

CURRENT STATE OF MALAYSIAN BOOK PUBLISHING

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Introduction

Developing countries depend on the knowledge and information produced by industrialised countries just as they depend on these same countries for the supply of books. Thus, the Malaysian book market is immersed with imported publications especially from Britain and the United States. But as a multi-racial country comprising Malay, Chinese and Indian population, the book supply is also coming from Hong Kong, Taiwan, India, Indonesia and the Middle East.

With the emphasis on the Malay language, the increase in literacy, the upgrading of technical processes in book production, the progress in translation, and the new trends in marketing, local book publishing is charting phenomenal development in its growth patterns. Apart from the large influx of imported publications, which is still high in the list of preferred materials, there are now more locally published and printed books written by indigenous authors in the vernacular, ensuring a content suitable for the multi-ethnic, multi-cultural, multi-religious and multi-lingual market.

One of the factors influencing the development of indigenous book publishing is the government policies relating to book publishing in the local language namely the National Book Policy and the National Education Policy.

The National Book Policy

The National Book Policy which was adopted in 1985 proposes that the book industry should be recognised as an essential industry and, therefore, support must be given for its development. One of the main objectives of the policy is to ensure that books are easily available to the people. The policy also hopes that Malaysia will not only achieve a full literacy but also become a reading society. The Book Policy is to be implemented hand-in-hand with other related policies such as the National Education Policy, National Language Policy, National Cultural Policy and National Communication Policy. With the existence of the book policy, the government hopes to address the problems in the book industry in an integrated manner.

To ensure an effective implementation of the development of books, the government feels that certain conditions and requirements have to be satisfied: high literacy rate and widespread interest in reading, recognition of the book industry as an important cultural industry and the economic conditions that could help the book industry.

Reading Habit and Reading Campaign

A recent study on the reading habit (National Library, 1997) shows that an average Malaysian reads two books a year. The literacy level among adult Malaysians has actually been rising steadily. Literacy in the Malay language rose from 43% in 1967 to 85% in 1985. Today, Malaysia's literacy level is 93%. The survey also reveals that the actual practice of reading is 87% but reading here is mostly for studying purposes. Women exhibit a higher interest in books than men and as expected, interest in books depends on the level of education and to some extent on the income of individual households.

Numerous reading campaigns have been conducted in Malaysia to inculcate reading habit among the people. A division for the promotion of reading has been established at the National Library in the early 1991. This section plays an important role in executing and co-ordinating activities at the national level. The National Library has also been appointed the Secretariat for the national reading promotion committee. This committee, consisting of heads of several government and private bodies is a decision making organisation to improve reading on a national scale. The Ministry of Education, too, has given more emphasis on the importance of reading and, therefore, reading activities become part of the school curriculum.

In 1995 the government accepted a proposal that August would be celebrated as the "reading month" using the Kuala Lumpur International Book Fair as the anchor event. While the concentration is on the month of August, reading promotion is conducted throughout the year through the co-operation among the main players in the book industry, educational institutions, government departments and the public sectors.

Libraries continue to develop and currently there are about 10,000 libraries in Malaysia with an estimated total collection of 20 million materials. There are more than 370 public libraries including branch, regional, town, rural and mobile libraries run by the various public library corporations and local authorities. There are also more than 300 special libraries and about 8,000 resource centres in secondary and primary schools.

Publishing and Printing Business

Figures from the Registrar of Companies in 1996 revealed that the total turnover for companies categorised under publishing and printing was RM1.9 billion (USD0.513 billion). In 1990 the turnover was RM1.24 billion (USD0.335 billion) which means that there was an increase of RM700 million (USD189 million) in the period of six years.

Figure 1: 1996 Turnover for Printing and Publishing

Company Category	Turnover (RM)
Publishing and Printing Agent	225.0 million
Book and stationary Wholesalers	718.6 million
Publishing	668.8 million
Printing	257.0 million
Publishing Agent	96.0 million
TOTAL	1,965.5 million

Figure 2: Imports and Exports of Printed Books (RM million)

Printed books, brochures, leaflets and similar printed matter	1994	1995	1996	1997	1998
Exports	78.9	79.7	94.3	91.9	162.2
Imports	194.4	197.2	203.1	224.6	201.0

Based on the figure from the Statistics Department (Figure 2), Malaysia's total import on printed books for the past several years worth more than RM200 million (USD50.04 million) annually. On the other hand, total annual exports worth less than RM100 million (USD27.02 million). In 1998, it jumps to more than RM150 million (USD40.54). These figures, however, are referring to printing which include leaflets, brochures and similar printed matter whether or not in single sheets.

There are 500 companies or organisations said to be engaged in publishing as their core business activities. However, only about one-third can be considered as active (Md Sidin 1999). These consist of different categories of publishers in terms of ownership. A majority of them are privately owned with around two to 50 employees. The rest are full or semi-government institutions, which include university presses or publishing departments.

