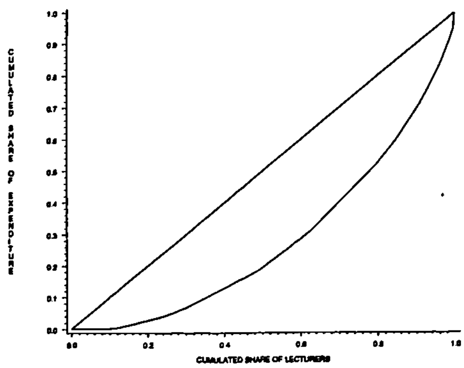
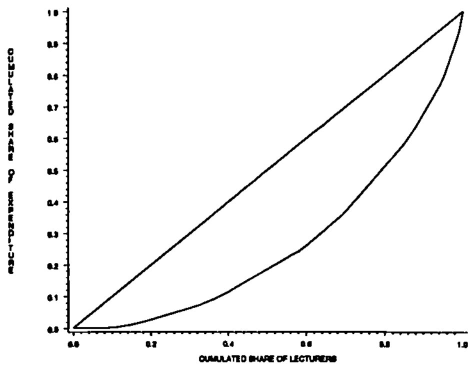


Fig A16.2.15 Humanities; Gini = 0.4650



APPENDIX 17

Table A17.1.1 **Mean number for journals and books bought by lecturers**

	N	Min	Mean	Max	Std Dev.
Number of scholarly journals currently subscribed (Q8a)	121	0	1.322	12.0	1.68
Total expenditure on journals for past year (Q11b)	121	0	166.47	2000	295.44
Number of books bought for past year (Q10)	121	0	5.83	50	7.24
Total expenditure on books for past year (Q11a)	121	0	287.07	2000	321.14

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A Samad Said, General Hospital, Kuala Lumpur, March 1993

Abdul Manaf Saad, GM, Berita Publishing, Kuala Lumpur, January - July 1993

Gordon Graham, Editor, LOGOS, Marlow, Buckinghamshire, 1992

Hasrom Haron, Chairman of PEPET, President of MABOPA and Head of UKM Press, at UKM Press, March - May 1993

Khoo Kay Kim, History Society, University Malaya, June 1993

Chief Librarians/representatives of UPM, UKM, USM, UIA, ITM, UM, UTM, UUM, DBP and National Library, February - June 1993

Heads of Publication Unit/Representatives of UPM, UKM, USM, UIA, ITM, UM, UTM, UUM, FRIM and MARDI, February - June 1993

Marketing Manager/General Manager/Managing Director of DBP, Longman, Utusan, Penerbit Fajar Bakti, Berita Publishing and Parry Book Centre, February - June 1993

Managers/Representatives of UPM, UIA, ITM, UM, UTM, UUM and University of Stirling book shops, February - June 1993

Representatives of MABOPA, MBIA, MBSA, PPM, MKBK, GAPENA, PEPET, February - June

Several deans, head of departments and lecturers, May - July 1993

GLOSSARY

author's proofs The set of galley proofs that are sent to an author for further checking. This set has sometimes already been read by the typesetter and corrected against the original manuscript.

backlist Older titles kept in print by publishers.

camera-ready copy A piece of copy ready to be photographed for reproduction without further alteration (CRC)

CRC (author-prepared) Authors' typed manuscripts, used by some book and journal publishers. Copy is photographed for offset printing, after being supplied by the author according to publisher's specifications, and assumed to be error-free.

catalogue List of all of a publisher's book cuurently in print.

complimentary copy A book sent free to a faculty member for evaluation as a required or supplemental text in a course.

copyright Protection of an "intellectual work" reserving to the author or other owner the right of protection.

discount The reduction of a full price to a buyer by a seller, as the difference, usually expressed as a percentage, between the price at which a bookseller sells a book and the price at which the bookseller has to buy the book from the publisher. The discount can vary with the type of book, quantitiy ordered, etc.

direct-mail advertising Advertising sent through the mails or other direct delivery service.

direct marketing The selling of books, goods, or services directly to the consumer.

edition One of the different forms in which a book is published.

freelance A self-employed person such as a designer, photographer, or writer who pursues a profession without a long-term commitment to one employer but who is contracted to carry out particular assignments for different firms.

galley proof A proof of text divided into lengths, usually of more than page depth, for convenience of handling.

gross national product (gnp) The total value of a country's output of goods and services within a defined time period (usually a year) prior to the deduction of depreciation and capital consumption.

gross margin Allowing for the very great looseness in the use of accountancy/financial terms, this term in practice usually refers to the contribution towards profits left after direct (variable) costs have been deducted from sales revenue. Also called gross profit or net contribution.

hardback/hardcover A book with stiff board covers.

in house Of work undertaken within an organisation or company such as publisher, not bought in from an outside individual or company.

