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BOOKS AS TOOLS FOR NATIONAL GROWTH AND DEVELOPMENT

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under contract to

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PREFACE

This report is an adapted version of the 1964-65 study, "Books as Tools for Turkish National Growth," contracted for by The Agency for International Development's Central Book Fund for use by A.I.D. staff in Turkey, by the Turkish Ministry of Education and by the National Planning Board. A planning and program guide, the report contained long-term projections of Turkish national requirements for text, reference, and other technical books, and gave estimates of the human, physical, and financial resources required to meet these needs, through both the importation of books and development of the local book publishing industry.

This adaptation has been prepared to provide the results of the original Turkish survey in the form of a more generalized case study, high-lighting and illustrating the basic facts and problems of the book industry, (including educational publishing) in developing countries, in its relation to educational development and to national growth.

All developing countries are faced with staggering problems in educating their present and future generations and in training young people and adults who are newly-literate and in some instances largely unfamiliar with the twentieth century world and the requirements of an industrialized developing economy. National planners have difficult choices to make when it comes to allocating scarce resources for the development of physical resources on one hand or for the development of human resources on the other. In the latter area, too, there are significant decisions to be made by educational planners as between education of children and the training of adults; between providing more and better school buildings or more teachers or more books. Unfortunately, in some past instances planners have developed programs for massive education and literacy with little or no thought to providing the books which are essential tools for the achievement of such education and literacy goals.

To be effective, national plans for education, adult training and other phases of human resource development require in most cases a specific and definite commitment on the part of the Host Government to the provision of needed books--including (a) provision of the foreign exchange and the mechanisms for importation of suitable technical, text and reference books from the developed countries, and (b) the development of the human skills, the industrial capability and the physical plant necessary for producing those books which must be of local origin.

The Turkey survey was an experimental effort to provide basic information required for planning and carrying out a national book program as part of a larger educational and economic development plan. While the specific results are pertinent only to the particular situation in Turkey, much of

the approach, many of the generalities and some of the data provided in this prototyped version are of general interest and applicability. Hence, we believe that study of this report and discussion of the basic problem to which it is directed might well pave the way for appropriately-adapted local study and planning to cope with book needs in other countries.

CHAPTER 1

INTRODUCTION

BOOKS AND NATIONAL GROWTH*

Books are an indispensable tool in all the processes of a developed society. They are the principal instrument of education at all levels. Technical training requires them. They are the major means of communication of knowledge and the major repository of information in such fields as science, engineering, agriculture, medicine, pedagogy, public administration and business management, which are basic to the whole process of development.

No advanced economy can function, and no less developed society can advance, without making a major, intensive use of books. Indeed, a nation's production and consumption of books is usually a good index of its general stage of social and economic development. One of the principal problems of any development program is, hence, to assure the availability of the books that will be required, and the means of producing and using them.

Books have two distinct roles in conveying the sorts of knowledge and skills needed for national growth. One is the transmission of necessary information from developed countries to the developing country. The other is the dissemination of such

---

* Much of the material on these first few pages is adapted from the introduction, "The Problems and Needs in Perspective", contributed by Dan Lacy, Managing Director of the American Book Publishers Council, Inc. to the AID/American University report on the Airlie House Conference, "Books in Human Development", Washington, D.C., September 1964.

information within the developing country. The first function is a relatively simple one. It requires only that books published in the United States and other technologically advanced countries be readily available in appropriate "receptor" institutions in the developing country. Much more complex is the problem of using books to disseminate information and skills within a developing country.

Books themselves, as physical objects, are the least of this problem. Few books imported from another country can serve effectively to spread information within a country. Differences of language, cultural background and specific needs make this difficult. Simply to inject a quantity of alien books, however valuable in themselves, into the processes of a society ill equipped to assimilate them accomplishes little or nothing. Required instead is the development of a set of interrelated skills, institutions and other resources adequate to plan, write, edit, manufacture, distribute and use books of the kinds and in the quantities required.

Developing these resources for creating and using books is a complex task. It involves, among other factors:

Development of editorial and writing skills, especially for the creation of textbooks.

Development of publishing skills: the capacity to plan and manage the creation, production and distribution of books.

Installation of printing and binding equipment, and assurance of an adequate supply of paper.

Creation or strengthening of commercial distribution and promotion, including facilities for bibliographical information, warehousing, shipping, wholesaling and retailing.

Provision of adequate financing and working capital for publishers and printers.

Creation or strengthening of an adequate library system, including elementary and secondary school, university and public libraries.

Development of educational techniques that make effective use of books as materials of instruction.

Increase of effective literacy.

In most developing countries, the book supply is adjusted to a situation in which only a minority of the population is literate; education is available for only a small proportion of children and that only for elementary levels; a minimal use of books is made in teaching; few if any public programs undertake to bring books to the adult; skilled and professional personnel requiring books comprise only a tiny part of the labor force; and the whole economy and society operates at a level which does not require the use of book-embodied knowledge and skills.

As the society moves into a stage of rapid development, its book requirements increase many-fold, and so do the demands on all the factors listed above. A successful program for the use of books in national growth must involve the simultaneous and parallel development of all these factors. The creation and strengthening of book producing, distributing and using capacities in a developing country is a complex process intimately related to educational and library programs, investment policy and foreign exchange allocation; it requires close cooperation between developing and assisting countries, as well as sound decisions with respect to public and private sector roles.

It can thus be seen that the book program must be coordinated with many other aspects of a general national development program.

On the part of the developing countries, book programs call for a major, serious commitment of resources to the purchase of textbooks, school library books, and books for adult education and the development of a library system -- including the necessary training of teachers and librarians.

The key factor in the whole problem of providing books and using books in a developing society is the educational system. The first books needed are textbooks to be used in the schools, both for the students receiving their formal education and for adults. A close second are the supplemental books required for the newly literate to practice their reading skills and for those adults hungry to acquire needed information.

The educational system is thus the fundamental market for books as well as the basic instrument for training the population in their use. But, importantly, since school books reflect the educational system in which they are used, the very nature of the educational system shapes and circumscribes the role which books perform in the learning process.

The intervention of the state is necessary both to provide children with the basic textbooks and school libraries they require. Any program for the use of books or the development of a book industry will be ineffective unless there is a dedicated commitment by the developing country to provide accesibility to these. It is useless to provide needed foreign currencies for paper and other raw materials for books, or for printing equipment, training and royalties unless there is a truly serious national resolve, backed by allocations from the national budget, to make effective use of books in the educational program.

On the part of developing countries, book programs also mean permitting private publishers access to the educational market and a role in the development of educational materials, as well as access to paper, capital and foreign exchange as may be necessary and possible.

On the part of the technologically advanced countries, book programs mean long-term credit for printing and papermaking equipment; technical assistance in training editors, publishers, printers and distributors, especially in the production of educational materials; assistance in obtaining rights to translations and adaptations of books, especially educational books, used in developed countries; and assistance in providing such books as are needed in transmitting scientific, technical and related information to the developing countries.

The private publishing industries of the developed countries have a potentially significant role in the development of varying patterns of responsible collaboration with the publishing industries of the developing nations.

International organizations, and especially UNESCO, have an obviously important role to play in the technical assistance aspects of such programs. So do the international organizations concerned with development finance, insofar as capital and foreign exchange requirements are concerned.

And finally, the book programs of the Agency for International Development, both in Washington, D.C. and in the USAID Missions throughout the world, can make key contributions in changing attitudes, stimulating development, enriching culture and promoting international understanding.

THE CENTRAL BOOK FUND'S TURKISH PROJECT

Appreciation of the above facts led AID in 1962 to issue Policy Directive 12, which formally sets forth the Agency's book program policy, and to establish a Central Book Fund program to stimulate AID book activities and help shrink the "book Gap" in developing countries.

Early in 1964, the Central Book Fund, Education Division of the Office of Technical Cooperation and Research (TCR/Ed) created a project for the preparation of a prototype manual designed to assist USAID Missions and newly-emerging nations in the more efficient use of books as tools for national growth.

TCR/Ed selected Turkey as a pilot case study for the project because the unusual complexities and length of the Turkish 40-year struggle against underdevelopment, and the successes and failures of its infant book industry to properly serve its rapidly expanding book needs, offers insights into book program problems and solutions which should be of assistance to the USAID Missions in and the governments of the newly emerging nations.

Wolf Management Engineering Company, chosen to conduct the Turkish book survey, carefully recruited the following group of experienced development, book publishing and education specialists:

Stanley A. Barnett, Chief of Party
Director of International Operations
Wolf Management Engineering Company

Emerson L. Brown
Vice President, Editorial Director of Webster Division
McGraw-Hill Book Company, Inc.

Robert W. Frase
Director, Joint Washington Office
American Book Publishers Council, Inc. and
American Textbook Publishers Institute

Kenneth T. Hurst
Vice President and General Manager
Prentice-Hall International, Inc.

Peter H. Neumann
Vice President and Director, International Division
Addison-Wesley Publishing Company, Inc.

I. N. Thut, PhD
Professor of Education, and
Chairman, Foundations of Education
University of Connecticut

The team's United States back-stopping was headed by Herbert J. Gottlieb, Chief Industrial Economist of Wolf Management Engineering Company's New York office, who conducted continuing technical research in many pertinent areas.

The scope of the survey included these areas:

a) Analysis of current textbook usage in the Turkish educational system, and how textbook improvement can help solve the problem of providing better trained and equipped men and women for a country that is striving toward industrial growth.

b) Definition of the Turkish use of books in the conquest of illiteracy, by the professions, for reference purposes, by the general public and in libraries; an analysis of the supplementary roles played by newspapers, periodicals and audio-visual materials.

c) A functional analysis of the component parts of the Turkish book industry: the roles of the public and private sectors (as both producers and consumers); the roles of semi-public and non-profit organizations; of bilateral and multilateral assistance; of imports.

d) Evaluation of present human, physical and financial resources and capabilities in the publishing and printing industry.

e) Delineation of Turkish and international development plans which are affected by book industry capabilities: education projections; industrial, scientific and technical personnel projections; paper and other raw material projections.

f) Description of government measures and policies which affect the book industry: postal rates, tariffs and quotas, financial policy, copyright protection, etc.

g) Recommendations for improvements in book publishing and printing techniques, methods, organization and training, on the part of both the private and public sectors.

h) Projections of short-term and long-term book needs, at various levels: determination of which types should be producted locally, by which sector, and those which could most economically be imported.

i) Recommendations to the Ministry of Education, the State Planning Organization and other Turkish agencies concerning the book industry and book priorities.

j) Recommendations for program guidance and new project development, on the part of TCR/Ed and USAID/Turkey.

k) Suggestions concerning the sponsorship and priority of recommendations resulting from the survey.

As a pioneering, experimental study in the little researched field of how books contribute to national growth, and how their use can be expanded and strengthened, the survey findings were of specific and immediate value to Turkish government agencies and to USAID/Turkey.

However, the investigation of book use and potentialities, as noted, took place in a nation that has already met and faced up to many of book problems of developing countries. Thus, the findings of the Turkish survey are expected to be of assistance and guidance to other developing countries as they, in turn, take steps to expand their infant publishing industries.

For these reasons, the original Turkish report has been revised and adapted into the present work.

CHAPTER 2

THE BOOK INDUSTRY IN DEVELOPED COUNTRIES

This chapter describes various aspects of the book industry in developed countries, in order to illustrate the kind of role books may be expected to play in the developing countries -- including Turkey -- as their economies grow, incomes rise and education is extended. It also establishes a frame of reference for the evaluation of Turkey's own publishing and printing industry, which follows:

Section 1 discusses the differing natures of book industry growth in developed and developing countries.

Section 2 presents pertinent book statistics for selected countries.

Section 3 discusses the schoolbook publishing process in the U.S. and the key supervision exercised in this process by the editor.

Section 4 outlines common characteristics of developed book industries.

Section 5 reviews a typical developed book industry -- that of France.

DIFFERING NATURES OF BOOK INDUSTRY GROWTH

The historical context in which the book industries of the United States and the Western European countries came to maturity differs so greatly from that of the developing countries that it is of little direct use as a guide or model.

In the developed publishing countries, the growth of literacy in the whole population by means of primary education was so gradual -- in some cases, taking place over the course of a century -- that it was possible for the production of reading matter to evolve slowly and gradually through the unplanned process of individual enterprise. Both the total population and the school population expanded very slowly.

> In Great Britain, universal primary education did not arrive until the 19th century; but already in the 15th and 16th centuries, when printing was first used, there were enough people who could read to provide a market for books on a considerable variety of subjects. As early as the 1830's in England, there was published a series of moderately priced popular books designed for education and self-improvement rather than entertainment.
>
> In the United States in 1870, 50% of the children between the ages of 5 and 17 were already enrolled in schools, and the literacy rate was 80%. In France in 1872, 44% of the children aged 5 to 14 were in school, and the literacy rate was 71%. Even in Japan, it is believed that about half of the male population was literate in 1870.

The contrast with today's developing countries is striking. In 1950 or thereabouts, the percentage of illiteracy among the population 15 years of age and older was 82% in Algeria, 67% in Bolivia, 55% in Brazil, 80% in Egypt, 81% in India and 68% in Turkey. These countries cannot afford to wait a century before achieving universal primary education and universal literacy. They seek to achieve these goals in a much shorter period, and by planned governmental action, at a time when their populations are expanding with extreme rapidity.

The speedy development of a book industry to provide reading matter for a literate and educated population which is being increased as quickly as possible is quite a different and much more difficult matter than the gradual evolution of an industry to match a rather slow rate of growth. This is true not only for school books and books for neo-literates, but in practically all other fields of publishing as well. For example, scientific books were being published in the U.S. well over a century ago, and several of the presently highly sophisticated and experienced

American scientific and technical publishing firms have been able to develop their skills over a long period of time concomitant with the gradual growth of science and science education in the U.S.

BOOK STATISTICS IN SELECTED COUNTRIES

Although it is easy to recognize that books are used in wide variety and in large quantities in developed countries, it is quite difficult to be precise and to demonstrate it by means of statistics. Until now the publishing industries of Europe and of the U.S. have been among the last to develop detailed statistics, and the governments of those countries have not fostered their development either. Poor as national publishing statistics have been, the situation in respect to international comparisons is even worse, for each country has usually established its own set of statistical definitions and systems.

However, we now stand at the beginning of a new era in respect to book, newspaper and periodical statistics. After several years of staff work and two international conferences of experts, UNESCO has now formally recommended to its member countries standard statistical definitions for publishing. As national statistics begin to be compiled on the basis of these new UNESCO definitions, it will become possible for the first time to make truly meaningful analyses of the book production in individual countries. At the moment, however, any attempt such as this to sketch out the role and function of books in any group of countries--developed or developing--must reflect the inadequacy of the underlying statistics.

Overall Statistics

In the countries of Western Europe and in the U.S., annual per-capita book production and consumption varies from three to six copies. Figure A (on the following page) shows the range among individual countries for which some kind of information is available on copies produced or sold, along with other related data. The examples selected are five of the most advanced publishing countries, plus two developing nations.

FIGURE A. BOOK PRODUCTION PER-CAPITA AND RELATED STATISTICS FOR SELECTED COUNTRIES
(1961 unless otherwise indicated)

	U.S.A.	U.K.	France	West Germany	USSR	Yugoslavia	Turkey
No. of copies of books produced or distributed (millions)	1,113	–	179	–	1,119	–	–
Same for domestic market (millions)	1,017	150	143		1,119	33	21
Copies per-capita domestic	5.5	3.0	3.1		5.2	1.8	1.0
Percentage of literacy (age 14 or 15 and older)	97.8% (1959)		96.4% (1949)		98.5% (1959)	87.6%	56.0% (1953)
Percentage enrolled in 1st and 2nd educ. level schools (1960)	100%	81%	88%	83%	78%	75%	47%
Percentage of national income spent on education	6.2% (1959)	4.2% (1959)	3.4% (1960)	3.7%	1.5% (1960)	2.7% (1960)	2.9%
Per-capita national income	$2,319		$957	$1,073		$192	$178
Daily newspapers--copies in relation to population	1 to each 3.1	1 to 2	1 to 3.9	1 to 3.3	1 to 5.5	1 to 15.2	1 to 22.2
Per-capita consumption of newsprint (kg)	36.3	24.0	10.9	10.4	2.0	2.6	0.9
Per-capita consumption of printing & writing paper (kg)	26.1	17.6	16.5	17.2	3.1	3.9	1.7

Principal sources: UNESCO Statistical Yearbook 1963
Statistical Abstract of the United States, 1964
Monographie de l'Edition 1963
Book Publishing in the USSR
The Book Industry in Yugoslavia

It will be noted that the annual per-capita production of books in the United Kingdom and France is about three. Although this figure is not available for the Federal Republic of Germany, other indicators--such as per-capita printing paper consumption--suggest that the German total is probably also in the same range. The U.S. and USSR figures, 5.5 and 5.2 respectively, are substantially higher.

(Actually the USSR figure is inflated by a large but unmeasurable amount, because it includes both books and pamphlets, whereas the U.S. figure consists only of books over 48 pages, not counting government publications. There is some confirmation of this in the very low per-capita printing and writing paper consumption in the USSR of only 3.1 kilograms--one fifth of that in the U.K., France or West Germany, and one-eighth of that in the U.S.)

By comparison, the Yugoslav per-capita copies figure is only 1.8, and the Turkish 1.0.

There is a general but not exact or consistent relationship between the per-capita book production figures and the per-capita newsprint consumption, the level of literacy and the proportion of national income spent on education. There is a good deal less correspondence between the comparative book production in these countries and the per-capita national income expressed in terms of U.S. dollars. Crude as the figures are, they suggest that highly-developed publishing countries show the following related characteristics:

- an annual per-capita book production of three or more copies;
- more than 95% literacy at the age of 14 years and over;
- school enrollment at the first two levels at 75% or more of that age group;
- daily newspaper production of one copy to each five persons or fewer.

Figure A does not show the number of book titles published in each of the seven countries. "Book Titles" is a frequently quoted statistic, using figures collected and published by UNESCO, but without reference to the lack of statistical comparability. At the present time, all "titles" figures are practically worthless for this purpose, although they do serve a useful purpose by showing the development trend within each country separately. The following differences between national statistical standards for book production in two of the Figure A countries illustrate the point:

	1961 Title Production	Counting of Reprints
U.S. -	18,060 books of 49 pages or over, not counting government publications.	Reprints not counted if no change in content or format; a single title may be reprinted without change dozens of times over a period of years and is counted only once.
USSR -	73,999 books and booklets of five pages or more, 41% of which are not priced or sold.	Unchanged reprints are counted as titles, partly because plates are not retained and type is usually reset for the same titles over and over again.

Turkey's statistical standards for book titles are again different from either of these two countries (see Chapter 4).

Notes on the U.S. Textbook Industry

Because textbooks constitute so important a product of the printing and publishing industries in developing countries, we present the following background information concerning the U.S. textbook industry:

1963 sales of textbooks and workbook manuals by U.S. publishers broke down as follows:

	Value of textbooks, workbooks & manuals	Number of copies (textbooks only)
Primary school	$ 185,200,000	80,610,000
Secondary school	120,650,000	36,555,000
Total: primary & secondary	$ 305,850,000	117,165,000
Higher education	156,900,000	37,930,000
Grand Total	$ 462,750,000	155,095,000

Although an increasing proportion of U.S. textboks are paperbound, the vast majority are still hardboard and last several years--typically five years in the primary and secondary grades. If they were all paperbound and lasted only a year or two, the number of copies would have been very much larger.

Sales at all levels have been growing steadily at about 5% per annum. Sales of higher education textbooks are expanding most rapidly; those of primary school textbooks most slowly--because of differing growths of enrollment. Since the U.S. does not have a federal system of education, the states are responsible for public education. The customers for primary school books are local public school systems, and private and parochial schools. In most of the states the school boards are free to purchase whatever texts or series they choose, but in 22 states, a list of eligible books is prepared by state departments of education.

The American textbook industry is also specialized. With one exception, no major U.S. textbook publisher does any of its own book printing or binding. This work is performed by independent book manufacturers.

Most publishers combine their selling activities for primary and secondary school books, since the distribution methods for both levels are basically the same. Competition is so intense that there is little difference in the price of competing books--the main motivating factors in local school system decisions are the quality and usefulness of the texts themselves. The textbook field has undoubtedly been more profitable than general book publishing, in which the sales of individual titles cannot be predicted with much accuracy.

THE SCHOOL BOOK PUBLISHING PROCESS IN THE UNITED STATES

Subsequent chapters of this report refer to the "editorial process" and its key potential function in the creation and publishing of primary and secondary school textbooks in Turkey. This section discusses pertinent aspects of this process as they have been applied to the U.S. school book publishing process.

U.S. publishing firms originate and develop new textbook project ideas in various ways. The ideas may originate with salesmen, sales managers, editors, or with teachers who contact the publisher. In U.S. school book publishing, the publisher's field staff, in its daily contacts with teachers, is engaged in market research on a continuous basis. In addition, the publisher's school book editors (who specialize in disciplines such as social science or mathematics) attend the meetings of teachers who confer periodically on these subjects, read current literature on the subject, and many editors have originally been teachers themselves. Thus school book editors' knowledge of the specialized needs of their market is profound.

When a project is decided upon, the publisher gathers a group to make the publishing decisions and carry out the development of the textbook title or series. The individuals who comprise this group possess in aggregate these skills: (a) a knowledge of the subject matter field and particularly of educational trends in the subject matter field, (b) a knowledge of the money available for the new publishing project, and (c) a knowledge of the marketing procedures involved. The group functions under the guidance of an assigned school book editor, who coordinates, expedites and supervises its work.

The publishing process for a typical school book follows this general pattern:

(a) The publisher selects the subject and course of study to which he expects to give publishing priority. He does not do this in terms of today's needs, but rather in terms of the needs as visualized a number of years ahead. At this point, the publisher places the school book editor in charge of the project.

(b) Criteria for the selected single title or the series are then developed. These consist of a set of guidelines that delineate the characteristics of the book or series and thus make them more acceptable to educators than books of competitors. The criteria may reflect new viewpoints, new methods, or other distinguishing characteristics.

(c) For the development of these criteria, the publisher usually selects a team that combines these qualities: scholarship, a knowledge of teaching methods, an understanding of learning methods, and importantly--skill in writing. Thus the typical school book development team consists of a university professor who is an authority in the field, a primary or secondary school classroom teacher who understands how students respond to printed materials in the field, a specialist who knows the most recent developments in the field of methods, and a group of authors who are recruited by the publisher on the basis of their experience and competence.

(d) The school book editor and the team of authors then develop a complete outline for the book or the series.

(e) After the outline has been approved, the editor assigns work on the preparation of the manuscript to the various members of the authorship team, schedules the work each is to accomplish, and prepares a timetable to be followed.

(f) The manuscript is normally submitted to the editor one unit at a time. As he receives the units, he sends them out to be read and criticized by teachers and scholars who specialize in the field. He then reviews the manuscript himself, collates the criticisms received with his own and returns the manuscript to the authors for revision. During the manuscript preparation process, the manuscript is likely to undergo two or three revisions--and a seventh grade geography or an eleventh grade American history textbook may take as long as three to five years to complete.

In preparing the manuscript, the authors and editor pay close attention to the reading level desired, to the needs of teachers, the courses of study, recent trends in scholarship, etc. The textbooks therefore become multi-dimensional; they are not one-dimensional

books whose main purpose is to present the information that the students must learn to pass the examinations --as is often the case in many other countries, including Turkey.

(g) The editor's coordination and direction of efforts toward the production of a textbook or a series of textbooks is a complex undertaking. While he is supervising the authors in the preparation of the manuscript, he is also working with artists, photograph specialists and draftsmen to prepare the illustrations, maps and charts desired by the authors. This material is submitted in rough form to the authors for comment and change. At the same time, to guide the illustrators and the authors, the editor works with a designer, usually on the publisher's staff, to decide on the typography for the book, the nature of its design, the trim size, and so on. At this point, the editor is working with authors, illustrators, artists, and with production men who have explored the most economical ways to meet the standards of publication.

(h) When the manuscript is finally ready for the outside printer, the editor's responsibility is usually turned over to the production specialist or managing editor who sees it through the printing press. The process may take an additional 8-12 months.

It can thus be seen that U.S. school books are the end-products of carefully planned and organized publishing efforts aimed at producing books of maximum effectiveness and value in the educational process.

COMMON CHARACTERISTICS OF DEVELOPED BOOK INDUSTRIES

Although difficult to quantify, developed book industries have certain easily recognized common characteristics. These include:

a) Book manufacturing capacity sufficient for internal needs and frequently for export as well. The machinery for printing and binding books need not, however, be produced within the country; imported machinery is common in even the largest publishing countries.

(b) Adequate supplies of paper. Most of the larger countries produce their own paper; but all that is required is a good supply at reasonable prices, whether produced locally or imported.

(c) A corps of trained and experienced personnel. The trained personnel required involve literally scores of specialists; for example, numerous kinds of authors, illustrators, translators and editors; management and accounting personnel; engineers, foremen and skilled workers in printing establishments, and experts in sales and distribution. These trained people are developed only gradually, on the job. For countries working to develop their book industries quickly, this is by far the most difficult requirement. Printing presses and paper can easily be purchased on the world market; skilled personnel take a relatively long period to develop.

(d) The separation of the publishing, printing and bookselling functions. Although there are firms which import, publish, manufacture, and distribute books at retail, or combine two or three of these functions, these are usually the exceptions rather than the rule. Among developed book industries, firms are specialized. Normally, publishers only publish, printers only print and booksellers only sell.

(e) An effective distribution network. A good distribution network for getting the finished books into the hands of the consumer is essential. The means of distribution may vary considerably from country to country. By and large there are two general types of distribution systems--the European (including the U.K.) and the American. In the European pattern, the retail bookstore distributes the great majority of books...in some countries 90% or more. This bookstore distribution includes elementary and secondary textbooks and the supply of books to libraries.

In the U.S. pattern, bookstores handle a minority of sales...on the order of 20% of the total. Primary and secondary textbooks are sold to the schools, which supply

them free or rent them to students. Encyclopedias are sold from door to door. Professional and specialized books are frequently sold and distributed by mail, as are book club selections. Lower priced books are sold at newsstands, drug stores and many other types of retail establishments. Books sold to public and school libraries are distributed normally through wholesalers rather than retail bookstores. The American pattern seems to be spreading to Europe to some degree.

(f) Favorable laws and government policies. Government probably has more impact on publishing than on most industries and the industry requires an appropriate framework of law and government encouragement. Among the most important requirements in this field are:

- a copyright law protecting and encouraging both domestic and foreign authors:

- freedom from censorship;

- freedom from burdensome taxation;

- freedom to import and export books and publishing rights easily, with little or no burden of tariff, exchange restrictions and import formalities.

- a postal system and postal rates permitting extensive use of the mails both nationally and internationally, at least for small book shipments;

- virtually universal literacy developed through the educational system;

- provision of a market for books in educational institutions, by giving books an important role in the curriculum and learning process, and in some cases more directly by providing free textbooks and ample supplies of books in school and public libraries.

(g) Active author and book trade organizations. Strong organizations of printers, publishers, booksellers and authors are characteristic of highly developed publishing countries. These associations play an essential role in developing professional standards and competence and in helping to secure the necessary government policies.

(h) Adequate bibliographic tools. A comprehensive bibliographic apparatus is necessary both to a flourishing publishing and bookselling trade and to the effective use of books in education, industry and the professions. These bibliographic tools can be provided in a variety of ways. In the U.K. and U.S. they are supplied largely by private companies with major assistance from the national libraries. In other countries the trade associations and government agencies are more important.

FRANCE: AN EXAMPLE OF THE DEVELOPED PUBLISHING INDUSTRY

Unfortunately, it is not possible to present a composite quantitative sketch of a developed book publishing industry for lack of comparable national statistics. As an alternative, we discuss below one country which may be called typical--France. For the purpose of illustration, France is preferable to the U.S., because of its smaller size and the equal availability of its statistics. Almost all the following figures are taken from the excellent Monographie de l'Edition; the data are for 1961, except where otherwise noted.

Population: 45,960,000.

Per-capita income: $957.

Literacy, 14 years or older: 96.4% (1949).

Number of book titles published: total 11,878.
Translations 1,608.

Number of copies of books produced: 178,667,000.

Number of copies for domestic market: 143,000,000.

Annual per-capita book consumption: 3.1 copies.

Sales of publishers at wholesale prices:

domestic - $122,807,000 (79.7%)
export - 31,227,000 (20.3%)

Paper consumption for books:

total - 63,000 metric tons
per-capita - 2.74 kilograms

Number of publishing houses with sales of more than $20,000:

273

Employees in publishing houses: 7,239

Breakdown of titles and copies produced:

	New Titles	Re-prints	Total No. of Titles	Total No. of Copies
General literature	2,580	1,640	4,220	65,350,000
Children's books	555	1,005	1,560	35,200,000
Textbooks	650	2,375	3,025	56,350,000
Scientific & technical	495	446	941	4,382,000
Encyclopedias	41	81	122	2,685,000
Law, economics politics, scholarly	500	237	737	2,229,000
Medical	162	61	223	702,000
Bibles, prayer books	78	92	170	2,460,000
Religious literature	354	271	625	4,465,000
The arts	165	90	255	4,844,000
Total	5,580	6,298	11,878	178,667,000

Bookstores: (estimated figures)

Major general bookstores	300
Other bookstores specializing in books	2,600
Stores offering other merchandise as well	6,000
Other outlets where books may be purchased (widely distributed books, chiefly in paper-bound form, may be purchased in at least 12,000 outlets)	18,000
Total	26,900

Readership among adults (20 years of age and over):

	Never Read	Read Books	Read other publications only
With primary education	7.0%	28%	65.0%
Higher primary or technical education	3.5%	60%	36.5%
Secondary or higher education	1.0%	80%	19.0%

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It will be noted that although two of the largest single categories of books published in France--general literature and children's books--consist primarily of fiction and other imaginative literature, about half of the titles are books relating to education and to economic and professional activities. In addition, general literature and children's books serve educational as well as general cultural purposes. In this respect, France reflects the contemporary trend in developed publishing countries. As compared with the 19th century and even this century up to World War II, books now tend to be relatively less significant as entertainment and leisure time activity and more important as tools of education and economic, scientific and technological development.

In some countries this trend has gone further than it has in France. In the U.S., for example, there were 2,103 fiction titles published in 1930--21% of the total of 10,027 book titles published that year. By 1963 the number of adult fiction titles published had increased to 3,124 (of which 1,731 were in paperback format), but they represented only 12% of the 25,784 titles published that year.

> The trend is the result both of (a) competition from other forms of leisure time activity, such as television, the automobile and sports, and (b) the higher levels of education, science, technology and professional activity in the modern economy, which require much more extensive and intensive use of books as tools.

The same emphasis on books as tools of economic, social and political development is likely to be reflected in the types of books published in the developing countries. At the same economic level, these countries are likely to publish a much higher proportion of educational, scientific and technical books than was the case in the U.S. and Western Europe during the 19th century.

CHAPTER 3

THE TURKISH SURVEY: SUMMARY OF FINDINGS AND CONCLUSIONS

When the Turkish Republic was founded in 1923, the illiteracy rate was almost 90%. The adoption of the Latin alphabet five years later provided impetus for the growth of literacy and the book industry. Since that time, Turkish book output has expanded rapidly, especially during the last fifteen years. 1963 production of book and pamphlet titles (including reprints) was 5,193; translations accounted for about 25% of the more substantial works.

An estimated 29,000,000 copies of books and pamphlets were published in 1963. Of these, primary and secondary school textbooks accounted for about 12,765,000, and supplementary school books another 6,238,000. Book imports were small--only about 200,000 copies. Annual per-capita book consumption was slightly less than one.

Major inhibitors to the book habit include illiteracy, cultural resistance and an "oral" tradition, cost, the absence of libraries, inadequate distribution, and--most important of all--a memorization-oriented educational system, which does not encourage students to do independent research, to consult the library or study anything outside of the prescribed textbooks or lecture notes.

Publishing and Printing in Turkey

The National Board of Education in the Ministry of Education exercises complete control over school book and educational material content. It is responsible for curriculum design and textbook approval. Its workload is expanding faster than its capacity to handle it. After Board of Education approval, the book is published, then purchased by students through bookstores or student-cooperatives.

Textbook sales prices are set according to a government formula which takes into account the size of the book, number of pages and complexity of subject matter. The prices apply equally to private book publishers and the Ministry of Education. The low price level imposes severe limitations on the size of textbooks, their quality, attractiveness and durability.

Until 1949 all Turkish primary and secondary textbooks were published by the Ministry of Education under a single textbook system; in that year a multiple textbook law opened the field, with certain exceptions, to unrestricted publishing (teachers select the textbooks to be used in their classrooms). In spite of this change, the Ministry's plant has trouble keeping up with demand...there are signs that it may have to decrease its present scale of involvement in the textbook field, concentrating more in the important cultural book areas which may not be economically feasible for private publishers at present levels of demand.

In 1963, 66% of primary and secondary school textbooks were published by the private sector - which accounted for 77% of the books used during the last two years of primary school, and 98% and 96% respectively of the non-technical textbooks at the orta and lise levels. The Ministry of Education monopolizes textbook publishing for the first three years of primary school, for pedagogical schools, and for the few technical books used in the secondary schools. Supplementary books are predominantly of private sector origin.

The Ministry of Education's Publications Directorate produces, finances and distributes the public sector-produced books. Except for textbooks, which follow well-delineated channels to customers, its promotion and distribution efforts are weak.

The private printing and publishing industry is splintered into numerous small plants doing work of generally indifferent quality and earning a precarious living; the State Planning Organization, aware of the inefficiencies resulting from this fragmentation, is encouraging mergers and consolidations. The few big printing plants are busy but not overworked. Industry management lacks operating and financial know-how. Most publishers are also booksellers and/or printers. Industry trade associations are generally lacking, but the Istanbul Publishers' Association contains the nucleus of a group which may be of eventual benefit to Turkish education.

> Textbook publishing is highly concentrated...five firms publish almost 90% of the copies of privately-produced primary and secondary school texts. Price differential among textbooks is less important than publisher and author names and reputations.

The private publishing industry is weak in the promotion and distribution of non-school books. This seems due to the absence of an attractive market for general trade books outside of big cities and towns, and to the relative ease with which publishers have passed along to the Ministry of Education the responsibility of textbook distribution. Too many publishers try to market their own products; ignore sales possibilities offered by wholesale distributors and other booksellers. Private publishers sell through bookstores and other retail outlets; there is virtually no direct distribution to the customer. Sales are characterized by lack of formal marketing organization and an "order-taking" mentality. High postage rates for domestic shipment of Turkish books have an additional adverse effect on book distribution--especially in the more remote areas which lack bookstores.

Turkey's chronic foreign trade deficit forces it to control imports carefully. Paper, printing equipment and books are imported; of these, paper requires most foreign exchange, and books the smallest. Semi-annual quotas are set for paper and ink imports; printing machinery and equipment imports come under a global "investment-need" quota for Turkish industry. Books are not subject to quota or tariff, but the procedure for importing them is exceedingly cumbersome (except for those through the Informational Media Guaranty program--IMG).

Book Markets

Public education in Turkey is free, and primary school education is compulsory. Primary and secondary education, highly centralized under the Ministry of Education, is based on a nineteenth century French pattern. In spite of initial low literacy, precarious economic strength and a widely-dispersed village pattern which limits educational growth, Turkey has fought hard to provide educational opportunity to all.

Between 1950 and 1962, primary school enrollment doubled and secondary school enrollment trebled. But there is a sharp dropout in enrollment of school-age population as the academic ladder is climbed. While Ministry of Education statistics indicate that all, or almost all six-year-olds* began first year of primary school in 1962, they also note that only 49% began fifth year classes. 18.7% of the population age-group started orta (junior high school) and only 7.1% started lise (high school); in both levels, the percentage who attended third year classes was halved. Only 4% of the university level age group were enrolled. Education expenditures average 2.3% of national income.

Teaching is not a very attractive profession in Turkey. Salaries are low, the numbers of teachers are insufficient, and quality needs improvement. Thus, good school books are all the more important, to raise teaching levels and stimulate the learning process.

Turkish textbooks reflect the educational pattern--its weaknesses and strengths. The high density concept in textbooks reflects the general pattern of teacher lecture and pupil rote recitation. The Turkish educational system must change before textbooks and textbook usage can be revised significantly to improve education.

Textbooks are not provided free to primary and secondary students, except to the relatively few in pedagogical and state boarding schools. Primary school texts cost little, even in relation to village family purchasing power; secondary school books cost somewhat more. All approved textbooks are indirectly subsidized by virtue of a special low price which book producers pay for paper stock. Turkish children appear to have textbooks; Ministry of Education production statistics indicate that most have new texts...in addition, others have second-hand books.

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* Throughout this report, the American method for computing a student's age is used. This differs from the ages of Turkish children as reported until very recently in Ministry of Education reports. When Turks indicate that a child is in his seventh year, they usually mean that he has passed his sixth birthday, but not yet his seventh. Americans are likely to interpret such a statement as meaning that the child has already passed seven, and thus normally assume from school statistics that Turkish children enrolled in given grades are one year older than is the actual case.

There is a lack of adequate secondary level technical and vocational textbooks that is all the more serious in view of the great expansion these schools are to undergo in the near future and the lack of teacher know-how in using effectively those books which are available. The Ministry of Education, which monopolizes book production in this area, probably will not be able to take care of the increased needs.

There is no general university textbook market; professors' printed lecture notes, translations, or Turkish adaptations, mostly of outdated foreign books, generally form the basis of instructional material. This is particularly noticeable in the area of the pure and applied sciences. Because the use of these "books" is generally restricted to the authors' students, they are printed in small uneconomic quantities subsidized by the universities. The lack of foreign language fluency on the part of university students bars them from access to foreign language texts--a grave handicap in the fast-moving specialized areas of learning, where Turkey lacks the human skills to write many of these books. Besides, student enrollment, in most cases, would be insufficient to warrant publication of an adequate variety of modern textbooks in Turkish.