The total turnover for the book industry in 1998 was estimated at RM554 million (Md Sidin 1999). There was a slight decrease (10%) compared to the 1998 figure that was estimated at RM617 million. This was mainly due to the lacklustre performance of the Malaysian economy which affected the book trade. Some of the badly affected publishers recorded up to 50% contraction in their revenue during these bad times. However, the setbacks suffered are not as serious as those seen in other industries.

About 9% of all publishers achieved a turnover of more than RM20 million for both 1997 and 1998. On average publishers (64%) collected less than a million ringgit each for their turnover. Despite the economic downturn, the number of new titles published recorded an increase of 4.8%, from 5,536 in 1997 to 5,816 in the following year (see figure 1). This figure is based from the National Library statistics on books received and registered under the Preservation Books Act 1996 and the Deposit of Library Material Act, 1996.

Figure 3: New Titles Published in Malaysia 1995 - 1999

Subject	1995	1996	1997	1998	1999
Children's Book	2,913	2,503	1,532	3,085	NA
School Textbook	918	1,822	2,383	1,310	NA
Government Publication	264	172	390	286	NA
General Book	2,370	1346	1,231	1,135	NA
Serial	394	271	324	321	313
Compact Disk	NA	361	350	251	143

Most of the publishers in the Malaysian publishing scene seemed to lack variation and most of them concentrate on the production of children's books, educational books and school textbooks (Md Sidin and Azizah 1998). Publishing for children continues to be considered the safest and most reliable along with the market for educational publications. It is also observed that:

- As much as 80% of MABOPA (Malaysian Book Publishers Association) members publish children/educational materials as the main activities.
- More than 40% of the total Malaysian book titles in the 1990s were in the category of children's books.

There are, however, new publishers who create their own niche and are capable of producing quality publication in their specialised areas such as illustration books, travel guide books and maps. More publishers are now concentrating on Islamic books and most of them do quite well.

Children's Book

On the whole, interest among publishers in children's literature has increased significantly since the last decade. In 1980 for example, only 188 titles were published while in 1998, there were more than 3,000 titles.

Figure 4: Production of Children's Books

Year	Children's Books	All Books	Percentage of Total
1970	7	558	1.2
1980	188	1,205	15.6
1985	124	1,657	7.5
1990	1,466	4,578	32.0
1995	2,913	6,465	45.0
1998	3,085	5,816	53.0

Source: Malaysia National Library

The present trend manages to provide sets of inexpensive publications each year to nearly all of the approximately 500,000 children's between the age of 7 to 12. Malaysian parents are becoming more education-conscious and are sending their children to kindergartens, thus creating a greater demand for pre-school literature.

Although the number of children's books, both imported and locally published may seem to be more than adequate, Malaysian educators, authors, publishers, librarians and readers recognise weaknesses and deficiencies in both content and production quality. In any country, the development of children's publications is seen to reflect that society's development not only contentwise but in style, format and accessibility. Policy makers are also aware of the overall educational, psychological and political philosophies

involved in the production and dissemination of children's literature. In Malaysia, there is a great deal of national consciousness inducing educators and government officials to produce all levels of children's books that is clearly appropriate for the multi-faceted Malaysia.

Textbook Publishing

Textbook and educational publishing is generally a lucrative business and as noted earlier, Malaysian publishers are concentrated in this area of publishing. There are now about three million children in primary schools and another 1.2 million in secondary schools. Overall, the government spend about RM100 million (USD27 million) annually for school textbooks and this amount does not include reference and revision books which are highly in demand in an exam-oriented school system. In 1998, 22.5% of the total new titles published in Malaysia were school textbooks. In 1990 it was 30.8%. While the overall percentage decreases, the total number of titles as well as the volume continues to increase.

However, as in many developing countries, textbook publishing in Malaysia is a monopoly of the government. Book writing and manuscript preparation is mostly handled by the Textbook Division of the Ministry of Education and the production and printing is contracted to the government's publishing agency, Dewan Bahasa dan Pustaka. Only selected titles for a certain number of subjects and titles in Chinese and Tamil are opened to the private publishers.

Academic Publishing and the University Presses

For the past three decades, the growth and demand for academic and scholarly books in Malaysia have increased dramatically. While the major local producer of books intended for the use in the institutions of higher learning is the Dewan Bahasa dan Pustaka (the Language and Literary Agency), the contribution of university presses is increasingly important. As in many countries, university presses in Malaysia play their role in the production, promotion and dissemination of scholarly publications. The establishment of a university press encourages the scholarly publishing programmes and increase scholarly development and communication. The number of Malaysian universities involved in scholarly publishing has increased as more local scholarly materials are needed.