ISBN International Standard Book Number, an established international system of book numbering. The system is administered in Malaysia by the national Library.

ISSN International Standard Serial Number, a unique number assigned to a serial publication that remains unchanged as long as the title of the serial remains unchanged.

jobber A type of intermediary who performs a selling function between a supplier and other dealers (a supplier of the books of many different publishers to libraries and bookstores).

list price Suggested resale price.

mailing list A collection of names derived from a common source.

mail-order A book order received by mail, phone, or other medium and shipped to the customer through the mail or another carrier.

marketing All activities related to directing the sale and movement of books and publications from publisher to user.

mark up 1) To prepare a manuscript for typesetting by specifying typographical instructions. 2) To set a higher price, the mark-up being the increase on the cost price of goods for sale to allow for the seller's profit.

mass market paperback Paperbound books, relatively low priced, and distributed to various mass-market outlets.

microform Graphic materials photographically reduced to extremely small size.

monograph A treatment, usually short, of a single subject by an author or a group of authors.

NBA See net book.

net Price to be paid; no further discount.

net price The bookseller's cost for a book, usually the list or suggested resale price less discount. Transportation charges, when levied, are usually added onto the net price.

net profit The "paper" profit a publisher makes when the sale of a book is made, regardless of whether payment is ultimately collected (after all deduction have been made)

net book A book with a fixed price. Net books, under the Net Book Agreement, may not be sold at less than the price fixed by the publisher.

offprint Copies of a journal article made available in quantity, apart from the original journal issue.

ppp Purchasing Power Parity dollars ($PPPs) are used to convert a country's national currency expenditures to a common currency unit that allows real international quantity comparisons to be made. $PPPs are based on "market basket" pricing exercises.

pro forma A vehicle for informing a prospective book buyer of the book and total cost, including any applicable charges.

sample surveys A fundamental method of marketing and social research is the collection of data from individuals in a sample of the population of interest to produce results which can be generalised to apply to the whole population.

sampling frame The definition of a population from which a sample is to be drawn.

serial A publication issued in successive parts or issues, usually at a regular intervals. Serials include periodicals, annuals, and proceedings and transactions of societies.

standard deviation The standard deviation (σ) is a measure of the spread of any given smapling distribution about the mean.

standard error The standard error of the mean is an indication of how accurately the population mean may be estimated from the mean of a sample. It is a statistic derived from the standard deviation which measures the degree to which the results from a sample survey, may be expected to differ from the reral value which would have been determined from a census of the whole population. The standard error is expressed in terms of a confidence level and a confidence limit. The confidence level is expressed as a percentage (usually 90, 95 or 99 per cent) which indicates how many times out of a hundred we would expect an identical survey to come up with a result withing the stated confidence limit - also expressed as percentage. Thus survey results will usually carry a notation that the results are 'accurate to x per cent at the 99 per cent confidence level'. Confidence limits increase, i.e. become bigger, as confidence levels arise.

STM publisher/company One engaged in the publication of scientific, technical, and/or medical books.

SWOT analysis SWOT is an acronym for strengths, weaknesses, opportunities and threats and is popular shorthand for the environmental analysis and marketing audit which comprise such an essential part of formal strategic merkeitng planning. Specifically, strengths and weaknesses relate to the present and expected future status of the company and are determined through the marketing audit while opportunities and threats exist in the present and future environment in which the organisation is to operate.

teleordering An ordering system linking bookseller to wholesaler by a computer terminal in the bookstore.

translation rights The licensing of a publisher to publish a translation of a book.

typesetter One who sets type of the owner of a business which offers a typesetting service.

university press A not-for-profit publisher of scholarly books and journals, which is owned by or related to a university or group of institutions of higher learning.

SOURCE: Nat Bodian, *Book Marketing Handbook*, vol 2 (New York: R.R. Bowker, 1983); Martin H. Manser, Printing and Publishing Terms (Edinburgh: Chambers Commercial Reference, 1988), and Michael J. Baker, *Macmillan Dictionary of Marketing & Advertising* (London: Macmillan, 1984).

BIODATA

Firdaus Ahmad Azzam, received honours degree from University of Malaya, Kuala Lumpur in 1986 (Department of Writing) joined MARA Institute of Technology (ITM) in 1987 as a lecturer at School of Mass Communication after working as an editor for a few months. She then established a Publishing course for Diploma degree at ITM in 1988, pursued her studies at Stirling University, Scotland in Publishing Studies and then continued her doctoral research. Her interest in Writing and Publishing has developed since she was young as the blood of writing is gained from both her parents. Her father is one of the active writers in 1940s and 50s and currently is still writing while her mother is a scholar and her teacher at home and school. Thus, she continues the 'struggle' of her parents who wanted to see the society become a book loving people! Up to date, she has published five books and intends to actively become involved in producing scholarly publications.