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POLICY REVIEW OF THE GEORGIAN BOOK SECTOR

*Report prepared by
Grzegorz Boguta*

**Cultural Policy and Action Department
Directorate General IV – Education, Culture and Heritage, Youth and Sport**

The opinions expressed in this report are those of the author and do not necessarily engage the responsibility of the Council of Europe.

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1. INTRODUCTION

This report was prepared on the basis of a visit to Georgia in February 2002. All information was obtained through meetings with Georgian government representatives, members of the Georgian Parliament and other state institutions as well as with some actors of the Georgian book trade, i.e. publishers, distributors, writers, translators and others. Additional support data was collected in March and in April of 2002 to complete a survey of the Georgian book sector.

The purpose of the visit was to analyse the current situation of the Georgian book trade and to identify obstacles which limit access to books and their availability, and finally to propose a number of recommendation points with regard to National Book Policy.

Publishing in Georgia is facing numerous problems but, unfortunately, Georgian authorities do not regard this as an important factor towards the stabilisation of country's cultural and social policy.

2. SUMMARY (RECOMMENDATIONS AND CONCLUSIONS)

1. That the Ministry of Culture should take a lead in coordination and preparation of a consistent policy for the Georgian book sector. The policy should include the promotion of the Georgian language in book publishing and the role of books in a modern education system.

2. That key objectives of the policy should be as follows:

- a. To define the role of direct budgetary contribution in supporting of book publishing and bookselling.
- b. Definition of specific taxation rules for the whole book chain.
- c. To sign and apply the provisions of the Florence and Nairobi Agreements on customs duties in the publishing sector.
- d. To define and implement consistent policy towards the book sector.

3. That a reduced VAT rate should be imposed (zero or at least a reduced rate at 5 % recommended by the EU commission) on all types of book, periodicals and other cultural material. This should replace the current subjective VAT exemption scheme for certain types of publications.

4. That with regard to educational publishing the State should consider to:

- a. An analysis of whether school textbooks are to be purchased by all pupils, or if the State should introduce at a national level , a competitive system enabling the development of new textbooks (in a form of tenders). Textbooks should then be purchased by the State and borrowed for free or for a symbolic amount of money, by pupils. A proportion of the World Bank loan within "Education System Realignment and Strengthening" programme could be used to test all possible alternatives and to set up an independent auditing body to guarantee transparency in the governmental decision process of public publishing contracts.
- b. Eliminate the widespread, black market of school textbooks by rapid implementation of rules recommended by the World Bank experts.
- c. Embody a consistent policy on the support of university textbooks at a national level. The Ministry of Education and the Ministry of Culture should initiate open and

public discussion on academic publishing and national curriculum standards. The State should seriously address the issue of partially legal self-publishing by academics and university teachers.

5. That bookselling requires immediate state support (tax incentives, training programme etc.). The state chain *Saktsigni* should be privatised as soon as possible in order to remain the leading bookshop network serving all Georgian publishers. Privatisation process should be open and transparent.

6. That tax incentive programmes should be introduced:

- a. For publishers of original Georgian literature in the shape (for example) of free-interest loans.
- b. For small booksellers in the form of reduced-rate loans (Swedish model).

7. That the deposit copy requirement should be formally adopted as a separate legal act or as an amendment to the Law on Libraries. The number of deposit copies should not exceed four. Use of the ISBN number should be obligatory for all Georgian publishers.

8. That libraries should be properly funded bearing in mind that libraries are major partners in any book policy. Particular attention should be paid to school and public libraries and co-operation between them.

9. That a state Georgian Culture Fund should be established under the Ministry of Culture supervision. A good model for implementation might be Culture Capital Foundation of Latvia.

10. That the Ministry of Culture should help trade organisations of publishers, booksellers and librarians to compile a sustainable Books-in-Print cataloguing system in accordance with international classification standards.

11. That representatives of all independent trade organisations of the book market actors (authors, printers, publishers, booksellers and librarians) should be able to participate in Parliamentary meetings of the Committee for Education, Science, Culture and Sport. The Ministry of Culture could arrange for the awareness programme on lobbying practices in democratic societies for leaders of trade organisations.

3. BACKGROUND FRAMEWORK

3.1 Short History, Geography and Population

People have lived in what is now Georgia for thousands of years. The first Georgian state was established in the 900's B.C and the Georgians are considered to be one of the most ancient of existing nations. In the 200's B.C., most of what is now Georgia was united as one kingdom. However, for almost all of its history, Georgia was divided and powerful empires fought over it. Over a period of one thousand years Romans, Persians, Byzantines, Arabs, and Seljuk Turks invaded Georgia. Georgia adopted Christianity in the A.D. 100's and it resulted in strong religious and cultural traditions.

Since 1783 the Russian Empire had influenced Georgia both, politically and culturally. In the early 1800's, all of Georgia was absorbed into Russia.

An independent socialist republic was established in Georgia after the First World War in 1918. But soon after, in 1921, Russian communist forces invaded Georgia and a Communist Republic of Georgia was proclaimed, and a few months later Georgia, Armenia, and Azerbaijan were forcibly united in a form of the Transcaucasian Republic, which was incorporated into the Soviet Union in late 1922. In 1936, Georgia became a separate Soviet republic. Following the emergence of *perestroika* (restructuring) in the Soviet Union in mid 1980's, a strong independence movement appeared in Georgia. Elections to the Republic Parliament were held in 1990, and non-Communist candidates took the majority of seats in Parliament. In April 1991, after nearly 200 years of Russian and Soviet rule, Parliament declared Georgia independent. However, the new state was suffering from political instability, growing ethnic conflicts and a huge economic crisis. At present, all of these problems are still far from being resolved.

Georgia is a relatively small country, situated in the south west of Asia, bordering the Black Sea, between Turkey and Russia. Geographically, Georgia lies mostly in Asia, but part of northern Georgia is located in Europe. Its surface area covers 69,700 km² (26,911 miles²). It has joint frontiers with four countries: with Turkey in the south west (252 km), with Armenia in the south (164 km), with Azerbaijan in the south east (322 km), and with the Russian Federation in the north (the largest one – 723 km).

