

## EASTERN EUROPE: BACK TO THE FUTURE?

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*A personal view of the situation in eastern Europe, and the opportunities for publishers and subscription agents*

'From Szczecin in the Baltic to Trieste in the Adriatic, an Iron Curtain has fallen across the continent of Europe'. At that time, Eastern Europe consisted of eight states, which formed a buffer zone between the Soviet Union and Western Europe, between 600km and 1200km in breadth. These states were run as socialist or communist centralised economies from the end of the 2nd world war until about ten years ago when, one after the other, and through various forms of secession or revolution - some violent, most astonishingly peaceful - but all as a direct result of the failing might of the Soviet Union, they started to emerge into the cold dawn of a market economy. Today that same territory is occupied by thirteen independent sovereign states. The former Soviet republics are not part of this paper.

The principal trading characteristic of all the eastern block countries was a centralised import-export organisation which dealt with books and journals, and which in some cases extended to records, stamps, coins and almost anything in a broadly cultural category. These organisations formed the basis of more than four decades of international trade, and the privatised and semi-privatised organisations with which we are trading today are mostly direct descendants of the old monopolies. Only the names have been changed to protect the innocent (and some not-so-innocent). Most of the individuals now running private import organisations spent their formative years growing up in the old state concerns, and some understanding of the way things were is necessary to an effective functioning in the way things are.

The state import-export organisations, which used to enjoy imaginative names like Buchexport, Artia, and so on, were 100% state-controlled and run by card-carrying apparatchiks. They existed for two reasons - political and economic. All power circulated around the allocation of hard currency. The Party had to control the foreign travel which was available (this was the principal perk of party membership), and the Party had to control

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the hard currency - Devisen - which was made available for cultural and educational imports. A hard currency import budget for cultural materials was allocated by the Ministry of Culture or Education, and then it was up to the western publishers to compete for a share of the cake. This was achieved by means of good old fashioned personal relationships (dinners and drinks and invitations), publisher exhibitions, and book fairs. Karger Publishers (my other half), was always disproportionately well represented in eastern Europe, by virtue of decades of first class people on the ground (my predecessors, I hasten to add), of Polish and Sudeten origin, and with all the necessary linguistic skills. Many of my east European friends from those years are now running their own companies or are working for privatised enterprises, and most are still selling to the same librarians who have been there for the last three or four decades, and who respond best to the techniques of those decades - personal relationships, dinners and drinks, exhibitions, and book fairs.

There are still annual or biennial international book fairs in Leipzig, Warsaw, Moscow, Budapest, Belgrade, Banja Luka, Novi Sad, Sarajevo, Sofia, Bucharest, Prague (and probably several others I know nothing about), and they are still centres of massive commercial activity, including journals business. The old apparatchiks always used to save up all their contract-signing for a big book fair, so that they could justify their foreign travel by showing the amount of business that had been done there. Nowadays, the apparatchiks have gone (mostly) but the library budgets can still be 90% - 100% reserved for expenditure at the national book fair, given the paucity of bookselling structure in many countries, particularly in the south. Some of these book fairs seem to behave like Cairo or Tehran or Havana. The aisles of these book fairs are teeming with university librarians. Local booksellers and agents are there to grab them, people like me are there to grab them, and there are always deals to be made. Never underestimate the conduciveness of an east European book fair to the making of a deal. Do not neglect journals when you are deciding on participation at east European book fairs.

And do keep a weather eye on where the money comes from. Apart from the DDR, which has been funded overgenerously by its richer

western brother, all the emerging countries have had to find money from their newly decentralised economies. In many cases this money simply was not there, and is not there. As a general rule, with a couple of honourable exceptions, the further south you go, the more the money is not there. The Soros foundation has poured countless millions into supporting the educational programmes of countries that have come out from under communism, and more or less every capital city in the east has its Open Society office, which is responsible for considering funding applications to Soros from libraries. For an understanding of how the funding system works, it is worthwhile to be acquainted with the regional directors of the Open Society.

When, and if, any of these countries enter the European Union, then you may be sure that even more countless millions will be poured in by Brussels, but if the Greek experience is anything to go by, then I estimate these will be finite funding projects only and unsuitable for ongoing subscriptions.

Let us work our way south from the Baltic.

The DDR, Deutsche Demokratische Republik, had its Buchexport, which disappeared when the country became part of the Federal Republic in 1990 and is now the 'neue Bundesländer'. Indeed, many of the eastern universities have received preferential funding since unification and are now in a better subscribing condition than their counterparts in the western Bundesländer.