In Turkey, books are far from the large-scale effective tools they can be in raising the educational system to a higher level of quality and efficiency. Few Turkish officials or book producers have ever been afforded the opportunity of learning how the book creation process works, or how books can play a leading role in the educational process.

Adult education is key among other book markets, from the national growth point-of-view. In Turkey, adult education continues to be an important weapon in the elimination of illiteracy, but it is handicapped by an almost total lack of suitable reading materials. No textbook specifically designed for the civilian adult literacy program has yet been used, although one is being prepared; until now children's and Armed Forces textbooks have been employed. The Turkish Armed Forces operate the largest adult literacy program in the country today; working in close cooperation with the Ministry of Education, they have taught 250,000 recruits how to read, using excellent textbooks. There is a great lack of books for neo-literates.

With the possible exceptions of law, medicine and western-trained faculty members, there is little evidence of widespread book use by the professions; nor does the average professional buy imported books, to any extent. Reference books represent another neglected market. These small markets are seldom economically feasible for private publisher exploitation.

The market for trade books has been undergoing continuing expansion, but is still slight compared with the population. Printings average around 3,000-4,000 copies, and often take several years to sell. Many are translations of foreign works. There is great need for juvenile books of sufficient quality and interest to spur children to develop the reading habit.

Libraries are at an early stage of development; they provide a very small present market for books published in Turkish, or for imports. Books are too often considered commodities to lock up, and librarianship is insufficiently recognized as a profession. Primary and secondary school libraries are few; university libraries are generally fractionalized and "private" in nature; library budgets are miniscule and student use is minimal. Few public libraries lend books, and their collections are too often unbalanced.

Newspapers have long been important in the Turkish drive for mass education. Since the mid-1930's their number has increased six times, and the number of periodicals has tripled. In 1962, 1,635 different newspapers and periodicals were published. Newspaper problems revolve around distribution, not printing

Needs, Resources and Capabilities

All indications point to a continuing rapid growth and acceleration of book demand. School enrollments are projected to increase sharply from 1963 to 1977: in primary schools 91%, in ortas and lises 66% and 112% respectively, and in general higher education 175%.

> Technical and vocational enrollments are expected to spurt even faster. At the secondary level, technical schools will expand 641%, and vocational and pedagogical schools will rise 256%. Technical university enrollments will rise 673%. From 1963 to 1977, the number of technical and vocational lise students will rise from 36% to 58% of total lise enrollments, and university technical students from 17% to 37% of total university enrollments.

The potentially book-using professional, scientific, technical and administrative groups show similar large anticipated increases.

If there are no big changes in the current new-textbook-to-enrolled-student ratio, and if curriculum remains essentially unchanged - primary and secondary school new textbook needs will rise from a total of 12,765,000 copies in 1963-1964, to about 17,093,000 copies (a 34% increase) in 1967, and 25,862,000 copies (a 103% increase) in 1977. By then, assuming a continuation of the existing private/public sector division of publishing responsibility, the private sector would be expected to produce about 16,426,000 copies, and the Ministry of Education 9,436,000 copies--respective increases of 94% and 120% over the 1963 totals.

Assuming an alternate requirement of one-new-book-per-student-per subject (and unchanged curricula), textbook needs by 1977 would rise to 36,296,000--40% over the projection based on current new-textbook-to-enrolled-student ratio, and 185% over 1963's actual textbook production.

However, curriculum changes now under way at the primary and orta levels are likely to change the textbook usage pattern; teachers are being given more freedom to develop their own materials of instruction, and are using fewer, but better correlated, teaching units. The heavy emphasis on technical and vocational instruction also indicates great expansions in textbooks for these branches--especially in view of the present dearth of technical and vocational books. And the introduction of the multiple-book classroom system in some experimental schools, whereby many students use the same book, again indicates new textbook usage patterns that may affect future needs. Other probable changes involve increased classroom use of supplementary books and more adult literacy books. Some of these trends will tend to cancel one another out, but their net effect will increase book demand sharply.

Turkish textbook authors are discouraged from making bold, new content innovations. However, writing textbooks that adhere closely to a prescribed curriculum is relatively easy, and Turkey contains people capable of doing this. Trade book authors seem to be available for non-specialized subjects - although they are handicapped by the slight market of readers in Turkey, a small audience outside the country, and the Turkish copyright law.

Non-technical translators are plentiful and commercial artists are excellent. The chief human resource problem is lack of publisher comprehension of the editorial process and the training of editors to function within it. But little can happen until there are revolutionary changes in the Turkish educational and publishing patterns.

There is an almost complete lack of skilled craftsmen in the printing industry. Printing technicians generally lack a basic knowledge of their skill, and are relatively undisciplined. Training is minimal, and printing associations play no role in the process. Print shops prefer to hire inexperienced youths and train them on-the-job, rather than employ the graduates of the Istanbul Printing Trades Institute -with good reason.

Private book producers have difficulty borrowing funds of any kind: the Industrial Development Bank is barred by statute from lending money to the industry; short-term collateral and interest requirements are too high to be used to any extent. The Ministry of Education's book production activity is financed out of appropriations and revolving funds.

Most book paper in Turkey is the product of the monopoly government paper mill, but the paper--especially offset paper--is inferior. Production projections for the category of printing and writing paper indicate a 353% rise by 1975; the two 1977 textbook need projection increases noted above average only one-half as much. Since textbook paper accounts for only about 10% of the total printing and writing paper category, the 1977 textbook paper requirements can be met without difficulty - providing, of course, that paper production projections are realized. This, however, is far from certain, for foreign venture capital is not being attracted to new paper plants, as had been anticipated. Should construction of the new plants be delayed further, paper imports will have to be multiplied to meet demand, or paper production and consumption projections will have to be reduced--both unthinkable alternatives.

The efficiency of the 42 individual government printing plants is poor; their machinery is often out of balance, they lack coordination, and operate at mere fractions of one-shift production capacity. Most public <u>and</u> private printing machinery is obsolete and inefficient. The Ministry of Education's plant-- the only major book producer of the public group, and the largest print shop by far--has dedicated, hard-working management that is burdened with badly balanced equipment and unsufficiently trained, excessively numerous staff.

The key producers in Turkey's private printing industry average only one-and-one-quarter shift operation; the small plants probably even less. Basic problem is not insufficient plant capacity, but rather lack of skilled technicians and experienced managers.

Both the private and public sectors possess sufficient unused capacity to produce more books; with a modicum of new printing and binding equipment, and more efficient operating practices, there is little reason why the private sector cannot handle the projected textbook increases. Two-shift operation, alone, might bring the industry close to meeting 1977 requirements.

At the present state of Turkish publishing and printing development, there seems little immediate incentive for foreign firms (especially U.S.) to enter into joint-venture arrangements that are more elaborate in nature than the supplying of titles to local publishers for translation and adaptation, plus some technical assistance and financial aid, in return for royalties.

Turkey has received much printing and publishing-related aid from foreign sources. Chief vehicle of assistance has been the USAID Mission, almost every division of which has sponsored book projects. Other important outside sources include AID/Washington's Central Book Fund, USIS, The Ford Foundation, UNESCO, OECD, and the Peace Corps. The USAID projects with greatest impact have been those of the Office of Communications Resources, the Educational Materials Development Center and the Georgetown University Contract Group--which, in varying degrees, have helped train a nucleus of competent writing, production, editorial and art personnel.

CHAPTER 4

TURKEY - AND THE NATURE OF ITS BOOK INDUSTRY

Turkey began its development effort one full generation ahead of most emerging nations; in many respects, the country and its book industry have already faced and partly solved the problems new countries are even now meeting, or will meet in the future. In addition, Turkey is located at a historic crossroads; for millenia it has been a frequently used bridge between Europe and the land masses of the Asian and African continents, and between the "East" and the "West". Turkey's choice as the object for the book industry pilot study was thus a logical one.

GEOGRAPHIC, HISTORICAL AND SOCIAL BACKGROUND

Turkey straddles the narrow waterways that separate Europe and Asia. 97% of its territory is in Anatolia; the remainder in Thrace. Boasting long coastlines on the Mediterranean, Aegean and Black Seas, Turkey nevertheless borders many countries: Bulgaria and the Soviet Union on the north; Iran, Iraq and Syria to the east and south; and Greece to the west.

Since the beginning of recorded time, Turkey's location has placed it in the path of important social, political and economic forces. The heartland of modern Turkey witnessed the rise of the Hittite civilization dating from about 2,000 B.C. Later, Greek and Roman colonists established outposts in these and neighboring areas; some of which, i.e., Byzantium and Ephesus, became the stage for important events in the rise of Christianity. Byzantine scholars continued to cherish Greek and Alexandrian learning long after it had been cast out of Western Europe... and when driven out in 1453, they fed important elements back into the schools of Europe to support the Renaissance, from which modern Western ideals and concepts evolved.

The Ottoman Empire, centered in Turkey, extended its influence over the Middle East, much of Northern Africa, and at one time northward to the gates of Vienna. As a result of World War I, Turkey found much of its present and all of its former territory occupied by the victors. A dynamic revolutionary group, led by Mustapha Kemal Pasha, deposed and sultan, forced the occupiers to depart, and in 1923 instituted the Turkish Republic; whereupon it began to replace the Eastern traditions inherited from the Ottomans with those Western ideals and practices it felt would enable Turkey to undertake more efficiently the difficult ascent toward development.

The Atatürk Revolution: Stress on Education, Nationalism and Alphabet Reform

At the outset, the Turkish Republic faced social problems similar to those of the newly emerging nations. Its people were almost 90% illiterate, landless, and bound by archaic ties to an economic and social tradition.

The outlines of its system of public schools had already taken form under the Ottomans. The Islamic religion is a "revealed" religion. As such it has its sacred literature, given in revelation and recorded in Arabic, which needs to be transmitted from generation to generation. Under the Ottomans, small numbers of boys entered religious schools at about the age of seven and stayed three or four years. They learned to read the Koran aloud in Arabic, and to memorize it, generally without learning the meaning of the individual words, so different from their spoken Turkish language.

Books played a very minor role in either the education or the everyday life of the Turkish people. Fearful of losing control of the people, the sultans and the religious authorities opposed the general diffusion of knowledge. Printing was restricted by edict as well as by the cumbersome nature of the Arabic alphabet. Books were often handwritten manuscripts, admired equally as works of art, as of sources of information. Literature dealt mainly with religious matters and the vast majority of Muslim Turks had little opportunity to participate in their own government or to acquire the knowledge and skills needed to develop trade and industry.

As World War I approached, the Ottoman Empire still clung stubbornly to the culture, social and religious traditions of the past. The proclamation of the policy of public education had brought some support to a system of public primary and secondary education that, however, did not extend much beyond the environs of the larger towns. And even in these schools the Turkish language continued to be neglected in favor of "Ottoman grammar, history and geography". The vast majority of Turks continued to live in villages without schools, pursuing the traditional forms of agriculture, serving occasionally as warriors and ever obedient to the commands of the Sultan.

The new republican government detected that the people were not prepared, unaided, to make the difficult transition from local "tribalism" to responsible self-government on a national scale, and soon established tight control over education, the press and the economy (including the publishing industry). Turkey was proclaimed a secular state. The Arabic alphabet was outlawed and the Islamic and other "Ottoman" literature was banned from the schools and other public institutions. Kemal Atatürk recognized that the Arabic script and the cultural heritage around which it revolved were serious obstacles to the reform movement. In 1928, therefore, a law was passed replacing the Arabic alphabet with a 29-letter adapted version of the Latin alphabet.

Educationally, the Latin alphabet became a bridge over which the Turkish people could be led quickly to their new goals. Phonetic and easier to learn to read and write, the alphabet made it possible to successfully attack the almost universal state of illiteracy. It also assured that the new literates would read books and other instructional materials that presented "westernizing" ideas only, for the alphabet reform made it impossible for anyone who had not been in school in the 1920's to read anything published before 1929, and almost impossible for him to read, even in a transliterated form, anything before that date. It thus automatically dropped from the curriculum the Arabic and Persian elements and so cut students off from traditional cultural roots.

Lacking a history of education in reading and writing the new alphabet, or even a Turkish literature, the problem of securing its widespread use became a substantial one.

To disseminate the spread of literacy via the new alphabet, the government transferred education from religious control to its own, and greatly expanded an old government printing plant in Istanbul, which was assigned to the Ministry of Education.

The ban on the traditional Ottoman literature and script offered the government an excellent opportunity to introduce a highly selected list of literary works and school books as a basis on which to build the new nationalism. While a vigorous campaign to teach the new alphabet in the towns and villages was being waged, teams of translators worked to provide a body of Turkish literature from Western sources. Many classics and modern works were translated and inexpensively printed in the Ministry of Education print-shop; to date, more than 150 titles have been published.

During the early days of the Republic, with the banning of all books in Arabic and a restriction on books in Turkish, there were practically no books that could be put into the schools. The government inherited a monopoly in the textbook publishing field and continued to exercise it in its campaign to spread the new nationalism. For well over 20 years, no books but those printed and published by the Ministry of Education were permitted in the schools. Furthermore, there was but one textbook for each subject, an arrangement that helped perpetuate the attitude that the textbook is the ultimate authority and that it is imperative that the student memorize its contents.

By 1949, however, the number of schools and students had increased to an extent where it became impossible for the Ministry of Education's Publications Division to keep up with demand. At that time much of the textbook publishing activity was transferred to the private sector--a step which gave powerful impetus to the development of an indigenous private publishing and printing industry. Today, textbooks are the backbone of the private Turkish book industry.

The philosophy which brought a new alphabet to Turkey also gave birth to a movement for "purifying" the national language of its non-Turkish elements. The Arabic and Persian elements which were dropped have been replaced by some content of European origin; and this process continues unabated. The present fluidity of the language is a mixed blessing: many claim that written Turkish is rapidly drawing away from the spoken language, and that the Turkish scholar is losing contact with the Turkish people. All admit that the rapid obsolescence of words renders many books that were published only 10 and 20 years ago difficult to read, and causes translations of foreign works to become battlefields of conflicting linguistic theory.

Turkey Today

Turkey's population, now numbering 30,000,000 has more than doubled since 1927. Presently it is expanding at the very rapid rate of nearly 3% per year (a net increase of more than 800,000 persons). It is unlikely that this rate will decline in the near future.

The per-capita income of Turkey has remained stagnant at roughly $200 since 1956. Furthermore, the distribution of income is uneven; a great discrepancy exists between rural and urban incomes. Agriculture occupies 77% of the active population; industry about 10%.

Turkey's balance of payments in unfavorable, and is growing more so. Imports in 1963 totalled $691,000,000 and exceeded exports by $310,000,000. Commercial imports consist essentially of equipment goods (including spare parts) and raw materials; consumer goods represent a bare 12% of imports. While imports have risen with national production, exports have shown virtually no growth over the last decade. A large part of exports consists of commodities (such as tobacco and dried fruit) for which international demand increases slowly; much of the rest comprises minerals and other raw materials, prices of which have developed unfavorably.

Recently, the Turkish Grand National Assembly approved a Five-Year Development Plan to give a systematic and coherent answer to the nation's agricultural and industrial development problems. The 1963-1967 Development Plan projects sharp increases in educational enrollments, and in the training of scientific, technical and professional manpower--all of which are affected by the capabilities and resources of the Turkish book industry.

In spite of adversities, Turkey has made heartening progress. Literacy of those over six years of age increased from 10.6% in 1927 to 40.1% in 1960...although in recent years its growth has been slowed by the rapidly swelling population. From 1927 to 1960, male literacy grew from 17.6% to 62.1%; female literacy from 4.8% to 25.4%. (A person's ability to sign his name is the usual criterion of literacy.)

Another hopeful sign is the growth of a middle class. The Turkish economic and cultural pyramid is slowly but surely broadening, in the provinces as well as the major cities. This developing of intellectual and professional elites in the towns

has been described as the most important post-World War II cultural phenomenon in Turkey. It is coupled with a social mobility that augurs well for the future: the lack of a recognized class distinction, other than that between the rulers and the ruled, and the continuance of the earlier Ottoman ideal of equal chance of access to the ruling class for those equally able, provides a setting in which the poorest child (in a town at least) can obtain an education and rise to the level of his abilities.

Turkey has many of the book problems typical of the partially-developed lands. It has overwhelming future requirements for education and for technical books; its school age population is growing rapidly; it has limited financial and trained human resources.

Curiously, its book problems are compounded by the fact that among a minority of developing nations Turkey never experienced a cultural or political colonization. It thus lacks the widespread second language fluency in one of the "world languages" which alone insures speedy access to scientific and technological advances.

CURRENT STATUS OF THE BOOK INDUSTRY

It is difficult to measure precisely the current output of the Turkish book industry and thus to make valid comparisons over a period of time or with other countries. Since 1934 statistics have been assembled on the number of book and pamphlet titles published in the country, but Turkey's definition of books and pamphlets does not correspond to that used in other countries of recommended by UNESCO.

While overall title totals are available, no statistics have been kept on the number of copies of books and pamphlets produced or distributed each year, except for elementary and secondary school textbooks for some recent years.

Title Statistics

The Turkish book and pamphlet statistics are based on definitions which tend to exaggerate publishing output. These statistics are a by-product of the 1934 "Copyright Law" which requires five copies of every printed item of one page or more to be sent to the Ministry of Education's Istanbul Copyright Office for recording and subsequent distribution to the five national depository libraries. Thus classes of printed matter not ordinarily classified as books of pamphlets are counted, i.e. calendars and timetables.

The following indicates the extent to which the Turkish statistical standards differ from those ordinarily used in more advanced publishing countries, and shows why no really valid comparison can be made, for example, between the 5,193 titles published in Turkey in 1963 and the 26,000 book titles published in the United States that year:

Comparison of Turkish and UNESCO Standards

Type of Publication	UNESCO Definition	Turkish Definition
Under 5 pages	not counted	a pamphlet
5-16 pages	a pamphlet	a pamphlet
17-48 pages	a pamphlet	a book
49 pages and over	a book	a book
Unchanged reprint	not counted	counted
Offprints of journal articles	not counted	counted
Calendars, timetables, advertising matter, etc.	not counted	counted

Figure 1* shows trends in Turkish printing output since 1928. Measured against population rise, book and pamphlet output at first barely held its own, although it has increased sharply during the past fifteen years. This trend continued during 1963, when output rose 14% higher than the 1958-1963 average.

Other important facts concerning Turkish book and pamphlet output:

- The Turkish National Library publishes a breakdown of titles by subject. In 1963 the totals were:

Social Sciences	1,429	History, Geography, Biology	254
Literature	1,036	Pure Science	252
Applied Science	835	Fine Arts and Sports	208
General Subjects	709	Philosophy and Ethics	108
Religion, Theology	257	Language	105

- Approximately 25% of the output represents translations of foreign works.

- The geographical distribution of book and pamphlet title output reflects the extraordinary concentration of the Turkish publishing industry in Istanbul, and to a lesser extent in Ankara:

Istanbul	61%
Ankara	29%
Izmir	6%
Other cities	4%
	100%

Although no information is available on the number of titles "in print" in Turkey at any one time, it is estimated that there may be as many as 10,000 titles in print in Turkey at the present time. However, they are not really available for purchase because of the lack of a usable bibliographic listing.

Apparently privately published textbooks and supplementary readers are printed in quantities designed to be sold out completely each year, if at all possible. Other books (including technical textbooks published by the Ministry of Education) may be carried in stock for two or three years, or more...not

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* All Figures are presented in numerical order in Appendix A.

for the convenience of potential customers but because a printing of a size designed to sell out immediately would be uneconomic.

Number of Copies

Data are not collected in Turkey on the number of copies of books produced or distributed each year, except for approved school textbooks and supplementary reading books. These latter figures are maintained in an effort to control the use of specially-priced paper destined for educational use.

A direct comparison of per-capita book consumption cannot thus be made, either with other countries or with previous years in Turkey itself. A very rough estimate of the number of copies of books printed in Turkey during 1963 follows:

	Government Printed	Privately Printed
Copies of elementary and secondary school textbooks	4,297,000	8,468,000
Estimate of elementary and secondary school supplementary books	6,238,000	
Other Turkish books	9,580,000	
Imports	200,000	
Total Copies	28,783,000	
Books per capita	.95	

Note: Except for the textbook totals, these estimates have no reliable statistical base. The Turkish school book totals are high because books are paper bound, and frequently last only one year, and hardly ever more than two.

Newspapers and Periodicals

Statistics are also compiled by the Istanbul Copyright Office on the numbers of newspapers and periodicals published in Turkey. Although precise definitions are not used to separate non-daily newspapers from periodicals of frequent circulation, these data do not present as many problems as those on books and pamphlets and other printed matter.

Figure 1 shows the recent rapid growth which has characterized both categories. The average number of newspapers published has increased six times, since the mid-1920's; the number of periodicals has more than tripled. In 1962 the number of different newspapers and periodicals published in Turkey totalled a surprising 1,653.

The present machinery of the Ministry of Education's copyright deposit system provides the vehicle for development of an excellent and useful system of statistics on book, periodical and newspaper publishing--one that will measure progress in Turkey and make comparisons with other countries meaningful. But this will require (1) a better system of definitions, and (2) tabulation of data on the number of copies produced of private publisher titles. The UNESCO recommendations on the standardization of publishing statistics approved by the thirteenth Session of the UNESCO General Conference in November 1964 cover both requirements and provide a basic structure which can be easily adapted to Turkish needs.

FACTORS THAT INHIBIT BOOK USAGE

The objective facts are few and sketchy, but there is general agreement that the flow of books in Turkey is small; that it is difficult to buy a representative group of Turkish books in any field; and that many book publishers find it hard to exist on present sales volume.

Some few maintain that Turks' desire to read is great, but that they are prevented from doing so by a variety of causes. These include people who point to the common practice in rural areas of children imploring passing automobiles for newspapers. They also include men who maintain that with television non-existent and radio often inaccessible, the only practical

alternatives are talking and reading...and that the startling circulation rise of some newspapers shows that Turks are starved for reading material.

Most, however, claim that Turks lack a love of books; that long-extant practices and customs are the prime factors inhibiting the book habit. Among the causes most often advanced were (1) illiteracy, (2) cultural resistance, (3) cost, (4) absence of libraries, (5) inadequate distribution, and (6) - most important of all - the orientation of the Turkish educational system:

- With a literacy rate of 40.1%, it is obvious that a majority of homes are without books simply because of illiteracy.

- Even in the homes of the middle classes and the well-to-do, however, books and private libraries are rare. A prominent author noted that he had not heard of a single book discussion in Turkey for years, and that not over 5% of his educated friends had home libraries. In part, this is a reflection of the low educational attainment of older family members in even middle class homes, but most is attributed to a relative lack of vital interest in books; there is little feeling that Turkey is a "book-devouring" country where great personal sacrifices are made to buy reading material.

- An additional factor may be the continuing "purification" of the Turkish language, which many claim is causing the literary style to grow away from the speaking habits and vocabulary of the people; idiomatic books are needed.

- The high cost of books is sometimes mentioned. This is a factor for the rural poor who operate mainly in a non-money economy, and in the case of some expensive foreign books, for urban dwellers. However, with a few exceptions, Turkish books are generally low-priced, even in relation to low Turkish incomes.

- Lack of public libraries. Many of the literate population live in villages where public libraries are absent. Too often literates are furnished with the "golden key" but not the "chest of knowledge" it can open.

- Inadequate distribution pattern and facilities. This is particularly true in the out-of-school field, where distribution is a critical unsolved problem, especially in adult literacy.

- The most frequently accused inhibitor to further book usage in Turkey is identified as the educational system. Over and over, comments repeated the same theme: "Schools do not teach the reading habit...Primary school teachers have large classes; are preoccupied with finishing the year's syllabus; have time only for textbooks, not supplementary books...The lise system of secondary education, derived from the 19th century French system, stresses memorization with little training in independent research...University students are not provided with stimulating reading materials; they are dependent almost exclusively upon the lectures given by the professors, their assistants, or enterprising students who duplicate their notes and sell them to other students...The student is not trained to ask for or use reference works, and therefore does not learn the advantages of the world of books."

CHAPTER 5

GOVERNMENT PUBLISHING AND THE TESTBOOK INDUSTRY

THE MINISTRY OF EDUCATION'S PUBLICATIONS DIRECTORATE

Many Turkish government agencies are active in printing and publishing; according to a State Supply Office survey, there are 42 individual government printing plants. The major function of most of these is service: they print forms, stationery and various government bulletins and statistical reports. Because, however, this and the succeeding chapters concentrate their attention upon the component parts of the Turkish book industry, the coverage of the public sector is here limited to the Ministry of Education -- the only government agency to figure importantly in the book field.

The public sector responsibility for publishing educational and cultural books is lodged in the Ministry of Education. Within the Ministry, the Board of Education is the agency that determines school book policy for both the private and public sectors. The publishing operations of the Ministry are carried out by its Directorate of Publications, which operates an Istanbul printing plant that produces Ministry publications up to its capacity. The Directorate of Publications is also responsible for the marketing and financing of the books it publishes.

In addition to its key textbook function (see below), the Ministry of Education's Publications Directorate also produces foreign and Turkish classics, plays and art books, encyclopedias and periodicals...including a weekly official journal for teachers and monthly magazines for primary and orta level teachers.

Until recently, the Publications Directorate, through an affiliated Educational Materials Development Center, also

produced supplementary books for children, and textbooks, supplementary books and other instructional material for the Armed Forces adult literacy programs.

The Ministry of Education's printing plant prices its publications at the break-even point, since it must return profits on sales to the Treasury. As a result, printing cost is nearly always just a fraction under the net selling price, except for certain books such as the primers, which are purposely subsidized.

The philosophy behind the printing plant's costing and pricing system is simple: total expenditures are spread over the work produced, on the basis of labor hours accumulated for each job. The plant director receives output reports in monetary terms, compares them with the plant expenditures and then balances the two. In theory, all labor hours are accumulated on job tickets and charged to individual jobs (these are strictly direct labor costs...supervision and machine depreciation are not included). A machine is normally charged on the basis of the total labor cost of the men who attend it. 60% overhead is then added to take care of depreciation and other direct and indirect expenses. Because the present product is generally quite uniform--virtually all is book work; most printed on the same paper stock, using the same format and binding--the averaging out of total costs to total production does not lead to great inconsistencies.

Unfortunately, the method used does not indicate the true cost of individual books, nor does it provide for any production and efficiency control.

The Publications Directorate is financed by appropriations and revolving funds. During the last two years, the Ministry of Education has made special appropriations of 2,000,000 liras* per annum for new machinery; and an equal sum is planned for 1965. The distribution and sale of publications is financed by the "State Books Revolving Fund", which now totals close to 15,000,000 liras. The printing plant has a separate "Printing Plant Revolving Fund" of 125,000 liras. In its publishing of books, the "State Books Revolving Fund" in effect hires the printing plant - buys the needed paper, covers, pays royalties, gives the completed manuscript to the plant, and accepts delivery of the completed product. It is estimated that the

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* One lira equals 11.11 cents.

Ministry's printing plant uses approximately 975 tons of paper annually for textbooks, plus roughly another 300 for other books.

Except for textbooks, which follow well-known and apparently efficient channels to customers, the Publications Directorate is weak in distribution and promotion. For example, much of the supplementary book output of the Materials Development Center reportedly still remains in warehouses long months after completion. These books are advertised in the teachers' bulletins and are on sale at the fourteen Ministry of Education bookstores, but coverage, location and efficiency of the latter units leaves much to be desired. The overstocked condition recently induced the Publications Directorate to create a "book caravan" to take the books to villages near Ankara. The move brought some degree of success--in part because no one had ever seen the books before. The "caravan" is not, however, an effective long-term means of distribution; it is too narrow in scope and too costly. The Directorate does not distribute books through private bookshops.

ROLE OF THE NATIONAL BOARD OF EDUCATION IN THE SCHOOL BOOK PROCESS

Although Turkish school books are produced both by the Ministry of Education's Publications Directorate and private printers and publishers, the Ministry exercises complete control over textbook content and pricing, aids publishers by providing them with paper at a reduced price, and facilitates textbook distribution and sale.

The National Board of Education is the most influential body in Turkey from the standpoint of directing educational development and the use of school books and instructional material. A permanent advisory body without any executive power, it is composed of members appointed by the Minister of Education. The functions of the Board are various and broad; it seems to be consulted on anything that requires educational specialization--is responsible for design of curriculum, policy and examinations, and approval of textbooks and supplementary books for all primary, secondary and pedagogical schools.

The Board has full control over the material that goes into school books. Regardless of whether a book originates in the

public or private sector, it must be evaluated and approved before it can be used in the state-supported schools. Authors and/or publishers usually approach the Board with textbook manuscripts, but at times the Board commissions an individual or group to prepare one. This occurs when the book is to be produced by the Publications Directorate, or infrequently when the Board is dissatisfied with a current work. In approving the manuscripts submitted, the Board ascertains that they conform strictly to the prescribed syllabus and also assures itself that they will not harm international, racial, social or religious understanding. Textbooks are generally approved for a period of three years, after which they are subject to review and recommended revision of the Board.

Of recent years, the work of the Board of Education has snowballed. It is deeply engaged in curriculum revision to update the rapidly-expanding educational system; the use of supplementary books and other instructional material has increased; and the Board has been all but overwhelmed by the recent flood of privately published textbooks. The result, according to many, has been a diminution of textbook quality and a slowdown of textbook processing. The Board lacks the personnel or the time to adequately cover its many duties; often it has to evaluate the books hurriedly or "farm them out" for incomplete analysis.

PUBLIC AND PRIVATE ROLES IN TEXTBOOK PRODUCTION

Until the passage of the 1949 law which allowed unrestricted textbook publishing (except for the first three grades), Turkey had a single textbook system under which one text per subject per grade was used throughout the school system. The Ministry of Education recruited the authors or a commission to write the books, and all were published by the Publications Directorate. The change at that time was considered desirable because the Directorate was behind on its publishing program and the competence of authors and private publishers had increased to a point where they could begin to carry some of the load.

Since 1949, the production of textbooks, with certain exceptions, has been turned over to the private sector which, spurred by competition, has developed multiple books for the same subject. Theoretically, the approval by the Board of Education of a multiple list of textbooks makes it possible for authors to write and publishers to publish a variety of basic textbooks

designed to meet the differing needs of village and urban students. But such is not the case; all textbooks must follow exactly the same curriculum--and the result is a marked similarity of content.

There has been much praise and much criticism of the multiple book system and the private sector's handling of textbooks. Much of the comment was necessarily subjective, but most agreed that while school books were still rather poor, they were nevertheless somewhat better in aggregate than those previously produced under government auspices and offered some advantage of choice. Private industry naturally backs the multiple book system; claims that competition has produced better results. Most at the Ministry of Education also advocate continuance of the multiple book system.

From a practical point of view, the Publications Directorate could not possibly handle the load if for some reason there was a reversion to the all-government-produced single book system. Twenty years ago there were only 80, not 500, technical and vocational secondary schools, and there were 8,000 primary schools, not 27,000 as now. Where once it printed 150,000 primers, now the Directorate prints 1,000,000 per year (using free press time) and can't keep up with demand. Working full time, the Ministry's printing plant now prints annually about 75,000,000 sixteen-page printed signatures.

(While the Ministry does not intend to enter more forcefully into the textbook field--and there are indeed signs that it may decrease its present scale of involvement--it is expanding its efforts in important cultural areas that do not seem to be commercially feasible, i.e. comprehensive encyclopedias and dictionaries, and art books). At present, the Ministry retains a textbook publishing monopoly in these four areas:

> Primers and readers for the primary school grades (to provide stability and uniformity for a changing Turkish language).
>
> Books used for religious instruction (to develop a common set of values and beliefs).
>
> Pedagogical books used in teachers' training schools.
>
> Technical books used in the commercial, vocational and technical secondary schools (to insure that content keeps pace with technological change. Theoretically,

the Ministry may print a new edition before the stock of the outdated previous edition is exhausted -- something private publishers cannot do. In sample checks, however, the team found many books that have remained unchanged for 10-20 years).

Figure 2 shows that the private and public sectors shared the 1963-1964 textbook market as follows:

Published by Private Sector
8,468,000 Textbooks (66% of total)

4,256,000 copies - Second stage primary school (4-5 grades): 77% of total
3,306,000 copies - Orta level, non-technical books: 98% of total
906,000 copies - Lise level, non-technical books: 96% of total

Published by Ministry of Education
4,297,000 Textbooks (34% of total)

2,517,000 copies - First stage primary school (1-3 grades): 100% of total
1,307,000 copies - Second stage primary school (4-5 grades): 23% of total
64,000 copies - Orta level, non-technical books: 2% of total
34,000 copies - Lise level, non-technical books: 4% of total
158,000 copies - Secondary level technical books: 100% of total
211,000 copies - Pedagogical textbooks: 100% of total
6,000 copies - Religious textbooks

Figure 3 shows that the private sector dominates the supplementary school book market; that it produced fully 80% of the supplementary titles approved for 1964-1965.

The textbook approval process follows this normal procedure:

1. A private publisher either commissions an author to write a manuscript, or an author brings a manuscript to the publisher. In both cases, the manuscript is submitted complete to the Board of Education with all illustrations and art work. Occasionally, as noted previously, the Board of Education commissions a textbook to fill a gap. In no case is there much editing of the manuscript before submission.

2. The Board of Education evaluates the manuscript - approves it, rejects it or returns it to the author/ publisher with suggestions for revision. Evaluation may take many months. This completes the editorial function.

3. If the Board accepts the manuscript, it is sent to the Publications Directorate, where it is priced - depending on the size of the book, the number of pages and the complexity of the composition (see below for the approved pricing formula). When the Ministry publishes a book, the final text and layouts must be in its hands eight months before distribution begins.

4. After approval, the title is included in the official list published annually in the mid-May issue of "Tebliğler Dergisi", the Ministry of Education's weekly bulletin for teachers.

5. The book is printed either by a private publisher/printer or the Ministry's printing plant, depending on the manuscript's origin. Books must be available for distribution two months before school starts.

Authors of Ministry-published and printed textbooks receive a royalty based on a percentage of costs, with a minimum. The royalty and the minimum both increase with grade because the student enrollment and thus the number of textbooks published drop sharply as the grades rise.

Authors of privately-produced books make individual royalty arrangements with their publishers. Formerly, authors were given flat fees; but the royalty percentage basis is growing in acceptance.

TEXTBOOK SELECTION, DISTRIBUTION AND PRICING

The list in the mid-May issue of "Tebliğler Dergisi" is sent to all primary schools, ortas, lises, technical and vocational schools and normal schools. It contains the titles, authors' and publisher/booksellers' names and the prices of all textbooks and supplementary books approved for use during the succeeding academic year. Unless a book appears on the list, it cannot be used in the classroom.

Textbook titles are selected by the school director in conjunction with class teachers at the close of the academic year. Teachers choose the specific titles they intend to use. After selections have been made, the information is collected on a schoolwide list which includes the total quantities and the titles of the textbooks that will be needed and the number if any, still on hand from the previous year. The book list is then brought to the local certified bookstore (or to the school book purchasing cooperative), which orders the books from the publishers. A copy of the order goes to the Publications Directorate, via the provincial director of education, for consolidation into a master list and the issuance of the special reduced price permit for textbook paper obtained from the government's Izmit paper mill. The amount of paper author ized for individual publishers is based on Publications Directorate and private publisher projections.

Privately published books are generally sold to bookstores and cooperatives at a 20% discount. Private bookstores order copies of the Ministry-published books direct from the Publications Division's warehouse, or from the Ministry's own bookstores. In either case, the books are sold 15% off list and the Ministry pays postage, which equals another 4-5%. Students buy textbooks either from the local certified bookstore or, if one has been organized, the student cooperative. The school director usually handles the money with which the cooperatives buy books. Purchases are often made by money order from publisher warehouses. It can thus be seen that distribution of textbooks follows well marked channels.

Promotion of newly approved textbooks consists primarily of sending examination copies to the schools involved and to the provincial directors of education. Because there are 27,000 primary schools, the publisher does not cover all; rather, he usually sends the new textbook to 2,000 or so of the more important schools. Then he awaits orders, confident that the inclusion of his product on the approved textbook list will attract sales. Second year orders are likely to follow the same pattern because of the use which is made of second-hand copies.

The prices at which textbooks must be sold are determined by their size and complexity, and the number of sixteen-page signatures they contain. Figure 4 shows the current pricing formula set by the Directorate for textbooks. The formula is identical whether the book is published in the private or public sector; is based on fixed prices per signature that

vary depending on page size, the school level for which the textbook is intended, and the complexity of the printing matter (e.g., whether it is straight printing or includes graphics and formulas).

Price-per-signature rates are set annually by the Publications Directorate and are based on a formula which includes paper cost, labor cost, royalties, insurance, warehousing, and a percentage for profit. The figures are established each January, after a survey reportedly conducted among various private publishers and at the Directorate's printing plant. The per-signature formula price has remained unchanged over the past four years. During this time special reduced price paper costs have varied:

1961 - 2,260 liras/ton (third quality paper used)
1962 - 1,800 liras/ton (third quality paper used)
1963-1964 - 2,300 liras/ton (a special upgraded paper, half-way between second and third quality.)

The result of strict price control is low-priced textbooks. For example, a leading fourth grade textbook, 112 pages long, 59 x 84 centimeters trim size, with maps printed in two or more colors, sells for 1.25 liras (14¢); a first year lise general geography, 178 pages long, same trim size, printed throughout in black and white, is priced at 3.10 liras (34¢).

Several factors contribute to the low price. The books are cheaply printed on low cost pulpwood paper; the signatures are bound by wire stitching; the books are paper bound; and the publishers have virtually no editorial or marketing costs. Editorial and design costs of Ministry-produced titles are apparently not charged against the book costs. If these "hidden expenses" were included, they would materially increase the cost.

The low price level of textbooks imposes severe limitations upon their attractiveness, quality and durability. However, although some private publishers complained that the fixed signature price put them "in a straightjacket", none claimed that they were unable to produce books at a profit.