Much of Georgia has a rugged landscape. The northern and southern part are mountainous, (the Caucasus Mountains and the Little Caucasus Mountains), and the highest areas are permanently snow covered. Western Georgia includes lowlands near the Black Sea, suitable for agriculture. Eastern Georgia includes part of the upper Kur Valley, which extends into Azerbaijan. This region has the driest climate in Georgia.

The estimated 2002 population of 5.0 million inhabitants is divided among 70.1% Georgians, 8.1% Armenians, 6.3% Russians, 5.7% Azerbaijanis, 3% Ossetians, 1.8% Abkhazians and 5% other. Population growth rate is –0.62% (2000 estimation).

In Georgia, distribution of the population is: 56% - urban and 44% - rural. The capital Tbilisi with approximately 1,400,000 inhabitants, is the largest city of Georgia, located in the narrow gorge of the Kura River. The other major cities are Kutaisi (240,000 inhabitants), Rustavi (158,000 inhabitants), Batumi (137,000 inhabitants), Gori (70,000 inhabitants) and Porti (50,000 inhabitants)

3.2 Political Background

Georgia declared independence (April 1991) before the Soviet Union was formally dissolved (December 1991). The people elected Zviad Gamsakhurdia president the next month. Unfortunately Gamsakhurdia, the leader of the non-Communist majority, moved towards dictatorship and he jailed political opponents and censored the press. In January 1992, opposition parties formed an alternative government and Gamsakhurdia fled the country. Eduard Shevardnadze became head of the State Council, he was then elected to serve as chairman of Parliament and finally elected president of Georgia. The country is currently facing massive ethnic conflicts in South Ossetia, a self-governing region in North-central Georgia as well as in the autonomous region of Abkhazia. In both regions Russian troops remain garrisoned as peacekeepers. However, Georgia

continues to move toward greater integration with European political and economic institutions. For example, Georgia became a fully-fledged member of the Council of Europe in January 1999. And in 2002, the US sent hundreds of Special Operations Forces to train and technically support the local military forces.

Chief of state is Eduard Shevardnadze, re-elected as president by popular vote for a five-year term. The president is both the chief of state and head of government.

Parliament consists of 235 seats and its members are elected by popular vote to serve four-year terms. Leading political parties are (year 2000 statistics):

Citizen's Union of Georgia (more than 40% seats in Parliament), Union for "Revival" Party (25% seats), Industry Will Save Georgia (8%). All other parties such as Georgian United Communist Party or Abkhaz faction received less than 7% each.

3.3 Economic Background

The break-up of the Soviet Union disrupted traditional trade and payments links. In addition, Georgia experienced a huge energy deficit. All these difficulties were compounded by ethnic conflicts in Abkhazia and South Ossetia, resulting in large and costly movements of refugees. Therefore, Georgia suffered one of the sharpest economic declines among the former Soviet republics. In just five years, between 1990 – 1995, output fell by more than 70%, heavy disruptions in agriculture occurred, and tourism revenues virtually collapsed. Since 1994 the government has implemented a comprehensive economic reform program with support from the World Bank and the International Monetary Fund. Real GDP growth resumed in 1995 and reached 10% per annum in 1996 – 1997. However, economic performance was stopped in 1998 due to the onset of the Russian crisis. GDP declined to less than 3% over next three years. But adequate levels of external aid are expected to help the Georgian economy maintain real positive growth, which is expected to reach 4,5% per year on average starting from 2002. However, revenue shortfalls, weak tax collection, and unrealistic budgeting continue to be on top of the governmental agenda.

	1996	1997	1998	1999	2000	2001
GDP Growth(%)	10	10	2.9	2.9	2.0	4.5
Inflation(%)			3.6	44	10	10
State budget for culture (%)				0.89	0.85	0.81

The government has launched an ambitious privatisation programme for key industries such as transportation, telecommunications, and the power sector. Unfortunately, the growing trade deficit, continuing problems with tax evasion and corruption, and political uncertainties cloud the short-term economic picture.

However, in 2001 the government continued in its efforts to maintain positive trends in the area of macroeconomic stability.

4. THE BOOK SECTOR AND GOVERNMENT

4.1 Office for Culture, Education, and Youth Affairs at the State Chancellery

This department is a part of the President's Office and plays advisory role to the President concerning culture, education and science, in the first place. Chief of the department and his staff are responsible for defining President's policy in these sectors. They can also influence who takes the post of the minister of culture in Georgia.

There are quite close relations and exchange of information between the current chief of the department and the Georgian Publishers and Booksellers Association.

State policy for a period of 2002 – 2005 concerning the Georgian library system is one of key issues the department is focusing on.

4.2 Ministry of Culture

Responsibility for the book sector in Georgia falls basically under the Ministry of Culture and the Department of Book Industry and Libraries, in particular. Through it, the Ministry sets up national policy related to book publishing, printing and bookselling as well as the public library network. Overall budget for culture in 2001 was 9,127,000 GEL, but in reality the ministry received only 60 per cent of this. The 2002 plan is to make 9,166,000 GEL available for culture. Taking into account at least 10% inflation, the Ministry can theoretically get less than a year earlier.

Unfortunately, the allocation of support for the book sector within ministerial sponsorship programmes is rather symbolic (see below the break down of 2002 budget for the programmes of the Ministry).

- development of Georgian professional theatre - 100 000 GEL
- development of Georgian professional music - 100 000 GEL
- development of Georgian professional fine art - 80 000 GEL
- state support programme for arts education - 60 000 GEL
- state support programme for culture in regions of Georgia - 85 000 GEL
- mobile monuments registration programme - 70 000 GEL
- state programme for protecting the Georgian cultural heritage - 60 000 GEL
- popularisation of Georgian culture abroad - 120 000 GEL
- state programme for the development of cultural-educational and Folk art fields - 45 000 GEL
- re-training of the staff - 25 000 GEL
- development of the library system - 20 000 GEL
- protecting historic and cultural monuments - 235 000 GEL
- supporting the development of film production - 450 000 GEL

The total 2002 sponsorship's budget is 1 450 000 GEL, and only a symbolic 20 000 GEL (€10 500) is allocated for support of the Georgian library system.