Poland, probably the most traumatised European state of the twentieth century, had its Ars Polona and Skladnica Ksiegarska. It has universities in Warsaw, Kraków (my favourite in Europe), Gdansk, Lodz, Poznan and Szczecin. The predominance of the Warsaw Book Fair in the old days - and its sheer fun - meant that Poland was probably the most familiar market to western publishers, and Warsaw is still the most internationally vibrant of the east European fairs. Lange & Springer are more active here than anywhere else in the east (apart from the Baltic states) with offices in Poznan and Szczecin, and the local companies to talk to are IPS and ABE, while Ars Polona is still active but at a purely domestic level.

Crossing south from Poland into the Slovakian Republic, which has lagged some way behind its richer Czech sister since partition, where Alfa has

disappeared, and Slovart has been privatised into its constituent parts of publisher and bookseller / subscription agent, and where there are a couple of active local agents close to the university library community, notably Malé Centrum in Bratislava. A visit to the other university city of Kosice can also be rewarding, although the overall financial situation in Slovakia is not terribly encouraging for the time being.

Much of the superstructure and infrastructure of the old Czechoslovakia was of course in Prague, and now the Czech Republic has a high concentration of privatised initiative and the most advanced programme of industrial privatisation, not to mention the greatest number of German tourists and the highest car crime of any city on the planet. Artia was responsible for the import and export of books and journals and had the hard currency allocation, while Zahranicni Literatura sold them domestically. Both have passed away as far as the import of western periodicals is concerned, and there is now a plethora of small to medium-sized private import companies, most of whom exhibit at the Prague Book Fairs - notably Mega Book and Bonus Books. Generally, however, Czech universities tend to prefer the larger international subscription agents (EBSCO have representation in Prague, Minerva in Brno). There are universities in Prague (which alone has three medical faculties), Plsen, Brno, Olomouc, Hradec Kralovy and Ostrava, and it is worthwhile to visit these individually.

Hungary had its Kultura. Indeed, Hungary still has its Kultura, now divided into two sister companies, one for books and one for journals, and there are now a number of private bookselling companies which for the most part do not handle subscriptions, except maybe to individuals. There are universities in Budapest, Debrecen, Szeged and Pecs. The budgets are stable. Electronics are well advanced and the universities libraries more sophisticated than might at first appear. Vienna is only a couple of hours drive from Budapest, so it is natural that Minerva is the dominant agent in Hungary.

If you are really determined to have an awful time, you can sit at one of the road borders from Hungary into Romania, where the late unlamented Ilexim has disappeared, and where the subscriptions market - worth I guess around \$2m - is dominated by Romdidac in Bucharest and

Books Unlimited in Timisoara, who work in a variety of partnerships with Swets, Teldan and Karger Libri. The Central University Library in Bucharest is one of the great works of renovation in Europe, following the fire in 1989 when it was destroyed by revolutionaries who mistook it for the Securitate headquarters next door, and there are universities and medical universities also in Timisoara, Cluj Napoca, Iasi, Constanta, Craiova, Galati and Brasov. All these are in regular and close negotiation with their local agents, who make frequent visits and strongly represent the publishers from whom they have good terms.

The former Yugoslavia presents one of the more varied and challenging subscription markets. Each of the half dozen republics had its own import export organisation or organisations, which gave some notional autonomy, but in effect all surplus proceeds were repatriated to Belgrade.

The largest of the new republics is the Federal Republic of Yugoslavia, which incorporates Serbia (which itself has two further self-styled semi-autonomous provinces of Vojvodina in the north and Kosovo in the south) and Montenegro. Serbia Montenegro has a number of established universities in Belgrade, Novi Sad, Nis, Kragujevac, Podgorica and Pristina, but the years of sanctions effectively obliterated their library collections, and the Serbian seats of learning, which had become accustomed to generous funding from Belgrade in Tito's days, were reduced from more than 1,000 subscriptions to just half a dozen titles in the space of four years. Even the metropolis of Belgrade, one of the crossing points over the Danube for the Crusaders, has lost much of its sense of historical and academic significance and has become a political playground for Milosevic. Serbia has anyway a largely illiterate population, or rather, a non-reading population, so it will be some time before the ethos of a strong journals collection at the heart of a university is re-established there. The old Prosveta and Nolit are still there, after a fashion, but the book import business is now entirely private, very active and very competitive. Companies in Belgrade such as Proex Agencija, Jugoslovenska Knjiga, Data Status, Mrljes, and Stylos in Novi Sad are all active and successful in book imports, but most have now effectively given up on the subscriptions market. What subscriptions market? Do not bother trying to sell

journals in Serbia, I see no short or medium term prospect of any improvement in library budgets.