No one questions that a lifting of the fixed price regulation would improve the appearance and probably the content of textbooks, for private publishers might then be able to afford research expenditures that would bring about product improvement. However, there is a fear of adverse political reaction

to the abolition of the fixed price and the resulting inevitable textbook price increase. For this reason, a speedy elimination of the practice cannot be counted on, even though its retention does have a definite inhibiting effect upon Turkish school books.

CHAPTER 6

PRIVATE PUBLISHING AND OTHER LOCAL BOOK PRODUCERS

When the Turkish alphabet was reformed in 1928, the Ministry of Education was the country's almost exclusive producer of books. At that time the private book industry hardly existed. It did not begin to assume a vital role in the educational and cultural life of Turkey until an additional 21 years went by, when the 1949 multiple textbook law provided it with a market base of sufficient economic breadth to permit expansion into other book areas.

THE PRIVATE PRINTING INDUSTRY

In general, the Turkish printing industry is splintered into numerous small plants, doing poor work and existing precariously. The few big plants are busy, but not overworked; few run more than one shift plus occasional overtime. The industry lacks much in the way of organizational, management and costing know-how.

The nature of the Turkish printing industry can be more readily gauged than its size. It consists of hundreds of small letterpress shops (the State Planning Organization estimates there are about 1,500), plus several dozen plants with 25-50 workers. The half-dozen largest plants may employ as many as 50-100 workers. The situation is typical of a young printing industry. Most of the small plants have been established by printers who opened businesses of their own, after having worked for larger firms; these artisans know something about technique and next to nothing about business practices.

It is difficult to ascertain how adequately the private printing sector meets present needs. Its one-shift operation pattern

suggests that it is functioning far below capacity, but it almost certainly needs better organization and training if it is to expeditiously handle swiftly growing demand. The private printing plants are concentrated in Istanbul, Ankara and Izmir, in that order. (See Chapter 10 for a more detailed discussion of the physical and human resources of Turkey's private printing industry.)

The fragmentation of printing into small family-type enterprises is abetted by the Turkish tax system, under which businesses with annual volume under 60,000 liras are not subject to the business or corporation tax, and businesses employing four or less workers are not required to withhold income taxes from salary payments. Authors are taxed on declared book income over 10,000 liras per year; the lack of small printer record-keeping makes them attractive to tax-avoiding authors and thus hinders the development of substantial professional publishing houses.

The State Planning Organization, however, is aware of the inefficiences brought about by fragmentation within the printing/publishing industry, and is actively encouraging printing plant mergers into larger enterprises to foster large-scale efficiency. This effort is backed by a tax policy favoring larger firms. Thus, approved enterprises that invest over 250,000 liras are eligible for tax reductions of from 30% to 50% (depending on the part of Turkey in which the plant is erected). Firms too small in terms of size and capitalization cannot invest the minimum amount required; the SPO thus anticipates that there will be a tendency toward small-firm mergers to take advantage of the tax reduction provision.

Most printers quote standard prices for setting up and printing standard-sized sixteen-page signatures. The price for a 17 x 25 centimeter format, using second quality paper, is usually around 350 liras ($38.50) per signature for the first 1,000 copies, including cardboard cover and incidental art work...but the smaller plants, with little overhead and much use of boy apprentices, occasionally cut prices deeply. By contrast, however, the few large "professional" printers are reputed to charge as much as the traffic will bear. They rely on their superior quality and regular delivery schedules to attract customers. Many of these big printers do beautiful work...some of it worthy of export.

THE PRIVATE PUBLISHING INDUSTRY

No exact information is available on the number of book publishers in Turkey, or the number of titles and copies each publishes. However, it is evident that there is a great deal of concentration within the industry. Some of this is geographic; the 25-30 members of the Istanbul Publishers' Association account for about 90% of the private book publishing in Turkey. Some of this concentration refers to size: as noted below, just five firms account for almost 90% of primary and secondary school textbooks (and textbooks, of course, represent a substantial proportion of all books published in Turkey).

Like the nation's printers, Turkey's large and small publishers are typical of those in the early stages of publishing development. Most, in fact, are booksellers or printers who also publish. The majority of publishing firms are family-owned or are partnerships. They do not publish financial reports and did not appear able and/or willing to provide the book survey team with details of financial operation. Their fear of competition and the tax collector impells them to maintain "business secrecy". They tend to look upon the firm as a family project -- too often withdraw profits rather than reinvest them in the business; are insufficiently financed; and the smaller firms engage in price-cutting practices.

The overwhelming majority of both publishers and printers learn whether they have made a profit only at the end of the year, after balancing income against expenses. They do not know or use internal costing systems or budgetary controls; are thus unable to tell with certainty which of their titles are profitable and which are not.

The industry's stage of development is shown further by the relative weakness of the only publishers' association. Although it is almost 20 years old and its members comprise the country's most important and alert firms, the Istanbul Publishers' Association lacks a full-time paid director or staff, and its principal function is apparently limited to representing the private sector in discussing specific problems with the government. Although presently undeveloped, the Association, with proper guidance, might form the nucleus of a creative, powerful group which can be of benefit to Turkish education as well as to the book industry.

THE IMPORTANCE OF SCHOOL BOOKS

Almost all the major publishers depend for their basic business on school books. The textbook business is especially important. It is highly seasonal, but has the advantage of high volume sales, high turnover and quick return on investment. Publishers print only sufficient copies for one year's sale (their reduced price paper allotment is projected on this basis); printings are large (in 1963-1964 they ranged up to 200,000 copies for approved primary school textbooks, up to 100,000 copies for orta textbooks, and up to 50,000 copies for lise textbooks). And there is little carryover, because the number of copies produced is predicated on school estimates of needs.

Textbook profit margins average about 10%-15% of net sales (see Figure 5).

> (The trade book market has few of the advantages of the textbook market. Except for a few isolated best-sellers, general trade books--mainly fiction --are published in small editions of about 3,000-5,000 copies which may take several years to sell. Profit is consequently small: a year's sale of 2,000 copies of a 5 lira novel totals only about 7,000 liras ($770), after bookstore discount and distribution cost have been deducted. If profit equalled a high 15% of net cost, it would total only about 1,000 liras ($110), not a great deal for a year's effort.)

Probably because it can be profitable, there exists much competition in the private textbook market. Publishers and authors must adhere strictly to the syllabus; cannot improve their books by including new content. Private publishers, therefore, strive to win acceptance for their titles among teachers and school directors by recruiting authors with classroom experience, and by including colored illustrations and dramatic covers. And some leading publishers have two or more of their own textbooks competing for sales in the same course.

The 1964-1965 list of approved textbooks shows this intense competition and title proliferation. For example, there are 50 approved fourth grade primary school books for the six courses which feature privately published texts:

- 13 are competing mathematics books (including 3 by Inkilap ve Aka, and 2 by Ders Kitaplari).

- 12 are geography books (including 4 by Ders Kitaplari, and 2 each by Akif H.B.M.H. and Inkilap ve Aka).

- 8 are history books (including 3 by Inkilap ve Aka).

- 7 are civics books (including 2 by Inkilap ve Aka).

- 5 are natural science books.

- 5 are "family life" books.

This intense competition is confined to a concentrated number of firms; the "big five" textbook publishers--Atlas Yayinevi, Remzi Kitabevi, Ders Kitaplari Anonim Şirketi, Güven Yayinevi, and Inkilap ve Aka Kitabevleri--apparently captured 87% of the 1963-1964 primary and secondary school private textbook field. They accounted for 92% of all primary school private textbook production, 86% of orta private textbook production, and 65% of lise private textbook production.

An analysis of individual title sales figures reveals that price differential among textbooks (competing books may vary in price by 20%-30%) is less important than publisher and author names and reputations. Thus in the 1963-1964 academic year, Atlas Yayinevi produced at least eight of the twelve top selling private titles in fourth and fith grade primary school courses. All eight were authored or co-authored by Nimet Çalapala (an ex-teacher and wife of Atlas' publisher) who apparently wrote or helped write books which seem to have accounted for over half of that firm's textbook sales and possibly as much as 15%-20% of the total number of private textbooks sold to the primary and secondary schools.

NON-SCHOOL BOOK PROMOTION AND DISTRIBUTION

Distribution has been defined as the effort to get books to the customer; promotion as the effort to induce people to buy books. In the case of trade books, the private Turkish publishing industry is weak in both areas.

When Turkish publishers own one or more bookstores (and most do), these constitute their chief outlets for non-school books. In geographical areas not covered by their own bookstores, the publishers may sell directly to other bookstores or use Turkey's few book distributors. Publishers usually promote through booklists and catalogs, and some do newspaper advertising, but they are unlikely to do much more. Full-time book salesmen are not employed; rather, the publishing firm principals themselves make the necessary periodic road trips. These trips are confined to the larger population areas. It should be recognized that it is a formidable task to reach the book outlets outside of the larger towns and cities; at present it does not seem economically feasible for publishers to do so on a regular basis.

The absence of an attractive market for general trade books outside of the big cities and towns, coupled with the Ministry of Education's, and the individual schools' assumption of responsibility for procuring needed textbooks may partly explain the lack of a more effective and aggresive non-textbook distribution system. Nevertheless, until such networks are constructed, publishers will find it difficult to enlarge their market to any large degree.

Physical distribution of books is handicapped by high postal rates; it is mainly carried out by truck, or in some cases, water freight. As often as not, it is the customer who must go to the publisher, or send him an order, in order to make the purchase. Publishers seldom seek out customers.

Many sources reported a reluctance on the part of some publishers to permit local sales to be handled by other booksellers; they try to concentrate these sales in their own hands. Only where publishers are clearly unable to reach an existing market do they seem willing to let other booksellers participate in the selling effort.

On the whole, the attitude of private publishers toward book distributors is even less encouraging than it is toward other booksellers. Most avoid them. Consequently, book wholesaling in Turkey is in its infancy. There are about 750 Turkish book outlets -- most are general stores which sell books along with many other products (only about 15%-20% are large enough to concentrate on books and related items). However, the number of book distributors is tiny; they are typically newspaper and periodical distributors who have expanded into the book field.

An important book distributor, during the team's visit, was Orhan Ozsisman, who sold books, newspapers and periodicals in Izmir and the surrounding area. Mr. Ozsisman received piggyback rides for his books on the trucks of the distribution company owned by the newspaper HÜRRIYET; thus received daily deliveries from Istanbul.

During the concentrated textbook season, however, he received large shipments by water freight. He sold to 40 Izmir book outlets and served approximately 125 book outlets in the Aegean area, through his news vendor network. Somewhat under half of his total business consisted of book sales; of these, two-thirds were textbooks.

> He stocked 800 school book and 3,000 trade book titles, and had 17 employees and 3 trucks of his own. He owned outright 70% of his book stock; the rest was on consignment.

Another important book distributor is Bateş Teşkilati of Istanbul. Bateş, too, was originally set up to distribute several of the major Turkish newspapers and periodicals, and most of its sales volume still comes from the latter. The firm devotes most of its book distribution efforts to those produced by Hayat Kitaplari, Doğan Kardeş and the Turkish Language Association, but also distributes individual titles of other publishers, selected on the basis of sales potential.

> Bateş stocks about 300 titles, of which 75 are new each year; takes physical possession of them. It mails announcement leaflets on each major title and, several times a year, sends a complete book title catalog to approximately 700 book outlets. Delivery is made by one of Bateş' 15 trucks (to western Turkey), or C.O.D., via the post office (to eastern Turkey).

Private publisher book discounts average 25% to bookshops (plus mailing charges which amount to 4%-5%), and are usually 30%-40% plus mailing charges to wholesalers. Textbook discounts are lower; i.e., are 20% to bookshops and to school cooperatives (which get free delivery). Distributors give a 20% discount off list price to bookshops; report they need a 15% margin to operate successfully.

Credit terms range from 30 days up to 90 days net, but much of

the business with smaller book outlets is done on a C.O.D. basis. Few retailers are served on an open account basis; most have established credit limits, and many must post performance bonds with the publisher or distributor. Some distributors receive some stocks on consignment (e.g., Ozsisman). Textbooks are usually sold on a cash basis. Publishers accept a certain percent of returns.

In sum, distribution by the private sector in Turkey is still confined to the trade itself. There is practically no distribution to the consumer -- eliminating the potential for consumer mail-order purchasing and restricting availability of books in small towns and villages which lack bookshops. With such a background, it is premature to propose the introduction of sophisticated sales techniques into Turkey. These must await book market growth to a size that will be able to support such methods.

Private marketing is weak. It is characterized by the lack of a formal distributive structure on the part of almost all private publishers; it is characterized by a promotional effort -- consisting mainly of catalogs mailed to bookstores -- that is more closely related to "order-taking" than to marketing alertness. Much sales effort is restricted to part-time trips on the part of already overburdened publishing executives; much merely duplicates efforts of other firms; and little use is made of the wholesale-distributors who alone have the potential for efficient, cost-saving distribution.

There is, in short, a great need to improve the efficiency of marketing practices in the private book industry, just as there is a great need to improve the Ministry of Education's badly outdated distribution system for supplementary books and classics.

Internal Postal Rates on Published Materials

A final note on internal postal rates: single book shipments within Turkey fall within the printed matter category (weight limit: two kilograms - 4.4 pounds) Rates Are:

. For approved textbooks and supplementary books, newspapers and periodicals	- .01 lira per 50 grams
. For other books	- .10 lira per 50 grams
. Minimum postal money order	- .50 lira
. C.O.D. charge	- .50 lira
. Registry	- .50 lira

Thus, when a single copy of a book weighing 500 grams (1.1 lb.) is sent by mail C.O.D., it costs the customer 1.60 liras (18¢) for postage, C.O.D., registry and postal money order, if it is an approved textbook...and 2.50 liras (28¢) if it is a general trade book. Since checks are little known in Turkey, the C.O.D. money order system is the usual one used.

These domestic postage rates add up to a rather high total, considering that textbook prices average 1.50 to 3.00 liras (17¢-33¢) - and trade book prices normally vary between 3 and 10 liras (33¢-$1.10). Turkish rates (including parcel post) are proportionately much higher than those in the U.S. and many other countries, in relation to book prices and the general standard of living.

The rates undoubtedly have a dampening effect on book distribution in Turkey since there are no alternative methods for small shipments to all areas and sometimes even for large shipments to places outside the cities and big towns. The Istanbul Publishers Association has been trying to induce the government to reduce the postage rate for non-approved books to the approved book-newspaper-periodical rate.

The postal system is a major method of book distribution in all countries, and especially in those like Turkey with a population rather widely scattered in villages and with a thin transportation network. Yet, as noted above, the cost of shipping a single book equals a sizeable percentage of the book's selling price--at times even matches it.

THE UNIVERSITIES

University "Textbooks"

There is no general university textbook market. Textbooks are not used to a great degree, and professors usually sell their own printed books or lecture notes to their classes.

The quantity of these "books" is usually small, for they are sold normally only to the professor's captive student market and are seldom adopted by other professors -- even in the authors' own universities. Because they are printed in small, uneconomic quantities, these "books" are usually subsidized by the universities. Thus, in 1963-1964 Aegean University supported 100 "books" -- 66 by members of the Faculty of Agriculture, 26 by members of the Faculty of Medicine, and 8 by members of the Faculty of Science. Typically, each was subsidized to the amount of 1,500 liras ($165) paid to the author, plus the cost of printing.

There are as yet no fully developed university presses at Turkish universities, although many have small print shops which produce numbers of professors' books. Ankara University's Faculty of Letters publishes about ten subsidized titles per year; these are printed either in private shops or in the university's own print shop.

To qualify for subsidization, a manuscript must be approved by a university's publications committee. Manuscripts are rarely rejected; editorial services are not provided, and the manuscripts are usually printed unchanged. They are published in the sequence in which they were approved, and if printed in the inadequate university print shops, completion may be delayed considerably. Professors may contract with private printers without forfeiting the university subsidy, but this method is more expensive.

The print runs for many university "books" range from 300 to 3,000 copies -- although occasionally the books reach wider audiences. An example of such a case is a two-volume English reader (covering two years of instruction) which was produced by a noted Ankara University professor of English. The combined volumes sell for 10 liras ($1.10), and were published in 5,000 copies.

The University of Istanbul Faculty of Letters subsidizes "books" in another way. Instead of royalties, the professors are given free the first 600 copies of their books, to sell to their students (and hopefully to others). The university assists the professor in this endeavor, by refraining from placing on sale any of its holdings (usually an additional 1,400 copies) until the first group has been sold.

Neither the university nor the private printer who prints a university "textbook" provides assistance in marketing the finished product. As a consequence, sales languish. At all universities visited by members of the book survey team, it was reported that large stocks of university-owned "books" lay in warehouses awaiting sale.

University Periodicals

The individual faculties of many Turkish universities publish their own bulletins or periodicals in which foreign as well as domestic research and opinion is noted. Thus the Science Faculty of Istanbul University publishes a quarterly "Periodical of the Science Faculty"; the Science Faculty of Ankara University publishes a similarly-titled quarterly "Journal of the Faculty of Science"; the Faculty of Architecture of METU has just launched a "Journal of Architecture", etc. Some of the faculty publications are successful; others have encountered difficulties because single faculties often cannot produce manuscripts of sufficiently high quality to be published. The faculty periodicals are usually subsidized; income from subscriptions is not sufficient to maintain them.

Team suggestions that different faculties might consider combining their efforts to provide improved contribution levels, editorial services, cross-faculty stimulation and a more frequent publication with larger circulation, aroused little general interest. Nor did academicians feel the strong need for an inter-university press which might make available to Turkey's university teachers research done in their fields in other countries.

Until universities learn to look for quality in Turkish language textbooks and other scholarly publications and professors are willing to use as textbooks the work of other professors,

even those at other universities, no market can be developed to support an effective university textbook publishing operation either by private publishers or university presses. The problems standing in the way of developing such a market are too great to be dealt with by a single Turkish university, but several forms of inter-university cooperation are called for... cooperation that will afford competent editorial as well as marketing assistance. The initiative must probably come from a non-university source. Unless the educational institutions of Turkey can continually feed new knowledge into the educational bloodstream, they may retard rather than accelerate the development process. The Turkish universities have not as yet assumed their full responsibilities in this area.

Professors and secondary school teachers generally are aware of this deficiency. Almost without exception, they stress the difficulty of securing up-to-date information about developments in their respective fields of specialization. These difficulties arise from the fact that Turkish scholarship has not yet developed sufficient research capabilities to be self-sufficient, while at the same time the language barrier and the high cost of foreign books restrict its access to foreign scholarship. Also, there is a high degree of inertia in the university community.

The absence of Turkish professional journals of high quality with national circulation is an additional important limiting factor.

NON-PROFIT ORGANIZATIONS ACTIVE IN BOOK PRODUCTION

This section discusses three local organizations that are important factors in the Turkish book industry, either because of scope and activity, or quality and type of publications produced.

(1) The Turkish Historical Society, a privately-endowed, non-profit organization with semi-official status, has the most modern and efficient printing plant in Turkey. Its book activities are two-fold.

> The Society prints scholarly publications. In 1963, it published 177 books and pamphlets on Turkish history,

philosophy, archaeology, history of the Turks, and general historical works. These works, usually written by the Society's membership (35-40 noted scholars), are not edited; they are simply laid out and printed. Infrequently the Society publishes the work of others. The average run of Turkish Historical Society publications is 1,500-2,000 copies; authors are paid 15 liras per 220 words. Distribution is handled through eight bookshops and the Society's headquarters; most sales are made at the latter -- either by personal purchase or mail order. Students and teachers are the prime customers; both receive 25%-50% discounts. 200 copies of Society publications are sent to overseas institutions; 150 are distributed to Turkish libraries.

To fill plant capacity, the Society additionally does a great deal of commercial printing. It works on a cost plus 20% basis for a relatively few selected clients who want high quality work and are willing to pay for it. Included in this contract printing activity is the publishing of various university textbooks and monographs.

(2) The Union of Chambers of Commerce and Industry is the central headquarters for 154 different chambers of industry and commerce and commodity exchanges. Privately-supported by its members, it is recognized by the government as spokesman for the private sector; has received the financial and technical support of both the Turkish government and USAID/Turkey for its investment activities.

The Union has its own printing plant and produces a diversified group of business publications. Those published or in preparation include:

- The Daily Trade Register: a tabloid-sized periodical which contains announcements of new business charters, bankruptcies, etc. 1,500-5,000 copies daily.

- The Weekly Turkish Economic Gazette - 3,700 copies.

- Investment promotion publications: i.e. Investment Guide to Turkey, The Foreign Investment Encouragement Law.

- Industry monographs. There have been fifteen, so far.

- Industrial opportunities publications. 10 planned.

- Directory of Manufacturers, etc.

Publications of the Union of Chambers of Commerce are sold at the organization's Ankara sales office, or by mail.

(3) The American Board of Foreign Missions represents the United Protestant mission effort in Turkey. That effort has been directed toward education goals, and has made itself manifest through colleges and secondary schools the Board operates, and through its publications -- which seek a wider audience. The American Board publications, usually multilithed by private printers, concentrate in these areas:

The Redhouse English-Turkish dictionary, published in 1950 with Ford Foundation and USIS subsidy: This work is the accepted standard for English-Turkish dictionaries. Price is 45 liras ($4.95). The Turkish-English section is now in preparation.

Juvenile books: These are literary in nature, or are designed to help Turkish children learn English. Many are translations; almost all are secular with strong moral overtones. Several American Board juveniles are on the list of approved supplementary books for schools. Because the Board is convinced that most juveniles should not sell for more than one to one-and-a-half liras, book lengths are often held to a single signature. Juvenile printings are set at 5,000 copies (a 3-year supply) so that costs can be spread sufficiently to permit a low selling price. Until recently, these printings were 10,000 (a 6-year supply), which tied up excessive amounts of capital.

Books for neo-literates: Seven titles have been published so far; two more are planned. These small books retail for .25 to .50 lira, (3¢-6¢), and are printed in runs of 10,000 copies.

The American Board also publishes books for adults (i.e., Reveille for a Persian Village, The Life of Mahatma Ghandi) and a few inspirational religious books. In 1960 it published the well-known Report of the Turkish National Education Commission.

In the past, the best customer for the American Board's children's and neo-literate books has been the Ministry of Education. The juveniles are distributed by the Ministry to school cooperatives, where they are sold direct to pupils. The Board distributes through 300 book outlets; the low selling price of most of its books sometimes causes retailers to neglect them. Like other publishers in Turkey, the Board finds marketing difficult. It lacks established distribution channels -- must depend upon its own limited resources to get catalogs and price lists into the hands of book outlets, and has encountered difficulties in shipping books and collecting bills.

CHAPTER 7

THE ROLE OF IMPORTS

Turkey's foreign trade deficit is chronic. In spite of progress made in other fields, little expansion has taken place in the nation's exports, while development efforts have necessitated increasing imports:

TURKEY'S FOREIGN TRADE SITUATION
1959 - 1963
(figures in millions of dollars)

Year	Imports	Exports	Deficit
1959	470.0	353.8	116.2
1960	468.2	320.7	147.5
1961	509.5	346.7	162.8
1962	622.2	381.1	241.1
1963	687.5	368.5	319.0

Source: State Planning Organization.

During the past five years, Turkey's imports have risen 46%, while exports have remained essentially static. Thus, its foreign trade deficit has increased rapidly -- doubling within the last two years and almost tripling since 1959. In a situation such as this, Turkey obviously must control imports carefully.

BOOK IMPORTS

Although there is no quota or tariff, Turkish imports of books and other published materials are relatively small for a country of its size and level of income. This is due

principally to the lack of facility in reading English and other foreign languages among the educated population, as noted previously.

It is difficult to measure precisely the volume of Turkish imports of books and other publications. The official import statistics do not seem to check with information available from other sources and particularly the known volume of U. S. exports of books to Turkey under the Informational Media Guaranty program. During the three years ending June 30, 1964, U.S. books exported to Turkey under IMG averaged $147,000 (1,303,000 liras) per annum.* Yet the Turkish published statistics indicate that foreign language book imports from all countries totalled only 598,000 liras ($65,800) in 1962 and 619,000 liras ($68,100) in 1963. In spite of these statistical discrepancies, it is clear that the total imports are small and much of the importing is done under the IMG program.

Books sold under IMG are principally university textbooks, scientific and technical books and English language teaching materials. Practically no use is made of IMG for purchasing translation rights to U.S. books. If the IMG program were to be discontinued, it is likely that Turkish imports of foreign language books would decline because of the cost in time and money) of meeting import requirements with free currency.

Both booksellers and educators reported that they were subject to no quota restrictions in securing foreign books and periodicals. However, the procedure for importing books from other countries and from the U.S., when the IMG program cannot be used, is exceedingly cumbersome. Also, in Istanbul the customs formalities are very time-consuming for books not imported through IMG; though this does not seem to be the case in Ankara. When single copies are ordered, the cost in bank fees and stamp taxes alone often reaches 25 liras ($2.75) per book, not including the cost of staff time involved in handling the paper work.

There is not much prospect in the immediate future for a great increase in Turkish imports of foreign language books, even if existing formalities were greatly simplified. Only if major

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* Significantly this amounts to only about one-half of the actual average of $290,000 allotted under IMG contract during this period.

changes were made in the educational system to stress book use and foreign languages would there be any substantial increase.

IMPORTS OF PAPER AND INK

In 1962, imports comprised 53% of the first quality printing and writing paper and 55% of the newsprint consumed in Turkey. Paper is imported by the state pulp and paper plant at Izmit, by large printer/publishers, by paper jobbers-wholesalers (who warehouse and distribute) and by brokers (who do not take possession, but who sell from the customs shed).

67,811,000 liras ($7,459,000) worth of paper was imported by Turkey in 1963:

TURKISH IMPORTS OF PAPER IN 1963
(All figures in thousands)

Category	# Tons	Value in Liras	Value in Dollars
Printing and Writing Paper	10.4	23,849	2,623
Newsprint	17.0	20,033	2,204
Kraft	---	16,063	1,767
Cigarette	---	7,866	865

Source: Second Draft, SPO 1965 Program

Imports of paper are controlled. They enter the country either through (1) bilateral trade agreements or (2) quota allocations. Most of the paper imported for books, periodicals and newspapers comes in under bilateral agreement with the Eastern Bloc, as the result of barter trade agreements (i.e., Turkish tobacco for printing and writing paper from the German Democratic Republic).

Quotas for paper imports are allocated in dollars; they are announced semi-annually in the Official Gazette on January 4 and

July 4, and become effective immediately. The Thirteenth Semi-annual Paper Quota, announced on July 4, 1964, allocated:

$ 90,000 for coated and fancy paper ($75,000 allotted to industrialists; $15,000 to importers).
800,000 for kraft paper (allotted to industrialists) for bags.
180,000 for cigarette paper (to industrialists)
40,000 for reproduction papers, i.e., blueprints (to industrialists).
50,000 for citrus wrappings (to importers).
145,000 for other paper, including impregnated paper, IBM cards, carbon and stencil paper (to industrialists).

It can be seen, therefore, that only a small percentage of first quality paper and no newsprint entered Turkey during the last half of 1964 through the quota system.

The import quota system works slightly differently for paper importers (the jobber-wholesalers and brokers) and for "industrialists" (whose ranks include printers and publishers):

> Importers apply for a share of the total quota (but not more than 20%) at their local banks, which forward the request to the Central Bank for consolidation and final announcement of the dollar allotments granted to each. All requests are pro-rated; the Union of Chambers of Commerce and Industry is not active in the importer allocation process.
>
> Industrialists' applications are handled through the Union of Chambers of Commerce and Industry. If the item is also handled by state enterprise, the Union and the government first set the private share. This allotment is then divided among the national Union headquarters and the local Chambers of Industry, which in turn parcel out allocations to individual firms.

Firms must deposit funds for 30% of their requested quota with the Central Bank at the time the request is submitted. A letter of credit is opened after the quota is received, and the imported paper must be cleared from customs within six months.

Turkish tariffs on printing paper for books are rather complex. A step duty is imposed, to bring the world market price up to the high domestic prices charged by SEKA, the government's monopoly paper mill at Izmit. The high duty applies even to

kinds of printing paper not manufactured in Turkey, such as paper suitable for good offset work.

> For paper of this sort, there is a base tariff of 60% on the value. Approximately 51% in other taxes and fees are added, so that tariff and taxes total well over 100% for this first quality paper. (If the paper is subsequently a component of an exported item - e.g., a calendar - the tariff is remitted).

It can thus be seen that offset printing -- which should be expanded in Turkey for various reasons, including improved textbook quality -- is being discouraged by the high price of imported offset paper, while at the same time, the presumed purpose of the high duty (encouragement of domestic production of good offset paper) has not materialized.

> Until such time as domestic offset paper production reaches acceptable standards, it might be advisable to lower the tariff on the needed imported paper.

Much of Turkish printing ink, and almost all offset ink, is imported. Ink imports were first placed on the foreign exchange quota with the Thirteenth Semi-Annual Quota of July 4, 1964.

At that time, a quota of $250,000 was established for inks -- of which $200,000 was allocated to "industrialists", including printer/publishers, and $50,000 was allocated to ink jobber-wholesalers.

The Federal Republic of Germany is the major ink exporter, by far; according to the German Export Guide, it shipped $241,000 (D.M. 965,000) worth to Turkey in 1963.

The basic tariff for inks is 75% of value.

PRINTING EQUIPMENT AND SUPPLIES

1963 imports of printing equipment and supplies totalled 15,928,000 <u>liras</u> ($1,752,100):

	Liras	Dollars
Bookbinding machinery and parts	279,000	$ 30,700
Typesetting & composing equipment	1,445,000	159,000
Typesetting & composing parts and accessories	988,000	108,700
Engraving parts and supplies	603,000	66,300
Other photoengraving and type-setting machinery	498,000	54,800
Other photoengraving and type-setting parts and accessories	1,059,000	116,500
All other printing presses and machines	8,873,000	976,000
All other printing machine parts and accessories	2,183,000	240,000

Quota allocations for printing equipment and supplies are taken out of a $20,000,000 global quota, "Investment Needs for Turkish Industry", controlled by the Ministry of Finance. Printers who want to import equipment valued at over $20,000 request an allocation from this global quota, direct from the Ministry. Allocations for less than $20,000 are handled through the Union of Chambers of Commerce and Industry.

Here again, the Federal Republic of Germany plays an important role. The German Export Guide shows that 1963 exports of printing equipment and supplies to Turkey totalled $909,000 (D.M. 3,636,000) -- 52% of the total:

Printing presses	$823,000 (D.M.	3,292,000)
Typesetting and engraving	61,000 (D.M.	243,000)
Matrices	25,000 (D.M.	101,000)

CHAPTER 8

THE EDUCATIONAL BOOK MARKET

The educational book market is by far the largest in Turkey. Primary and secondary school textbooks alone accounted for fully 44% of total Turkish book production in 1963. When we add to this the number of supplementary books used in the schools, it is obvious that books play their most important role as development tools in the Turkish educational system.

BACKGROUND FACTORS THAT AFFECT THE EDUCATIONAL BOOK MARKET

Elementary and secondary education in Turkey is highly centralized. The curriculum in every province, city, town and village is established and modified only by official action of the Ministry of Education. In practice, government control and administration are comprehensive: "teachers are selected, assigned, transferred and paid by the Ministry and thus all teachers in Turkey are on the same basic salary schedule. While there is some meager financial support of elementary schools made directly by the local people through their village or municipal government, for middle schools (ortas), lises and all other secondary schools there is no financial participation from local sources".

Public education in Turkey is free. Even university fees, when charged, are small.

Turkish expenditures for education average about 2.3% of national income--lower than any other member of the Organization for Economic Cooperation and Development (OECD), and two-fifths of the U.S. figure. Turkey's per-capita national income is also lower than other OECD countries. Although the Republic of Turkey has budgeted more money for education each

year since 1950, the great annual increase in pupils has resulted in a gradual deterioration in current expenditures per student.

Turkey has fought hard to provide educational opportunities for its people in spite of initial low literacy, underemployment, precarious economic strength and a network of tiny, widely dispersed villages that render positive achievement difficult.

The extent to which the village pattern limits educational growth and the educational book market can be seen from the following: 2,500,000 Turks inhabit 11,800 villages of less than 250 population, while an additional 13,500,000 live in 22,500 communities with less than 1,500 people--the minimum number required for the establishment of a 200-pupil five-grade primary school (in smaller villages, the number of children aged 6-10 is below the 200 pupil minimum). Thus, over half of Turkey's population, scattered to more than 34,000 settlement areas, are either deprived of education or receive a primary education of necessarily low quality.

Geographical distribution of schools and other kinds of training institutions excludes 27% of children aged 6-10 from primary education (and therefore all formal education) by the lack of schools; similarly, 81% of children are excluded from the ortas, 92% from lises and 94% from higher education. This uneven distribution and the small number of ortas impose a bottleneck at the point of entry to the next level, for 95% of the counties (kaza) in Turkey lack a lise. At the university level, the condition becomes worse. Universities are located in only four cities; in terms of location they are available only to very small proportions of the total population.

Teaching is not an attractive profession in Turkey. Salaries are low and the purchasing power of teachers' salaries averages about three-quarters of what it did in 1938. Traditionally, teaching has been an honored profession, but its prestige has fallen considerably in recent years. Little wonder then that Turkey is plagued with a shortage of teachers or that teachers are often insufficiently trained.

The lower the level of teacher competence the more important become good school books. They insure better coverage of the subject material and function as a lever for raising the level of teaching and of teachers.

Unfortunately, Turkey's use of educational books reflects the general pattern of teacher's lecture and pupil's note recitation. Textbooks tend to have far too high "concept density"; that is to say, the number of concepts presented on a specific page without supporting detail is so large that there is little opportunity to use such materials except to assign parts to be memorized and given back on examination. It is difficult for the student to form any generalizations. Books with fewer concepts and more supporting examples between those concepts would give pupils a better opportunity to understand the big ideas and result in more effective learning.

The use of textbooks could be improved further if teachers' editions or manuals were published to accompany them--especially in the Turkish context where many teachers are not well trained. These teachers' aids (usually supplied with all school books in the U.S.) take the teacher by the hand, figuratively speaking, and help him on a page-by-page basis to teach the textbook. Teachers' editions and manuals are almost non-existent in Turkey. A manual now in the process of preparation will accompany the new primer for the recently adopted primary school experimental curriculum. However, many, many more are needed.

It will be noted that Turkish textbooks reflect the educational pattern...its weaknesses and strengths. Realistically, the Turkish government will have to change its philosophy of education before textbooks and textbook usage can be revised significantly to improve education.

NATURE AND SIZE OF THE EDUCATIONAL MARKET

Dramatic recent increases in numbers of students in Turkish schools bear witness to the continuing intensity of the government's drive for education. Between 1950 and 1962, elementary school enrollment doubled from 1,576,127 to 3,399,606, and enrollment at the secondary school level tripled from 178,589 to 537,064. More important, the percent of school-age children enrolled in schools has more than kept pace with the population rise, which is one of the highest in the world. Between 1950 and 1960, the percent of primary school population enrolled in school rose from 60.8% to 63.6%, while the equivalent figures for secondary school age population in schools rose from 6.6% to 13.1%

Figure 6 shows the distribution of Turkish youth population enrolled in public schools during the 1962-1963 school year. At that time a total of 4,011,528 students attended school:

3,399,363	attended	26,139 primary schools.
336,363	attended	721 orta (middle) schools.
91,544	attended	140 lises.
77,206	attended	476 technical and vocational secondary schools.
31,951	attended	70 normal schools (secondary level).
47,339	attended	the four non-technical universities.
22,269	attended	the various technical universities and higher technical schools.
5,250	attended	the higher teacher training schools.

Figure 6 also portrays graphically the sharp drop in enrollment percentage of school-age population as the academic ladder is climbed. While it is estimated that the overwhelming majority of Turkey's 1,024,257 six-year-olds began first year of primary school, only 49% (409,597 students) of the ten-year-olds attended fifth year primary school. It shows further that primary school is terminal for 60% of fifth year students -- only 18.7% of the eleven-year-olds attended first year orta, and this decreased to 10.8% of the age group by the third year of middle school. In the same way, the entering lise class accounted for 7.3% of its age group, while the last lise year enrolled only 3.1% of its group. 4% of the university age group was enrolled.

Approximately 12,765,000 new textbooks were published for primary and secondary school use in 1963-1964 (See Figure 2). Of these, 8,468,000 -- 66% of the total -- were produced by the Turkish private sector; the remainder, 4,297,000 textbooks, were produced by the Ministry of Education's Publications Directorate. Of approximately 347 textbook titles, four out of five were produced by the private sector.

An additional 811 supplementary book titles appear on the Ministry of Education's approved list for primary and secondary schools, but their use is apparently not great. The titles on the list indicate that most are of textbook nature, rather than books that supplement the information contained in the approved textbooks.

THE PRIMARY SCHOOL MARKET

Substantial differences exist between village and urban education. Village school terms are approximately 180 days, urban school terms a minimum of 200 days; textbooks overwhelmingly reflect the latter orientation; and teacher level is different.

Children enter primary school at about six years of age and graduate after completing five grades. Primary school attendance is compulsory, the only component of the Turkish education system that is, but is clearly only nominal in those one-third of the villages which still lack both school buildings and teaching staff.

Primary education concentrates on teaching reading, writing and arithmetic, and giving children a basic understanding of their environment. The primary school curriculum has been revised several times since the Atatürk Revolution; it is in the process of being revised again.

Primary School Books

An overall total of 8,080,000 new primary school textbooks were produced in 1962-1963; 53% of these were published by the Turkish private book industry, the remainder by the Ministry of Education. During the first stage of primary school (grades 1-2-3), only one or two books are used per year. These are all Ministry-published and printed, for the government has not yet opened this area to private publishers. However, for the second stage of primary school (grades 4-5), where 8-9 books are required annually, the situation is quite different. There, privately published books dominate; accounted for 77% of all second stage textbooks and for 67 of the 73 titles.