In addition, publishers rarely receive any sponsorship from the Ministry.

4.3 Ministry of Education

The Ministry of Education plays a crucial and unique role in educational publishing in Georgia. The Ministry is responsible for setting the national curriculum and all school textbook approval standards. The Ministry, in co-operation with the World Bank, is currently working on the Government's realignment and strengthening programme for the education system. Phase I (2001 – 2005) of the project is under way. It is focused on developing curriculum standards for basic/general and secondary education core subjects, training teachers and principals for the attainment of those targets, providing basic learning materials to support such attainment, assessing the results of student learning in core areas and specific grades. In 2002, fifty schools out of 3,400 in Georgia are taking part in a pilot phase of the new system.

Since 1999 the Ministry has been organising formal tenders addressed to Georgian educational publishers. This relatively new procedure has been financed over last three years by the Open Society-Georgia Foundation. As a result the state has already accepted a dozen of new textbooks in core subjects and specific grades, as a rule - two titles for each subject and grade. This procedure has effectively helped break the monopoly of the state own textbook publisher, *Ganatleba*. So far, nineteen private publishers have won tenders for new textbook projects.

Regarding higher education, the system is rather decentralised with more than 200 universities (*sic!*), both state and private, all of them being fully autonomous. The Ministry has no intention to co-ordinate the higher education curriculum or to influence academic publishing. This is unfortunately, to a great extent, part of the Georgian black market.

4.4 Ministry of Finance

The Ministry presents the very pragmatic view that publishing houses are firms like any others and special regulations should not be applied for the book industry. The State, represented by the Ministry of Finance, does not have a fiscal policy towards the book sector. On the other hand, there is a quite confusing Government structure with the Ministry of Tax Revenue responsible for all tax issues, both at a corporate and individual level.

4.5 Parliamentary Committee for Education, Science, Culture and Sport

The Committee consists of 24 members. Recently, the Committee has been occupied by educational reforms in co-operation with the World Bank. On the other hand, parliamentarians work on a project of the new law on charity.

Following amendment of the Copy Right Act in 1999, according to EU standards the Committee seems to be satisfied with the current progress in Georgian book sector legislation.

Every year the Committee members are lobbying for more funds for culture, education and science. In theory the state budget looks fine, e.g. 15% of state spending is allocated to education, 1.5% to science and 2% to culture. However, in practice the state can afford to transfer much less on the annual basis due to very weak tax collection.

4.6 State Department of Printing and Publishing Industry

This department is a state owned institution and its role is to control the remaining state owned enterprises in printing, publishing and book selling on the one hand, and to oversee privatisation processes on the other.

There are only two remaining state publishers: *Ganatleba* who used to be the only educational publisher in the past and children's book publisher – *Nakaduli*. The most likely privatisation scheme would be to give both companies away to their employees or sell to them for a symbolic amount of money.

Once all state owned companies are privatised, the department most likely will be converted into a state information centre on book publishing.

4.7 Georgian State Book Chamber

The Georgian State Book Chamber subordinates the President's Office.

With its 80 staff the Chamber's main task is to collect copies of all kinds of production published in Georgia as the value of cultural, historical and national achievements and put them into archives. So far there are 1.6 million Georgian titles in their archive.

The chamber is also responsible for preparation of the National Bibliography and other bibliographic works (retrospective, personal, branch, Georgianologic, etc). The National Bibliography should be published in a hard copy edition monthly, quarterly and annually. Due to a shortage of state budget the chamber has not published the National Bibliography since 1998. There is a plan to put all entries of the National Bibliography on-line, but some additional funding is required to complete this task. The other activities of the chamber include:

- acquisition of funds with Georgian literature published abroad
- creation of a state bibliographic and statistical information bank in Georgia
- implementation of research works in bibliography.

The Georgian State Book Chamber is probably the best source of information on the book trade in Georgia.

4.8 Literacy and Reading

The Georgian alphabet, one of fourteen in the world, originates from the 3rd or the 4th century and Georgian began to emerge as a literary language in the 5th century.

Nowadays, Georgia has a very high level of literacy (99%) and most citizens are able to communicate through the spoken and written word in two languages, e.g. Georgian and Russian.

4.9 Budgetary Financing of Culture

Due to recent government efforts to stabilise the Georgian economy tough methods have been introduced to reduce expenditure and the culture sector is being affected among other public and social affairs.

The real value of budgetary expenditure on culture in Georgia at present amounts about 80 % of 1998 level and it is about 0.81% of the total state annual budget in 2001.

Financing of culture in Georgia is much too centralised in comparison to other member countries of the Council of Europe.

One can hardly expect a substantial change in the field of financing of culture in the near future. Only a gradual, consistent, programme of public administration reforms may release more funds for public financing of culture in Georgia.

5. PUBLISHING

The first Georgian printed book, Georgian-Italian dictionary was issued in 1629 in Rome. The first Georgian printing plant was established in Tbilisi in 1709.

Despite this long established tradition Georgian publishing is in a very difficult stage at the moment. The size of the Georgian book market is hard to estimate, as there is no precise data available. There is no Books-in-Print catalogue and the National Parliamentary Library in Tbilisi has only partial data on this. The estimated number states between 25 and 30 million lari (GEL) or between € 13 and €16 million of total turnover annually. It makes the Georgian book market one of the smallest among member states of the Council of Europe.

Unfortunately, non-textbook publishing amounts for only 2 million GEL (€1.05 million) at the most. The publishing scene is strongly dominated by educational publishers. The above ratio of non-textbook to textbook publishing (1 to 15) is quite unique among the member states of the Council of Europe. In most Eastern European countries it usually varies between 35 to 50% market share of educational publishing. The Ministry of Culture should carefully analyse this situation and devise a programme to strengthen non-educational Georgian publications.

Unfortunately, there is no foreign investment in Georgian publishing whatsoever.

The key problem the Georgian book trade currently faces is illegal production (photocopying) of educational materials. Some official sources in Georgia have estimated that this amounts to over 5 million GEL (€2.6 million) per annum.