Over the border in the Republika Srpska, the university at Banja Luka is slowly coming back into function, but with professorial salaries at around DM200 p.m., you will see that tertiary education is not yet funded as it should be, and any journals marketing programme here would be wasted, at least foreseeably.

Cross into Croatia, Republika Hrvatska, which has two universities in Zagreb (one of my favourite cities - even the Pope has been there twice) and in Rijeka and Split, and a university periodicals budget of, probably, DM5,5m, which is controlled on the basis of an annual tender by the Ministry of Science, and maybe DM10m total market. Croatian government tendering is one of the few unappealing aspects of the country, and in the last eight years or so the contract has been awarded to at least nine different companies, four of them Croatian, and because of the usually quite late contract decisions and renewals, this brings with it all the chaos of overlapping subscriptions. In Croatia the economy is in principle a healthy one and the Kuna enjoys a stable relationship to the DM, but the ethnically complex refugee problem with Croatian Serbs and Bosnian Serbs means that hundreds of thousands are not accepted back into their own neighbouring states. Already the Croatian government has rebuilt more than 50,000 homes, but this cross-border ethnic intransigence, coupled with the aftermath of war, means that they have to go on rebuilding, and this leaves a shortage of budget for science and education. Compared with the situation before the war, some 30% - 40% of the old periodicals market (particularly in industry and hospitals in the war zone) has simply disappeared. A number of senior people from the old Mladost have now established their own companies, Knjiga Trgovina is the most active in periodicals marketing. Also Algoritam is the best bookshop in any of the Yugoslav republics, and there is also Tamaris and Rado & Straus.

West into Slovenia, always the least Yugoslavian of the republics, with Ljubljana only an hour or so drive from Klagenfurt or Trieste (a city which has three syllables in Italian and none at all in Slovenian, Trst), and the first to secede in 1989. With a population of only a couple of millions, and a considerable refugee problem of its

own, Slovenia barely has the critical mass to be a viable economic entity, and yet in many respects is the most successful and stable of the republics. There are the usual arcane laws of tender, but here they are uniquely protective of local companies, and the old pluralist bookselling system still flourishes, with Cankarjeva Zalozba and Drzavna Zalozba Slovenija still there from the old days, and doing very well, and luminaries from the old Mladinska Knjiga now in successful private practice, particularly Markom, and also Valvasor. Outside Ljubljana, there is an excellent university library in Maribor, and a couple of very active pharmaceutical concerns with substantial libraries. Slovenian libraries are served by Slovenian booksellers and subscription agents. It is in their nature to be extremely close to their customers, indeed you cannot avoid it in such a small country. Talk to them, work with them. They are not only booksellers, they are library suppliers and have profoundly long personal relationships. They are more than happy to act on your behalf if the terms are right and if their customer gets a good deal.

Head south again and into Bosnia i Hercegovina (which had its Svjetlost). The university library in Sarajevo will probably have its first journals acquisitions budget this year, and given the substantial international aid money going into the reconstruction of this ravaged city, there is a good chance that the restructuring will work. It is still sufficiently early in the process for agents to be reasonably influential on title selection, and here I recommend a good connection to Sahinpasic in Sarajevo (who anyway enjoys a virtual monopoly there), and who will, as usual, be organising the Book Biennale which starts on April 23 this year. An incredible tonnage of journals and magazines is entering Bosnia every day through Trieste, and to my knowledge hardly a single issue has been lost, even during the war.

Head southwest into Macedonia, which had its Makedonska Knjiga, and which of course is known officially by the Greeks as FYRM - the Former Yugoslav Republic of Macedonia), and here everything is concentrated in Skopje, which would be a beautiful old muslim city, if it had not been destroyed by earthquake in 1963. Here the alphabet is cyrillic, and signposts are to Thessaloniki and Athens, and not Belgrade. It is a small population beset by economic disaster and

one of the weakest currencies of the region, not to mention a refugee problem of potentially catastrophic proportions, if Kosovo goes bad. Despite all this, government money seems to filter through the system into a substantial National and University Library, which sub-allocates to individual departments and even hospitals. People come from Pristina to buy their books in Skopje, but there is no local domestic subscription agent. Karger Libri however has some interests there, as does one of the Croatian agents, and one of the British.

(I should perhaps also mention that most of the republics in this part of the Balkans have some kind of military hospital network, or military medical academies, Vojnomedicinska Akademija, which in many cases are better funded than those under the Ministry of Health, and as a general rule it is good to ensure these are on your mailing lists)

Across the border to the west is the still more or less uncharted territory of Albania, much of whose ethnic population is in western Greece, around Ioannina, in Kosovo, and in Bulgaria. I saw a map from Tirana called 'Ethnic Albania', and on here it looked like about the biggest country in eastern Europe. Yes, there are universities in Tirana, Elbasan, Korce, and Shkodra, and a National Library in Tirana, but I have no evidence of any journals activity here, and the last time I booked a flight there they put tanks on the streets and the locals were busy raiding the militia's armouries, so I unbooked my flight and consequently have no recent personal experience to offer.