Cost of Primary School Books

Although the Turkish primary school is free and compulsory, primary school textbooks are not free. This fact, coupled with

a widespread feeling that many primary students cannot afford textbooks, has given rise to ideas aimed at insuring greater per-capita textbook usage.

Some have suggested that this can be done through free textbooks. (Both neighboring Iran and Afghanistan do so. Iran provides free books for the first four years of primary school through a Shah-sponsored charity.) Others have suggested subsidies to pay part of the cost. Still others have recommended book rental.

In the village and urban schools visited by the book survey team, students seemed to have textbooks. School and provincial education directors stated that primary students are all provided with them, and that schools have available small revolving funds to buy books for pupils who are otherwise unable to do so.

A comparison of the last two columns of Figure 7, "New Textbooks Published, by Grade", seems to corroborate these statements that most students have new textbooks. Since a certain proportion of students also have second-hand texts, it seems probable that primary school textbooks are gotten into the hands of pupils, one way or another.

Primary school textbooks cost relatively little. The four that are required during the first stage are Ministry-published; their cost totals about 3.20 liras (35¢) over the three-year period. The 8-9 books required annually for the last two primary school grades cost appreciably more--about 11-12 liras ($1.20-$1.32) per year.

Compared to the average Turkish family's purchasing power, or even to the average village family's purchasing power, however, primary school textbooks are not expensive.

In time, as the educational system makes greater use of textbooks, and as their character, content and quality change, textbook rentals may prove desirable. But the present primary school textbooks, cheaply bound and printed on poor quality paper as they are, would probably not serve more than two students.

Textbooks are now subsidized to a slight degree. Some Ministry-published first stage books are purposely sold below cost.

And all primary and secondary texts, whether published by the private sector or the Ministry, are indirectly subsidized, by virtue of the special low price that producers pay for paper stock.

THE SECONDARY SCHOOL MARKET

The Academic Ortas and Lises

The orta school offers a three year course of study immediately after the five year primary school; thus it enrolls students at the same grades as the U. S. junior high school. Orta enrollments have increased many fold since the Atatürk Revolution. They totalled 6,000 in 1923 and 336,363 in 1962.

The number of lise students has also expanded greatly--from 1,200 in 1923 to 91,544 in 1962. The lise enrolls students at the same grades as the U. S. high school. Until recently lises were available only to young people living in the larger cities, and by 1960 they were found only in 66 towns and cities.

Secondary school students study more subjects than primary school students. Because standard Turkish practice calls for a basic book for each subject, more books are required at the secondary level and the overall textbook cost is thus higher. An average 10-11 textbooks are used per year by orta students; 9-13 by lise students. The number of books used at any one time may be less than the number of courses, for many of the 12-14 courses studied per year are parts of a three year sequence, and some of the books are used for several years.

Orta textbooks average 21-29 liras ($2.31-$3.19) per year. Lise texts cost 38-63 liras ($4.18-$6.93) per year. Second language orta and lise imported foreign language textbooks are still more expensive. Secondary school students apparently have textbooks; as in primary schools, some of the poorer students are provided with books free of charge. In terms of per-capita income, however, the lise textbook load can become a significant factor.

The curriculum in the orta and lise schools has changed little in the last 40 years. They are still, primarily, copies of

French lycees of the late nineteenth century. Like the orta, the lise is a three year school intended to train an élite. Its curriculum is similar to that in the orta in organization and is even more academic. The course of study is atomized, not integrated, consisting of from 12-14 separate subjects. In most cases, all children have to study the same subjects; very few electives are offered. Emphasis is placed on learning the facts, not on the development of understanding. In the classroom most of the time is devoted to lectures by teachers; the rest to formal recitations by students. The size of classes makes it almost impossible for the teacher to pay attention to individual student needs. The lack of school libraries also makes it difficult to develop students' individual interests and abilities. Turkey has adapted its educational system to cope with basic problems. The lecture system, which lends itself to large classes, reflects the country's severe shortage of classroom and teacher resources. As long as these shortages continue, the lecture method probably will continue to be used.

Orta and lise textbooks of the non-technical variety are overwhelmingly the products of the Turkish private sector--of the 4,310,000 textbooks produced for both schools, 4,212,000 (almost 98%) were published by the private book industry, only 98,000 by the Ministry of Education.

For the 1964-1965 academic year, the Ministry of Education approved 188 supplementary book titles for orta use and 223 supplementary book titles for lise use.

Vocational and Technical Schools

The Ministry of Education has come to realize that the academic ortas and lises, with their stress on preparation of an élite, are ill-suited to the majority of Turkish students and the needs of the nation. It has therefore begun to concentrate its attention on programs to improve secondary education in vocational and technical fields. A new attempt is being made to direct students into these schools.

Vocational schools are generally divided into those for boys and those for girls. For each, there are two levels...the lower a three-year school for primary school graduates; the upper a

two-year school for graduates of the lower school and for graduates of the academic orta schools. Graduates of the vocational schools may go only to a higher trade school or to the schools for training vocational school teachers. From an enrollment of almost zero in 1923, enrollments had risen to about 77,000 by 1962.

Orta level trade schools aim at producing skilled workers, foremen and lower-level technicians. For the most part, the term "trade" used to describe these schools is a misnomer. The curriculum of the boys' trade school, for example, is the same as that of academic secondary schools, except for about ten hours per week of practical vocational training which gives pupils the opportunity to improve their manual dexterity. A large percentage of those enrolled in the trade schools have failed out of the academic orta. The trade schools do not have the prestige of the university-preparatory secondary schools and attendance at them sets a limit on how high an education a student may obtain.

The commercial secondary schools are coeducational and have six-year terms, with almost the same standards as their academic counterparts, but again with less prestige. Generally, the commercial schools do not educate their students to take business positions, nor do they provide readily marketable skills. Rather they prepare their graduates to go on to a higher level commercial or business school.

Some of the higher level technical schools, such as the secretarial schools for girls and the academies of economic and commercial sciences, do prepare their students for the business world.

There seems to be an insufficiency of vocational and technical textbooks, and those that are available are usually not used effectively. Too often, the instructor does not use the available book as a basis for his lecture; he acts as both the teacher and textbook, draws a diagram on the blackboard and lectures from the diagram.

The trade schools, as has been noted, are to undergo great expansion in the near future. At present, they teach trades in the tradition of the journeyman and apprentice, and one teacher of specialized trades has 6-8 pupils. When the teacher has more and better books and other instructional materials, and when he

learns how to make full use of them, he will be able to efficiently handle classes that are three or four times as large.

THE PEDAGOGICAL SCHOOL MARKET

Primary school teachers are trained in either six-year normal schools for primary school graduates (usually village primary schools), or in three-year normal schools for orta school graduates. Great effort has been made, especially in recent years, to increase the number of primary school teachers. Although enrollment in normal schools has grown rapidly--by 1962 there were 10,000 students in the 25 orta-level normal schools and 22,000 in the 45 lise-level normal schools--the teacher shortage is still acute.

The curriculum of the first phase of the six-year normal schools is almost the same as that of the academic ortas; in the last three years of normal school, students spend about three-quarters of their time on subjects similar to those offered in the lises, and the remaining time on professional subjects.

The Ministry of Education also publishes and prints all pedagogical textbooks used in normal schools.

There are four teachers' colleges for training orta school teachers. They accept graduates of the normal schools and of the lises and give them in most cases a two-year course of study which consists mainly of subjects the graduate will teach. Vocational school teachers are trained in schools similar to the teachers' colleges.

Almost all students training to be teachers at all levels study under government scholarships, which cover most expenses, including books. The pedagogical books for the higher level teaching schools are also printed by the Ministry. Many are translations of U. S. textbooks in these fields, although Turkish authors are becoming active. Pedagogical textbooks and other instructional material for the teachers' colleges and institutes are in short supply, especially in fields such as educational psychology, educational sociology, supervision and curriculum, and for the methods of teaching vocational subjects such as home economics, etc.

THE UNIVERSITY MARKET

The traditions and practices of the Turkish university system severely restrict the university book market, which is characterized by something akin to chaos.

There are six Turkish universities; each an autonomous body with a separate budget:

Istanbul University: composed of faculties of medicine, law, economics, letters, science, forestry and pharmaceutical chemistry. 27,000 students.

Istanbul Technical University: composed of faculties of civil engineering, architecture, mechanical engineering, electrical engineering, mining engineering, and chemistry, 4,800 students.

Ankara University: composed of faculties of letters, science, law, medicine, veterinary, agriculture, divinity, political sciences, pharmaceutical chemistry, and medicine and medical sciences. 17,800 students.

Ege University (Izmir): composed of faculties of medicine, agriculture and science. 1,600 students.

Middle East Technical University -- METU (Ankara): composed of faculties of administrative sciences, architecture, arts and science, engineering and an English preparatory school. 2,100 students.

Atatürk University (Erzurum): composed of faculties of agriculture, arts and science, and medicine. 900 students.

In 1959-1960, approximately one-half of the students were enrolled in the social sciences, 23% in science and technology, 11% in arts and letters, 10% in health and 7% in agriculture.

There is no general university textbook market, nor are textbooks used to any great degree. Professors usually sell their own printed texts or lecture notes to their classes, either directly or through personal agents. These "books", printed in limited numbers, never get into general circulation at all; are sold only to the captive student market. They do not appeal even to other professors in the authors' own universities.

Because they are printed in small, uneconomical quantities, these "books" are often subsidized by the universities.

METU is an exception to the general rule. Because it is an English language university, many of its textbooks consist of standard U. S. and British works.

We have already noted that, unlike many other developing nations, Turkey has minimal second language fluency. Turkish educational authorities estimate that not more than 2% to 5% of the total Turkish university population know a foreign language well enough to effectively use materials published in such languages.

This poses grave handicaps. Turkey is too small to produce good science texts in its native language. (Even highly developed small countries like the Netherlands, Sweden, Norway and Denmark have turned to English language books for that reason.) And all but a few students are barred from using major portions of university library materials, because these are also foreign language in large measure.

It would be unfair to require competency in a foreign language for admission to a regular Turkish university, and such a step could not be seriously considered for political and philosophical reasons. Moreover, from a practical point of view, the severe shortage of foreign language teachers at the secondary level also makes such a step impossible in the near future.

For these reasons, numbers of foreign (mostly English) language scientific and technical works are now translated into Turkish. But the effectiveness of this practice is hampered by the long time lag between the appearance of the foreign books and the time they can be translated and made available to Turkish students and scholars. Besides, only a few of Turkey's scholars are sufficiently expert in both their various highly specialized fields and at the same time in the required foreign language.

For significant, long range results, it would seem vital that Turkey immediately initiate a crash program of foreign language teaching <u>at the secondary level</u> to enable its university students to gain access to the modern world of technology.

For the short range, however, this would have to be supplemented by (1) translation and publishing of some of the more urgently needed scientific and technical works, and possibly by

(2) a linguistic project to identify technical vocabulary enrichment required to better adapt Turkish to modern needs. In this important effort, subsidization of some sort will probably be necessary, plus, importantly, technical assistance in the form of human resources.

Areas in which the intensive translation program could begin might include some of the pure and applied sciences, economics, anthropology, psychology, other social sciences and business administration. In these fields, Turkish scholars would presently have difficulty producing original works of proper quality; a full-scale translation drive in these fields would help fill the book gap until Turkey's scholars are prepared to write them.

A final note of caution, however--unless there is a change of the educational and book use pattern in the universities, the publishing and sale of translations will be ineffective. In the absence of a multi-university market for textbooks in a particular subject, unsubsidized translated editions will be exceedingly high priced and relatively unused.

THE INFLUENCE OF EXPERIMENTAL SCHOOLS ON BOOK USAGE

Turkey's experimental primary and normal schools are testing new methods of book usage and are developing new instructional materials. Thus far, the small size of the experimental market has kept the Turkish public and private publishing industries from producing books specifically for its use. Hence, these schools must use and adapt the books already available. But although they are having little current effect on the textbook market because of the limited number of schools and students involved, some of the experiments they are conducting may significantly affect the manner in which books are exploited as aids to instruction and learning in the future.

In 1962, the Ministry of Education prepared an outline for the experimental primary schools, encouraging them to adapt the curriculum to local conditions. These programs are being continually revised; include changes in the number and composition of teaching units; place more emphasis on learning by doing, group discussions and greater use of visual aids.

AUDIO-VISUAL MATERIAL

The term "books" in the title of this report and in the overall context of this study is used in its broadest sense, to include other forms of instructional material. In Turkey, these include newspapers and periodicals as well as audio-visual materials...for all three play, have played, or can play significant roles in the national growth process.

The primary importance to the study of "books" (in the narrow sense) required that the team devote the large proportion of its necessarily limited investigative effort to that area, to the neglect of other forms of instructional media. Although lack of time imposed limitations on the depth of the survey into audio-visual material and newspapers, their vital function in converting illiterates into active readers is fully appreciated. This section briefly discusses audio-visual material; newspaper and periodical markets are touched at the end of the following Chapter.

* * * * *

It is difficult to triumph over illiteracy exclusively through books. Posters, slides, films and audio-visual devices of all kinds often meet the needs of the unsophisticated more easily and dramatically -- for adult and child, alike.

Turkey not only needs to improve its books--it needs to correlate them with a wide variety of other kinds of instructional materials, for education is most effective when the "teaching package", which provides the teacher with a well-rounded arsenal of instructional weapons, is used.

The Ministry of Education's "approved school book" list includes a number of posters which have been produced by the Educational Materials Development Center and the Film-Radio-Graphics Center, as well as by private sources. The book survey team visited businessmen who manufacture and import audio-visual devices, and schools where some were used. But almost everywhere, it noticed a lack, under-use or misuse of such materials.

Dr. Reign Hadsell, an experienced audio-visual specialist with USAID/Turkey, has noted that, to be effective, audio-visual efforts in Turkey should (1) be simple; (2) be inexpensive

(elaborate equipment is too difficult to operate, too costly to maintain); (3) be easy to make (use local materials wherever possible); and (4) concentrate on items of wide usage.

Translated into specifics, this means development of flip charts to visualize ideas; flannel boards composed of simple, readily obtainable materials, and instructional devices that can be made by teachers themselves. Widespread use of film-strips, motion picture films and more elaborate mechanisms are necessarily second steps; they can only succeed after Turkish teachers are experienced in their use, understand the basic principles of visualization and are proficient with simple materials.

Leapfrogging to the more complicated devices has caused frustration, lost effort and waste. There is much expensive audio-visual equipment scattered throughout Turkey which lies idle because not enough is known about its proper care, and because a proper system of servicing has not yet been worked out.

CHAPTER 9

OTHER BOOK MARKETS

ADULT LITERACY AND BOOKS FOR NEO-LITERATES

The Civilian Adult Literacy Campaign

Intense interest in adult education began with the Atatürk Revolution and the change from the Arabic to Latin alphabet. Nationalistic enthusiasm created an immediate demand for instruction in reading and writing the new alphabet, and classes for adults were formed throughout Turkey. It is estimated that over 950,000 persons attended such classes in 1928-1929, immediately after the alphabet reform. Many of these, however, had been literate in the Arabic alphabet; the number of adult illiterates who attended schools during subsequent years was much smaller.

At present, the civilian adult literacy program operates on a three-year cycle, with two hours of instruction usually given five nights a week during a four-to-six month term. Those who pass an examination at the end of the third year are granted a certificate equivalent to a primary school certificate. There are about 125 Community Adult Education Centers. In 1960-1961 they enrolled 135,000 students; by 1963-1964 the number of students had decreased, but teachers were reportedly doing a better job and the drop-out rate had been reduced to about 33%.

No specifically designed textbook for the civilian adult literacy program has yet been used, although one has been in the course of preparation for many months. Until now, the adult literacy students have had to use either the Ministry of Education textbooks designed for primary school children, or Armed Forces textbooks designed for new recruits. Both these series are written for quite different audiences.

There is a small neo-literate program that offers help in the continuation of reading skill. It too uses books originally prepared for children and recruits. Books of adult interest but written at fourth and fifth grade reading levels are rare in Turkey.

In an encouraging new development, the recently created Ministry of Village Affairs has been given responsibility over all the previously dispersed aspects of adult education. These include the adult literacy class program, home economics extension work, small business and handicraft training, and mobile vocational courses for men and women.

The Armed Forces Literacy Program

The Turkish Armed Forces operate the largest adult literacy program in the country today. Until 1957, its program paralleled the civilian program. At the beginning, recruits were given lessons after the end of the training day by untrained officers who first used primary school textbooks, and subsequently wrote unprofessional books of their own. Later on, teachers with reserve officer status began to be used. Finally in 1957 representatives of the Ministry of Defense, Ministry of Education, and USAID/Turkey developed an experimental program which, expanded and modified over the ensuing years, is used effectively today.

Impetus for development of the expanded Armed Forces Literacy Program was based on: (1) the Republic of Turkey's deep desire to eradicate illiteracy; (2) the realization that a modern military force cannot be developed from a recruit base which is to a large degree illiterate; and (3) the fact that the military presents an easy approach to developing an effective literacy training program, because the learners are a captive audience and can be accorded time for this training.

The present program is supervised by Ministry of Education personnel attached to the General Staff. It makes full use of books and instructional materials which were developed with the assistance of two USAID-sponsored units -- the Georgetown University Group and the Educational Materials Development Center-- and uses qualified teachers who are paid out of Ministry of Education funds.

A measure of the program's effectiveness can be seen from available data: in 1961-1962 some 200,000 recruits entered the Turkish Armed Forces. Of the 122,000 who were classified as illiterate on entering, 38% successfully undertook literacy courses during their service. Through the end of 1963, approximately 230,000 have graduated from the Armed Forces Literacy Schools, and received Certificates of Literacy (approximately three-quarters of the students now receive the Certificate). The course of instruction is four months. The 16 present training centers operate year-round, conduct three successive courses per year. 51,000 recruits were trained in 1964.

The Armed Forces Literacy Program uses five specially-developed textbooks (Turkish I and II, Arithmetic I and II, and Civics I). These are used in conjunction with 40 supplementary books, workbooks and teachers' manuals for each text (among other information, the manuals indicate how and when the supplementary books are to be used).

Present concern of those directing the program is material for neo-literates. In spite of severe financial problems and classroom and teacher shortages, some progress is being made in this area. A new supplementary program is under way to increase recruit word usage and develop the reading habit among unsuccess ful as well as successful students. An ambitious group of 162 second-series supplementary books for training brigade libraries is being written specifically for the program; the Materials Development Center has held a workshop for prospective authors and the General Staff has brought selected authors out to camps to study recruit life before they write the books. The new series supplementary books are cultural in nature; will be printed by the Ministry of Education in 115,000-copy runs. Third, fourth and fifth year textbooks are also contemplated for the continuing program.

The Armed Forces help spread education to civilians in the villages by distributing used textbooks and providing other assistance. This program, however, has encountered practical difficulties. The Armed Forces Literacy effort is programmed according to the U.S. system--its use of textbooks, teachers' manuals and workbooks is quite different from that employed in the European-oriented primary schools.

The Turkish Armed Forces provide some technical training for qualified service men. These courses include driving, airfield maintenance, designing, machine operating and repairing, cabinet making, water drilling and radio; have been given to

an average of 40,000-45,000 men (predominantly from the army) per year. The lack of instructional material for these courses parallels the comparable lack in civilian secondary level vocational schools.

Conclusions Re. Adult Literacy

The exact magnitude of illiteracy in Turkey is hard to determine due to the lack of a uniformly accepted and applied standard for literacy. As we noted in Chapter 4, government sources placed the figure in 1960 at 40.1%. Whatever the actual rate, it is certain that a substantial number of Turks still cannot attain optimal personal development or make a significant social contribution until further progress is made toward the goal of universal functional literacy (the ability to use the written language as a practical working tool).

Adult education continues to be a key weapon in attaining that goal, but the civilian effort is handicapped by an almost total lack of suitable reading materials carefully graded to facilitate the development of reading power and directed to the real interests and needs of adults. Materials developed for the Armed Forces Program are too limited for application to the largest audience. Some needed new materials for the civilian campaign are now being prepared. This is potentially a key market, but one that is not likely to be fully exploited until the new Ministry of Village Affairs has had an opportunity to get a suitable program into operation.

BOOK USE BY THE PROFESSIONS; REFERENCE BOOKS

According to Mediterranean Regional Project statistics, Turkey has a 1960 professional level work force of about 200,000. The occupations, which usually require higher education, broke down as follows:

Managerial and administrative	84,619
Religious professions	27,748
Professors and teachers	23,341
Artists, writers, musicians, etc.	16,148
Architects, engineers, topographers	12,948

Jurists and other specialized legal	12,221
Medical and related workers	11,584
Others: Agricultural, physicists, chemists, other technical and professional, etc.	9,884

With the two possible exceptions of law and medicine, the book survey team found little evidence of widespread book use by these professions. A certain number of law books are available in Turkish; they have a good market and are reported to be profitable for the authors, for a readily understandable reason: one cannot study or practice law without text and reference books. Turkish books on medicine appear to be more scarce, but students and doctors use foreign medical books.

Other than in these two areas, there is little available to the professional in Turkish; nor does the average professional buy imported books to any extent. Much of the fault for this situation must be ascribed to the Turkish educational system which, as noted, does not encourage students to do independent research, to consult the library, or to study anything outside of the curriculum and the professors' lecture notes.

Economic considerations further complicate the picture. It is difficult for a private Turkish publisher to make a profit on professional books. The scientific and technical book market seldom has the ability to absorb more than 3,000 copies of a given title, and imported books in this area are too expensive for many professionals to buy.

Reference books represent a neglected area: Turkish encyclopedias are few and cursory in nature, and a comprehensive Ministry of Education encyclopedia project will not be completed for many years.

JUVENILE BOOKS AND THE STIMULATION OF READING SKILLS

A corollary to the great need in Turkey for adult books at a low reading level is the equally great need for children's books, outside of the school, of sufficient quality and interest to encourage them to develop the reading habit. We have noted previously that although Turkish children acquire reading skills easily with the phonetic alphabet, many lose them soon

after leaving primary school because they have never developed an interest in reading itself.

The Turkish National Commission on Education recommended that the reading habit be developed and protected from harmful publications (comic books) by the speedy preparation of a series of Turkish and foreign children's classics. These are needed, but the gap in juvenile books extends beyond the classics, to include titles in science, in vocations, in current fiction, in biography and in other fields of interest to young people.

By and large, there is a great dissatisfaction with books in this high priority field, The quality and content of the few better juvenile titles published are considered satisfactory, but the number of titles published and copies sold are sufficient only to reach a small proportion of children. Once again, the problem has economic roots. Quality books for juveniles apparently cannot now be published without a subsidy of some sort (in the U.S., for example, over 75% of the market for higher-priced children's books is in school and public libraries). The three organizations generally considered to produce the best juvenile books are Doğan Kardeş, the Materials Development Center and The American Board. All are subsidized ventures, either directly or indirectly.

Doğan Kardeş, the largest private publisher of juvenile books, concentrates on high quality but expensive products. Sales are low; printings average about 10,000 copies for reasons of economic production, but these take five years to sell. The firm's juveniles sell for an average of 10 liras ($1.10); most are translations from foreign works.

The colorful products of the Educational Materials Development Center are translations of U. S. juvenile books or are children's versions of popular Turkish stories. Prices average about 1.50 liras, with the best seller the beautifully illustrated version of "Nasrettin Hoca" -- the nation's favorite folk character, at .80 liras (9¢). Also popular are translations of elementary science titles published by the Webster Publishing Company, which find great favor as teachers' aids. The American Board also produces inexpensive juvenile books.

GENERAL TRADE BOOKS

As distinguished from textbooks, trade books are written and published for the general book reading public which buys books for entertainment, information or self improvement, and for librarians who purchase books that appeal to the reading public.

With the advent of the new alphabet and the stimulus of the Atatürk Revolution, Turkish writers have been turning to the daily lives of the people for their stories. Some novels have become world-renowned, such as "Memed, My Hawk", which was first published in 1949 and is now in its sixth printing. Although successful novels may run into large editions over the years, first printings generally do not exceed 5,000 copies, and many original works are produced in 2,000-3,000 copy editions.

The leading Turkish "quality" publisher specializes in literature, social sciences and secondary and higher level supplementary books; most of his readers are students who "read to learn, not for pleasure". His growth has mirrored the fast-paced rise of the book industry as a whole, but is still miniscule by U. S. standards. Thirty years ago a normal printing of the books he publishes would be about 1,000, and a Faulkner-like title would not sell at all. Twenty years ago, his editions averaged 2,000-3,000 copies, while now his runs are 5,000-6,000 copies, with a break-even point at 5,000. Selling prices for original works or for translations (the latter are by far the most numerous) are about the same -- 4-5 liras (44¢ - 55¢) for "normal-sized books", 2-3 liras for smaller ones. (Other publishers report good selling translation titles which retail for 10-15 liras - $1.10 - $1.65.)

A large percentage of general trade books are translations of contemporary foreign works, including fiction, biography, drama and books dealing with topical subjects. The source of these works has shifted during the past two decades from German and French books to English language ones, with a heavy predominance of American works. The translated contemporary works include quality titles, as well as those with popular appeal. Missing are how-to-do-it books, books on nutrition and others of that type.

Trade book prices are low because printing is poor, paper cheap, and the translator is paid little -- perhaps 1,000 liras ($110) for a 200 page translation. Nor are authors paid more for

original works. The present Turkish copyright law handicaps local authors, and many have to publish their own works.

The generally available trade books also include many of the great classics of the world in translation. These titles, prepared and published under the sponsorship of the Ministry of Education during the past twenty-five years, are marketed through normal trade channels. Originally designed to make available the important works of Western culture in the then-new Turkish Latin alphabet, they comprise a comprehensive collection; have included as many as fifty different titles per year.

THE ROLE OF LIBRARIES

Libraries of all types play a key role both in the economics of book publishing and the use of books as tools of education and economic development. Without a substantial library market, many types of books cannot be published; conversely, libraries are the only efficient and economic way of providing a wide range of books for student use and for research.

Turkish libraries are in an early stage of development; they now provide only a very small market both for books published in Turkish and for imports. In common with the libraries in many developing nations, they share certain characteristics that impede their growth and limit their effectiveness:

- Present Turkish practice holds the librarian responsible for the contents of his library. Books are valuable "commodities"... a lost volume can cause an unfillable gap. Because librarians are made responsible for missing books, they tend to concentrate more of their time keeping shelves neat and well stocked than lending books. At a leading university a portion of the librarian's salary is placed in escrow to cover the cost of lost books. Not unexpected results: school libraries become "locked" libraries; fewer than 10% of public libraries actually lend books.

- Most people still regard librarianship as a clerical job rather than as a profession, in spite of the efforts of the Turkish Library Association, which is slowly rising to a position of influence. In general, librarians

are grossly underpaid and undertrained.

Primary and Secondary School Libraries

Statistics are not available on Turkish school libraries. It is clear, however, that there are relatively few libraries in the elementary schools, and secondary school libraries usually consist of several locked bookcases containing a miscellaneous collection of Turkish and foreign language books, many of them quite old. There are no trained librarians -- a teacher is assigned that duty and is "keeper of the keys".

The school libraries are not an integral part of the educational process. Students in the first few elementary grades depend on the required primer and readers. They have little access, in school libraries, to a wide variety of children's books which could stimulate development of the reading skill because they are of intrinsic interest. Similarly, in the secondary schools, students are not instructed in library use or assigned readings and themes which require library work.

The Ministry of Education is apparently aware of the primitive state of school libraries and has taken a few tentative steps to introduce basic libraries in some of the isolated village elementary schools. And a number of the experimental schools visited by the team boast good libraries. But library budget allocations are minimal, and adequate libraries are few.

University Libraries

Somewhat more surprising is the rather backward state of libraries in Turkish institutions of higher education. In 1961 D. R. Kalia, UNESCO library specialist then librarian of METU made a study of the six Turkish university libraries and developed conclusions which parallel those of the book survey team. Except for two of the newer universities which still have small enrollments -- Atatürk in Erzurum and METU -- he found that the university libraries suffered from a "lack of (1) proper organization, (2) adequate premises, furniture and equipment, (3) sufficient funds, (4) trained personnel, and (5) efficient techniques...the main ingredients of a satisfactory library

service". To these, the team would add "character of book content".

The situation has changed little if any in the four years since Mr. Kalia's report. Istanbul, Istanbul Technical, Ankara and Ege Universities all lack functioning central libraries. They have separate faculty libraries, rectors' libraries and many departmental libraries (although students from one department of a university are often refused the use of books in the library of another department). The collections are poorly catalogued; book purchase budgets small; the librarians untrained; and student use minimal. Mr. Kalia attributed these deficiencies to a number of historical factors including the great autonomy of the individual faculties and departments, and the fact that physically the older universities are scattered about in widely separated buildings.

However, the fundamental reason for the primitive state of Turkish university libraries is the method of instruction, which requires little library use. Mr. Kalia pointed this out as follows:

> "In any university, the extent of university use is largely determined by the method of instruction followed. (Where) it is the practice to use the lecture method...there is little encouragement for the students to use libraries. The students know that they are to be examined by the teacher on the lecture notes, and so the natural tendency is to memorize these lectures and reproduce their contents in the examination.
>
> "Under such a system, the students are unlikely to become widely read...Knowledgeable graduates are essential to provide adequate leadership to the community. It would seem, therefore, that every student needs to undertake reading in addition to lectures and thus a university cannot meet this need without providing first-rate library service."

It can be seen that with the vast majority of the 50,000 Turkish university students enrolled in institutions with inadequate library facilities and book budgets, university libraries are not much of a market and support for the Turkish publishing industry. Mr. Kalia indicated that book and periodical purchases per student are something on the order of 15-20 Turkish <u>lira</u> ($1.65-$2.20). This is much less than 1/4 of 1% of total

university expenditures.

(Under U.S. practice an average of approximately 3% of the total college or university budget goes to library operation; one-third of this is usually spent for the acquisition of materials. It is recognized that even the U.S. average is far from ideal, and the suggested standards of the professional library associations are significantly higher.)

Public Libraries

The fact that Turkey's public library system is also at an early stage of development is more understandable because of the great difficulties presented by widely dispersed population. 72% of the population is scattered in some 40,000 villages which have an average population of about 500. The low literacy level, plus this population pattern, make it exceedingly difficult to organize an effective public library network.

The overwhelming majority of Turkish public libraries are operated by the Ministry of Education; municipal libraries and those of private associations represent only a handful. The Ministry's system includes approximately 455 libraries, of which 60% are genel (general) libraries, one-third children's libraries operated by teachers in connection with certain schools, and 4%-5% halk ("public") libraries. Of these, only the halk libraries lend books; in all the others the reader must use materials on the premises.

The Director of Public Libraries states that in 1963 the average Ministry library received approximately 450 volumes from the Ministry of Education's Publications Directorate, plus another 650 books purchased from private sources; the 1964 appropriation for book purchases for the entire system was 630,000 Turkish lira ($70,000).

Turkey has three mobile library systems (located in the Ürgüp, Istanbul and Izmir regions) which, in general, are doing an aggresive, creative job in bringing books to the outlying villages. The Ürgüp mobile library system for example distributes books from ten branch libraries to 37 villages by jeep, donkey, mule and horse; the books it brings to the villagers have had the desirable side effect of sparking local construction of sanitary and other facilities. Unfortunately, the

three systems are but drops in the bucket of the 40,000 Turkish villages, and budgets are limited.

Even the most progressive of these public libraries, however, have small, inadequate and unbalanced collections and their degree of use is not intensive. Especially noticeable was the lack of good stocks of books for the newly literate, and books of practical interest for farmers, housewives and city dwellers. And those libraries which served adults and children alike had severely limited stocks of books for the latter. The public libraries are thus faced with a dilemma: they lack the kinds of books which would interest their potential readers, but form too small a market (because of the minimal book purchase funds available to them) to encourage publishers to produce the kinds of books which would be in demand.

The Director of the Turkish National Library feels that the public library system has been seriously neglected as a means of adult education for the rural population. In an article, "General Education and Learning in Turkey" (Cultura Turcica, Vol. I, No. 1) he has noted:

> "A great majority who learn how to read and write in village schools usually stay on in their villages after their primary school education and either forget what they have learned, or are left in a position where they cannot make use of their knowledge...although there has been a Primary School Education for the last (forty) years, on which a lot of time and money have been spent, no adult education program was thought of or applied parallel to the primary school education. Public libraries could have made up for the lack of adult education to a great extent, but they also were neglected."

The Ministry of Education library system also lacks professionally trained librarians. Not one of the graduates of the Ankara University Institute of Librarianship has gone into public library work; the librarians are usually trained by the library directors, some of whom are doing an excellent job.

Special Libraries

Special libraries are beginning to develop in the larger, more

progressive private businesses and industrial firms. One indication of this trend is the fact that special libraries have obtained the services of a considerable proportion of the trainted librarians turned out thus far by the Institute of Librarianship. The fact that none of these trained graduates has gone into special libraries in government departments indicates that government libraries are not developing as rapidly.

The Turkish National Library

The Turkish National Library was established at Ankara in 1947 as a separate unit of the Ministry of Education. Like most national libraries, it exists primarily for scientific and scholarly research. It is one of the five depository libraries which have received copies of every publication printed in Turkey since 1934.* Its present holdings are 500,000 volumes, of which about 40% are in the Turkish language. For a major library, its book purchase budget is clearly inadequate; there are many essential foreign books and periodicals which it cannot obtain for lack of funds.

Besides normal library operations, the institution also carries out certain central bibliographic functions, such as the compilation and publication of the Turki National Bibliography in quarterly volumes. However, it does not develop catalog cards for use in other Turkish libraries, who must catalog for themselves, a wasteful procedure.

The Ankara University Institute of Librarianship

This school was established in 1954 and developed for the next

* In addition to the Turkish National Library, the depository libraries include the Istanbul University Library, the "National" Library of Izmir, one public library in Istanbul and other in Ankara. The Ministry of Education's Istanbul Copyright Deposit Office first receives the mandatory five copies of all publications from private and government sources, codes and numbers them consecutively, by year, then distributes a copy of each to the depository libraries, which must keep the material, but which are not provided government funds for cataloging and shelving it.

seven years with the aid of a Ford Foundation grant administered through the American Library Association. A number of distinguished American library education experts have worked in the Institute, and a number of Turkish nationals have been trained in American library schools. Since June, 1961, the Institute has been entirely supported by the university budget; since 1962 it has had an entirely Turkish staff. Its 125 graduates have been about equally divided between men and women. Enrollment is increasing; last year 50 first-year students were admitted, and there is pressure to expand still further.

This seems one of the most successful projects in Turkey of foreign technical assistance carried out under either government or private auspices. The Institute of Librarianship has become an integral part of Ankara University. Without present foreign financial assistance or staff, it is gradually building a group of trained librarians who will lead to the improvement of Turkish libraries and Turkish education. However, additional library schools will be needed to provide Turkey with the large number of trained librarians required in the kind of library system that can truly power education and economic development.

NEWSPAPERS AND PERIODICALS

Newspapers have been important in the Turkish drive for mass education. From the earliest days of the Atatürk Revolution, newspapers have been considered key vehicles for the dissemination of information and learning, and for unification of the nation. Their development was encouraged officially, and was fostered through subsidies and other forms of governmental assistance. They remain the mass reading medium in Turkey; the State Planning Organization estimates that 1964 circulation reached an annual total of 549,000,000 copies, somewhat over 18 per capita.

Figure 1 shows the rapid increase in numbers of newspapers published: an average of 132-134 between 1934 and 1945 increased to an average of 384 between 1946 and 1951 and to an average in the mid 800's since then.

The prime problem facing Turkish newspapers is not one of capacity or human resources but of distribution. Although

some publishers are taking aggressive steps, such as hiring their own trucks and printing editions in more than one city, many of Turkey's villages are still newspaper-starved. Newspaper circulation is expected to continue expanding as newspaper distribution networks extend and more people have the opportunity to purchase newspapers daily.

A driving force in the newspaper field is Hurriyet, a new venture (founded in 1947) with the largest circulation by far in Turkey. It reported mid-1964 daily circulation at 451,000. Hurriyet engages in promotional schemes which further adult reading (and education) and make it a force in the book industry. Monthly, it publishes and distributes free over 200,000 copies of five different books--mostly novels, but including popular science and industrial education books--to readers who present evidence that they have purchased 20 copies of the newspaper in the calendar month. The books are inexpensively printed; most are translations.

The newspaper also maintains a "Hurriyet's People's University", which sponsors daily foreign language lessons in its daily columns (backed by radio advertising), and presents free foreign language-Turkish dictionaries to those who obtain certificates by passing an examination.

Several other newspapers show signs of initating similar promotions.

Periodicals are also numerous on the Turkish publishing scene. While the precise definition which separates non-daily newspapers from periodicals remains somewhat obscure, Figure 1 reveals that many periodicals are published and that their number is also increasing rapidly: from an average of 187-200 between 1934 and 1945, the average number of periodicals rose to 413 between 1946 and 1951, to 605 between 1952 and 1957, and to 709 between 1958 and 1963.

Periodicals run the gamut from juveniles to love stories; from popular family magazines to literary and historical publications. A number of the larger book publishers also produce periodicals.

CHAPTER 10

BOOK INDUSTRY NEEDS, RESOURCES AND CAPABILITIES

TEXTBOOK NEED PROJECTIONS

All indications point to a continuing rapid growth of demand for Turkish books. The acceleration nature of this increase is indicated by the following Turkish National Library totals for locally produced book and pamphlet titles:

1936 - 1,448	1953 - 3,472
1943 - 2,630	1963 - 5,193

This recent speeding up of book publishing activity will continue unabated for numerous different but mutually reinforcing reasons that are linked to Turkey's continuing development. Among these are:

Population, now about 30,000,000, will increase 11% to 33,700,000 by 1967, and 47% to 44,000,000 by 1977.

The Five Year Development Plan is geared to a GNP growth rate of 7% per annum through 1977. This would bring per-capita income up from a present level of about $200 to $355 in 1977.