5.1 Number of Publishers

The ISBN office, which is one of departments of the National Parliamentary Library of Georgia, indicates that as of March 1st of 2002 there were 140 legal entities registered with publishing as one of their activities. This is a very small number as compared to the number of publishers registered in other countries of similar population in Europe such as Slovakia (more than 2 200 publishers) or Latvia (ca. 1 400 publishers).

Approximately 80% of these companies are located in Tbilisi. The number of real publishers, who claim that publishing is their core business, e.g. publishers who produce at least 5 titles a year, is obviously significantly lower. Depending upon the source of information it varies from 20 to 50. The largest non-educational publisher in Georgia, Bakur Sulakauri indicates that its annual turnover is around 0.2 million GEL (€105,000).

The number of publishers regarded to be professional organisations with a clear ownership and employment structure, precise editorial plan and perspectives for development is no more than 20. Conversely, there are publishers who do not use ISBN numbers and are not registered anywhere due to the fact that piracy, especially of school textbooks, is widespread in Georgia.

5.2 Output of Titles

The output of titles between 1996 and 2000 shows a stability of the annual production – approximately 1 200 titles every year. However, the National Parliamentary Library of Georgia and the Georgian State Book Chamber manage to collect only 600 to 700 titles each year. Average current print runs are estimated to be between 500 and 2000 copies including the most popular fiction and children’s books.

5.3 Trend of Publication

The trend is typical of the experience of most post-communist countries with relatively small population. Except for educational books there are mainly best selling fiction and children’s books. Import of Russian books remains quite significant, although this has been declining over last three years and dropped sharply by 50% in 2001 alone.

5.4 Pricing

The small book sector in Georgia does not support the fixed-price system. However, publishers are able to control book prices through agreements with distributors and booksellers. The Retail Recommended Pricing (RRP) System has been recently implemented and forced by the Sulakauri Publishers, and other Georgian publishers will certainly follow. So far, sales are usually based on a consignment with the full right to return unsold stock. Whenever retailers want to increase prices they are forced by publishers and/or distributors to accept firm sales contracts but in reality prices are basically similar in different shops. The majority of publishers are reluctant to implement a modern discount system. In view of this there is not much left (up to 20% of a retail price) for distribution and bookselling.

A typical breakdown of list price is as follows:

- publisher’s gross margin	up to 50 %
- distribution and retail	40 to 50 %

It does not include VAT, which in Georgia is 20 % for the selected types of publications. However, the most significant types of publications are exempt from VAT (see chapter 0 10. TAXATION AND VAT).

Average prices for full colour books are around 7 to 15 GEL (€3.5 to €7.8), at least three-four times lower than in Western Europe and for the best selling paperbacks – 5 to 10 GEL (€2.5 to €5.2). Books imported from the Russian Federation are more expensive, on average by 30 %.

Some Georgian publishers complain that prices are too low for them to cover cost and risk and allow for reinvestment. This is why the most dynamic publishers, namely Sulakauri, revolutionised the pricing system.

5.5 School Textbooks

In accordance with the policy of the Ministry of Education the publishing of school textbooks is not directly financed by the state. Pupils or their parents have to purchase textbooks every year. The Ministry establishes curriculum standards and potential textbooks must be pre-approved by the Ministry. Publishing houses may apply for publishing of textbooks in a special public tender pursuant to the order of the government of Georgia (see details in chapter 0

4.3 Ministry of Education).

On average a single school textbook set costs about 60 to 70 GEL, which is more than official average monthly wage in Georgia. Therefore, illegal copying of school textbooks, with a half of the above price, is widespread throughout the country. In addition, due to a huge problem with distribution, a second hand market is being developed and quite frequently schools exchange sets of textbooks between each other.

The state educational publisher, *Ganatleba*, with about 30 per cent market share, dominates schoolbook publishing in Georgia, but other at least 18 publishers successfully place their textbooks on the market.

5.6 University Textbooks

Unlike the compulsory education system, university textbooks are not centrally controlled. Georgian universities are independent state-owned or private institutions and are expected to support their internal publications for students. Surprisingly, Georgia probably has, per capita, one of the largest number of universities in Europe with 30 public universities, and about 230 private universities and academies.

Except for a few publishers such as *Logos Press* or *Medea* there is no professional academic publishing in Georgia. There are a number of small university presses co-operating directly with the university faculty they are based on.

It is a widely known fact that the key issue in the university textbook publishing system is partially legal or simply illegal self-publishing by academics and university teachers. Usually, they force their students to buy self-produced textbooks or, more accurately, scripts. These underhand dealings negatively influence the quality of higher education in Georgia and effectively limit students' access to new, modern, textbooks.

5.7 Children's Books

Children's books are traditionally regarded as the strongest part of Georgian trade publishing. Translations account for more than half of all new children's titles published with a predominance of the Dorling-Kindersley type of publications. Children's books are regarded as an extension of educational publications and usually sell very well as supplementary school materials.

5.8 Electronic Publishing and Multimedia

Georgia is too small a market for electronic publishing and multimedia to be seriously developed. On the other hand, electronic titles imported from the Russian Federation

saturate the Georgian market. Publishers in Georgia are rather reluctant to invest in new media at present, as the number of computers in families is insufficient. Although schools seem to be relatively well equipped with computers the Ministry of Education does not provide funds for purchase of multimedia publications for the school system.

More promising is the Internet and thanks to financial support of the Open Society – Georgia Foundation. There are a number of projects within the programme aiming at the development of electronic publishing and electronic industry such as promotion of new technologies, training programme and assistance to electronic publishing in Georgian language (see details in chapter 0 11.4 Open Society – Georgia **Foundation**)

5.9 Subsidy in Book Publishing

There is no systematic subsidy scheme at a governmental level.

The key source of financial support for publishers is the Open Society- Georgia Foundation (see below the chapter on the Foundation).

The Foundation programme is aimed at creating environment for the development of **an** independent publishing industry. So far US\$ 40,000 has been spent on direct support for Georgian publishers.

5.10 Printing and Production

The Georgian printing industry seems to be strong and quite stable.

Paper is not locally manufactured and is usually imported from Russia.

The prices of paper are high, even higher than in the Western Europe, while printing services are still quite inexpensive.