Bulgaria had its Hemus, and at home I have probably south east England's largest private collection of Boris Christof recordings given in barter by the Hemus import manager for all the Mosby books which were required by his son who was studying medicine, his wife who had a friend who was studying medicine, his mother-in-law whose nephew would probably want to study medicine, and his dog who had recently bitten a medical student. Nowadays, there is simply no money. Bulgaria has universities in Sofia, Plovdiv, Varna, Veliko Tarnovo and Russe, and Martinus Nijhoff covers probably 80% of the subscription market in Bulgaria through its office in Sofia. Martinus Nijhoff Eastern Europe is also very active in the Ukraine and Russia. There is an EU Tempus project in Bulgaria, as in some other countries, for the training of library staff, and

Martinus Nijhoff is closely involved in this. There is a currency board which controls the allocation of budgets. The industrial sector has now achieved a certain economic stability which encourages investment in longer term production and research, and so the corporate subscription market is looking more promising. To all intents and purposes there are no local subscription agents, there are no real bookshops, and the import book wholesale service consists of a truck which drives to the edge of the market square every morning, next to the university library, and sells books off the back to the stallholders who line the square.

Broadly speaking, and again as a result of history and geography, a small number of subscription agents tend to be more active in eastern Europe than others. Of course, the Big 4 - Swets and EBSCO rather more than Blackwell and Dawson, all have interests in the east, as they do everywhere, but here the situation is not quite so straightforward as in a western economy.

If you look at the location of Berlin and Vienna, it will come as no surprise to learn that the sister companies of Lange & Springer and Minerva are very strongly placed in eastern Europe, the former in Poland, the Baltic and the former Soviet republics, the latter in Central Europe. It goes without saying, though I shall say it anyway, that Karger Libri also has a great deal of business in this part of the world; we have offices in Tallinn and Leipzig, and I personally spend far more time in the Balkans than is good for my liver or my marriage.

Because of our extremely close personal contacts, we are in very many cases in a strong position to exercise some small - or even large - influence on the choice of titles which are selected, and even more importantly on the choice of which publishers' excessive price increases come to the librarians' attention.

We, the small-to-medium size subscription agents, like to work most closely and most productively with those publishers who grant good terms (this is taken to mean at least 10% discount) and who inflict the most modest price increases on a diminishing library market (any increase greater than inflation is viewed with some scepticism by the library community, and any increase in double figures is reacted to with a large red pen in this part of the world, where all

the economies are less than sturdy, most are fragile, and a few have virtually collapsed.

Here, more than anywhere else, the old brigade know who their friends are. Old warhorses from the publishing and subscription agent community knew most of these people in the 1970s and 1980s, when life for them was very hard indeed. We stood by them then and they stand by us now. It is the longstanding personal contacts, often 20 or 30 years, and continuity of representation, which stand for something in these countries, where personal loyalties die hard. We, the subscription agents, can and do make a difference with selection and de-selection.

Another general point, and a very basic one which I am sure all of you are very good at - depending on the power of the librarian, he or she is invariably an invaluable source of information, and will happily give you names and addresses of department heads, professors and so on, who are the decision makers in recommending your key journals. Partly, still, as a consequence of the old party structure in eastern Europe, it is still the case that professors here carry more real political power than their western counterparts (indeed, the professor or the dean is very often also a minister), and the personal placing of the sample issue of the appropriate successful journal in the

right professor's hands remains the best way to do what you are all trying to do.

Karger, as a medical publisher, has consistently higher renewal rates throughout eastern Europe than in any other part of the world. We would normally reckon on having about 5% of the titles in a good medical faculty library; in one eastern European medical university library, 38% of the journals are published by little Karger. Why? Because we know the ground and the people and the agents (in this case, ourselves!)

I have tried to avoid mentioning personal preferences amongst agents in eastern Europe. Just as anywhere else, there are good guys and there are bad guys. I have my favourites to whom I would happily entrust my grandmother's ashes, and there are others with whom even Captain Maxwell would not have broken bread. Integrity and financial stability of the subscription agent are key concerns both for publishers and for librarians, and the Association is happy to act as referee where you have questions about potential partners, or to make disinterested recommendations.

In eastern Europe, it is only when you are on first name terms with the border guards, and you know all their children's birthdays, that you can be sure you are doing enough. We are.