Enrollment Projections

Figures 8 and 9 show the enrollment projections of the State Planning Organization. Figure 8 is broken down to show the number of students anticipated in the various branches of the educational system, by key years, from 1962-1977. Figure 9 relates these enrollment projections to school-age populations. The following facts from these projections appear significant:

Primary school enrollment will increase from 73% of the school-age population in 1963, to 100% by 1972. Numerically, enrollment will rise from 3,567,000 in 1963, to 4,736,000 in 1967, to 6,820,000 in 1977--increases of 33% and 91%, respectively.

Orta school enrollment will increase from 387,000 in 1963, to 480,000 in 1967, to 641,000 in 1977--growths of 24% and 66%, respectively. During the period, the percentage of school-age population attending ortas will remain relatively stable at about 20%.

Lise enrollment will rise from 96,000 in 1963, to 107,000 in 1967, to 204,000 in 1977--increases of 11% and 112%, respectively. During the fourteen year period, the percentage of school-age population attending lises will increase from 5.7% to 7.3%.

The accent is on expansion of the technical and vocational secondary level schools; Turkey wants to limit classical schools and increase those which will help fill its more immediate needs. Accordingly, vocational (including pedagogical) school enrollment will jump from 43,000 in 1963, to 81,000 in 1967, to 153,000 in 1977--increases of 88% and 256%, respectively. During the period, the percentage of school-age population attending these branches will more than double--from 2.6% to 5.5%. Technical secondary school enrollment will rise even more sharply--from 17,000 in 1963 to 42,000 in 1967, to 126,000 in 1977--spurts of 147% and 641%, respectively! During the period, the percentage of school-age population attending technical schools will increase from 1.0% to 4.5%.

Increases in higher level technical school enrollment will be large, too...the SPO anticipates rises from 11,000 in 1963 to 27,000 in 1967, to 84,000 in 1977--increases of 155% and 673%, respectively. The percentage of school-age population in the university level technical schools will quadruple from 0.6% to 2.4% during the period. General higher education enrollment will rise more slowly--from 52,000 in 1963, to 61,000 in 1967, to 143,000 in 1977--respective increases of 17% and 175%, while the percent of school-age population attending these schools will rise from 2.7% to 4.1%.

The magnitude of this drive toward technical and vocational education can be seen from these figures:

TRENDS IN TURKISH EDUCATION

(Percent of Students by Type of Course)

		General	Vocational	Technical
Lise school students	1963	62%	28%	10%
	1967	46%	36%	18%
	1977	42%	32%	26%
Higher education students	1963	83%	17%	
	1967	70%	30%	
	1977	63%	37%	

Ministry of Education officials and educators state that the enrollment projections are realistic--that they are based on fairly reliable long-term population and enrollment trends.

Textbook Need Projections Based on Present New Book Use

A conservative way to project future textbook needs is to assume (a) that texts will be used in future curricula much as they are now, (b) that the new-book-to-enrolled-student ratio prevalent during the 1963/1964 academic year will continue, and (c) that there will be no change in the current private publisher/Ministry of Education division of textbook production responsibility, by school level and subject area.

The Figure 10 projections are based on these assumptions. The chart relates the book usage information developed in Figure 2 to the SPO enrollment projections discussed above:

> In 1963, 12,759,000 new textbooks were produced*; of these 8,468,000 were published by the private sector,

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* This total omits 6,000 religious textbooks included in the figure 2 totals.

and 4,291,000 by the Ministry of Education.

By 1967, using the same student/new-book ratios per branch and grade, the new textbook need will be about 17,093,000 (a 34% increase). Of these, 11,091,000 (a 32% rise over present production) would be privately published, and 6,002,000 (a 40% increase) would be produced by the Ministry.

By 1977, the new textbook need will be 25,862,000 (103% increase). Of these, 16,426,000 (a 94% increase) would be privately published, and 9,436,000 (a 120% increase) would be produced by the Ministry.

(As a further guide to future needs, the National Board of Education and the Education Section of the SPO both expressed interest in a book survey team projection based on the more exacting assumption of one-new-book-per-student-per-subject. If all students had been equipped with new textbooks in the primary and secondary schools during 1963, they would have required about 18,446,000 textbooks, 5,687,000 (45%) more than the 12,759,000 actually produced. If all enrolled students are to be equipped with new textbooks in 1977, they will need 36,296,000--10,434,000 (40%) more than the Figure 10 projection of 25,862,000, based on present level of use.)

The Effects of Changing Curricula Upon Projected Textbook Needs

Caution must be exercised in estimating future textbook markets. New curriculum changes are now under way and/or are contemplated with a view to reforming the entire educational program for the primary and secondary schools. New trends in book utilization methods brought about by these changes could seriously distort such estimates.

Certain primary schools have already been designated as "experimental" schools with freedom to develop their own materials of instruction without reference to the official program of studies. Many in charge of these programs are former USAID participants, who have had experience with unit teaching, teacher-student planned units, and the development of reading materials based on the experiences of the students themselves.

> As a consequence, the experimental schools are being encouraged to develop units around topics such as "Effective Home and Family Living", "Our Country Yesterday, Today and Tomorrow", etc. The assumption is that more inclusive topics of this type will permit able teachers to correlate instruction in reading, arithmetic and the natural and social sciences around subject matter of immediate interest to the pupils, rather than continuing to have them memorize the subject matter of the traditional curriculum. The experimental curriculum has been introduced into 14 provinces.
>
> Although no books have been produced as yet for the new curriculum, its use of fewer but better correlated units will surely change the textbook usage pattern in the primary schools...should the experiment prove successful.

Changes are also foreseen in the orta school curriculum. There, social studies will probably replace the traditional courses in history and geography, and a program of general science instruction will be introduced. The trend academic lises are to take has not as yet been determined. It is probable, however, that more books will be needed, and of better quality than heretofore.

With the heavy emphasis on technical and vocational instruction at both the secondary school and higher education levels, these branches will certainly be using books much more than they presently do, if the quality of instruction is to improve.

Teacher training experimentation, begun in several normal schools, also may affect book usage. For example, the school at Hasanoğlan has adopted the multiple-book classroom library system, in which five or more students use the same book daily. Extension of this scheme would greatly change the present pattern of textbook consumption.

Other Influences on Future Book Use

In addition to curriculum changes that will affect the textbook market, there are trends in evidence that will affect other phases of the book industry. These include:

> Increased classroom use of supplementary books: the new curriculum changes and the trend toward greater teacher latitude and initiative, discussed above, indicate greater future use of supplementary books.
>
> Until now there has been no adult literacy textbook designed specifically for civilians. With the recent creation of a Ministry of Village Affairs and its newly-assumed responsibility over all the previously dispersed aspects of adult education, there may be a major breakthrough in the development of books for adult education and for neo-literates.
>
> As more Turkish professionals and technicians are trained and begin practicing, the professional and reference book markets should increase apace. So, hopefully, should the public libraries.

Finally, the adoption of book survey team recommendations in this report will affect the usage of school books and others as well. These recommendations include the supplying of supplementary books to primary schools for school libraries and eventually on a classroom set basis; development of teachers' manuals and student workbooks; drives to develop industrial education and home economic textbooks and to develop the editorial process itself, development of easy-to-read books for adults, and second-series supplementary books for the Armed Forces.

HUMAN RESOURCES

This section investigates present book industry capabilities from the human resource point of view--discusses strengths and weaknesses of the resource, to provide a current review of industry status and to evaluate its ability to meet the book need projections. The succeeding two sections take up, respectively, the book industry's physical and financial resources.

Human Resources: Publishing

Executives: Executives now direct the publishing operations in both the private and public sectors; the question thus is one of capability, rather than availability. Current Turkish publishing is a fairly simple process, whether for the one-dimensional textbook or for the slight, inexpensively-printed general trade book.

> As textbooks develop more complex aims, and as new techniques for the improvement of books make new demands on publishers, the need will also become apparent for improvement in all the skills of management -- organizational, production, financial and marketing. Indeed, the weakness and inefficiency of both the private and public non-textbook marketing methods are already obvious, and require assistance now.

Editors: Since the editorial process is virtually unknown throughout Turkish book publishing, it should come as no surprise that the country lacks editors. This does not mean that Turkish publishing is completely without people who possess editorial skills...the Materials Development Center and the Georgetown University and Spring Garden Contract Groups all will leave behind some trained Turkish specialists with high capabilities for writing, editing and producing instructional materials. Several of the private publishing firms include on their staffs people who perform editorial functions; with training and experience, they too could develop into editors.

> The roadblock in Turkey is not the lack of people with editorial competence, but rather (1) publisher lack of comprehension of the editorial process and what multi-dimensional textbooks can contribute to the improvement of education*, and (2) the present system of textbook publishing and pricing, which provides little economic base for the costs involved in the editorial process. The editorial process is also noticeably absent from the general trade

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* See Chapter 2 for a description of the editorial process as it functions within the U.S. school book publishing program.

book field; on one hand authors have no one to guide them in the preparation of their manuscripts, and on the other, after the books are published, authors have to depend for royalties on the sales efforts of printer/publishers who are not really organized to effectively market the books they produce.

School book authors: Turkey's Ministry of Education and the faculties of the schools, colleges and universities contain people capable of writing simple textbooks based on the present curricula--except in a few areas, such as certain aspects of vocational and technical education, and foreign language instruction. Writing textbooks that cover the curriculum content is a relatively easy task in Turkey. As noted previously, the curriculum and the examinations based on it narrowly fix the content of the textbook. There is no parallel in Turkey for the U.S. concept of bold new content innovations made by textbook publishers and authors, or of using textbooks to help solve the problems of teacher training, individual differences among students, and so forth. Today's Turkish textbook author needs the ability to process materials of a pre-determined content into a learning pattern for oral recitation and written examinations more than he needs scholarship or an understanding of learning theory. Thus, a Turkish author can and does write textbooks on many different subjects, apparently with equal success, as the official textbook list indicates.

> Authors of academic textbooks are generally teachers and ex-teachers, but also include members of the Board of Education, education inspectors and other officials of the Ministry of Education. The human resources to write (or translate and adapt) secondary level science textbooks are available in the Board of Education, the universities (especially METU and Robert College) and from returned participants.

Authors of general trade books are available in quantity for non-specialized subjects. However, as noted above, Turkish authors frequently must not only write the manuscript, but also find a printer to publish it...often financing the project by advancing money to the printer to buy the paper. Frequently, the author also is required to make the business arrangements for publishing the book. In these cases, authors often are forced into the role of publishers. That few can do this is obvious; some lack the money...others the business orientation to see their books through to completion.

The Turkish copyright law creates further problems for local authors. This law, based on the provisions of the Bern Convention of 1896, permits translation of foreign works more than ten years old without permission or payment to the foreign copyright holder. Its effect on the Turkish publishing industry is similar to that which occurred early in the history of the U.S. Until the 1890's, the U.S. did not extend copyright protection to foreign authors; as a result, American printer/publishers preferred to reprint well-known English literature, rather than pay royalties for the privilege of publishing American talent. Only subsequently, when the U.S. permitted foreign works to be copyrighted, did there develop a real flowering of native American literature.

In Turkey, the local author of a literary work is still being penalized. He has to compete against what is best and/or most popular in world literature, with the added handicap of having to demand royalties for his work. Turkish publishers and authors alike are unanimous in pointing out the difficulties faced by a new Turkish author trying to persuade a publisher to pay him for his work. Too often the result is "vanity" publishing by the tyro authors...they must pay to have their works put into print--because Turkish publishers usually have difficulty selling original works.

For scientific, technical and professional works, the ten-year clause does not serve the Turkish national interest; it encourages the translation of works that are already obsolete, or encourages irresponsible sub-rosa publishing.

Translators: For the translation of non-technical textbooks from English to Turkish there seems to be a reservoir of capable bi-lingual Turks among the participants on the university faculties (especially those of English and literature), and among Turks employed by several U.S. services in Turkey. Translators may be in short supply, however, for certain courses in prevocational, vocational and industrial education, where the need for translation and adaptations of U.S. textbooks appears urgent.

Good general trade book translators are available in quantity. For example, the large literary publishing firm, Varlik,

reports that it has no problem finding competent translators for the 50 or so titles it publishes per annum. Once again, however, an exception to the general rule of availability must be made for the technical subjects.

Production technicians: Turkey possesses competent production specialists and copy-editors within the narrow range of skills needed to produce the uncomplicated books that constitute normal output. Its commercial artists and designers are excellent: many have studied at the higher level School for Fine Arts and produce cover designs of top quality.

> As long as the Turkish publishing process operates within its current strict limits, there is no reason for elaborate training programs for production technicians; they develop best in a training program that involves them in the publishing process itself. Nothing more than in-service training programs are required for these specialists.

Publishers: The number-one priority in the Turkish publishing field is the development of publisher appreciation of the creative contribution they should make to the development of better textbooks. Publishers by and large are not competent to assist an author in the preparation of his manuscript; they do not develop teaching aids or supplementary materials. Their "editorial" function seems limited to copy editing and proofreading.

The editorial process as practiced in the U.S. (see Chapter 2) is not part of the publishing pattern in Turkey. Nor is it something "new" that can be added without revolutionary changes both in the current Turkish educational and publishing patterns.

Before the Ministry of Education and private publishers can be motivated to add the needed editorial function to their operation and make provision for the added research, operating and marketing costs it will entail, the benefits of the editorial process must be demonstrated to them in a convincing way.

Human Resources: Printing

Printing technicians: It is rare to find individuals with formal training in either the private or public sector; almost all Turkish printing technicians learn through practical experience. In the small print shops, they lack a basic knowledge of their skill and are relatively undisciplined. Although there is a printing school (see below), print shops prefer to hire inexperienced youths (some of whom are illiterate) and train them on the job. Even in the larger printing plants, the quality of the labor supply impedes efficiency and maximum utilization of equipment. However, the Turkish Historical Society and several other large shops send departmental chiefs to the Federal Republic of Germany and Great Britain for technical training, and infrequently the shops employ foreign technicians under contract.

> Often when new printing equipment is purchased from abroad, foreign technicians arrive with the new machinery and remain for several months to instruct plant personnel in its use; at times, too, Turks are sent to Germany to learn how to operate the new machines.

Printers' associations exist in Istanbul and Ankara, and perhaps elsewhere, but they are weak and limited in scope and activity; do not play their rightful role in the training process. In a kind of self-help program, a number of the larger printing firms in Istanbul support the Grafik Klüb, which provides basic courses in machine composition, printing fundamentals and the like. The Klüb helps bring printers up-to-date on latest techniques, but does not train inexperienced personnel.

In 1960, a three-year lise level Printing Trades Institute was founded at Istanbul. At present, it has 103 students and 23 teachers, 12 of whom give printing instruction. Few of the teachers have vocational teaching experience or background. Four, however, are undergoing training in the Federal Republic of Germany. The Turkish printing industry takes no interest in the Institute; does not accept its graduates because its courses are not sufficiently practical or up-to-date. Fewer than one dozen of the school's 300-350 graduates are employed in the industry; most take government "white collar" jobs. The Turkish government is aware of the

problem. The SPO's 1964 Annual Program noted that "the Printing Trades Institute, established to train vocational printers, is not equipped to train qualified personnel. The Institute should have closer contact with the industry in order to insure on-the-job training and familiarize students with out-of-school working conditions".

Printing plant management: A few of the larger printing plants have a good working knowledge of pricing and costing procedures--e.g., the Turkish Historical Society and Doğan Kardeş, both of which are managed by thorough-going craftsmen who underwent participant training in the U.S. But the overwhelming proportion of Turkish printers have no cost controls, do not know how to estimate bids. Even large printing firms undertake assignments without real knowledge of job costs; they price by "experience" and what they think the customer will agree to. (See Chapter 6 for a more detailed picture of the private printing industry.)

PHYSICAL RESOURCES

Physical Resources: Paper and Other Raw Materials

With population and literacy expanding rapidly, with new schools opening at an unprecedented rate and requiring ever more books, with industrial and commercial use (packaging, posters, advertisements, etc.) skyrocketing -- Turkish paper consumption has grown enormously and will continue to grow. From 1958 to 1962, overall paper consumption doubled from 58,000 to 131,900 metric tons. SPO projections indicate that this total will rise to 226,000 tons in 1967, and will more than quadruple to 564,000 tons in 1975.

> These estimates project a growth in needs which seems realistic in spite of the huge increase involved. Recent SPO paper projections, in fact, have consistently under-estimated consumption. From 1960 to 1962 it was estimated that per-capita paper consumption would rise from 3.20 kilograms to 4.08 kilograms; it actually rose to 4.57 kilograms. The 1963 estimate indicated a 4.46 kilogram per-capita consumption, and actually was 5.39.

SPO consumption for the book-pertinent "printing and writing paper" category (offset, 2nd quality, 3rd quality, and special textbook paper) indicates proportionately great increases:

1962 (actual)	24,048 tons	1967 (estimate)	45,200 tons
1963 (estimate)	28,600 tons	1975 (estimate)	129,700 tons

Unpublished data of the Ministry of Education's Publications Directorate indicates that textbook paper consumption for 1963-1964 totalled about 2,815 metric tons -- approximately 10.5% of the printing and writing paper consumed in Turkey that year. Of the textbook paper total, 1,840 tons were used by the private sector and 975 tons by the Ministry.

The textbook need projection based on the present use pattern indicates a 103% increase from 1963 to 1977, to about 25,862,000 copies. The maximum projection, based on one-new-book-per-student-per-subject, indicates a 1977 need of 36,296,000, a 185% increase over 1963's actual figure.

With an increase of 353% in printing and writing paper consumption (28,600 tons to 129,700 tons) projected between 1963 and 1975, and an average textbook consumption increase of 103% to 185% by 1977 -- somewhat under half of that magnitude, SPO paper projections should easily meet anticipated textbook paper demands, unless paper category requirements change (i.e., should the present second/third quality textbook paper be discarded subsequently in favor of offset paper), or unless paper projections are not met.

There is, in fact, some question how and whether the SPO paper projections can be achieved. Because of Turkey's unfavorable balance of payments and a reluctance to permit large increases in paper imports, realization of the paper consumption goals will depend on the rapidity with which local production can be increased.

Figure 11 shows that 76.6% of Turkey's 1962 paper needs were satisfied through local production. The major source of this locally produced paper is the Izmit Paper Mills, established in 1934, and set up in 1955 as The General Directorate of Cellulose and Paper Factories (SEKA)--an autonomous state economic enterprise, under the supervision of the Ministry

of Industry. SEKA's 1962 paper production was about 91,000 metric tons, of which 16,035 tons were printing and writing paper. Besides SEKA, there are seven private plants with a yearly capacity of about 10,000 tons of rough wrapping paper and paperboard based on straw. The private plants are technologically more backward than SEKA.

SEKA uses the sulphite process for manufacturing first quality paper and the groundwood newsprint process for cheaper grades. Current production is about 100,000 tons. The plant estimates that it can only increase production 1%-2% per annum with present facilities, which operate seven days per week, three shifts per day. Competent observers report that SEKA is indeed close to capacity under present operating methods, but that the plant is run at a low technical level. At normal U.S. standards, production would increase greatly.

The SPO acknowledges that the quality of SEKA paper is generally below western production standards; is pressing the plant to improve. Although some recent quality improvement was confirmed by a number of paper importers and printers interviewed by members of the team, there is general agreement that SEKA's offset paper is decidedly inferior, that production is uneven and that the plant has poor quality control.

SEKA has no sales department. As a monopoly, its marketing effort is confined to little more than order-taking. Largest customers are government agencies and newspapers. Insofar as the book industry is concerned, SEKA sells to both paper jobber/wholesalers and to printer/publishers. Purchasers often place orders in person at the SEKA plant, which is fairly close to Istanbul. Terms are net cash; quantity discounts are not available. SEKA representatives make occasional visits to the larger printer/publishers, and members of the Istanbul paper importers' association visit Izmit several times yearly to dismiss mutual problems. But the printing industry feels that SEKA knows and/or cares little about its needs, and that it will never be able to make suitable paper unless it understands the problems and requirements of its customers.

SEKA paper sells for more than world prices; its selling price is not a function of cost analysis, but rather of bookkeeping. Typical SEKA paper prices, per metric ton, are:

First quality paper	5,000 liras ($550)
Textbook paper (special grade between 2nd & 3rd)	2,300 liras ($253)
Non-textbook (3rd quality)	2,100 liras ($231)
Newsprint*	1,800 liras ($198)

Although SEKA is producing close to capacity under its present operating methods, there has been some discussion of introducing new methods and techniques that might enable it to raise production somewhat. But even in the unlikely event that output could be doubled, the present plant alone could not nearly begin to meet the anticipated demand. Since the archaic small private plants also lack expansion potential, needs will have to be met by the priority construction of new, modern, large-scale paper mills. The alternative -- satisfying the rapidly mounting paper requirements out of ballooning imports, or sharply curtailing the paper (and therefore book) projections -- are untenable.

The SPO-SEKA long range plan calls for the construction of at least five new paper mills--a kraft plant at Filyos, plus various sulphite mills; and all these mills are scheduled for completion in time to permit the huge paper requirement totals to be satisfied in overwhelming proportion from local production rather than from foreign-currency-requiring imports.

However, the planned first mill at Filyos has not yet been started. SEKA has been trying to attract foreign private investment to build it, but several U.S. firms made studies of the situation and afterwards withdrew from the field. The negative decisions are attributed largely to high pulpwood prices charged by the Turkish Forest Service, plus the tax on imported machinery. Another U.S. firm was considering the investment as the book survey team departed from Turkey, and several European firms were reported to be interested in some of the other projected plants; but the loan repayment terms stipulated by the European firms were considered unattractive. Thus, expansion plans were falling ever further behind.

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* This is an averaged local production-import price. The private sector reports that it can land imported newsprint for about 1,300 liras ($143) per ton. The spread is much larger for expensive papers.

The SEKA situation seems to afford little optimism for immediate improvement. Within the past year, it has lost key management personnel, and informed observers report that SEKA may even encounter difficulty equalling past production.

As noted in Chapter 7, much of Turkish printing ink and almost all offset ink is imported; most from the Federal Republic of Germany. Quality inks are not produced locally. Local inks are generally used only for newspapers and the inexpensive groundwood paper books, including textbooks. Various German ink manufacturers have considered opening Turkish plants, but thus far without conclusive result.

Cloth for book bindings represents a major problem. It cannot presently be imported, but good Turkish cloth makers are few. Turkish plastic covers, however, are of good quality.

All glue for binding is produced locally; there have been no glue imports since 1958.

Physical Resources: Plants and Equipment - Public Sector

The 42 individual government printing plants are largely non-book producers of reports and forms. Individually, they are often equipped with machinery that is completely out of balance, such as a brand new linotype serving a small press, or a large, automatic collating machine backed up by only a few multilith presses. Collectively, their efficiency is poor and proper costing or production management is non-existent.

Preliminary reports from the State Supply Office's survey of printing capabilities indicate that the government printing plants are being used about 9% of one-shift productive capacity...although this percentage seems unbelievably low. The SPO's 1964 Annual Program states that 1957 output in state printing establishments was "50.8% of the normal", and that in 1963 the percentage was 55.7%. The correct figure, probably somewhere between the two estimates, results from significant problems:

> Old, inefficient machinery: The 1964 Annual Program states that 64% of all printing machines in the public sector (and 60% of private sector machines)

are obsolete. Equipment manufactured and imported by Turkey before 1950 was semi-automatic; has low output.

Lack of compatability: Although most machinery now comes from the Federal Republic of Germany, it also comes from many other countries, including Japan, as well as those east and west of the iron curtain in Europe. The pre-1950 machines are an even more diverse group (and it is difficult, and oftentimes impossible to obtain spare parts for them). A State Planning Organization 1963 survey found 80-100 different makes represented in public and private machines.

Lack of coordination: The diversity of makes in the private sector is attributed by the SPO to the insistence of individuals on their own specifications. In the public sector, the non-coordination of related printing activity on the part of government ministries and agencies has resulted in duplication of effort, waste and low productivity.

Lack of coordination among public printing plants is not new. In 1954, a law was passed which authorized centralization of government printing facilities under the State Supply Office. As a consequence, the SSO is conducting the above-mentioned survey, and is building a pilot plant which will centralize the operation of 34 of the 42 government plants--not including, however, the Ministry of Education printing plant, which will remain separate. The SSO central plant will encompass 17,000 square meters; is seen as a sort of Government Printing Office. It is scheduled for completion in six years, and will employ 750 workers. The plant site is located between Istanbul and SEKA at Izmit. Planned investment is set at 45,600,000 liras ($5,016,000), of which about one-seventh will require foreign exchange.

The projected SSO plant is criticized in some quarters on two counts: (1) it may prove more efficient to leave plants in their present locations, but centralize and coordinate their control, and (2) faulty location--the plant's customers are located chiefly in Ankara.

In the meantime, progress seemslikely on one important front: on October 12, 1964 the director general of the State Supply Organization approved the adoption of the Printing Industry of America (PIA) management and operating plan, recommended

by USAID's printing specialist. The PIA plan covers production control, budgeted hourly costs, planning, scheduling and accounting procedures. In two or three years, when the system is installed in the present SSO plant, Turks will be trained to carry the new techniques to other government printing shops.

Currently, the five largest government printing plants are:

Ministry of Education printing plant	372 employees
General Directorate of Monopolies	159 employees
New Prison print shop (Ankara)	139 employees
Grand National Assembly print shop	127 employees
State Railways print shop	121 employees

The Ministry of Education's printing plant--the largest by far--contains a great deal of equipment, some very old and some very new. Most comes from West or East Germany. It has 23 letterpress printing presses, six offset presses and three lithography presses. Three of the offset presses (one a four-color press) as well as binders, collators, cutters and photo lab equipment have been obtained through USAID. The plant's manufacturing facilities are distributed over several multi-storied buildings, none of which is properly suited for a printing operation. Daily production is 25,000-30,000 books; annual production is about 7,000,000. Books are normally printed from stereos and zinc engravings mounted on patent bases.

Management of the Ministry of Education's printing plant is in the hands of a plant director, who works under the supervision of the director for publications. Both are dedicated, hard-working executives, doing their best under most difficult circumstances, and with an archaic physical facility.

See Chapter 5 for a discussion of other phases of operation of the Ministry's printing plant.

Physical Resources: Plants and Equipment - Private Sector

The 1964 Annual Program reports that private plants operated at 81.7% of single shift capacity in 1957. The figure seems somewhat high...it is doubtful that the figure is at that

level today among the many small print shops that comprise much of Turkey's private printing industry. Even checks among the larger printing plants (some of them offset) by the book survey team revealed that these industry leaders average only about one and one-quarter shift operation. The SPO 1965 Annual Program (second Draft) estimates that there is ample printing capacity for future needs.

Conclusions Re. Plant and Equipment

With a modicum of new printing equipment and with some modern bindery equipment, there is little reason why the private sector, from the plant and equipment point-of-view, cannot handle the projected textbook increases. Private firms have been active in Turkish textbook production for sixteen years, and can be expanded as demand increases.

The SPO 1965 Annual Program (Second Draft) calls for a cessation to the continuing proliferation of government printing plants. The warning does not apply, of course, to the Ministry of Education's printing plant, which runs a full one-shift operation -- producing textbooks, supplementary books, foreign and Turkish classics, dramatic works, art books and encyclopedias. But the Ministry's plant operates at lower efficiency than the larger private print shops and can increase its output.

Two-shift operation for private plants and for the Ministry's might come close to meeting the doubled production that would be needed to reach the 1977 textbook projections of Figure 10. But with the obsolete nature of much of the printing equipment and, more importantly, the lack of trained printing personnel, these goals will not be easy to achieve.

Turkey's problem is basically not one of insufficient plant capacity, but a lack of skilled technicians. Indeed, one reason for the present excess capacity is the lack of good printing technicians, as noted previously. There are many quality letterpress, offset and rotogravure printing jobs that remain unproduced because of the shortage of skilled technicians. And there is some loss of the more competent Turkish printing technicians to Europe, where higher salaries are the attraction.

Other overall printing industry problems include (1) a scarcity of engraving plants, and (2) a lack of binding equipment. Both the private and public sectors need binding equipment to balance printing equipment. The Ministry of Education's plant is perhaps the only one in Turkey with adequate binding facilities.

At the present stage of development of Turkish private publishing and printing, there seems little immediate incentive for foreign (and especially U.S.) firms to enter into joint-venture arrangements that are more elaborate than the supplying of titles to local publishers for translation and adaptation, plus perhaps a little technical assistance and financial aid, in return for royalties.

FINANCIAL RESOURCES

Financial Resources: Public Sector

Government operating units, such as the Ministry of Education's Publications Directorate, are financed through appropriations (which provide for operating and/or production budgets), plus revolving funds. Thus (see Chapter 5), the Publications Directorate has two different funds--the "State Books Revolving Fund" and the "Printing Plant Revolving Fund". State economic enterprises, i.e., SEKA and the State Supply Organization, are financed in much the same way. All theoretically function at a "break even" point.

For 1964, the SSO was authorized to spend 3,400,000 liras on its new printing plant. Total "Manufacturing investment" by SSO for theyear was set at 16,000,000 liras, of which foreign currency requirements were estimated at the equivalent of 930,000 liras.

SEKA's 1964 "manufacturing investment" authorization was set at 101,841,000 liras, of which paper accounted for 89,500,000 liras. The overall total included an estimated foreign currency requirement equal to 42,085,000 liras; if we add to this the estimated private sector foreign currency requirements for paper, that figure reaches 50,685,000 liras.

Financial Resources: Private Sector

Securing capital, whether short-term or long-term, for private business is difficult in Turkey. Printing and publishing firms are no exception to this general rule...and indeed have a more difficult time than most others.

There is no organized Turkish capital market, so that medium and long-term financing must often be done out of personal resources, by bringing in partners, or by reinvesting previous profits.

There is only one functioning source of medium-term investment capital--the Industrial Development Bank--a privately operated bank which has the use of a 15,000,000 lira deposit in U.S. counterpart funds. The bank lends money for 3-9 years at 8% per annum. It has averaged 50-60 loans annually since its founding in the early 1950's; has made several loans to industrial and commercial printers (printers of boxes, labels, posters, etc.), but never to a publisher or printer of books.

> Amendment #7 to the Industrial Development Bank's charter (dated December 14, 1957) specifically rules the publishing industries ineligible for loans. The amendment is an inadvertent by-product of a former decision to eliminate loans to newspapers, but it cuts off a potentially valuable source of capital financing for the industry.

The Industrial and Credit Bank is a new medium-term industrial bank which was established in March 1964 by several of the commercial banks. It has a capital of 120,000,000 liras, of which half represents counterpart funds. The bank lends money for 1-5 years; it is too recent to have extended many loans--has not as yet made any to printing and publishing firms.

Short-term capital is available for private businesses from the commercial banks at annual rates of 12 1/2% and up, with stringent requirements for collateral. Commercial loans are made for an indefinite period, but are payable on demand. The collateral required is usually title to commodities, notes of customers, or real property. Practically no loans are approved on the basis of a business firm's general credit standing.

These collateral requirements more or less rule out book publishers and printers. None of those interviewed by the book survey team had made use of commercial bank credit in this manner, although some reported that credit could be obtained on a personal basis, backed by collateral.

The 1964 Annual Program estimated that the public paper sector would invest 14,000,000 liras, of which foreign currency requirements would be equal to 8,600,000 liras. It also estimated that the private printing industry would invest 2,000,000 liras during the year.

CHAPTER 11

BOOK-RELATED FOREIGN ASSISTANCE TO TURKEY

The innovations and expertise that foreign-sponsored book programs have brought to Turkey will have a major effect on the future growth and development of the local book industry.

This chapter begins with a discussion of the largest book-related program of an outside organization, the Agency for International Development. It covers the AID/Washington Central Book Fund Program in Turkey--then the comprehensive program of the USAID Mission, in which almost all the component divisions have participated. Then the chapter outlines the scope of other U. S. Government agency efforts in the book field -- those of the United States Information Service (USIS) and the Peace Corps. Finally, it outlines the book-related work of the Ford Foundation and of UNESCO and OECD -- two international bodies to which Turkey belongs.*

There is a loose coordination of efforts among the different organizations that provide aid to Turkey - through the technical cooperation unit of the Ministry of Finance, and through formal and informal meetings of the parties involved. Most outside-financed effort is devoted to individual projects that provide technical specialists or assistance on a demonstration and "seed operation" basis. The remainder is in the form of training activity or financial support for the purchase of books and/or printing equipment.

The Middle East Technical University central library represents a striking (and perhaps unique) example of multi-organization

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* Note: Appendix C of this report presents a summary of key U.S. Government agency and UNESCO book programs for developing countries.

assistance. It has been the recipient of funds from a diversity of sources: the Ford Foundation contributes sums on a regular basis for the purchase of mathematics, chemistry and physics books; UNESCO has made a four year $100,000 grant to the university for library equipment and books in engineering and architecture; OECD is helping through the purchase of books on economics and statistics; and Cornell University, via an AID university project project, has provided books in management and public administration. In addition, the Turkish government appropriated 200,000 liras which were converted into dollars for the purchase of foreign language technical books. (Almost all METU library books are in English.)

AGENCY FOR INTERNATIONAL DEVELOPMENT

AID book-related projects have had the biggest impact of all. They consist of two main types: (1) those that originate in Washington, D. C. as part of AID/TCR's Central Book Fund Program, and (2) those that originate with the USAID Mission to Turkey. Both programs are carried out by USAID/Turkey staff or contract personnel.

The Mission's activities are widespread. On an individual basis, its Educational Division, Office of Communications Resources, Public Services Division, Industry Division, Agriculture Division and Labor Division have all sponsored book or book-related projects. In addition, there have been several projects which can be considered Mission-wide in scope:

> Participant Training: Among the nearly 3,000 Turkish participants who have been sent abroad by USAID for training in the U.S. or other countries have been a number who have studied publishing and printing. Many of these received U.S. training for USAID-sponsored book projects (i.e., the Educational Materials Development Center); others have been sent to "third countries" (i.e., specialists in the Ministry of Education's printing plant, who were given training in Lebanon.)
>
> (In addition to improving the arrangements for the handling of individual participants, AID/TCR's Central Book Fund has initiated a series of group-training seminars for managers of private and public book

industry organizations. Several Turkish publishing officials were enrolled in a February 1965 group seminar held in the U.S.)

The Mission Technical Support Book Fund: This is a $15,000 fund used to purchase and donate U. S. books for special purposes. Recipients to date have included Atatürk University, the Turkish Management Association, METU, the State Planning Organization, the Economic Research Foundation and the Hittite Museum.

Central Book Fund

Pursuant to AID Policy Determination #12 of 1962 (see Foreward), AID/TCR's Central Book Fund Program develops demonstration pilot projects for USAID Missions. These projects are designed to be taken over, developed in depth and funded by the Missions. To date, USAID/Turkey has adopted six CBF-sponsored projects.

Ten Turkish educational, technical and scientific organizations function as a high-level "Central Book Fund/National Committee" to help operate these projects. Members of the committee are the six Turkish universities, the Ministry of Education, National Library, Atomic Energy Commission, and the Scientific and Technical Research Council. The committee has a USAID/ Education Division advisor; it was formed on January 22, 1965.

During the survey team's visit to Turkey, five of the Central Book Fund projects were being administered by the USAID/ Education Division:

National Academies of Sciences (NAS) Science Reference Materials Program: - Under this project, 4,000 U.S. scientific books are to be provided to member institutions of the Central Book Fund/National Committee when requested by title to fill specific needs. These will be reference books, textbooks (not multiple copies), books on natural and social sciences, engineering, technical and educational books.

American University Presses Book Project: - Two sets of a collection of almost 300 books published by University Presses have been provided by the Central Book Fund for

use in Turkey. One set was retained in the USAID's Technical Library; the other was presented to the library of METU. The initial collections of 182 titles covering scholarly books published during the years 1960 and 1962 have been supplemented by collections of over 100 scholarly books published during 1963 and early 1964. The project is designed to make available to Turkish scholars a representative collection of U.S. scholarly publishing within the developmental subject areas.

National Development Reference Library: - This is a project designed to put in the hands of motivators of change in the developing lands a balanced set of U.S. books relating the various segments of the national economy to the growth process, and is one of the Central Book Fund's key services. Two 300 book collections were provided for Turkey -- one was placed with the State Planning Organization, and the other in USAID's Technical Library. The collections include works on the theories of economic growth and developmental planning, and appropriate works on industry, management, public administration, science and research, agriculture, public health, resource management and labor.

Textbook Depository Libraries: - This project is providing the National Board of Education with 1,000 secondary school textbooks, and Istanbul Technical University with 1,000 college textbooks in various disciplines. Each of the two depository libraries will possess a collection whose coverage is designed to show a relatively complete representation of the total curriculum and leading texts of U. S. textbook publishers. This is a new project; it was approved on July 29, 1964.

Global Royalty Fund: - The project pays translation rights for Turkish publication of U. S. books. As of the end of January, 1965, USAID had requested and publications rights had been obtained for upwards of 20 titles. Franklin Book Programs operates this program under contract to AID.

USAID/Office of Communications Resources was responsible for the Central Book Fund-sponsored survey of book industry capability and the role of books in educational development and national growth, of which this report is an end-product.

The survey, carried out under contract to Wolf Management Engineering Company, involved the combined skills of development and educational specialists with experienced and internationally-knowledgeable officials of the U. S. private book industry.

In addition to the above described Central Book Fund projects, USAID/Turkey is also considering a new CBF program covering neo-literate instructional materials. Franklin Book Programs personnel are presently locating and screening neo-literate supplementary reading and teaching material, as it is being developed in the various U. S. current efforts to reduce poverty and underemployment traceable to functional and occupational illiteracy.* This material will be classified by type and made into kits for local adaptation through the local USAID Mission.

USAID/Education Division

Six important book and instructional material-related projects have operated recently out of USAID/Turkey's Education Division: (a) the Educational Materials Development Center, (b) the Armed Forces Literacy Training Project, (c) the Audio-Visual Project, (d) the Georgetown University Contract Group, (e) the Spring Garden Contract Group, and (f) the Test and Measurements Bureau project.