5.11 Digital printing

Digital printing is entirely new for Georgian publishers and printers.

There is a great need to introduce these modern technologies to the Georgian book trade by organising awareness programmes among publishers, booksellers and printers. The Soros Foundation network jointly with leading technology providers such as Xerox could be helpful in launching a programme on digital printing.

Based on the experience of leading Georgian publishers one can say that traditional offset technology might be used to print 400 and more copies to break even. For books below 400 copies quasi-digital technology is successfully implemented, e.g. risography.

5.12 Trade Publications and Statistics

So far there is no trade journal for the Georgian book sector, neither are there any reliable statistics. Some data is available at the National Parliamentary Library of Georgia and the Georgian State Book Chamber, only.

5.13 Training in Publishing

A former publisher, Mamuka Khantadze has successfully established the Publishing Study Centre. The Centre is a part of the Faculty of Philology of the Tbilisi State University. Every year at least ten students graduate. In addition, the Centre offers an in-house training programme for publishers if required. The Centre also publishes special professional literature for publishers.

Some professional seminars and workshops have also been organised by the Open Society - Georgia Foundation or other international bodies.

6. BOOK DISTRIBUTION

There is no government policy towards book distribution and this is identified as a major problem facing the Georgian book trade. Publishers complain that Georgian publications are very badly distributed - unlike imported books from Russia.

In view of the above, publishers tend to deal directly with bookshops.

6.1 Bookselling

Firm statistics on book retailing are rather scarce but based upon data taken from the Georgian Publishers and Booksellers Association there are approximately 200 bookshops throughout the country and about 100 of them are located in Tbilisi. The state owned retail chain *Saktsigni* still exists with 170 outlets, but most of those shops were converted into retail points of goods other than books. Only a few managers of those bookshops were able to take over their shops and established private, independent business. Major bookshops only carry about 1,000 to 2,000 titles.

A new promising channel could be supermarkets, some in Tbilisi have already started selling books.

6.2 Subsidy in Bookselling

Neither the central government nor the municipalities have developed support for booksellers. In city centres booksellers have to pay extremely high rent as compared to expected turnover or total expenses; the authorities do not consider bookshops to be a "local cultural centre". The Ministry of Culture should consider supporting a "model bookshop" concept to promote professional activity in this sphere, since none of the existing bookshops in Georgia can be compared to a standard outlet in other countries of Europe.

6.3 Book Clubs

A book club concept is not considered as an alternative sales channel due to very high postal rates. Cost of mailing an average book quite often exceeds a retail price by a factor of two. Therefore, no Georgian publisher is investing in direct mail or a book club.

6.4 Book Distribution

Book distribution remains the weakest point of the whole supply chain within the Georgian book trade. As there is no reliable distribution company in Georgia publishers usually deal directly with booksellers. In 2001 the Book Agency was established, it seems to be the best distribution structure in Georgia.

The majority of transactions between publishers and booksellers and/or wholesalers are based upon consignment. Therefore, in case of a bankruptcy it is not an easy procedure for a publisher to get its stock back from a distributor or a bookseller. Delayed payment is a characteristic factor of almost all transactions between distributors/ booksellers and publishers in Georgia. One has to point out that a distributor is left with a totally inadequate margin made on the maximum discount of 8-10% of a retail price. Bearing in mind how difficult is to obtain a loan from the Georgian banks, quite often delayed payment is the only way for a distributor to support own working capital.

6.5 Books in Print

The true picture of the Georgian book trade is difficult to be drawn, as firm statistics on publishing are basically not available. The supporting role of Books in Print data is self-evident among professionals. In view of this managers at the National Parliamentary Library of Georgia recognise the problem caused by the lack of a modern book information system. The Georgian Publishers and Booksellers Association undertook some efforts towards a pilot project in this field. Unfortunately there is very weak support from publishers and booksellers who do not understand the real function of such a system. Perhaps, close co-operation between the Association and the Georgian State Book Chamber could work, if the Ministry of Culture supported the project.

Without any doubt an awareness programme is needed to educate all actors of the Georgian book trade with regard to the role of the Books in Print catalogues.

6.6 Training in Book Distribution

There is no specialised training programme for booksellers or distributors. Certain elements of a training programme can be found at the Publishing Study Centre. Special seminar on book distribution was organised by the Open Society – Georgia Foundation in 2000.

6.7 Book Imports

Georgians readers are usually bilingual. Therefore, traditionally, there is a strong demand for Russian language publications in Georgia. Street vendors, an important partially legal supply chain, have been selling only Russian books. Over the whole decade of 90's import of Russian books was regarded as very lucrative business irrespective, whether books were imported officially or simply smuggled through the border. There is now a new response of the Georgian book trade and since 2001 there has been a significant drop in sales of Russian books (by 50%) and within the same period of time there was 10 per cent growth of sales of local publications.

7. AUTHORSHIP

7.1 Authorship

As in other countries with a relatively small population, it is quite difficult for Georgian authors to get published. Contemporary Georgian literature is especially strong in poetry and prose, additionally work for children by Georgian writers is known to be popular.

Print runs of contemporary Georgian literature are quite short and rarely exceed 1,000 copies.

Authors and publishers are free to negotiate terms of a contract between themselves.

7.2 Copyright

A new amended Law on Copyright was passed in the Georgian parliament in 1998 in order to comply with relevant EU directives such as duration of copyright (70 years) or reproduction rights. However, publishers are not regarded as producers and cannot formally benefit from a distribution of money.

7.3 Piracy

Georgia has signed the international copyright conventions.

It is clear that piracy remains a worrying problem in Georgia. In particular, illegal copying of school textbooks seems to be an attractive business practice and it is at least tolerated by the government since there is no action or plan to fight with piracy in a form of well co-ordinated governmental action. Additionally, a number of new Georgian publishers are not aware of importance of copyright protection and this issue should be properly analysed by both trade associations of publishers in Georgia. An awareness seminar programme could be organised by the associations and the Ministry of Culture.

8. LIBRARIES

8.1 Structure of the Library Service

The library system in Georgia is regulated by the Parliamentary Act on "Library service" of 1996. This system, consisting of the National Parliamentary Library of Georgia based in Tbilisi, and three other state libraries, public scientific libraries (universal and branch), scientific-technical, scientific-educational libraries, public libraries, and youth, children's and specialised libraries, is a part of the state information system.

In 2001 about 5000 libraries were operational out of 8000 existing during the Soviet era:

Type of libraries:	Number
Public libraries	2 169
In Tbilisi (subject to municipality)	53
School libraries	2 369
Libraries of higher education institutions and scientific libraries	200
Special libraries	20
State libraries:	4
National Parliamentary Library	1

The library service in Georgia is basically free of charge. In the National Parliamentary Library readers are asked to pay annual registration fee, a quite symbolic 5 GEL for individuals and 15 GEL for institutional readers (€2.4 – €7.2) per year.

As elsewhere in the region of the former Soviet bloc, Georgian libraries are heavily under funded and they do not have ability either to buy new books or pay proper salaries to their staff. Quite often, due to budgetary problems, libraries receive funds with a huge delay and employees are not paid sometimes for three or four months.

8.2 School and University Libraries

The Georgian government allocated 15% of the annual budget 2001 to education. It is a noticeable fact that a very small fraction of all spending on education goes to school and university libraries.

Therefore, more and more school libraries have stopped their activity over last few years.

Bearing in mind the lack of state and municipal funds perhaps, the optimal solution for today would be to combine public and school libraries in one place under the same budget.

8.3 The National Parliamentary Library of Georgia

The National Parliamentary Library of Georgia is placed under the Parliament of Georgia and the head of Parliament appoints the library's director.

The National Parliamentary Library activity is regulated by the Law on National Library adopted in 1997 by Parliament.

The Library has got a "special" line in the governmental budget unlike in other countries in that their National Libraries belong to a Ministry of Culture structure.

In 2001 the state budget reserved 1,000,000 GEL (€480,000), but only 60 per cent was allocated. Theoretical budget is regarded by the management of the library as at least 70% too low and secure funds from the state should amount to about GEL 3M.

Therefore, the library management is seeking sponsorship elsewhere. So far the largest contributions have been offered by the Open Society – Georgia Foundation, the Euro-Asia Foundation, the World Bank and US Aid.

The library remains reliant to a significant extent upon legal deposit copies for collection development.

8.4 National Bibliography, ISBN and ISSN Agencies

The State Book Chamber in Tbilisi is responsible for the Georgian National Bibliography.

The National ISBN (International Standard Book Number) Agency was established in 1997 jointly by the Georgian Library Association and the National Parliamentary Library. Its offices are located at the National Parliamentary Library. The most recent list of registered companies comprises of 140 publishers. ISBN publishers' data base also maintains the records on 'historic publishers' who have ceased their business activity but whose titles are still the part of library catalogues. The real number of active publishers is approximately 70.

In 1995 Georgia received the ISBN prefix 99928, but it is estimated that only about 50% of books published in Georgia are equipped with the ISBN. Unfortunately, small publishers either do not know or ignore the ISBN system.

The National Parliamentary Library in Tbilisi is also responsible for ISSN (International Standard Serial Number).

There is no special agency for ISMN (International Standard Music Number).

8.5 Deposit Copies

So far there is no specific regulation with regard to the legal deposit copies. Only a few publishers send a copy to The National Parliamentary Library of Georgia and/or to the Georgian State Book Chamber on regular basis. No more than 700 titles (out of at least 1200 published per annum) arrive in these institutions.

9. LEGISLATION RELATED TO BOOKS

9.1 Pace of Legislative Change

There is no legislation relating specifically to books in Georgia. Prior to commencing their activities neither the publisher nor the bookseller is obliged to fulfil any obligation. Both publishing and the distribution of books are classified as free trades. An administrative fee to register private businesses is €280 and in addition there is a tax office fee of 70 GEL (€36).

9.2 The Florence Agreement

Georgia has not yet signed the Florence Agreement. However, a regulation dating from mid 90' had already exempted books and related materials from import duties.

10. TAXATION AND VAT

The amount of VAT is relatively high – the basic rate is 20% (electronic publications for instance) and the following types of publications are VAT exempt (according to the tax code, clause 101): scientific literature, school textbooks (based on the list issued by the Ministry of Education) and children’s publications. Imported scientific, art books and magazines are also VAT exempt.

Books, publications and documents of Georgian classics and Georgian Citizens published abroad are exempt from import duty.

11. BANKING AND FINANCE

11.1 The World Bank

Georgia has been a member of the World Bank since 1992.

There are a number of projects, in Georgia, financed by loan schemes from the World Bank but none of these is related directly or indirectly to the book trade.

The most promising programme, which publishers can benefit from is “Education System Realignment and Strengthening”. The World Bank has already approved the Phase I loan for the period of 2001-2005 in amount of US\$ 25.9 million and the predicted Phase II and Phase III loans, if approved, will be for US\$ 20 and US\$ 15 million respectively.

11.2 The European Bank for Reconstruction and Development

To date, the EBRD is involved in several projects in Georgia (capital investment or loans) and the bank is one of the largest investors in Georgia, with cumulative commitments of €242.5 million so far.

Unfortunately, the EBRD makes no loans to the Georgian book trade and there is no indication that the bank policy is going to be changed or modified in this respect.

There is ongoing project of EBRD to provide United Georgian Bank (UGB) with an equity investment in the form of subscription to ordinary voting shares and a five-year loan (total - €13 million), which will be used for on-lending to the United Georgian Bank's customers in the small and medium-sized enterprise (SME) sector of the Georgian economy. Theoretically, publishers and/or booksellers could apply for credits from UGB.

11.3 Availability of Credit

The book sector in Georgia has very limited access to credit. Even the largest and most stable publishers in Georgia could not obtain a credit line without heavy negotiations. The process of arranging for credit is usually too bureaucratic and takes up to 6 months to be completed. Interest rates are also unfavourable and amounted on average 24 % in 2001. TBS Bank in Tbilisi offers short-term loans (3 months) up to €12 000 to publishers who are able to present valuable assets to this lender as a loan guarantee.