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* Franklin Book Programs, Inc. is a non-profit educational organization which has the support of the U.S. book industry as well as private foundations, individuals and government agencies in many countries. It is active in AID book programs. Its main concern is the creation and strengthening of indigenous book industries in developing countries, and assisting in various ways to facilitate reproduction of books for current use (including both original works and adaptations and translations from existing works). Franklin is not itself a publisher; local publishers produce its output. Franklin provides technical assistance in editorial preparation, manufacture and publication to local organizations.

(a) The Educational Materials Development Center (MDC) was founded in 1961 to assist the Ministry of Education's Publications Directorate in establishing a program for the preparation, production and upgrading of educational materials. The staff consisted of 1-2 USAID specialists, plus part-time technicians (mostly Turkish teachers). The Center was almost entirely U. S.-financed.

The MDC was guided by a policy committee consisting of the Director of Publications of the Ministry (coordinator and supervisor of the project), the Editor-in-chief and two members of the Board of Education. The U. S. technicians were ex-officio, non-voting members. After the committee chose the titles to be published, the MDC recruited the authors, assisted them in the planning stages, reviewed the manuscripts and worked with the authors in rewriting and revision, designed the books, prepared the art work and made dummy layouts for the Ministry's printing plant.

In all, the MDC prepared 175 supplementary book titles, as well as other educational materials. Its work included:

Continuing editorial, art and layout assistance to Ilköğretim and Yeni Ortaöğretim, monthly periodicals for primary school and orta school teachers, respectively.

Preparation of 40 supplementary books for the Armed Forces Literacy Program - folk stories and tales with morals.

The Basic School Library Project: 500,000 liras of counterpart funds were used for MDC production of 27 books and 3 wall charts to provide basic libraries for 13,200 underprivileged primary schools. Books included 12 originally prepared for the Armed Forces Literacy program, 12 translations of elementary science titles, originally published by Webster, and 3 large picture books.*

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* The primary school basic library project also included an additional 1,000,000 counterpart liras ($110,000) for the purchase of children's books from Turkish private publishers. In this phase of the project, 13,200 copies each of 52 different titles were purchased from 15 publishers.

As a training assignment for staff personnel, the MDC translated the U.S. Office of Education handbook on preparation of educational materials, which was subsequently printed by the Ministry's printing plant. It also translated and multilithed a manual of style and a glossary of publishing terms.

The MDC held two seminars for authors: (a) Adult Education Book Seminar - to teach writing and preparation of adult education books, and (b) Seminar and Workshop on the Writing of Children's Books. The latter seminar resulted in the submission of numerous new manuscripts. Each of these 3-day seminars was attended by 25-30 authors and teachers. Several private sector publishers also participated.

15 textbook-preparation participants were sent forth under MDC auspices to study in the U. S., the German Federal Republic and Lebanon.

Book production was the chief need when the MDC was formed; it thus placed major emphasis on getting books published and little on distribution. Main distribution of MDC books was through the Ministry of Education bookshops, which do not promote the role of books. As a result, copies tended to back up in the warehouses.

The MDC undoubtedly did much good. It provided the Publications Directorate with guidelines for improvement of the publishing process; awakened educators, authors, and publishers to the value of colorful, dramatic supplementary books; began to teach the public and private publishing sectors the need for editorial assistance; and trained a nucleus of competent writing, production, editorial and art personnel.

And yet, the MDC never established permanent roots. During its three years of operation, the MDC was not granted legal status by the Ministry of Education, which would have provided it with a regular budget and a permanent role.

The MDC seems to have represented a kind of foreign "graft" on the Ministry's book production process, which unfortunately never "took".

(b) The Armed Forces Literacy Training Project of USAID's Education Division developed (1) curriculum and educational materials, (2) a teacher and supervisor training program, and (3) financed the construction of physical facilities for the General Staff's program of the same name.

The educational materials phase of the project included an initial preparation of eight basic textbooks for instruction in Turkish, arithmetic, civics and health, plus six detailed teachers' manuals. These were developed first in cooperation with the Georgetown University Contract Group, and later with the MDC. The books were printed on the Ministry of Education's presses.

Subsequent production included 40 graded supplementary reading books (via MDC) and films, slides, filmstrips, charts and other audio-visual teaching aids (via the Audio-Visual Center). A second series of supplementary books is now being planned for a part-time, follow-up program.

The Armed Forces Literacy Training Project had side benefits that included the establishment of the MDC (which was set up with persons originally brought together and trained for the Armed Forces project), and linguistic research, in the form of a study of spoken and written Turkish, which was prepared as a guide to selection of vocabulary and sentence structure for the books.

(c) The Audio-Visual Education Project helped the Ministry of Education's Film-Radio-Graphic Center (F-R-G) to develop a competent permanent staff. The F-R-G Center operates under the Vocational and Technical Directorate of the Ministry. Like the MDC, it has never achieved legal status; it has, however, acquired a revolving fund and has an operating budget.

In six years the Center has produced 38 films on industrial and cultural subjects, 50 filmstrips, and one pedagogical film on the unit method in teaching. It has a staff of 75. Content "writers" for its films and filmstrips are obtained from the Turkish agencies for which work is done. Projects have included Audio-Visual work for the Armed Forces Literacy Program. . .a number of posters, three films and eight filmstrips on Turkish subjects, and ten adaptations of Walt Disney health films originally prepared for the Office of Inter-American Affairs.

For the Ministry of Education, the F-R-G Center is developing films for combined film-book instruction (the films parallel and illustrate textbook content).

The Center will shortly begin work on audio-visual materials for pedagogical purposes; teachers will be taught how to teach subjects such as educational psychology, social sciences, etc.

It has also produced film slides in limited numbers, for school use, and has produced about 130 charts and posters in its silk screen shop for the military and for schools.

Distribution of Film-Radio-Graphic Center products is made to 67 Audio-Visual Distribution Centers, which bring and show films and filmstrips to schools and villages. The distribution system encounters difficulties at this point...teachers are often unaware what materials are available at the Distribution Centers.

(d) The Georgetown University Contract Group project was created in 1954 to provide English language training for Turkish participants going to the U. S. It was later broadened to include assistance to the Gazi Pedagogical Institute in the training of teachers of English as a second language. Projects included:

Assistance in the preparation of the beginning set of readers, arithmetic, civics and health books, and teachers' manuals for the Armed Forces Literacy Project (see above).

Intensive English language training for participants: Georgetown prepared a series of texts programmed for teaching. The books are aimed at adult Turks; take them from beginning to advanced level in a five-month, 600-hour course.

Georgetown prepared a six-volume "English speaking Friends" set, for six years of secondary level English study. Three of the six volumes had been approved by the Ministry of Education for supplementary book use at the time of the book survey team's visit to Turkey; approval of the remainder was expected shortly. The books were to be published as a commercial venture by the Teachers' Bank. A teachers' manual accompanies each volume. (The Georgetown Group also prepared a three-volume "English as a Third Language" set).

In 1960 Georgetown conducted a vocabulary study to provide a basis for preparation of instructional material for the Armed Forces Literacy Project. Through tape recorder research, the 200 most frequently used Turkish words were identified and listed in order of their frequency. This material was published in English and Turkish.

(e) The Spring Garden Institute Contract Group project was initiated in 1959 to provide assistance to the Ministry of Education in establishing training facilities in the field of electricity-electronics and automotive maintenance. Part of its assignment included the preparation of instructional materials for use in these courses for the trade institutes, technician schools, for in-service teacher training and for the Higher Technical Teacher Training College. By the time the book survey team departed Turkey, these materials had not yet been approved by the Board of Education, and so had not been made available to the schools.

(f) USAID has provided technical assistance and financial support to the Ministry of Education's Research and Measurement Bureau. While assigned to the Bureau, the USAID specialist, Jefferson Eastmond, wrote six special studies on "Educational Opportunity in Turkey". Among other projects, the Bureau made a study of the vocabulary of primary school children to serve as a basic guide in the development of primary school textbooks.

USAID/Office of Communications Resources

The aim of the Office of Communications Resources (OCR) is to provide USAID with the means by which ideas, programs, methods and information can be communicated to Turkish and U. S. audiences. It employs many media of communication and works in close cooperation with USIS/Turkey. It is a service activity, not a program activity, that supports USAID technicians in their communications responsibilities. As such, OCR works in two main areas; has a unit for each: (a) "Communications Resources Utilization", and (b) "Communications Resources Laboratory."

(a) The Communications Resources Utilization unit conducts its own communications seminars, as well as most management sessions in seminars held by other USAID divisions. It also prepares visuals for Turkish exhibitions (as demonstration projects) and provides consulting services in the areas of graphic and visual-aid equipment for various Turkish organizations.

During the 18 months ending June, 1964, Utilization unit personnel conducted sessions at 103 seminars, with a total attendance of 3,700. Its flannel board and flip chart presentations include 22 in Turkish and 10 in English. Typical presentation titles are, "Simple and Inexpensive Teaching Materials", "Visualizing Your Ideas for Better Communication", and "Leadership and Communication".

(b) The Communications Resources Laboratory consists of 22 technicians, all Turkish except one; it is divided into management, printing, photography, art and audio-visual sections. The laboratory has produced the following:

Flip charts, maps and graphic materials for other USAID divisions.

Demonstration "seeding" preparation of books and manuals, including:

"Investment Guide to Turkey", an elaborate publication of the Union of Chambers of Commerce and Industry, for which the Communications Resources Lab set type, made layouts and carried production through to "camera ready".

Preparation and printing of the first book in the USAID/Industry Division's "Small Business Book Program" (see below).

Preparation of various books for USAID/Education Division, including the first shorthand book used in Turkey's commercial secondary schools and the first primary school music book published in Turkey.

Production in Turkish and English of a 100 page management manual used in USAID/Public Services Division seminars.

Publishing of a series of booklets on unions and union administration for USAID/Labor Division.

Translating into Turkish and publishing 10,000 copies of the U. S. Navy's "Conference Sense" manual, as a seminar give-away.

Production of 12,000 copies of the Georgetown University Group's "English Speaking Friends" book, when the title was approved in 1963; also, binding the copies of a Peace Corps-prepared teacher's guide for the Gatenby English language textbook.

"The Participant Journal" is an outstanding bi-monthly periodical, first published in 1962 to "build a bridge to participants" who have undergone training in the U. S. The publication is edited, printed and published by OCR personnel; has a world-wide USAID distribution and has inspired other Mission publications. "The Participant

Journal" is oriented to Turkey and its problems; and contains articles written by Turkish government officials, participants, USAID staffers and others. Most articles are in English, because "that is what the participants want". The periodical began with a 2,000 copy run; now averages 5,000.

OCR recently assumed responsibility for the USAID Economic and Commercial Library and is converting the present unorganized collection into a Mission archive.*

USAID/Industry Division

The Industry Division's Small Business Book Program is a seeding operation, financed from project funds, in which instructional booklets have been specially prepared for free distribution to small businessmen. The six titles published and distributed to date are, (a) "Cost Accounting for Small Industrialists", (b) "Marketing for Small Industrialists", (c) "Blueprint Reading", (d) "Lathe Operation", (e) "Use and Care of Carpentry Hand Tools", and (f) "Practical Oxygen and Electric Welding."

From 7,500 to 20,000 copies of each booklet have been published. Most have been distributed through Small Businessmen's Credit Cooperatives associated with the Halk Bank (the booklets are usually given to borrowers). Supplementary limited distribution has been made by the Ministry of Education, Ministry of Industry and the Union of Chambers of Commerce.

2,000 liras are paid for manuscripts. Authors are usually teachers. Average per-copy manufacturing cost has varied between 1.50 and 3.00 liras (17¢-33¢). The first book in the series was prepared by the OCR; editorial work is still done by USAID-connected personnel, but subsequent books have been printed by Ajans Turk, a private printer/publisher in Ankara.

The project has aroused interest in Turkey. Although designed for small manufacturers, several large manufacturers have requested the booklets for training programs; the Ministry of Education has requested copies for a vocational teachers' seminar; and Ankara University has requested the accounting booklet for use in its Institute of Business Administration.

*Many recent as well as old USAID project and specialist reports are missing or out-of-stock. By establishing the library as a depository for Mission reports, OCR hopes to avoid future loss of this valuable data.

The booklets have also aroused interest in Jordan, Pakistan and Iran -- all of which have asked permission to publish specific titles (the books are in Turkish, thus will have to be translated).

During the autumn of 1964, plans were being formulated to establish a committee of various interested organizations which might underwrite the future cost of the program. Until then, it had been entirely financed from counterpart funds. The present private printer had not shown an interest in handling the booklets as a commercial venture. In view of the dearth of practical books on the Turkish market and the widespread interest these aroused, it was hoped that a private firm will develop an interest in the series. The booklets had always been distributed free of charge -- it was uncertain how well they would sell.

USAID Public Services Division

In 1960 the Public Services Division began a project in printing and supply management that brought a competent advisor to Turkey to work with the State Supply Office (SSO). He is helping the SSO to carry out its responsibilities for central printing services and coordinating of procurement. As part of his assignment, the USAID specialist has been surveying the myriad government printing plants. Some of his findings and plans are discussed in Chapter 10, under "Physical Resources: Plants and Equipment". The project also includes participant training activity.

USAID/Food and Agriculture Division

This division's book and publication activity has included:

> Preparation of an "Agricultural Extension Handbook": by USAID and Turkish technicians. All 1,500 Turkish agricultural extension agents are equipped with the handbook. It contains 140 separate articles in key categories, such as extension, home economics, youth programs, livestock and poultry, land and water use, pasturage and forage, and forestry. It was printed in 10,000 Turkish and 1,000 English copies and has been forwarded to many other Missions.

Subsidization of various agricultural periodicals (i.e., "Farm Magazine", "Village Letter", "Tobacco World", "Olive Oil"). The subsidies have taken the form of 6 to 12-month free subscriptions for selected farmers throughout Turkey.

"The Farmer", a monthly wall newspaper that is posted in village coffee houses and headman's houses. Costs are fully paid by the Ministry of Agriculture; at present, copies are printed by local newspaper. The project evolved from a similar idea in South Asia.

In addition to the above, the Agriculture Division also has (a) subsidized the house organ of the agricultural extension service, (b) provided free articles written by Agricultural Division personnel for the Ministry's "Agricultural Publicity Bulletin", and (c) prepared a 189 page glossary of soil conservation and farm irrigation terms.

OTHER U. S. AGENCIES

United States Information Service

The United States Information Service (USIS) operates a relatively small book program in Turkey, consisting of information libraries, assistance in book translations, and the IMG program.

There are four regular U. S. Information Libraries in the country -- at Ankara, Istanbul, Izmir, and Adana. Although apparently well run, attractive and well-stocked, these libraries are not nearly so heavily used as those in many other countries, because of the small fraction of the population with a reading knowledge of English. The same low level of use exists in the similar libraries of the British and French governments. The books most used in the U. S. Information Libraries are college texts and children's books with simple vocabularies (which are read by students, not children). If and when Turkish secondary schools and universities place more emphasis on the use of the English language in their classes, increased patronage of USIS libraries can also be expected.

Under the book translation program, USIS is able to use Turkish lira obtained from the sale of U. S. agricultural surpluses (P.L. 480), to help publishers bring out Turkish editions of U. S. textbooks and related works. USIS pays for printing, paper, cover stock, rights, translation and editing. The local publisher is expected to pay for the distribution costs. Under the program, ten titles were published in 1961-63, with an average edition size of 2,600 copies and a usual retail selling price of 5 liras (55¢). The cost to USIS was greater than the selling price. A further 37 titles were contracted for as of March 1964.

> All of these books are expected to be sold primarily to students through regular distribution channels. However, because of the very limited demand for textbooks other than those required at the primary and secondary level, commercial publishers are not interested in publishing under this program, in spite of the heavy subsidy. Therefore, contracts have been made for the most part with non-profit publishers, association and institutions, with government agencies and with universities. No information is available regarding the actual number of copies sold as compared with the print orders on the titles thus far produced.

USIS/Turkey participates in USIA/Washington's low-priced book program. It has had 14 fiction and non-fiction titles translated and published during the last three years. The books are printed in quantities of 10,000; prices vary from 1.25 to 5 liras (14¢-55¢).

The Informational Media Guaranty program (IMG) has operated in Turkey since 1951. It is essentially a Washington program of USIA. Local USIS officials have no day-to-day operating functions under the program and seem to know very little about it. Essentially, IMG is a currency conversion system in certain dollar-short countries. Under a bilateral agreement with Turkey, U. S. exporters of books and periodicals and educational material may sell to Turkish importers for lira up to certain maximum contract limits of each exporter. The U. S. exporter in turn sells these local currencies to the U. S. Treasury, which sells the lira to U. S. government agencies operating in Turkey, for meeting local currency expenses.

> In the fiscal year ended June 30, 1963, $366,655 worth of U. S. informational media were sold to Turkey under the program, at practically no net cost to the U. S. Government.

Of this total, $133,000 represented book exports, $55,200 periodicals, $157,000 motion picture rentals and $25,000 other informational media. In Fiscal Year 1964, the overall total dropped to $292,000, distributed as follows: books $168,000, periodicals $66,000, motion pictures $21,000 and miscellaneous media $37,000.

Peace Corps

110 Peace Corps volunteers taught English in Turkish secondary schools during 1963-1964. At the request of the Turkish government, their number doubled in 1964-1965, and they may become a major factor in intensifying the teaching of English in the Turkish educational system. For this work, the Peace Corps developed a mimeographed teachers' guide to the Gatenby British textbook which has been adopted by most schools. The teachers' guide was prepared by the first group of volunteers for the use of the newly arrived group; in addition, the volunteers developed their own simple educational charts.

The Georgetown University Group's "English Speaking Friends--Vol.1" was printed by the USAID/Office of Communications Resources (see above) for the Peace Corps, which uses it as a supplementary book.

OTHER OUTSIDE ASSISTANCE

The Ford Foundation

The bulk of assistance provided to Turkey under the Ford Foundation's Overseas Development Program has been in the area of educational development. A number of these projects have touched directly or indirectly upon books:

> The establishment of the Ankara University Institute of Librarianship was made possible by grants from the Ford Foundation and the cooperation of the American Library Association. Among other things, Ford provided assistance in the development of curriculum and teaching materials.

Similarly, the Ford Foundation helped establish the Institute of Business Administration at Istanbul University (with the aid of the Graduate School of Business Administration of Harvard University), and provided help in the development of curriculum and teaching materials.

The Ford Foundation is doing the same for the new prototype National Science Lise, opened recently at Ankara.

The Turkish Society for Pure and Applied Mathematics was assisted in publishing a series of booklets for supplementary reading, designed to stimulate greater understanding of mathematics. 22 books have been published thus far in the program; most are Russian translations, some are German. 400-500 copies of each title have been printed; they are priced from 1.60 to 5.50 liras (18¢-61¢). To date, however, the books have had disappointingly poor sales.

In addition to the above listed projects, the Ford Foundation (a) provided financial support for the establishment of the Turkish National Commission on Education, and subsidized the publishing of its 1960 report; (b) supported the Redhouse Turkish-English Dictionary publication work of The American Board; and (c) provided funds for the purchase of books by METU's central library and the Library of International Law at Istanbul University.

UNESCO

Although the United Nations Educational, Scientific and Cultural Organization (UNESCO) has played an important role in Turkish education and has been of vital assistance to METU in the administration, teaching and equipping of its faculties of engineering and architecture, its book role in Turkey has been of more modest dimensions. The Turkish National Commission for UNESCO operates on a budget of about $55,000 per year (in Turkish lira), of which about half is used, among other things, in support of the translation and/or publication of such books as:

Seven U.S. textbooks for the Ministry of Health and Social Assistance's new Academy of Social Welfare. UNESCO pays

for translation. The Ministry pays $150 nominal copyright fee. The texts are printed in quantities of 2,000, and are distributed free at the Academy and to professionals throughout Turkey. The books are not professionally edited; and are commercially printed.

A series of library science handbooks in English and French.

Various art titles; a book on Turkish miniatures; one on "Turkish Art".

A bibliography of books on education that were published before the introduction of the Latin alphabet in 1928.

Turkey participates in the UNESCO Book Coupon Program, which originated in 1949 to enable individuals and institutions in soft currency countries to buy scientific books and periodicals from hard currency areas. The coupons are used to facilitate transactions with a minimum of formalities between UNESCO member countries active in the program. The current degree of Turkey's participation in the program is not known.

UNESCO has helped in the creation of the semi-official Institute for Public Administration, which is responsible for the development of administrative capabilities among the younger employees of the Turkish government. Although one of the Institute's responsibilities is the publication of public administration materials, it has not yet become very active in this area.

As noted above, UNESCO has furnished the METU central library with a grant for books and library equipment in engineering and architecture. It also pays the salary of the library's competent director.

The UNESCO secretariat has just approved an expanded book flow and local capability program which may enable Turkey to take better advantage of its services.

OECD

The Organization for Economic Cooperation and Development (OECD) also has a limited book program in Turkey. Its projects have included:

Translation of basic college level textbooks mathematics, chemistry and physics, to serve as models for writers and publishers. This work has been done for the Educational Aids and Technical cooperation Division of the Ministry of Education. 14 textbooks have been produced to date. The Ministry's printing plant produces these in paperback form, in runs of 1,000-2,000 copies. The books are priced at 4 and 5 liras (44¢-55¢) and are distributed via the Ministry of Education bookshops and sent free to major libraries. Translations are done by professors in science faculties.

A subsidy to the periodical "Agricultural Extension", the house organ of the Agricultural Extension Service. The support is predicated on the magazine devoting 50% of its space to OECD-Paris originated material.

In addition, OECD has granted the METU library money for the purchase of books on economics and statistics.

CHAPTER 12

RECOMMENDATIONS FOR THE MORE EFFECTIVE USE OF BOOKS IN TURKEY

This chapter contains recommendations of the book survey team which are designed to assist Turkey in converting books into more effective development tools in education and in other vital areas. The recommendations are also aimed at helping the Turkish printing and publishing industry cope with the increasing demand for its services that looms ahead.

Below are listed short summaries of the more important recommendations; the number in parenthesis after each refers to the order in which the recommendations are covered at length later in the chapter. These detailed later write-ups cite sponsoring organizations and supporting agencies whose approval and/or active cooperation might be required to implement the recommendations.

Many of the recommendations deal with textbooks and with the use of other books in the schools. Turkey's elementary and secondary textbooks reflect its educational pattern and they adhere closely to the approved curriculum. At the higher education level, adequate textbooks do not exist and there is undue reliance on lectures and lecture notes. At all levels of education there is very little use made of supplementary books because of the lack of adequate school and university libraries. Not much can be done to improve the effectiveness of book use until major changes are made to modernize the whole structure and pattern of Turkish education.

As the report notes, textbooks tend to confine themselves to the one-dimensional aim of passing on the concepts the student must memorize to pass his examinations. The recommendations advocate that, in addition, textbooks be used to further teacher training and deal with cultural and individual student differences.

The book survey team realizes each nation's use of school books reflects that nation's educational system and is closely tied up with its political, social and economic structure and its cultural habits. Mere imitation or copying of another nation's books or educational system is self-destructive; it cannot result in changes that have true, long-lasting, effective roots.

However, in the book-developed countries in general and the U.S. in particular, textbooks and supplementary books play a diverse and powerful role in support of education and in the development of human resources for economic growth. Before Turkey can understand how these school books can be created, produced and distributed - before it can understand their expanded role - the potential force of that role must be explained and clarified. We believe that other-country experience can provide a valuable insight into the potential power of this development tool and create a better understanding of how Turkey can harness it more effectively.

In the final analysis, the conversion of the Turkish textbook into a multi-dimensional tool can only follow twin decisions and commitments by the government and the Ministry of Education: (1) to use textbooks as instruments of change to help solve existing problems, and (2) to revise the educational pattern. Until these commitments are made, there is little prospect for optimum use of textbooks in Turkey.

With this understanding, we suggest the following.

SUMMARY OF RECOMMENDATIONS

A) Recommendations for Increasing the Use of Books and Development of Reading Skills in Educational Institutions and Libraries

As first priority, we recommend that a top-level seminar for policy-making Turkish government officials, educators and book industry representatives be held in the U.S. The basic object of this "climate-changing" seminar is creation of an appreciation on the part of important Turkish leaders of the expanded role that school books might play in Turkish education. The seminar would demonstrate the vital function of school books--in their broadest sense and application--in U.S. education, and the contribution made by the U.S. book industry to the development of these books (1).

The seminar would be followed by a project to re-edit and re-design a currently approved geography textbook used in the Turkish normal schools, (a) as a prototype to demonstrate the advantages of the editorial process, and (b) to add to the pedagogical education of teachers-in-training by providing a standard through which they can learn the possibilities of textbooks as teaching tools. In addition, a teachers' edition would be prepared to accompany the prototype textbook (2).

After the prototype textbook and teachers' edition had proved their worth, a team of U.S. textbook publishers would conduct in Turkey a demonstration workshop on the nature of the editorial process, for local private publishers and the Ministry of Education (3).

Finally, should a local demand for long-term assistance arise, one or more U.S. textbook editors would come to Turkey to function as on-the-spot advisors to the private and public textbook industries (4).

The workload of the National Board of Education should be eased and redirected to enable it to devote more time and energy to the creative task of developing and testing experimental material which would lead to better school books (5).

As a step to further the improvement of primary school textbooks, we recommend that the Central Book Fund's Textbook Depository Library project in Turkey be enlarged to provide three collections which represent a wide range of U.S. primary school textbooks and instructional material (6).

The Ministry of Education might consider publishing primary school textbooks which relate more closely to village needs and experiences (7). Simple, inexpensive textbook-related audio-visual material should be produced in greater quantity for classroom use (8).

B) Recommendations for the Improvement of Vocational and Technical Textbooks

It is important that a Ministry of Education team explore the extent of the book gap in the vital area of secondary level vocational and technical textbooks, and that it then spark a drive to select, translate and adapt foreign language industrial education textbooks for boys (9), and prevocational and vocational textbooks for girls (10).

We further recommend that teachers' editions be prepared for these books, and workshops be held to instruct teachers how to use them to best advantage (11).

C) Recommendations for the Expansion and Improvement of Reading Skills

In preparation for the forthcoming commissioning of a new series of readers for the revised curriculum, a group of distinguished Turkish educators, linguists and reading specialists should be appointed to study recent other-country advances in basic reading. The study will permit Turkey to benefit from new developments in the field, as it creates methodologies for teaching of reading best suited to its language and culture (12).

The equipping of all primary and secondary schools with "basic libraries" of supplementary readers is needed to stir student imagination, teach health practices, inform about history and science, and so forth. These books should initially be supplied to school libraries and eventually be supplied on a classroom set basis (13).

We recommend that production and distribution of the long-awaited civilian adult literacy primer be expedited (14) and that a Turkish specialist make a firsthand study of the easy-to-read book efforts now under way in the U.S. (15); further, that vigorous campaigns be mounted to open more village libraries (16) and more mobile libraries (17), so that more books can be made available to village neo-literates.

Books are not commodities to be rigidly safeguarded, but rather tools of knowledge and communication. Thus, reading should be encouraged by "unlocking" Turkish libraries and converting them to open shelf libraries (18) and public library content should be improved through better book selection practices (19).

A Turkish national book committee might be created to promote the reading habit and bring together the public and private sectors in a common effort to do so (20).

D) Recommendations on the Use of Books in Higher Education and Especially Increasing Access to the Products of the World Scholarly Community

To help overcome the lack of foreign language capability which cuts off most Turkish university students from key books in the natural, social and behavioral sciences, we recommend that an intensive program be undertaken to improve and extend English language reading instruction in the secondary schools. This effort should be supplemented by the translation and publishing of some of the more urgently needed university level textbooks, and also by a drive for technical vocabulary enrichment of the Turkish language (21).

We recommend that a scholarly publications digest be established to select, publish and disseminate original Turkish articles and reports, as well as translations and abstracts of significant research papers and books written abroad (22); that in addition Turkish universities investigate the possibilities of combining the present plethora of individual faculty bulletins and periodicals into multi-faculty publications of broader scope and interest (23).

Turkish professionals might be provided access to up-to-date reference books in the English language through the creation of a comprehensive professional book lending library which would be stocked on a continuing basis (24).

Lastly, the current cumbersome foreign exchange restrictions on book imports should be eliminated; the amount of foreign exchange saved is small and these restrictions limit the development of Turkish education and industry (25).

E) Recommendations for Improvement of the Turkish Book Industry

Except for textbooks, the book marketing practices in Turkey are weak and inefficient. This is true both in public and private sectors. A book distribution and promotion specialist should be brought to Turkey on a short-term basis to analyze current practices, recommend steps to make them more effective and, if deemed advisable, develop a plan for follow-up workshops (26).

The advantages and inducements for foreign investment in the projected new Turkish paper mills must be liberalized and expanded,

so that needed outside financing and technical know-how can be attracted in time to permit the scheduled rapid expansion of local paper production (27).

The SEKA government paper mill should undertake customer research in order to make its products more responsive to the needs of the Turkish book industry (28).

As component parts of a program to improve printing skills and practices--an apprenticeship law for printing technicians might be passed (29), the Printing Trades Institute at Istanbul should be reorganized and its teachers trained (30), and the printing industry might sponsor foreman and management training (31).

The amendment barring medium-term Industrial Development Bank loans to the book industry must be repealed forthwith (32). Consolidations and mergers of private printing plants should be encouraged through added tax incentives (33).

The productivity of Ministry of Education's printing plant can be improved by its adoption of a modern management and operating plan (34).

A book trade journal might be developed to serve as a communications medium for the industry and an educational medium for publishers, printers, booksellers, librarians and others (35).

F) Recommendations for Miscellaneous Changes in Turkish Government Policy and Laws Affecting Publishing and Education

Postal rates for books and educational materials should be subsidized to encourage the wider dissemination of published materials within Turkey (36).

We recommend that Turkey no longer use the provision on translations of the 1896 Bern Convention, and that instead it adhere to the Universal Copyright Convention and adopt the more modern Bern provision on translations (37).

The Ministry of Education should begin considering the mechanism that will be needed to transfer the publishing of secondary level vocational and technical textbooks to the private sector, and when the shift takes place, special pricing latitude should be granted to make these publishing efforts economically feasible (38).

Representatives of the Ministry of Education and the private book industry should hold periodic meetings on the improvement and expansion of textbook publishing to better satisfy the requirements of the Turkish educational system (39).

Turkey should adopt the recommendations concerning the international standardization of statistics relating to book and periodical production adopted by the UNESCO General Conference at its thirteenth session, 1964 (40).

If the ratio of illiterate recruits continues to decline, the Armed Forces might consider the gradual conversion of its educational training facilities from their present use as literacy centers to use for expanded vocational and technical education activities (41).

The Turkish depository library system should be reviewed and possibly expanded (42), and in time auxiliary library, bibliographic and statistical services should be provided (43). Lastly, public and school librarians should receive better training (44).

DETAILED RECOMMENDATIONS OF THE BOOK SURVEY TEAM*

RECOMMENDATION 1: Top-Level Seminar on the Role of Books in the Educational Process#

Most of these recommendations are designed for measurable short- or medium-term impact upon specific problem areas. However, the team's research in Turkey uncovered a basic underlying problem that requires a more general approach: most Turkish officials and businessmen have never been afforded the opportunity of learning how books can play a key role in improving the educational process. Therefore, our initial recommendation in this area concerns a "climate-changing" idea that will have the long range but vital

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* Appendix D presents a recapitulation of the recommendations according to suggested sponsor and supporting agency, with preliminary estimates of time and personnel requirements.

\# Since the preparation of the initial Turkish survey report, of which this version is an adaptation, AID's Central Book Fund developed and arranged for the conduct by Franklin Book Programs, Inc. of an orientation seminar, complementary to Recommendation 1, for Ministry of Education officials from a number of countries. The first trial orientation seminar was held in July, 1965 for twenty officials who are responsible for book affairs, including procurement, adoption, production and translation, etc. and for curriculum development. A precis on the approach and content planned for the Franklin Books multi-country Ministry of Education seminar is provided herewith as Appendix E.

effect of building the framework of understanding and support that the shorter term specific-problem-oriented recommendations will require if they are to be of maximum benefit.

There is a close relationship between book publishing and the educational system in all countries. Books are in large part an educational tool and publishing really flourishes only where books are intensively used in the educational system. Conversely, the educational system can only reach its highest level of quality and efficiency when it makes use of books and other instructional materials on a large scale.

The pattern of Turkish education at all levels is not built around making maximum use of educational materials. It is not unique in this respect; the dependence on oral instructional methods is typical of many countries at similar stages of economic development.

When reading habits are poor, book "needs" are minimal. This is the crux of the problem. Simply by going to school, students do not necessarily gain an education. A true education is one that teaches its students the art of inquiry, the techniques of research, and encourages them to use habitually the tools of knowledge--books--so that when they leave school, their education can continue throughout their lives through wide reading and use of books.

In addition, the present Turkish textbook tends to have a one-dimensional educational purpose: it contains the facts and concepts that the pupil needs to learn to pass his examination. Textbooks can and should be used to solve educational problems as well. For example, textbooks can help solve the problem of teacher training; that is the reason for the development in the U.S. of teachers' editions. Textbooks can help solve the problem of cultural differences; that is the reason that the U.S. has developed books for rural centers and for urban centers. And textbooks can help take care of individual differences among students; that is why the content of books may be at a fairly low level, but the exercises may be graded so that any student in the class can find an exercise at about his level of intellectual attainment.

To demonstrate the vital multi-dimensional role of textbooks, supplementary books and school libraries in U.S. education, we recommend that a seminar be held for Turkish government officials and educators at the policy making level, representatives of the Turkish book industry, and their U.S. counterparts. The seminar might take place in Washington, D.C. and/or New York City

The seminar would be aimed at opening up to key Turks the whole new world of expanded educational book use - to encourage and inspire them and make them aware of the advantages of modernizing their traditional system.

Participants would be high level policy makers, including representatives from the Ministry and Board of Education, the State Planning Organization, the Ministry of Finance, the Turkish universities, and key private and public sector publishers. U.S. participants might include representatives from AID/Washington (including TCR/Ed), USAID/Turkey, USIA, the Ford Foundation and private publishers and trade associations. Simultaneous translation arrangements, interpreters and country specialists would make it possible to invite key Turks, whether they speak English or not.

The conference would be explanatory in nature - would cover the role and growth of books in the general educational process of the U.S., with emphasis on problems which the U.S. has faced and is still facing that are pertinent to Turkey. No effort would be made to interest Turkey in specific technical assistance; rather, the entire effort would be directed toward creating an understanding in depth of what has happened and what is now happening in the U.S., and what might be valid and worthwhile for Turkey if it wishes to use some of the experience the U.S. has gained and the materials it has developed.

The agenda might include topics such as:

The textbook and national unification.
The textbook and educational innovation.
The textbook and the knowledge explosion.
The textbook and the culturally deprived.
The textbook and individual differences.
The textbook series and growth.
The textbook and supporting material.
The textbook and programmed learning.
The textbook and learning by discovery.

The logical sponsor for the seminar would seem to be the Education Division of AID/Washington's Office of Technical Cooperation and Research. The concept might be developed and elaborated by a subcommittee of the Government Advisory Committee on International Book Programs, which ought to include representatives of the National Science Foundation and other foundations and organizations concerned. The U.S. book industry trade associations would also be expected to participate actively in the formulation of the programs.

Hopefully, the Turkish Educational Book Seminar would simply be the first in a series of top level conferences with a number of developing nations. Out of these seminars, certain regional and international centers might develop to carry on communications, clearing house and training functions on a continuing basis.

RECOMMENDATION 2: Preparation of a Prototype Textbook and Accompanying Teachers' Edition

Recommendation 3, below, proposes that a team of skilled textbook publishers conduct a demonstration workshop on the editorial process for Turkish publishers. The recommendation made here covers a preliminary project which would dramatize the advantages of the editorial process and also produce a textbook and teachers' edition that have had the benefit of this kind of editing.

The book survey team analysis of primary school textbook content (see Chapter 8) revealed that organization and high concept density tend to impede the learning process. The Report of the Turkish National Commission on Education, published in 1960, discussed the need for improvement of current textbooks and suggested how this might be done:

> "The Ministry of Education should have some good examples of high-quality textbooks translated and published to serve as a guide to teachers and authors."

We propose a variation of this idea, which would involve the reworking of a currently used Turkish textbook.

A textbook publisher, probably from the United States, would spearhead this project, with the active cooperation of the Ministry of Education and the USAID/Education Division.

The Board of Education would first select a title from the current approved list of Ministry-published normal school textbooks (i.e. a geography book). The textbook would then be treated exactly as if it were a new manuscript. A representative of the Board of Education and the author of the selected work would proceed to the U.S. where they would work with an American textbook publisher to reedit and redesign the manuscript. If it needed to be reorganized for easier assimilation of the facts, it would be reorganized. If the density of concept was too heavy, some concepts would be developed more completely and others would perhaps be eliminated. The

vocabulary load would be checked and the author might have to provide examples to support his generalizations, etc. In short, all the contributions a professional editorial staff can make for a book's improvement would be brought to the manuscript.

After completion of the work, the revised version would be published by the Publications Directorate and made available to the normal schools through regular channels. After its worth had been proved, supporting audio-visual materials might be prepared.

The selection of a Ministry-published geography textbook used in the normal schools would be to the advantage of prospective teachers who are going out to use textbooks in the schools. The use of a book that is carefully and thoughtfully edited and skillfully illustrated would add to their pedagogical education by providing a standard by which to judge the possibilities of this important teaching tool.

As a practical step to further insure proper use of the prototype textbooks, and also to show how an effective teachers' edition can be prepared, we also recommend that the U.S. publisher, the representative of the Board of Education and the Turkish author would follow up the prototype textbook with the development of a teachers' edition to accompany it. The edition would outline the method of teaching the material in the textbook, and would also include teaching suggestions printed in the teachers' copy of the same text the students use.

Turkish educators admit that the caliber and training of primary and secondary school teachers are below the required level. Thus the development of well planned and written textbooks and teachers' editions becomes an important step in a campaign to improve teaching competence and help insure effective transmission of syllabus content to students. At the time of the book team's survey, the Board of Education had developed only four teachers' manuals for the primary school curriculum, and it was reported that these were "not good enough".

RECOMMENDATION 3: Demonstration Workshop for Textbook Publishers

To clarify the nature of the editorial process for Turkish publishers both private and public, and to motivate them to make use of it, we recommend a workshop that would also include management

and marketing procedures. Its purpose would be to demonstrate, not to train.

The workshop would be attended by members of the Board of Education, the Publications Directorate and by private publishers. It would be conducted by a team of 3-4 skilled textbook publishers from the U.S., who would explain the functions of the editor, the author, the illustrator, the designer, the marketing staff, and the general manager. They would explain how they decide what to publish, how the author is selected, how the manuscript is handled, the role of the editor as supervisor, expeditor and coordinator, etc.

The team of U.S. publishers might remain in Turkey for two to three months, during which time a number of demonstration workshops could be programmed. The project might be sponsored jointly by the Board of Education and the USAID/Education Division.

RECOMMENDATION 4: Textbook Editor Consultant-Advisor

After the demonstration workshop team described above had made evident the benefits of the editorial process, it is likely that the Ministry of Education and the private publishers would support longer term, continuing assistance in the following form:

USAID or a multilateral organization might sponsor a technical assistance project to bring one or more experienced textbook editors to Turkey for one or more years to function as an on-the-spot consultant-advisor to the public and private textbook industries. The number of specialists and the length of their tours of duty would be determined by the degree to which Turkish publishers commit themselves to use the specialists.

The specialist(s) would work closely with the Board of Education and the Publications Directorate, but would also be available for assistance to private textbook publishers.

RECOMMENDATION 5: Ease the Workload of the National Board of Education

The Board of Education's function as an instrument of curriculum development and textbook approval is both understandable and

logical. In Turkey where there is so much to be done and time is so valuable a commodity, continuing care must be taken to keep the level of school books high.

The book survey team had the benefit of many contacts with members of the Board of Education--a group of alert, dedicated and competent professionals doing a remarkable job in the face of an overwhelming workload. It is this latter condition that causes concern, for it may eventually undermine the quality of school books produced, and equally important, it may prevent the Board of Education from exercising in depth a function of extreme importance--the coordination and sponsorship of research projects in the improvement of teaching and of school books.

It is our impression from personal investigation and discussions with private and public publishing officials and educators that the Board is swamped with new textbooks and supplementary books awaiting approval; that because the board has insufficient personnel, it must too often work in haste.

The excessive workload results in a performance that is necessarily uneven. In view of the burgeoning Board of Education responsibilities in curriculum revision and in the ever multiplying load of school books and instructional materials, we recommend that steps be taken by the Ministry of Education to prevent the Board from becoming a bottleneck to orderly expansion and improvement.

Such an easing of the Board's present workload would enable it to devote more time and energy to the creative task of developing and testing experimental material which would lead later to better school books, without imposing on the private publisher and on the price of textbooks the huge initial burden of product improvement expenditures.

RECOMMENDATION 6: Extension of Textbook Depository Library Project to Include Primary School Books

The Central Book Fund's Textbook Depository Library project (Chapter 11) provides two sets of U.S. textbooks--one, of secondary level textbooks, to the Board of Education; another, of university textbooks, to Istanbul Technical University.

Primary school textbooks constitute the largest and most important book market in Turkey (representing two-thirds of all textbooks

published). These texts are produced in almost equal amounts by the Publications Directorate and by private publishers. Both sectors can use help.

While the above-noted textbook depository collections may be of some value to those who influence Turkish primary school textbooks and are interested in their improvement, such value will be limited and obviously cannot serve the same purpose as that served at the secondary and university levels. Hence, in view of the fundamental need for improved primary school textbooks, the book survey team recommends that the Central Book Fund extend this project by providing additional 1,000 volume libraries that consist of representative selections of U.S. primary school textbooks. The libraries would include not only the traditional textbooks, but also new types, such as programmed books and self-study books with correlated audio-visual aids.

We suggest that three sets of books be provided: (1) one to the National Board of Education; (2) one to the USAID/Education Division; and (3) one to the Istanbul Publishers' Association, provided it is prepared to maintain the collection and make it available to all publishers and to educators and authors. The three sets will provide these vitally concerned groups with access to a wide range of current U.S. primary school textbooks--for examination, reference and inspiration. The set for the Publishers' Association might also include secondary school textbooks.

RECOMMENDATION 7: <u>More Rural Orientation of Textbook Content</u>

In spite of the difficulty of bringing primary schools to the widely dispersed villages of Turkey, by 1960 the nation had succeeded to an extent where approximately one-and-three-quarter times as many village children as town children attended school. However, textbooks are generally urban-oriented. We recommend that this bias be overcome.

The Report of the Turkish National Education Commission noted that "(Turkish) educational programs are being carried out with a single type of school, without regard to regional conditions and needs or the individual characteristics of the young people who live in them. We are convinced that we should move toward a variety of schools and teaching programs." To this last sentence, the book survey team would add the words, "and textbooks".

RECOMMENDATION 8: Increased Use of Audio-Visual Instructional Material

Audio-visual materials are often vital intermediate links in the literacy process. The Turkish educational system makes insufficient use of this material which is so effective in the teaching process. We recommend that the Board of Education work more closely and creatively with the Ministry's Film-Radio-Graphic Center, to make that organization's assistance more useful.

We recommend further that the Board of Education relate the audio-visual material to textbooks and that teachers be directed in the teachers' editions how to put the material into dramatic and resultful use. This audio-visual material should not be complicated; rather it should be simple, inexpensive and easy to make. (See Chapter 8 for further details.)

RECOMMENDATION 9: Intensive Drive to Translate and Adapt Industrial Education Textbooks

Chapter 8 also notes the current emphasis on industrial education and the current lack of textbooks in this field. This book gap is similar to the one which prevailed in industrial education at its infancy in the U.S. However, as American authors and publishers began to fill the need with textbooks, teachers discovered they could depend on the texts to provide the basic course information, thus permitting the time previously spent by them in lecturing to be devoted to demonstrations and individual assistance to students. Moreover, with textbooks, the students had available handbooks for reference to consult while developing their projects, freeing the teacher still further.

As a result, industrial education textbooks gained widespread acceptance: they increased teachers' efficiency, permitted them to teach larger classes (thus decreasing per pupil cost for instruction), and provided students with handbooks while practicing their trades.

Because the need for Turkish industrial education textbooks is immediate, the book survey team recommends that the Board of Education, the Directorate of Vocational and Technical Training and the Publications Directorate form a team to explore the extent of the gap in the boys' Middle Trade Schools and in the vocational branches of trade institutes, and take steps to alleviate it.

It will require a long-term effort for Turkish authors to research and write the industrial education textbooks needed. Furthermore, while Turkey has a proud national history, literature and language, industrial technology is international in nature; there is no national lathe, no national wood-turning machine. Because industrial technology is international in nature, textbooks in this field lend themselves well to translation and adaptation.

The Ministry team would first inventory for suitability and use titles presently in print or in preparation in Turkey.

Then, with the assistance of an industrial education specialist recruited through a multilateral organization, the Ministry team would visit one of the more developed countries to identify books to be considered for adaptation and translation. The book survey team suggests that the industrial education specialist be an American, and that the country visited be the U.S. The field was pioneered in the U.S., and the selection of books there is more comprehensive than elsewhere.

For the trade schools, the books studied would include the general industrial arts titles used in the U.S. for pre-vocational courses in woodworking, metal-working, general shop and mechanical drawing. For the specialized boys' institutes, it would include titles such as auto mechanics, machine shop, electricity and electronics, and perhaps titles in related mathematics and science.

The Ministry team would select the textbook titles it desired to have adapted and translated. It might select as the ideal translator-author of the Turkish edition an industrial education teacher who combines a technical background with English language ability (several have been associated with the Spring Garden Institute Project). Aid in obtaining translation rights would be obtained from U.S. government sources.

We recommend, furthermore, that the author(s) of the U.S. original work with their Turkish counterparts in adapting the U.S. edition to Turkish needs. With the adaptation complete, the Turkish specialist would find his translation task greatly simplified. Partnership with the author would also be an in-service course in textbook writing and manuscript preparation.

RECOMMENDATION 10: Program to Adapt and Translate Pre-vocational and Vocational Textbooks for Girls

The problems and solutions pertinent to industrial education textbooks and teachers' editions for boys apply equally to pre-vocational and vocational courses for girls. Even though these subjects are more difficult to adapt and translate than the former, there is more than enough worthwhile material in the U.S. to make exploration rewarding; and in pre-vocational and vocational instruction, even more than in industrial education, Turkey has the human resources capable of and desiring to do this work. Some worthwhile work has been done in this field at the Girls' Technical Training College of Ankara.

To fill this priority need, we suggest a counterpart program to the one recommended above for industrial education textbooks. The pre-vocational and vocational textbook program for girls would also include (1) an inventory of available Turkish books; (2) a selection of foreign textbooks for examination by a joint team; (3) assistance by U.S. home economics authors; (4) adaptation of the textbooks to fit Turkish educational patterns and culture, by the U.S. author and Turkish counterpart; and (5) translation and publication of the books.

RECOMMENDATION 11: Preparation of Teachers' Editions for the Translated Technical and Vocational Books

As corollaries to the two preceding recommendations, the book survey team suggests that the Ministry of Education develop a program to teach industrial education books effectively:

1. The Turkish translator-author and the U.S. author of each title might, with the approval of the Board of Education, prepare a teachers' edition of the book containing marginal notes to guide the teacher each step of the way, and including a 32 to 64 page teachers' manual dealing with the way to organize and teach the textbook. This is the type of teachers' aid that the teacher will use daily.

2. Members of the Board of Education and selected industrial education teachers might observe in the U.S. some of the many teachers of industrial education textbooks, and

demonstrate these methods at subsequent workshops in Turkey for vocational education teachers. An alternate procedure would be to send U.S. teacher trainers to conduct the Turkish workshops.

RECOMMENDATION 12: A Commission to Study the Teaching of Basic Reading

The Board of Education has introduced a new curriculum for the first three grades of primary school on an experimental basis in various parts of Turkey. The new curriculum, plus other current curriculum examination and revision that is being carried on by the Board, testified to the spirit of inquiry that characterizes its present activity.

The book survey team held a number of meetings with educators on the subject of instructional materials and the development of the reading skill. From these meetings, we gathered that children learn to read without much difficulty, but that since Turkish is a phonetic language, this does not mean that they actually understand everything they read. Visits to primary schools by members of the team confirmed this impression. We learned further from these meetings that new readers are scheduled to be written in the near future.

Before Turkey embarks on the preparation of a new reading series, it would seem beneficial to take advantage of new developments in the field. As a result of recent discoveries about language and the way pupils learn to read, the teaching of reading in the U.S. is achieving a significant break-through. These findings should be of particular interest to the Board of Education and to prospective authors of the new readers, and of general interest to Turkish educators. This recommendation is based on the expectation that the discoveries, if applied to the teaching of the phonetic Turkish language, might prove of significant value.

The Ministry of Education might appoint a commission of linguists, prospective authors of planned new curriculum readers, Board of Education members, and distinguished educators, to study the teaching of reading and recommend a program for its improvement. As part of their assignment, the commission would tour the U.S. and possibly Great Britain to study the experiments now being carried out by specialists at the leading reading centers.

From this comparative study, which must be made in depth, the commission might develop a methodology or methodologies for teaching of reading best suited to the Turkish language and culture. When a consensus is achieved, a new series of readers could then be commissioned. By series, we mean readers carefully graded to provide progression from book to book. The commission might decide to sponsor several different series...each differing from the other according to cultural differences between various segments of the population.

Sponsors for the project might be USAID or a private foundation. We cannot conceive of another program that could be carried out within the current pattern of education that holds such promise.

RECOMMENDATION 13: Supply Supplementary Books to all Schools

Turkish school children need supplementary readers for many reasons: their basic readers are slight books (the bright students probably read them through within a week or two after school begins). In addition to readers, Turkish children need books to read. Educational deprivation can usually be traced back to a lack of books to read at home and school.

The Ministry of Education in a modest initial program recently provided "basic libraries" for 13,200 under-privileged primary schools. At the risk of recommending the obvious, we propose that a much more comprehensive program be undertaken to provide students with additional supplementary books for reading and reference--one that will eventually provide them on a classroom set basis.

The program would begin with the distribution of presently published books to the schools: (1) the Ministry would check to see that the original group of primary schools actually have received their "basic libraries"; (2) these "libraries" would be distributed in the near future to the remainder of the schools; (3) then, as soon as possible, sets of supplementary books would be provided to all classrooms. Choice of books would be made from among the 155 supplementary books currently approved for primary school use. In a second phase, new books would be developed for supplementary use. Where books are not available, they would be written to correlate with the phonetic structure and vocabulary level of the basic readers.

These supplementary readers might be prepared in various classifications: science readers, readers about home and family for girls, readers aimed at villagers, readers for pupils who are book-shy, readers for pupils with high aptitude, and literary readers. By rotating these books from pupil to pupil, a classroom set of five of each title would seem adequate.

With literary readers to stir the imaginations and emotions of the children, with health readers to teach nutrition and other health practices by implication, with readers to inform students about the world of science, and with a variety of other readers, this program might go a long way toward helping develop a reading tradition in Turkey.

The bottleneck to this program will undoubtedly be lack of funds. But the need is urgent: money spent for supplementary books will mean fewer failures, fewer drop-outs and fewer illiterate adults. A way must be found to finance this supplementary reading program. If the Ministry lacks the needed funds, the program should receive the benefit of bilateral aid--either from a governmental source or an interested organization, such as the Ford Foundation.

The books would be bound durably so that with reasonable use they would last for 4-5 years. The classroom sets will develop a better teacher attitude toward books that will translate speedily into an increase in student reading habits.

In time, the supplementary book program would be extended to the secondary schools. It would be easier to install and implement at that level, because of the direct Ministry channel to the secondary schools.

RECOMMENDATION 14: Expediting the Civilian Adult Literacy Primer

We suggest that the Ministry of Village Affairs take immediate action to expedite the preparation, production and distribution of the civilian adult literacy primer. Until the Adult Education Centers use textbooks designed specifically for civilian adults rather than books designed for children or recruits, they will encounter continuing difficulties.

RECOMMENDATION 15: Development of Easy-to-read Books for Adults

Chapter 8 noted the sharp drop-out during the early school years and the fact that 60% of the students who do complete primary school obtain no further education. Thus, Turkey has many citizens with no better than third, fourth and fifth year reading skills who are capable of reading books that are mature in content but easy to read, and that depict real situations with which they can identify. Few books of this kind are available.

Since this same problem exists on a smaller scale in the U.S. and is the subject of much study, Turkey might find it advantageous for one of its specialists concerned with the problem to study first-hand the efforts being made in the U.S. to cope with it. This might be accomplished under the USAID/Turkey participant training program.

RECOMMENDATION 16: Renewed Emphasis on Establishment of Village Libraries

The 455 public libraries and 125 adult education centers in Turkey represent small fractions of the 27,000 primary schools and the 40,000 villages. In the absence of the first two in a village, books for neo-literates must be made available somewhere. Short-term aid might be achieved by placing such books in coffee houses (as planned by the Turkish Library Association) or by "acceptance of the principle that in each (village) school a library or reading room should be set up and kept open for the benefit of adults and young people" (as suggested in the 1960 Report of the Turkish National Commission on Education).

But the basic solution requires a vigorous, continuing campaign to open more and more libraries in more and more villages.

RECOMMENDATION 17: Expand the Mobile Library System

The mobile public libraries taking books to the inhabitants of isolated villages are striking examples of the power of a good concept carried through to effective practice by dedicated public officials. Three mobile library systems are grossly inadequate; many more are needed to help bridge the library gap. The Ministry of Education should expand use of this key development tool.

RECOMMENDATION 18: Unlock the Libraries

We recommend that Turkish libraries be converted to open shelf libraries as soon as possible; that people be encouraged to read by making books easily available. Librarians should not be charged for missing books; so long as the percentage of such missing books is low, this should be regarded as part of the overall investment in bringing knowledge to the people of Turkey. It is important to get across the fact that books are not commodities to be rigidly safeguarded and accounted for, but rather tools of knowledge and communication, tools which need to be used to be of help.

RECOMMENDATION 19: Improve Public Library Content

Public libraries naturally reflect the Ministry of Education's publishing stress on culture, history and related subjects. Village libraries lack the practical agriculture-oriented books of prime interest to potential readers; urban libraries lack the practical technical and homemaking books of immediate interest to city dwellers. Children's books were scarce; those we saw were tattered and worn. On the other hand, village libraries contained too many adult translations into Turkish of books by Truman Capote, Marcia Davenport, Jean-Jacques Rousseau, John Stuart Mill, etc.; titles which are unsuitable and often incomprehensible to the library users.

A large part of the problem undoubtedly results from the unavailability of proper books, but some also appears to be faulty selection. We recommend that care be taken to have titles selected with greater discrimination.

RECOMMENDATION 20: Establishment of a National Book Committee or Trust

The creation of a Turkish book committee, to promote the reading habit and bring together in common effort government agencies and the private book industry, would be highly desirable. In addition to reducing misunderstanding between the private and public sectors, the trust can promote public interest in books and reading. Thus, Great Britain has its National Book League, and the United States its National Book Committee.

UNESCO has assisted in establishing book committees or trusts in a number of countries, including Ceylon, Pakistan and India. UNESCO or another multilateral unit might be able to provide the State Planning Organization with assistance in the creation of such a body.

RECOMMENDATION 21: Crash English Language Reading Instruction Program to Improve University Level Science and Technology Learning

Turkey's university students lack widespread second language ability, and are thus barred from much of the modern world of science and technology. That Turkey has realized this condition can handicap the achievement of its ambitious development plans can be seen by the development of the foreign language secondary schools, the new National Science Lise and METU. But these efforts are not sufficient.

Turkey, in its own self interest, must stress foreign language proficiency more throughout its whole educational system. There must be a massive drive to develop the foreign language reading skill required to keep up-to-date in the natural, social and behavioral sciences and technology. For most of these subjects, the language necessarily is English. This means first that English teachers will have to be trained in sufficient numbers and their present skills upgraded; second, that intensive summer courses in the English language will have to be established for secondary level students in the then-deserted schools.

Until the student English language skills are developed, a number of the more vitally needed science and technology textbooks should be translated, for that is presently the only way to get the knowledge to the majority of students. Since, as previously noted, few of Turkey's scholars are sufficiently expert both in the various highly specialized fields and in English, they will need the help of specialists. In addition, the small size of the printings of these specialized texts would mitigate against the profitability of the translations. Thus, although this latter program will be of modest dimensions, Turkey will probably need some bilateral or multilateral assistance, including both a monetary subsidy and provisions for technical know-how. Franklin Book Programs might be of assistance in this program.

Turkey might also consider a program aimed at further technical vocabulary enrichment of its language.

RECOMMENDATION 22: Development of a Scholarly Publications Digest

We recommend that the Turkish government establish a national agency charged with the responsibility for surveying scholarly publications from all parts of the world, with a view toward selecting those items of value to Turkey; that suitable translation facilities be provided to make such materials available to the Turkish community of scholars; and that the translated materials be published in periodical form and be made available to those persons and institutions where they may be of most value.

The agency best able to render these services might be a form of inter-university press, such as the concept discussed with the Chief of USAID/Turkey's Office of Communications Resources during the book survey team's stay in Turkey. Alternatively, it might be a special semi-autonomous agency similar to the Institute of Public Administration, or the Science and Technology Research Council of Turkey. Or it might be a private agency receiving outside support.

The scholarly publications digests of such an agency would include original Turkish articles and reports, as well as translations and abstracts of research papers and books written abroad. A possible co-sponsor for the project with the Turkish government might be the USAID/Office of Communications Resources, or a private foundation.

RECOMMENDATION 23: Combine Faculty Publications to Broaden Their Value

Turkey's plethora of individual faculty bulletins and periodicals results in a fractionalization of skill and effort that has stretched available human resources and reduced the size of potential audiences. As a result, few of the publications get outside the universities or even the faculties that publish them. With mergers of various faculty publications into periodicals of broadened scope and widened appeal, pertinent information could begin to be disseminated more thoroughly throughout the Turkish scholarly community.

We therefore recommend that Turkish universities investigate the possibility of combining some of these individual faculty publications. After the broader interest multi-faculty publications begin to appear and scholarly periodical publication is centralized

within the universities themselves, a joint inter-university sales promotion and distribution center could be formed to further increase exposure to the valuable information they contain.

RECOMMENDATION 24: Creation of a Professional Book-lending Library at METU

Professional books in Turkish are few and a commercially feasible market for them may take many years to develop. Although imported professional books are too costly for most individuals, they do provide the only existing avenue for transmitting up-to-date technical information to specialists practicing in the various fields. To get the latest professional information quickly into the hands of those who can benefit from it, we recommend the establishment of a lending library of English language books that represent several professional fields, i.e. sociology, physics, architecture.

For practical reasons, we recommend further that the lending library be grafted on to the METU reference library, which can create the lending library and administer it. The professional book lending library might be provided with 2,000 new books annually. Lists of the books available for loan would be prepared by subject categories and sent quarterly to important Turkish professionals who are active in the fields covered and who might need the books. New titles would be listed in a quarterly bulletin. An arrangement might be worked out to make the collection available to METU students when the books are not out on loan. Possible sponsors for the project might be a private foundation or the AID/TCR Central Book Fund.

RECOMMENDATION 25: Eliminate Foreign Exchange Restrictions on Book Imports

The application of Turkey's present import control system to books is probably not worth the effort involved. For the foreseeable future, the amount of foreign exchange involved will be small in absolute terms, even if book importation were simplified to the maximum extent. Built-in limitations on large scale importation of foreign books include their relatively high price in terms of Turkish wages and income, and Turkey's low foreign language fluency--neither of which lends itself to speedy elimination.

As the size of the highly trained population in Turkey increases, the need and demand for foreign language books will grow. Books will be required for secondary school and university use in the teaching of foreign languages, for specialized high level university and library use, where Turkish editions are not possible or feasible; for reference by professional engineers, scientists, doctors and others; and for literature and current affairs.

At the same time, the prospect is virtually nil that Turkish publishers will ever have to face competition from books in the Turkish language that are produced abroad for export to Turkey; such a process would be impractical for non-Turkish-speaking countries.

In short, foreign books are a needed development tool--not a competitive threat to local industry.

Turkey does not now impose a tariff on books; but it does use a time-consuming and costly system for controlling the amount of foreign exchange made available for foreign language book imports. This creates a rather formidable barrier, especially when the imports are not made through the IMG program. The imposition of barriers of this type to book imports is not in Turkey's long-term national interest.

Because of the otherwise unobtainable knowledge they bring to Turkey, foreign language book imports pay for themselves many times over, in terms of contribution to increased knowledge and increased productivity. We therefore recommend that book imports be freed of present restrictions.

RECOMMENDATION 26: Survey of Book Industry Distribution and Promotion

We recommend that a project be developed to bring to Turkey for six months a book marketing specialist for the purposes of (1) analyzing current private and public book distribution practices; (2) recommending steps to eliminate or minimize inefficient methods and to strengthen or develop the growth of modern distributive and promotional techniques; and if deemed advisable (3) developing a plan for follow-up workshops which would become a force for continuing education in book industry marketing techniques. Modernization of Turkey's infant, yet archaic, book distribution system would represent a key preparatory step in its development as a vehicle for handling the huge book increases which are foreseen for the years ahead.

A multilateral body might sponsor this project. UNESCO's varied technical assistance program in the book field has frequently enabled it to make available marketing and distribution experts for work of this sort.

RECOMMENDATION 27: Liberalized Inducements for Foreign Investment in Paper Mills

We recommend that the Foreign Investment Encouragement Committee review, liberalize and expand the advantages and inducements to be offered prospective foreign investors in the Filyos and other planned paper mills. Outside private participation in the form of investment capital and technical know-how is needed urgently --the sooner the better--if Turkey's paper projections are to be met.

RECOMMENDATION 28: SEKA Customer Research to Improve Product

SEKA is not sufficiently acquainted with the methods employed by and the needs of its large customers in the printing industry. Differences in paper thickness and quality (at times in the same roll) often make Turkish printing a time-consuming, wasteful task. The mill also knows little about selling and marketing.

We recommend that SEKA make a special effort to become more familiar with the nature and requirements of the printing industry, so that its products can become more suitable for current and projected needs. SEKA officials should spend time in printing plants and with publishers on a regular, continuing basis.

RECOMMENDATION 29: Establishment of Labor Standards and Regulations

There is an almost complete lack of skilled labor in the Turkish printing industry. Except for a few training programs run by some of the larger plants for their own personnel, and the Grafik Klüb, nothing exists. Even these training programs affect few and sidestep the main problem of getting youngsters into the trade. The current practice of sending people abroad, or of retaining German technicians who have come to "start up" machinery, is costly and inefficient; and the Printing Institute is of no help.

The Turkish government, the industry and the Turkish labor unions all must take an interest in and assume responsibility for developing skilled labor. Regulations will have to be established to set minimum standards and define the responsibility of an employer toward his apprentice. A formal apprenticeship law should probably be passed.

The short-term assistance of an experienced labor specialist, familiar with the problem, would be required for this project.

RECOMMENDATION 30: Reorganization of the Printing Trades Institute

This should begin once the support of labor unions, employing printers and government have been secured. The project would involve equipment grants, a revolving team of foreign printing instructors, and training grants for a number of Turkish counterpart instructors.

Reorganization of the Printing Trades Institute is important for the improvement of Turkey's human resources in the printing trades. As noted in Chapter 10, the State Planning Organization's 1964 Annual Program states that the Institute is not now equipped to train qualified personnel.

RECOMMENDATION 31: Foreman and Management Training

The managerial phase of the printing industry requires speedy attention. We therefore recommend in-service foreman training and the initiation of courses in managerial skills: production scheduling, estimating, cost control, etc. This project could be handled by the Grafik Klüb--or possibly through a workshop project.

RECOMMENDATION 32: Repeal IDB Amendment which Bars Book Industry Loans

Because of their small size and lack of record-keeping, private publishers and printers experience great difficulty in borrowing short-term capital from commercial banks. They are also barred from IDB medium-term loans. As a result, the book industry often is forced to fall back on the confining practice of financing out of profits.

In view of the anticipated rapidly expanding need for locally produced books, the IDB ban is an anomaly that is not in the national interest. We therefore strongly recommend immediate repeal of Amendment #7, which has ruled out loans to the book industry, and suggest that USAID take action to expedite the repeal.

RECOMMENDATION 33: Encourage Printing Plant Consolidations Through Added Tax Incentives

In general, the Turkish printing industry is splintered into numerous small, inefficient plants whose operators have some knowledge of techniques but little about business practices.

Aware of the inefficiencies brought about by this fragmentation, the State Planning Organization is actively encouraging plant mergers to foster large scale efficiency. This effort is backed by a tax policy which makes larger firms eligible for tax reductions.

We recommend that the government further encourage mergers among private printing plants through added tax incentives.

RECOMMENDATION 34: Improve Productivity at Ministry of Education's Printing Plant

The Ministry of Education's printing plant should be helped to reorganize for more efficient production. This effort would be materially assisted by its adoption of the Printing Industry of America (PIA) management and operating plan.

RECOMMENDATION 35: Development of a Turkish Book Trade Journal

The book survey team did not find any magazine or journal from which booksellers, librarians and others can learn about new Turkish books (or the availability of new imported ones). Such a publication could be a great educational force for the industry. Among other things, a Turkish book trade journal might run articles on bookshop and library management, on publishing workshops, news from abroad, new regulations that affect Turkish printers and publishers, etc. It could also provide a needed communications and advertising medium and serve as a bibliography of currently available books.

This publication would not be self-supporting at the beginning, and proper development initially would require substantial technical and financial support. The project might be sponsored by a private foundation, which has been active in similar areas. It might also be of interest to USAID/Turkey's Office of Communications Resources, as a "seed operation" concept. At the outset, the publication could commence operations as a quarterly.

RECOMMENDATION 36: Subsidized Postal Rates for Books and Educational Materials

One of the cheapest means of encouraging and developing the book habit in Turkey might be to deliberately subsidize the postal rates for the transportation of books of all kinds. This has been the pattern of the U.S. and other advanced publishing countries, many of whose postal rates are adjusted at levels which encourage the wide dissemination of published materials.

RECOMMENDATION 37: That Turkey Discontinue Adherence to the 1896 Bern Treaty Provision on Translations

The Turkish copyright law, based on the provisions of the Bern Convention of 1896, creates problems for local authors by permitting translation of foreign works more than ten years old without authorization or copyright payment. Furthermore, it encourages the translation of scientific, technical and professional works that are already obsolete.

We recommend that Turkey no longer use the 1896 Bern provision on

translations; that instead it adhere to the Universal Copyright Convention and perhaps to a more modern version of the Bern treaty, as well.

RECOMMENDATION 38: Begin Planning Transfer of Vocational Education Textbooks to the Private Sector

Like the Board of Education, the Ministry's Publications Directorate is also faced with an increasingly greater workload. The Directorate's role in the production of books for Turkey's massive effort to increase literacy and educational opportunity has been a powerful one. However, as time passes and the private textbook industry continues increasing in size, competence and health, the Ministry would be wise to consider transferring larger areas of its growing responsibilities to that sector.

As a specific example, we cite the production of secondary level vocational books, still a government monopoly. The Publications Directorate is too busy and too involved in myriad other projects to properly handle these specialized works. Although it has put forth sensible reasons for its present exclusive role in the field (see Chapter 5), many of these textbooks have not been improved materially over the past 10-20 years.

The Ministry of Education should begin considering now the mechanism that will be needed to transfer the responsibility of preparing textbooks for the high priority technical and vocational schools to competent, responsible private publishers.

For courses of large enrollment, such as woodworking, metalworking, drawing, auto mechanics and machine shop, private publishers are likely to find a market of sufficient size to justify their unaided entrance in the field. However, in other areas there is a financial problem to be resolved - the small number of pupils enrolled in many specialized industrial education courses does not commercially justify the heavy, non-recurring expenses that must be amortized over the life of a book. Since the printings for many of these latter books will not exceed the 5,000-10,000 range, unit production costs will probably be too high for the private sector to publish them without financial assistance or subsidy.

As a corollary to the above recommendation, the Ministry may find it necessary to provide the private publishers of vocational education textbooks with a subsidy in the shape of a per-signature

pricing formula that is higher than the one presently used for academic works. Vocational texts, with their high illustration and diagram costs and their lack of a large market, probably cannot be published by the private sector under the present signature scale.

The cost of vocational education textbooks can only be estimated accurately when placed in the context of the improvement they make in the teachers' efficiency and the pupils' learning.

RECOMMENDATION 39: Frequent Joint Meetings Between the Ministry of Education and the Private Sector

The very existence of most publishers depends upon school book sales, which are strictly controlled by the Ministry of Education. It is clear that much depends on the relationship the Ministry establishes with individual publishers and the private sector as a whole.

The book survey team noted some tension and lack of understanding between the private and public sectors of the textbook industry. Some in the private sector regard the Ministry's textbook operation as inefficient and are afraid that government publishing will be expanded. The fixed price structure and the rigid framework of substantive content have also drawn criticism. Some educators on the other hand represent the private textbook publishers as being interested solely in profit and as having no concern in the improvement of education or textbooks. This tension between the private and public sectors is not unique to the publishing field in Turkey, nor is it unique to Turkey alone.

There seems to be no intention on the part of Ministry officials to enlarge the government role in textbook publishing; they regard such expansion as impractical. The Ministry's attitude should be made clear to private publishers.

There have been a few meetings held between the Ministry's Publications Directorate and private publishers and printers. There has reportedly been little formal contact between the latter groups and the Board of Education.

We recommend that there be frequent and regularly scheduled conferences between representatives of the private book industry and Ministry of Education for the mutual consideration of improvement

and expansion of primary and secondary school textbook publishing and printing to better satisfy the short and long term requirements of the Turkish educational system.

RECOMMENDATION 40: Adopt UNESCO Statistical Standards

The thirteenth session of the UNESCO General Conference of October-November 1964 formally recommended that member nations adopt its set of statistical standards for books and pamphlets, newspapers and periodicals. Turkey's present title statistics are not comparable with other countries', and tend to exaggerate and obscure its publishing output. We recommend that Turkey adopt the UNESCO recommendation.

RECOMMENDATION 41: Vocational Training in the Armed Forces Literacy Training Centers

If the SPO educational enrollment projections are met, the percentage of illiterate recruits entering the Armed Forces should decline continually during the years ahead, as more and more village children receive primary school education. Possessors of a fine educational staff and plant, the Armed Forces might then look into the possibilities of converting these resources, in stages, to the training of recruits in some of the host of vocational and technical courses taught in the armed forces of most developed countries.

The adoption by the Armed Forces of a program of vocational training would have the incidental advantage of providing a large additional market for the industrial training textbooks which are needed so urgently in the secondary level trade schools and institutes (see Chapter 8), and which become more commercially feasible to publish as printings increase in size.

RECOMMENDATION 42: Review and Possibly Enlarge the Depository Library System

The existing five-library depository system needs review and reorganization. It is likely that additional depository libraries will be required beyond the present two in Ankara, two in Istanbul

and one in Izmir. They will need financial help from the Turkish government in carrying out their functions, and probably should be relieved of the necessity of maintaining in perpetuity every existing scrap of printed paper.

It may be found that only the National Library in Ankara need keep a complete file, and that much of this may be stored on microfilm rather than maintaining the original documents. The subsidiary deposit libraries will probably need to retain only that small portion of the published output which is subject to active scholarly or research use.

RECOMMENDATION 43: Auxiliary Library, Bibliographic and Statistical Services

As libraries of all kinds are expanded and improved, the whole range of auxiliary support services becomes necessary. These include bibliographic services, journals for reviewing books, central cataloguing arrangements and more adequate publishing and library statistics. The Institute of Librarianship will need to be expanded and improved and others organized.

The Turkish National Library at Ankara, which has made a good start in providing a Turkish national bibliography, can also become a center for other services which can most effectively be provided on a national basis, such as the central cataloguing of all books published in Turkey. This service could be made available to all types of libraries either by selling catalog cards (as is done by the U.S. Library of Congress) or alternatively by printing the catalog information in the books themselves.

RECOMMENDATION 44: Training for Public and School Librarians

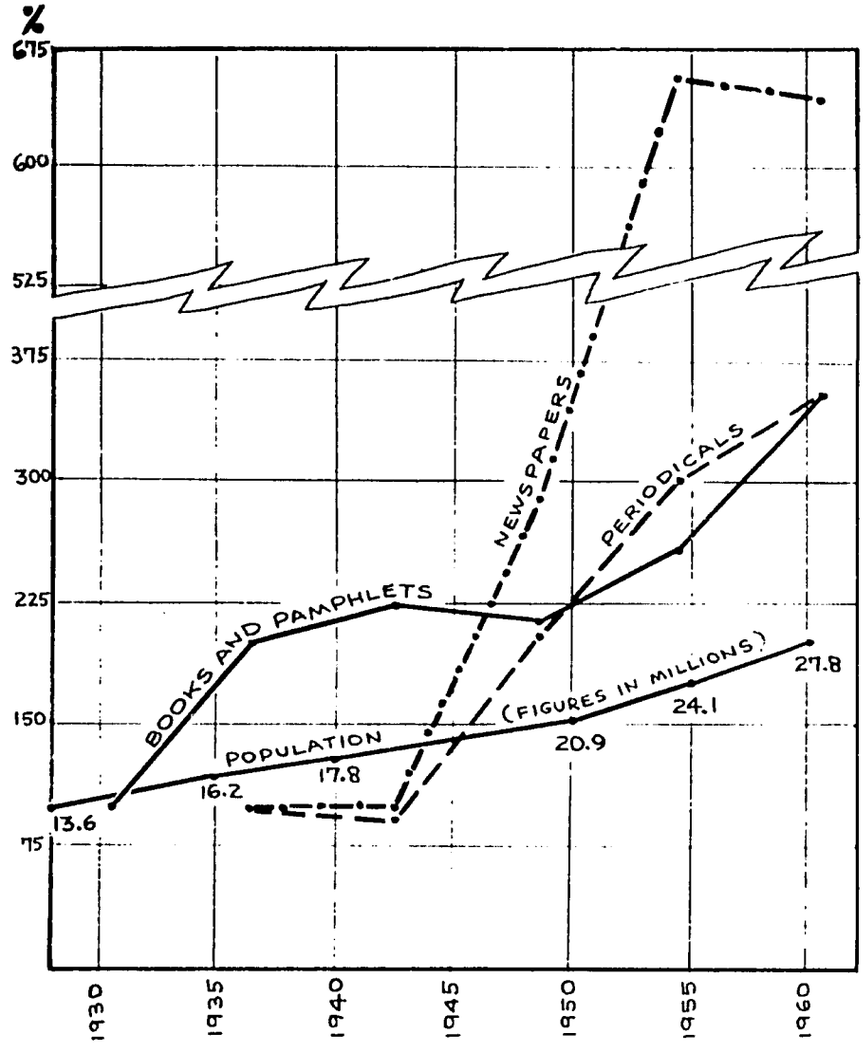
Genel libraries become halk libraries only when library personnel are deemed qualified to handle the increased and complicated work of lending books. The lack of trained librarians impedes this key development. Teachers who function as primary and secondary school librarians are also untrained or semi-trained. Graduates of the Ankara University Institute of Librarianship do not filter into these systems.

We therefore recommend that the Ministry of Education, which has prime responsibility in this area, provide a modest form of formal librarianship instruction so that the present ad hoc system of instruction can be eliminated and librarian competence can be developed more quickly and surely. This could be accomplished via short summer courses held at the Institute of Librarianship.