There is no visible sign that micro loans (up to €30,000) are going to be offered to small businesses in the predictable future

11.4 Open Society – Georgia Foundation

With no doubt the Open Society – Georgia Foundation is the most important private sponsor of publishing and related activities in Georgia.

Over last three years the Foundation has committed to spend about \$300,000 on support for publishing and library programmes (see below). In addition, \$350,000 has been spent on a programme for educational book publishing in co-operation with the Ministry of Education.

Selected examples of support within the National Publishing Programme:

This programme is aimed at creating environment for the development of independent publishing industry. Therefore, for the year 2000 priority was given to:

- education of publishing professions,
- training scheme,
- development of a book distribution system,
- updating and strengthening of legislative bases for publishing.

Priority was also given to translations. The support was offered by the Translation Programme of Central European University (Budapest) and about 30 different books in social sciences were translated and published within this programme (in the period of 1997 – 2002 US\$ 150,000 was spent).

Examples of subsidised projects:

Publishing Company "Diogene"- " Principles of Economy" - by Gregor Menque - US\$7558

Publishing Company GCI - "Reader, Publisher, Author" - US\$1865

Publishing Company "Diogene" - "Educational Book Market in Georgia" - US\$1959

Open Society -Georgia Institute - Seminar for book distributors - US\$4580

Publishing Study Centre – Support to training courses and publishing of "Publishing Dictionary" - US\$3964

Literature Lovers Union - "Georgian Children Book Exhibition" - US\$2211

Budget for the projects: US\$37113

Total budget of the programme: US\$40 000

Selected examples of support within National and Network Programme for Libraries

This programme is designed to support libraries in their transformation into educational and cultural centres. Thus, the priorities of the programme for 2000 and 2001 were as follows:

- training for special staff working in libraries,
- implementation of new technologies,
- providing librarians with professional information,
- providing support and assistance in creating national standards.

The Georgian Library Association - magazine -"Libraries in Georgia" - US\$2000
Iliia Chavchavadze Kutaisi Scientific-Universal Library - "Support for the library" - US\$617
Union for the Support of Invalids and Veterans - library " Support" - My Rainbow - US\$7 179
Consortium of integrated informational library space of Georgia - (Georgian libraries and bibliography database in the Internet). - US\$49 551
Travel grants for individuals (international seminars and conferences) - US\$7,500

Budget for the projects: US\$85994
Total budget of the programme - US\$135 000

Selected examples of support within the Electronic Publishing Development Programme

This programme is aiming at development of electronic publishing and electronic industry. Priorities for the year 2000 and 2001 were given to:

- promotion of new technologies,
- training for the specialists working with new technologies,
- assistance to the electronic publishing in Georgian language,
- financing projects that will potentially involve large group of consumers.

Gia Shervashidze - "Georgian Internet Avenue" - integrating Georgian language into International Informational Space - US\$7925
George Chogovadze - "Georgian Internet Explorer" - US\$6126
Union of Supporters of New Search Technologies - "Georgian Resource Searching System" - US\$7997
Iliia Chigogidze - "Online navigation in the Georgian Internet" - US\$7643
Georgian Atlantic Council - " Transparency of structural doctrines" - US\$6778
(Support for the research in defence and security issues, and adoption of strategic thinking principles in civil education).
David Kipiani "Governmental Structures of Georgia" - US\$5127

Budget for the projects: US\$67 984
Total Programme Budget: US\$70 000

Selected examples of support within the Programme for educational Books Publishing (TPP)

Textbook Competition - training of all target groups- US\$43381
Decentralisation and Management of Educational System- (EDMD)- US\$141 603
Reforms Supporting Agency (RSA) - US\$144.333
Programme for Schools - US\$14754
University Programme for Teachers - US\$36 802

Total Budget already spent: US\$893 108

12. BOOK SECTOR ORGANISATIONS AND ASSOCIATIONS

The Georgian Publishers and Booksellers Association (GPBA)

The Georgian Publishers and Booksellers Association was established in 1996, originally as the Association of Publishers only. In 1999 it became the booksellers joint Association. Today, the Association groups together 15 publishers and 17 booksellers (32 members) from Tbilisi mainly, plus 2 publishers from Batumi. GPBA is regarded as the most professional representation of the Georgian book trade. Among the initiatives and activities of GPBA one can mention co-organisation of the national book expositions at international book fairs, in Frankfurt in the first place. The most important is the International Tbilisi Book Fair which, since 1999, is held annually in June

Unfortunately GPBA is too weak to collect statistical data on the Georgian book trade. However, there are some efforts to catalyse launching of the Books in Print service and training programmes.

12.1 The Association of Publishers of Georgia

The Association of Publishers of Georgia was established in 1998 as the result of some tension and lack of understanding within the Georgian Publishers Association. The Association managed to group about 60 members, but the majority of these are involved in areas other than publishing, namely printers, NGO's, public institutions. The Association established regional offices in Kutaisi (Imereti branch) and in Batumi (Achara branch).

The conflict between the two associations does not help to create and maintain effective lobby in Georgia in terms of co-operation with the government and Parliament. None of these associations have become members of the International Publishers Association as IPA would like Georgian publishers to sort out their problems locally and then IPA may decide who will be invited to be a member.

Both associations and their leaders have been advised by international advisers to re – unite and join efforts to influence a weak Georgian publishing market.

12.3 The Georgian National Writers' Union

The most important Georgian organisation for authors is the Georgian National Writers' Union, which was established in 1917. Nowadays, in new Georgia the Union is working like a trade union protecting the interest of their members. The Union is basically fully dependent upon state subsidies. The annual budget of 500,000 GEL (€270,000) is spent on scholarships for the Union members, on monthly literary magazine "Tsikari", which is one of the oldest periodicals in Georgia established in 1852 as well as is allotted upon 33 staff members (*sic!*).

Some members of the Union are also running publishing companies - since no creator can make a living out of books. However, publishers and writers have a difficulty in finding common terms of author's contracts acceptable for both sectors.

12.4 The Georgian Library Association

The Georgia Library Association was established in 1997. The association groups together institutional bodies such as public libraries and information centres as well as individuals. There are 60 institutional members and 70 librarians. The president of the association is Mr. Irakli Garibashvili.