APPENDIX A

FIGURES

FIGURE 1. TRENDS IN TURKISH PUBLISHING, 1928-1963



	Average '28-'33	Average '34-'39	Average '40-'45	Average '46-'51	Average '52-'57	Average '58-'63
Book & Pamphlet Titles Published	1,044	2,099	2,351	2,240	2,690	3,703
Newspapers	--	132	134	384	865	848
Periodicals	--	200	187	413	605	709

Sources: Adnan Otuken, "National Education and Science in Turkey", Cultura Turcica, Vol. I, No. 1, 1964; and Ministry of Education Copyright Deposit Office at Istanbul. (Population figures from census counts.)

FIGURE 2. NUMBER OF APPROVED TEXTBOOKS PUBLISHED FOR THE 1963-1964 SCHOOL YEAR

SCHOOLS	TOTAL		Published by Private Sector			Published by Ministry of Education		
	COPIES	No. Titles	COPIES Number	%	No. Titles	COPIES Number	%	No. Titles
1st stage primary (Grades 1-2-3)	2,517,000	5	--	--	--	2,517,000	100%	5
2nd stage primary (Grades 4-5)	5,563,000	73	4,256,000	77%	67	1,307,000	23%	6
Total Primary	8,080,000	78	4,256,000	53%	67	3,824,000	47%	11
Non-technical orta books	3,370,000	136	3,306,000	98%	131	64,000	2%	5
Non-technical lise books	940,000	83	906,000	96%	78	34,000	4%	5
Secondary level technical books	158,000	25	--	--	--	158,000	100%	25
Total Secondary and Grades 4-5 Primary	10,031,000	317	8,468,000	84%	276	1,563,000	16%	41
Pedagogical texts	211,000	24	--	--	--	211,000	100%	24
Religious school texts	6,000	1	--	--	--	6,000	100%	1
GRAND TOTAL	12,765,000	347	8,468,000	66%	276	4,297,000	34%	71

Source: For private sector - actual figures supplied by Publications Directorate, Ministry of Education, plus estimates to cover missing information; for Ministry of Education - three-year average based on actuals supplied by Publications Directorate for 1962-1963, 1963-1964, 1964-1965 school years.

FIGURE 3. NUMBER OF SUPPLEMENTARY SCHOOL BOOK TITLES APPROVED FOR 1964-1965 SCHOOL YEAR

	Total	Published by Private Sector	Published by Ministry of Education
Primary Schools	155	152	3
Orta (non-technical)	188	157	31
Lise (non-technical)	223	170	53
Secondary level Technical books	128	100	28
Pedagogical books	108	61	47
Religious school	9	7	2
TOTAL	811	647	164

Source: "Tebliğler Dergisi", Ministry of Education Publications Division, May 18, 1964.

FIGURE 4. MINISTRY OF EDUCATION TEXTBOOK SIGNATURE NORMS (Price per 16-page signature, in liras)

	Page Size--68x100cm		Page Size--59x84cm	
	Straight Matter	Including Formulas	Straight Matter	Including Formulas
Primary School	.18	.20	.16	.18
Orta School	.21	.22-1/2	.17	.19
Lise I	.29	.31	.27	.29
Lise II (Fen-Edebiyat müşterek)	.29	.31	.27	.29
Lise II (Fen-Edebiyat ayri)	.31	.32	.29	.31
Lise III (Fen-Edebiyat)	.31	.32	.29	.31

Notes: More than 8 pages are considered one signature.
Less than 8 pages are considered 1/2 a signature.
Prices ending in more than 2 are rounded to 5.
Prices ending in more than 7 are brought up to 0.
Prices ending in 2 or less are reduced to 0.
Prices ending in 6 or 7 are reduced to 5.
Music and foreign language books are calculated as formula books.
Prices include colored covers, tables and maps.

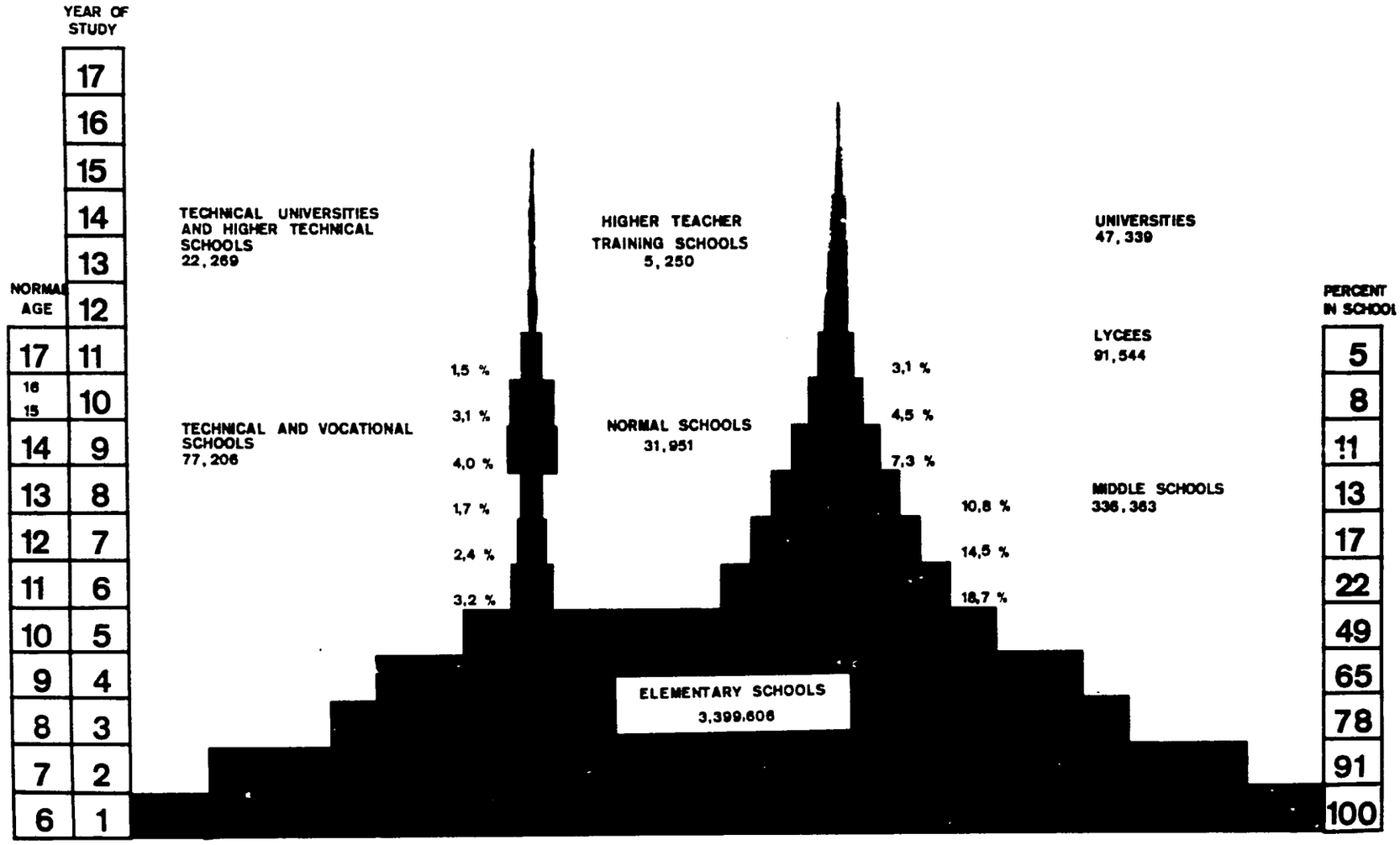
FIGURE 5. TEXTBOOK PROFIT MARGINS - CALCULATIONS FOR TWO PRIVATELY PRODUCED EXAMPLES, 1963

	PRIMARY SCHOOL 4th GRADE TEXTBOOK List Price: 200 liras Net Price: 150 liras 160 pages plus three color cover, saddle-wire binding, run of 120,000		ORTA SCHOOL 2ND GRADE TEXTBOOKS List Price: 280 liras Net Price: 200 liras 200 pages plus three color cover, saddle-wire binding, run of 14,000	
	Liras	% of Net	Liras	% of Net
Manufacturing: paper cover, binding, printing, engravings	.79	52.7%	1.06	53.0%
Royalty*	.20	13.3	.34	17.0
General Expense	.30	20.0	.38	19.0
Net Cost	1.29	86.0	1.78	89.0
Profit before taxes	.21	14.0	.22	11.0
Taxes (estimated)	.04	2.7	.04	2.0
Net Profit	.17	11.3%	.18	9.0%

* 10% of list for primary school book;
12% of list for orta school book.

FIGURE 6.

DISTRIBUTION OF TURKISH YOUTH POPULATION ENROLLED IN PUBLIC SCHOOLS IN SCHOOL YEAR 1962-1963



Source: USAID/Turkey

FIGURE 7. NEW TEXTBOOKS PRODUCED, BY GRADE, FOR TURKISH PRIMARY AND SECONDARY SCHOOLS DURING THE 1963-1964 ACADEMIC YEAR

	YEAR	Number of students enrolled		Largest # books published for a major subject during the 1963-1964 academic year.			Average # books published for major subjects for 1963-64 academic year		Total # new books printed for 1963-64 academic year		Normal # of books required.
		1962-1963 academic year 1/	1963-1964 academic year 2/	# Printed 3/	Subject	# books per Stud.	# printed for major subj. 3/	# books per stud.	Tot. printed all subj. 4/	Tot. new books per stud.	
PRIMARY LEVEL	1	1,024,257	1,106,200	900,000	Reader	.81	N.A.	N.A.	1,400,000	1.3	2
	2	796,988	860,750	750,000	Reader	.87	N.A.	N.A.	900,000	1.0	1
	3	641,980	693,350	650,000	Reader	.94	N.A.	N.A.	850,000	1.2	1
	4	530,784	573,250	445,000	History	.78	375,000	65	2,975,000	5.2	9
	5	405,597	438,050	350,000	Nature St.	.80	325,000	74	2,588,000	5.9	8
ORTA LEVEL (Incl. Comm. Vocational & Pedagogical Stud.)	6	177,127	184,200	159,000	Math	.86	141,000	.77	1,390,000	7.5	10-11
	7	130,091	135,300	121,000	Math	.89	108,000	.80	1,080,000	8.0	10-11
	8	89,636	93,200	106,000	Physics	1.14	97,000	1.04	900,000	9.7	10-11
LISE LEVEL (Incl. Comm. Vocational & Pedagogical Stud.)	9	76,238	82,350	60,000	History	.73	45,000	.55	370,000	4.5	9-10
	10	48,102	51,950	43,000	Physics	.83	37,000	.71	290,000	5.6	10-11
	11	25,265	27,300	30,000	Algebra, Geography Philosophy	1.10	30,000	1.10	280,000	10.3	12-13

Sources:

(1) Actuals, Board of Education

(2) Estimates, based on 8% increase over 1962-63 enrollments for primary and lise students; 4% increase for orta students.

(3) Actuals, Publications Directorate, Ministry of Education

(4) For first 3 primary years: actuals, Publications Directorate. For other years: Publications Directorate, actuals plus estimates to compensate for missing information.

Note: Technical and Pedagogical books not included in totals.

FIGURE 8. NUMBER OF STUDENTS IN VARIOUS EDUCATION BRANCHES, 1962-1977
(figures in thousands)

Branch	1962	1963	1964	1965	1966	1967	1972	1977	Index 1962 = 100 1967	1972	1977
Primary schools	3367	3567	3859	4141	4432	4736	5992	6821	141	178	202
Ortas	387	387	401	426	455	480	593	641	124	153	166
Lises	86	96	96	97	102	107	168	204	112	195	237
Technical Schools at Lise level	15	17	20	25	30	42	92	126	280	613	840
Vocational Lises (including teachers' training schools)	36	43	53	66	74	81	116	153	225	322	425
Advanced technical education	10	11	13	15	20	27	64	84	270	640	840
General advanced education	51	52	55	57	57	61	116	143	110	227	280

FIGURE 9. RATIO OF POPULATION IN THE DIFFERENT LEVELS AND BRANCHES OF EDUCATION TO THE SCHOOL-AGE POPULATION (in thousands)

	Primary Schools			Orta Schools			Lise Level Schools							Higher Education				
							Lises			Vocational		Technical		Technical			General	
Years	School-age population	Number of students	As % of school-age population	School-age population	Number of students	As % of school-age population	School-age population	Number of students	As % of school-age population	Number of students	As % of school-age population	Number of students	As % of school-age population	School-age population (19-22)	Number of students	As % of school-age population	Number of students	As % of school-age population
1963	4 880	3 567	73	1 985	387	19.1	1 675	96	5.7	43	2.6	17	1.0	1 880	11	0.6	52	2.7
1964	5 030	3 859	76	2 090	401	19.1	1 770	96	5.4	53	2.9	20	1.1	1 940	13	0.7	55	2.8
1965	5 150	4 141	80	2 200	427	19.0	1 870	97	5.2	66	3.5	25	1.3	2 040	15	0.7	57	2.7
1966	5 270	4 432	84	2 300	455	19.7	1 970	102	5.2	74	3.8	30	1.5	2 150	20	0.9	57	2.6
1967	5 390	4 736	87	2 390	480	20.0	2 075	107	5.2	81	3.9	42	1.9	2 275	27	1.2	61	2.7
1972	5 990	5 990	100	2 715	593	21.9	2 520	168	6.7	116	4.6	92	3.6	2 950	64	2.2	116	3.9
1977	6 820	6 820	100	3 000	641	20.1	2 800	204	7.3	153	5.5	126	4.5	3 450	84	2.4	143	4.1

Source: Tables 358 and 359, SPO First Five Year Plan.

FIGURE 10. BOOK PROJECTIONS BASED ON PRESENT LEVEL OF NEW BOOKS PRODUCED PER STUDENT, 1963-1977 (figures in thousands)

	PRIMARY SCHOOL					ORTA LEVEL					LISE LEVEL					Technical & Pedagogical Books			Total Books Published.		
YEAR	Enrollment	% of 1963 Proj.	# Books Published Pvt.	Pub.	Total	Enrollment	% of 1963 Proj.	# Books Published Pvt.	Pub.	Total	Enrollment	% of 1963 Proj.	# Books Published Pvt.	Pub.	Total	Enrollment (1)	% of 1963 Proj.	# Books Published Public (2)	Pvt.	Pub.	Total
1963	3,567	100	4,256	3,824	8,080	387	100	3,306	64	3,370	156	100	906	34	940	60	100	369	8,468	4,291	12,759
1967	4,736	133	5,660	5,086	10,746	480	124	4,100	79	4,179	230	147	1,331	50	1,381	123	205	787	11,091	6,002	17,093
1972	5,990	168	7,140	6,434	13,574	593	153	5,058	98	5,156	376	241	2,183	82	2,265	208	347	1,425	14,381	8,029	22,410
1977	6,820	191	8,129	7,303	15,432	641	166	5,488	106	5,594	483	310	2,809	105	2,914	279	465	1,922	16,426	9,436	25,862

Sources: 1963 Textbook totals: Figure 2, this report.
Enrollment figures: Table 359, First Five Year Plan, SPO.

NOTES : (1) Included in lise level enrollment totals.
(2) These figures are the sum of individual projections for technical books and pedagogical books, which have different growth rates. Percent increases for books, therefore, would not match percent increases for enrollment.

FIGURE 11. TURKISH PAPER PRODUCTION AND PAPER IMPORTS - 1962

Category	Production	Imports	Total
Printing and writing paper	16,035	8,013	24,048
Newsprint	20,420	11,203	31,623
Wrapping paper	33,230	181	33,411
Kraft paper	--	9,078	9,078
Corrugated pasteboard	9,608	960	10,568
Heavy paper and pasteboard	21,933	744	22,677
Others	--	485	485
TOTAL	101,226	30,664	131,890

Source: Table 87, SPO 1964 Annual Program

APPENDIX B

LIST OF ABBREVIATIONS

AID/W	-	Agency for International Development, Washington, D.C.
CBF	-	Central Book Fund, Education Division/TCR
F-R-G	-	Film-Radio-Graphic Center, Ministry of Education
IMG	-	Informational Guaranty Program, USIA
MDS	-	Educational Materials Development Center
METU	-	Middle East Technical University, Ankara
NAS	-	National Academies of Science
NSF	-	National Science Foundation
OCR	-	Office of Communications Resources, USAID/Turkey
OECD	-	Organization for Economic Cooperation and Development
PIA	-	Printing Industry of America
SEKA	-	The Turkish government's paper mill at Izmit: "The General Directorate of Cellulose and Paper Factories"
SPO	-	State Planning Organization, Office of the Prime Minister
SSO	-	State Supply Office
TCR	-	Office of Technical Cooperation and Research, AID/W
USAID	-	United States Aid Mission to Turkey
UNESCO	-	United Nations Educational, Scientific and Cultural Organization
USIA	-	United States Information Agency, Washington
USIS	-	United States Information Service, Turkey

APPENDIX C

SUMMARY OF U.S. GOVERNMENT AGENCY AND UNESCO BOOK PROGRAMS FOR DEVELOPING COUNTRIES

Chapter 11 outlined the various forms of book-related foreign assistance that have been provided to Turkey during recent years. The aid has been diverse and has made a significant impact upon the development of the Turkish book industry.

This Appendix reviews various central and regional book programs of U.S. Government agencies and of UNESCO that are directed at developing countries. It does so, to outline forms of assistance that might be taken advantage of. But, even more important, it reviews these programs to spark the imagination of both the developing countries and the USAID Missions that serve them, concerning the wide range of ideas and techniques that might be adapted for use in specific local situations.

> It will be recalled that the most active source of foreign-sponsored book programs in Turkey has been the USAID Mission to that country -- and that almost all the component divisions of USAID/Turkey have participated in the effort, which is inherently an outgrowth of Mission interest and initiative.

The Appendix first discusses pertinent AID central and regional programs, then those of USIA, the National Science Foundation, the Office of Education and the Peace Corps. It closes with a summary of UNESCO's policies and programs in the book field.

AGENCY FOR INTERNATIONAL DEVELOPMENT

In recognition of the basic importance of books in national growth, especially scientific, technical and vocational books, AID is committed to a policy of assistance in the development of indigenous book industries and of increased use of U.S. books, and adaptations and translations thereof, overseas.

The Central Book Fund (CBF)

The Central Book Fund is designed to strengthen the use of books as an instrument of the AID program, to increase the role the Agency plays in helping fill the book gap abroad, and to stimulate the development of local book capabilities.

The CBF Has undertaken a variety of projects during each year of its existence, reflecting policy emphasis and based on an appraisal of the most important non-project needs of the overseas technical cooperation programs. Some projects are purely illustrative of techniques and methods of book use. Others are designed to fill specific gaps in the availability of needed books in overseas institutions. Some of the most significant CBF projects are aimed at building essential institutional resources in the U.S. which the USAID Missions will require for future book industry development programs.

Key projects include:

Provision of National Development Reference Libraries covering the major phases of economic development, in about 270 titles. 109 sets have been distributed -- one or two to each USAID Mission in accordance with Regional Bureau instructions.

Provision of collections of about 280 "scholarly books" from the American University Presses; titles limited to economic and social development, administration, health, agriculture and community development. 92 sets have been directed to 55 Missions. A project aim: to demonstrate the potential role of a university press in meeting book needs.

Provision of seven University Textbook Rental Libraries, each in a different country, each providing a selected university with up to 4,000 books in a subject field designated by the Regional Bureau and confirmed at the country level by the Mission, which endorses host country institution requests for the collection.

Provision, through contract with National Academies of Science of a drawing account of up to 4,000 U.S. books each to the scientific and technical communities in nine countries. In effect, from 80%-90% of the purchase price of these expensive scientific books is subsidized through the project.

Participant training in the U.S. of some 120 book industry managers and supervisors, through group seminars conducted by Franklin Book Programs in 1964 and 1965.

The development by Franklin of a roster of training facilities in the U.S. for individual book industry personnel of all types, and Franklin Book's planning, scheduling and monitoring of training tours in the U.S.

Provision, under contract with Franklin, of a fund to defray dollar royalty charges for USAID-endorsed private local publishing of individual titles in fields of interest to AID.

Provision of 13 textbook depository libraries at secondary and university level, in various subject matter fields requested by the host country within the broad and social-economic development area. The collections placed generally in textbook development centers where they serve as reference on U.S. texts, and as guides to pedagogical techniques reflected in the texts, on the more advanced teaching methods and on technical subject-matter, per se.

The Turkish book survey and this prototype report.

A small-scale project to provide Cairo-published Arabic language versions of U.S. textbooks and reference books for use in Morocco; and a survey in the Arabic-speaking parts of Africa, undertaken jointly with USIA.

Appraisal trips by Central Book Fund staff to countries where there are USAID book programs; and utilization, on an availability basis, of book-industry representatives to provide technical advice to Mission staffs.

The Latin American Regional Book Program

In addition to the book publication and distribution activities outlined below, the Latin American Book Program has provided training and technical assistance to teachers and Ministries of Education, particularly with respect to elementary school textbooks:

The Central American Textbook Development Center in Guatemala City assists in curriculum planning and the development of textbooks and teaching materials for all the national schools of the region. At present a complete core series of materials for the first six grades is being prepared; seven new titles representing 3,500,000 books are going into the Central American public schools during early 1965.

The Regional Technical Aids Center/Mexico City provides Spanish-language instructional material in two primary book programs: (1) a Special Book Program which distributed an average of 1,500 copies of over 100 different titles of economics, land reform, public administration, public health, agriculture and teacher education books to libraries, universities, technical schools and key ministries; and (2) Regional support to Mission projects. This program includes contracting for the translation and publication of commercial book titles and printing of new non-commercial publications.

The Regional Technical Aids Center/Buenos Aires serves as an extension of the Mexico City Center and facilitates broader distribution of special texts produced under its program. It also serves to strengthen the Argentine publishing industry. A Brazil Technical Aids Center performs the same function in the area of Portuguese-language materials.

Other Latin American Region book programs include the providing of assistance to (1) improve the first two years of college curricula in the sciences and mathematics and (2) to acquaint secondary and university professors with new instructional materials and improvements in library science. (This program is handled, under contract, by the U.S. National Science Foundation.) Also, the provision of technical and scholarly journals in fields directly related to technical development in Latin America, via the Council of Higher Education in the American Republics.

The Regional Technical Aids Center/Paris

The Regional Technical Aids Center/Paris produces French versions of U.S. technical documents and publications for use in AID programs in 19 French-speaking countries of Africa. The former Indo-China countries also avail themselves of these services. In addition, a limited amount of Arabic-language materials are distributed by the Center to countries in Africa and the Near East.

The Center represents a central source for the provision of French translations of U.S. technical and training publications and documents. In addition to furnishing technical aids, it also provides a major translation service for Mission program documentation requirements.

UNITED STATES INFORMATION AGENCY

Among the USIA book-related programs are the following, which have been undertaken in developing countries:

PL 480 Textbook Program: This program, which concentrates on the translation, publication and distribution of high-quality U.S. textbooks, is financed with foreign currencies accruing from the sale of surplus agricultural commodities under the Agricultural Trade Development and Assistance Act of 1954. The local publisher sells the textbooks to students or the Ministry of Education in accordance with local customs. Rights to U.S. textbooks published abroad with these funds are negotiated by the foreign publisher and the U.S. copyright holder, since only foreign currencies are available for this program. The program has been implemented in 21 countries.

Informational Media Guaranty Program: This is a device which makes it possible for dollar-short countries to purchase U.S. informational materials and pay for them with their own non-convertible currencies. On the basis of authority contained in agreements between the governments of the U.S. and the participating countries, USIA contracts with U.S. exporters of books, periodicals, motion pictures, etc., to purchase from the contractors foreign currencies acquired from the sale of eligible materials (and certain intangibles such as authors' rights) if those currencies cannot otherwise be converted. The users of the materials must pay for them at regular commercial prices in their own currencies. The program has operated in 21 countries since its beginning; it still operates in eight.

Book Translation Program: This program promotes the translation and distribution of U.S. books which illustrate important aspects of U.S. life and culture. Most of the books are sold through existing or newly-developed commercial channels; many are used in schools and universities or are made available for supplementary reading. The books are translated by residents of the country in which they are published. Most of the books appear in translation complete and unabridged. To insure widest readership, inexpensive grades of paper and soft bindings are frequently used in the interest of keeping retail prices low.

USIA does not publish books. Rather, it provides assistance to foreign publishers to enable them to produce books in local languages. The assistance may include negotiating with copyright owners for language rights, absorbing translation and promotion costs, or agreeing to purchase part of the foreign edition.

Low-Priced Books in English: The program is aimed at meeting the need of the emerging nations for U.S. books in large quantities and at prices that readers can afford. Commercial channels are employed exclusively for the publication, promotion, distribution and sale of these books. Contracts are made with American paperback publishers which require that they place the books in their regular export channels in the countries and quantities designated by USIA. Content emphasis is on the illustration of important aspects of U.S. democratic institutions, economic and scientific achievements, and international relations.

Book Development Program: Designed to insure the writing and publication of books on subjects that further USIA requirements, but that would not otherwise be written or published for the commercial market.

THE NATIONAL SCIENCE FOUNDATION

During the past several years, the NSF has given financial support to a number of study groups consisting of leading scientists and mathematicians, teachers and technicians for the purpose of developing new, modern teaching materials in the sciences and mathematics. New teaching materials have been produced and new approaches to the teaching of science and mathematics have emerged. Concurrently, the NSF has supported a large-scale program for the retraining of science and mathematics teachers.

Through participation of foreign scientists and science teachers in many of these NFS activities, and in other ways, interest in new approaches to science education has grown in many of the developing countries and a number of them are embarking upon reform programs.

During the period of the new U.S. approaches to the improvement of science education, expertise has been gained by NSF staff and the scientists and teachers who have worked on the course improvement and teacher training projects. (See "The Latin American Regional Book Program," above, for details of how this expertise is being made available, under contract to AID, to developing countries.)

THE OFFICE OF EDUCATION

The Educational Materials Laboratory, part of the U.S. Office of

Education's Division of International Studies and Services, contains a research collection of about 12,000 books and periodicals used in elementary and secondary schools and teacher training institutions in the U.S. A representative collection of these same kinds of publications from other countries is maintained.

The Laboratory is used by educators from more than 70 countries, as well as by supervisors, teachers, and librarians in the U.S. who come to use its resources. Moreover, hundreds of written requests are processed annually for schools, libraries and materials centers in the U.S. and abroad.

THE PEACE CORPS

The Peace Corps by law has no money for book programs; it can purchase books only for the use of volunteers. It therefore provides footlockers of paperbacks containing from 200-300 titles for the volunteers to use as they see fit. The books are used as loan libraries and teaching aids where possible. (However, Peace Corps teaching programs do occasionally give rise to book-related projects at the local level. See Chapter 11 for a discussion of teachers' guide development work being performed in Turkey by Peace Corps volunteers.)

UNESCO

The development of books forms an important element in the Constitutional obligations of the United Nations Educational, Scientific and Cultural Organization (UNESCO), and has been the object of a variety of programs since the inception of the Organization. Recently these programs have been emphasized.

Activities have included assistance to the developing countries to expand book production, promotion of the free flow of books throughout the world, and publication or encouragement of publication of specific studies and reports.

UNESCO assistance for the development of book production in the developing countries has been geared to conditions and needs in Member States requesting aid. Various forms of aid have included:

> Training of authors: Some use has been made of fellowships under the UNESCO Technical Assistance Program. In particular, traveling fellowships have provided the

recipient with opportunities to gather material. Alternatively, experts have been attached to a Ministry for the general purpose of assisting in textbook production, part of which entails the training of local authors.

Another form of action has been the seminar, or workshop. This has been widely used in UNESCO's adult education program and has also been a major feature of the project for the production of reading materials for new literates.

For school books, the writing seminar has been less commonly used. However, Member States intending to organize such projects do call upon UNESCO to provide consultant services, usually in some specific subject area.

Production of science books: Under these projects, local science professors in developing countries are given concerted assistance in the preparation of books and associated science teaching aids. They work side by side with competent professors of science, science educators and audio-visual experts who comprise the UNESCO staff in these pilot projects.

Assistance to publishing and printing: The UNESCO Technical Assistance Program has frequently enabled the Organization to make available to Member States experts in various aspects of publishing, ranging from curriculum revision to authorship, illustration, production and distribution. Fellowships have been provided for training in these fields

Assistance to Distribution: The improvement of public and school libraries in the developing countries has been fostered by UNESCO through various means, including the pro vision of experts and fellowships, seminars and institution alized training courses.

Specialized documentation centers, mainly in the fields of education and science, are encouraged by similar means.

UNESCO promotes the free flow of books between countries by the following principal means:

International regulation of copyright problems, to assure adequate protection of authors' and publishers' rights and the simplification of formalities.

Promotion of the free flow of educational, scientific and cultural materials, and notably of books, by reduction of tariffs and other trade barriers.

Surveys, at regional level, of the production and flow of books.

Diffusion of knowledge about available books; UNESCO regularly produces standard reference works in the bibliographical field.

Encouragement of translations of important books, both from lesser known languages to languages of wide diffusion, and in the reverse.

Encouragement of public library and bibliographical center development, with the object of promoting cooperation between them and increasing the inter-availability of resources.

APPENDIX D

RECAPITULATION OF TEAM RECOMMENDATIONS

This appendix summarizes the recommendations made in Chapter 12 of this report and tentatively classifies them according to the nature of supporting agencies whose approval and/or active assistance might be required for implementation.

Section A lists those recommendations which appear to require varying degrees of bilateral or multilateral support. Section B lists those recommendations which probably can be handled successfully through unilateral Turkish action.

In the case of recommendations requiring non-Turkish support, we have made preliminary estimates of personnel and time involved to clarify the nature of the recommendations themselves, and for initial guidance in considering their implementation.

A. RECOMMENDATIONS REQUIRING BILATERAL AND MULTILATERAL SUPPORT

Listing Chapter 12	Recommendation	Time and Personnel Requirements, etc.
#2	As a demonstration project on the development of a modern textbook, re-edit and redesign a currently published textbook and prepare an accompanying teachers' edition.	2 participants--a Board of Education member and the textbook author - to spend 3-4 months in a book-developed country working with the original publisher.
#3	Demonstration workshop(s) on editorial process - follow-up to project above.	2-4 textbook publisher-editors from developed country, 2-3 months in Turkey.

Listing Chapter 12	Recommendation	Time and Personnel Requirements, etc.
#15	Study of easy-to-read book efforts in the U.S.	1 participant, to spend 3 months in the U.S.
#12	Commission to improve basic readers.	5 participants - educators, linguists, reading specialists, 3-4 months in book-developed countries.
#22	Develop scholarly publications digests.	Initial help from publishing specialists; financial assistance at start from bilateral organization or private foundation.
#35	Develop a Turkish book trade journal.	Technical and financial assistance required at start.
#9-10-11	Determine book gap in secondary level vocational and technical courses, select, translate and adapt foreign language industrial education, pre-vocational and vocational textbooks; prepare accompanying teachers' editions and instruct teachers how to use.	5-6 participants from Board of Education, Directorate of Vocational and Technical Training and Publications Directorate, 2-4 months in U.S.; plus services of an industrial education specialist from a developed country.
#4	Textbook editor consultant to local industry - possible follow-up to editorial workshop seminar, above.	1 or more developed country textbook editors, 1 or more years in Turkey.
#29	Establish labor standards for printing technicians.	1 labor specialist, 2-3 months in Turkey.

Listing Chapter 12	Recommendation	Time and Personnel Requirements, etc.
#1	Top-level seminar, to increase Turkish appreciation of the role of books in the educational process and to demonstrate their broad role in the U.S.	15-20 participants - educators, government officials, book industry representatives, to attend seminar in U.S.
#21	Translate some of the more needed foreign university textbooks, as stop-gap until English proficiency developed.	Project might be handled with assistance of Franklin Book Programs, Inc.
#6	Expand the Central Book Fund Turkish depository library project to include primary school textbooks.	Sets of 1,000 titles, for Board of Education, Istanbul Publishers' Association and USAID/Ed.
#24	Establish lending library for English language professional books at METU.	Funds for initial collection of 2,000 titles, plus later purchases.
#26	Book promotion and distribution specialist to aid non-school book industry.	1 book marketing specialist, 6 months in Turkey.
#20	Create Turkish national book committee or trust, to promote the reading habit.	1 specialist who will spend 2-3 months in Turkey to initiate project.
#30	Reorganize Printing Trades Institute at Istanbul and train its instructors.	Experienced printing specialists and instructors. Also training grants, some machinery and equipment.

B. RECOMMENDATIONS FOR UNILATERAL TURKISH ACTION

Listing Chapter 12	Recommendation
Ministry of Education	
#5	Ease and re-direct the workload of the National Board of Education.

Ministry of Education (continued)

Listing Chapter 12	Recommendation
#21	Intensive secondary level program of English language reading instruction to gain university student access to foreign scholarly works in the natural, social and behavioral sciences.
#13	Provide basic supplementary libraries to all primary and secondary schools...eventually on a classroom set basis.
#16	Open more village libraries.
#17	Expand the mobile library system
#7	Publish village-oriented primary school textbooks.
#8	Make greater use of textbook-related audio-visual material in the classroom.
#34	Improve the productivity of the Ministry of Education's printing plant.
#38	Consider transfer of publishing responsibility for secondary level vocational and technical education textbooks to the private sector...and grant special pricing latitude when the change takes place.
#19	Improve procedure for selecting public library books.
#39	Hold periodic joint meetings with the private book industry, to improve textbooks.
#44	Provide librarianship instruction for public and school librarians.

Ministry of Village Affairs

#14	Expedite publishing of the civilian adult literacy primer.

Listing Chapter 12	Recommendation
General Staff	
#41	Gradual conversion of Armed Forces Literacy training facilities to use for vocational and technical education training.
Turkish Libraries and Institutions	
#18	"Unlock" libraries...convert them to open shelf.
#43	As libraries develop, provide auxiliary library, bibliographic and statistical services.
Other Turkish Government Agencies	
#27	Liberalize advantages and inducements to attract foreign investment in urgently needed paper mills.
#32	Repeal of amendment barring book industry loans by the Industrial Development Bank.
#25	Eliminate cumbersome foreign exchange restrictions on book imports.
#37	Adhere to Universal Copyright Convention and adopt modern Bern provision on translations.
#36	Further subsidize internal postal rates for books and instructional materials.
#40	Adopt UNESCO recommendations concerning standardization of book and periodical production statistics.
#28	Have SEKA government paper mill conduct customer research to better serve book industry.
#33	Further encourage private printing industry mergers and consolidations through added tax incentives.
#42	Review and possibly expand the depository library system.

Listing Chapter 12	Recommendation
Turkish Universities	
#23	Develop multi-faculty publications of broad scope.
Turkish Private Printing Industry	
#31	Provide foreman and management training through the Grafik Klüb.

APPENDIX E

FRANKLIN BOOK PROGRAMS SEMINAR

FOR OFFICIALS OF MINISTRIES OF EDUCATION

In July, 1965 Franklin Book Programs, in cooperation with the American Textbook Publishers Institute and Harvard Graduate School of Education, conducted a seminar on the development and use of educational materials in the process of nation building. Ministry of Education officials from a dozen developing countries participated with outstanding American educators, educational publishers, and public interest spokesmen in a series of informal discussions, lectures, and field trips centering in the areas outlined as follows.

The seminar was sponsored by the Central Book Fund of the Agency for International Development (AID) in furtherance of AID's policy objective of aiding local writing, printing, publishing, and distribution capabilities in developing countries.

The steering committee responsible for the planning, content, and direction of this seminar comprised Dr. Austin McCaffrey, Executive Director, American Textbook Publishers Institute; Dr. Theodore Sizer, Dean, Harvard Graduate School of Education; Emerson Brown, Vice-President and Editorial Director, McGraw-Hill. Chairman of this committee was William E. Spaulding, Chairman of the Board of Houghton Mifflin Company.

Announced details follow:

Seminar Format and Content

"Following a few days in Washington, where the group will learn about the activities of the U.S. Office of Education, the National Education Association, the National Science Foundation and AID as they relate to educational materials development, the group will spend two weeks in New York City at Greyston Conference Center. The third week the seminar will be held in Cambridge. Following that, each official may spend up to two weeks in the U.S. pursuing subjects of special professional interest.

American educational publishers and educators will be living in with the visiting officials both in New York and Boston, participating in all aspects of the program. Visiting discussion leaders will include other publishers and educators as well as representatives from the business world, the foundations, the arts, economics, and public health--fields with a vital interest in education.

Francophones proposed for this seminar will participate in the foregoing program via interpreters to the extent feasible. However, for the most part a separate program, equivalent in content but not in format, will be arranged for them.

The curriculum will retain flexibility to permit exploration of any special problems the participants wish to introduce. However, the discussions will relate generally to two broad and closely associated questions:

A. What are the reasonable short-term and reasonable long-range objectives a country might establish with regard to the development, production, and use of educational materials, given its present state of economic development?

B. How can all the local facilities and resources that can serve these objectives be identified, marshalled, and coordinated most efficiently?

Against the background of these two over-riding considerations, the seminar will cover such matters as:

1. Textbook content and national goals; inculcating positive nation-building concepts and national and cultural pride in the young.

2. The gamut of educational materials--textbooks, supplementary books, workbooks, tests, teachers' manuals, teacher training books, encyclopedias and other reference books, periodicals, films and film strips, wall charts (including maps) and globes; their interrelationship and individual roles in the educational process.

3. Educational research, curriculum development, and educational publishing--their interrelationship.

4. Role of the publisher in the educational process; public and private sector cooperation to achieve national self-sufficiency in educational materials.

5. Implementing innovation in a traditional educational system: reorienting teachers, mobilizing public opinion.

6. Logistics and economics of establishing national self-sufficiency in educational materials; priorities.

7. Basic problems: developing writers, editors, illustrators, designers, production experts, printers, librarians; educational materials and literacy; educational materials and the problem of language.

8. Temporary measures--translation and/or improvement of foreign educational books; physical improvement of existing books.

9. Legislation and educational materials, especially textbook selection, copyright.

10. The textbook publishing process from idea to printed page (case studies)."

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