The mainstream activities are as follows:

- to promote the development of libraries;
 - to set up and implement library policy;
 - to defend libraries as institutions creating and protecting the national library holdings;
 - to assert the programme of technical and technological development of libraries;
- to co-operate with foreign libraries and to co-ordinate the progress in international organisations.

The Georgian Library Association played a crucial role in drafting the Law on Libraries in 1996.

13. SOURCES OF INFORMATION AND ADVICE

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Mr. Givi Alkhazisvili

Director of the "Merani" Publishers
Tbilisi, 24, Rustaveli Ave.,
380008 Georgia
Tel. (+)99532 996492

Prof. Nodar Amaglobeli

Chairman of the Committee for
Education, Science, Culture and
Sport
Parliament of Georgia
8, Rustaveli Ave.,
380018 Tbilisi
Tel. (+)99532 998058

Mr. Zurab Antelidze

The Ministry of Finance
Director of Financial and
Investment Policy Department
Irakli Abashidze st.70, Tbilisi
Tel: 25 06 21/25

Mr. Lasha Beraia

Publisher,
LOGOS and LOGOS PRESS
13, Chavchavadze Ave.
380079 Tbilisi
e-mail: logos@caucasus.net

Mr. Levan Berdzenishvili

Director General
The National Parliamentary
Library of Georgia
7, Gudiashvili Str.,
380007 Tbilisi
e-mail: cdic@access.sanet.ge
www.nplg.gov.ge

Mr. Givi Bojgua

Publishing Company
"Ganatleba" Editor in chief
Chubinishvili st.50, Tbilisi
Tel: 995 32 96 75 39

Mr. Michael Chachkunashvili

Executive Director
Open Society- Georgia
Foundation
10, Chovelidze Str.,
380008 Tbilisi
e-mail: misha@osgf.ge

Ms. Iza Demetrashvili

Department of Book
Industry and Libraries
The Ministry Of Culture of
Georgia
37, Rustaveli Ave.,
380008 Tbilisi
Tel.: 995 32 99 04 80

Mr. Gia Djividze

Deputy chairman of
Poligraphy and Publishing
State Department
Marjanishvili st.5, Tbilisi
Tel: 995 32 95 20 61

Mr. Irakli Garibashvili

Deputy Director,
Geogian State Book Chamber
47, Saburtalo Str.,
380060 Tbilisi
Tel. (+) 99532 385641
e-mail: IGAR@hotmail.com

Ms. Sesili Gogiberidze	Minister of Culture The Ministry of Culture of Georgia 37, Rustaveli Ave., 380008 Tbilisi Tel.: (+)99532 932255
Mrs. Nino Gugunishvili	The Ministry of Culture of Georgia Director of Artistic Programmes Department 37, Rustaveli Ave., 380008 Tbilisi Tel.: (+)99532 98 96 13
Mr. Guram Gverdtsiteli	Georgian Writers' Union 12, Khipshidze Str., 380062 Tbilisi Tel.: (+)99532 220983
Mr. Avtandil Iakobidze	Head of Juridical Department The Ministry of Culture of Georgia 37, Rustaveli Ave., 380008 Tbilisi Tel.: 995 32 98 74 31
Mr. Koba Imedashvili	Head of Department of Culture, Education, Science and Youth Affairs President of Georgia State Chancellery 7, Ingorokva Str., 380005 Tbilisi Tel.: (+)99532 931421
Msr. Elene Imnadze	Public Sector Management Specialist The World Bank Resident Mission Georgia 18A Chonkadze Str. Tbilisi Tel.: (+) 99532990448 e-mail: Eimnadze@worldbank.org
Mr. Merab Katamadze	Director Publishing Company "Azri" Kostava str.14, Tbilisi Tel:(995.32)99.01.06

Mr. Mamuka Khantadze	Director General, Publishing Study Center, Kostava st.14, Tbilisi Tel: 995 32 98 97 87 E-mail: revazich@posta.ge
Mr. Nukri Kiguradze	Head of Finance Department The Ministry Of Culture of Georgia 37, Rustaveli Ave., 380008 Tbilisi Tel.: 995 32 99 54 59
Mr. David Lomidze	Head of Investment Policy Division of the Ministry of Finance Irakli Abashidze st.70, Tbilisi Tel: 25 06 21/25 15 37/25 29 03
Mrs. Tina Mamulashvili	Managing Director, Bakur Sulakauri Publishing 150A, Agmashenebeli Str., 380012 Tbilisi e-mail: bakur@access.sanet.ge
Mr. Zviad Mchedlishvili	Head of International Cultural Relations The Ministry Of Culture of Georgia 37, Rustaveli Ave., 380008 Tbilisi Tel.: (+) 99532 995241 e-mail: culture@mmc.net.ge
Mr. Vakhtang Pataraiia	Deputy Director of the Financial and Investment Policy Department of the Ministry of Finance
Dr. Vladimer Sanadze	First Deputy Minister The Ministry Of Education of Georgia 52, Uznadze Str.,Bratislava, 380002 Tbilisi e-mail: sanadze@yahoo.com

Mr. Bakur Sulakauri

Owner and President,
Bakur Sulakauri Publishing
150A, Agmashenebeli Str.,
380012 Tbilisi
e-mail: bakur@access.sanet.ge

Ms. Guliko Togonidze

Publishing company
"Nakaduli" Deputy director
Chanturia st.12, Tbilisi
Tel: 995 32 92 01
14/931385/981871

Mr. Tamaz Tsivtsivadze

President
Georgian Writers' Union
12, Khipshidze Str.,
380062 Tbilisi
Tel.: (+)99532 220983

at the writers' union:

Zaur Kalandia - Editor of "Tsiskari" journal
Guram Gverdtseteli - Director of "Merani" journal
Givi Alkhazishvili - Editor of "Merani" and poet
Rezo Cheishvili - Chairman of Writers Union's "Litfund"
Lado Mrelashvili - writer
Geno Kalandia - writer
Fridon Khaklvashi - writer

Mrs. Gvansa Turmanidze

Ministry of Culture
Advisor to the Department
of International Cultural Relations
Tel: 995 32 98 74 26

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