There are currently eight university presses in Malaysia actively involved in publishing and disseminating knowledge. University of Malaya Press, established in 1960, is the oldest university press in the country. Four presses founded in the 1970s are the Universiti Kebangsaan Malaysia Press (established in 1971), University of Science Press (1972), and Universiti Putra Malaysia Press (1977). In the 1980s, three other presses were established: Biroteks ITM, Universiti Teknologi Malaysia Press, International Islamic University Press, and the Universiti Utara Malaysia Press. The total output of scholarly books by both the DBP and university presses in 1988 was 149 titles. In 1996, the number increased to 360 titles. The number of editors were also increased from 94 to 134. In the eight year period, the number of books has increased by almost 60% and the productivity of each editor has also increased from 1.58 to 2.68.

It is widely accepted that a university press plays an essential role in the development of scholarly communication especially the publication of research findings. If a campus does not have a press, it is likely that the lecturers and researchers would face a problem in disseminating their materials. It is, therefore, imperative that a university press gets a full support from its parent institution. The concept of non-profit making university press should augment well for the future expansion of academic publishing in Malaysia. In the wake of corporatisation, the idea of commercial gain should not become the decisive factor in academic publishing. Universities need to continuously reassure themselves that their main aim of a university press is for the sake of scholarship, and that it is quality of publications rather than sales quantity that matters.

Marketing and Distribution

Publishers normally handle their own marketing and distribution through sales representatives and agents. These representatives are mostly bookshop, wholesalers and retailers. There are currently about 600 book outlets of varying sizes serving the population (Malaysian Booksellers Association 1999). About 45% of these outlets are concentrated in the Klang Valley especially in Kuala Lumpur and Selangor area. About 20% are in the northern area especially Perak and Pulau Pinang. In Johor, about 60 book outlets (10%) are actively involved in book selling.

While the number of outlets is certainly encouraging, the quality of shops is a different question. It is not surprising that some bookstores would not strictly be just bookstores. They would also carry many other products such as school and office supplies, art supplies, postcards, greeting cards, wrappers, audio-cassettes, souvenirs and even toys. This is actually typical of Asian bookstores which present an uneven picture from a peddler sitting on the pavement to the luxurious airconditioned showrooms in the shopping malls.

Impact of New Media

Malaysia is strong in its intent to attain the highest level of communication technology. Its determination is reflected through the Multimedia Super Corridor (MSC) which is a US\$40 billion project to get into the electronic age. MSC acts as an impetus for the new information and communication technologies. Various government-backed ventures such as the Malaysian Institute of Microelectronic System or MIMOS, the Multimedia Development Corporations, the Smart School Projects and the Virtual Library Projects are providing wide opportunities for the development of the electronic publishing.

Since 1995, more than 1,000 titles of compact disks have been published and deposited at the National Library. Most newspapers and magazines currently have their on-line versions and academic journal, too, have started to go into digital versions.

In the area of marketing, several online bookstores have been set up to promote and sell books over the Internet. One example is Asiabooks.com. which offers books from a variety of publishers and on a diversity of subjects. Launched in 1998, this site has about 2,000 current titles. Besides providing a nation-wide online book ordering service, this site also aims to compile a comprehensive national bibliography and to become an online distributor of local content. Asiabooks.com also aspires to add an antiquated and

out-of-print list to its catalogue. Operated by experienced and skilled members of the trade, this site has a potential to become a gateway for Malaysian and Asian books in the future (Chin 1999).

Book Development Organisations

Two main organisations, the National Book Council of Malaysia (NBCM) and the Malaysian Book Industry Council (MBIC) are currently functioning as umbrella bodies to oversee the development of the book industry as a whole.

Established under the Ministry of Education in 1968, the National Book Council is a professional and advisory body in book development in Malaysia, which has the support of the government and the private sectors that are involved in the development of the book for social and national interests. As a non-profit making body, its sources of income are mainly from occasional government grants and from private donation.

The council works on a voluntary basis. Its strength and support come from members, both the public as well as the private sector. But the administrative function is provided by a professional secretariat in the Ministry of Education. Among other things, the council's main objectives are to promote professionalism in the book industry, coordinate book development activities, encourage reading habits and facilitate negotiations among the parties that are involved in the production and consumption of books.

The Malaysian Book Industry Council is formerly known as Malaysian Book Trade Council. It is an informal non-profit organisation whose members are drawn from representatives of various book trade associations, namely MABOPA (Malaysian Book Publishers Association), MBA (Malaysian Booksellers Association) IKATAN (Malay Publishers Association), MBIA (Malaysian Book Importers Association) and MBCA (Malaysian Book Contractors Association).

In 1993, MBIC set up a company called Malaysian Book Promotion Sdn. Bhd. with a paid-up capital of RM60,000, which was shared equally by the member associations, excluding MBCA. One of the main functions of MBIC is to manage and organise the Kuala Lumpur International Book Fair, which is held in the month of August or September every year. This company hopes to be actively involved in other activities to promote and strengthen the book industry.

MABOPA who is celebrating its 31st anniversary this year (2000) currently has 80 members. Most of them are actively involved in a wide range of publication including textbooks, revision course materials, workbooks, encyclopaedias, readers, magazines and multimedia products. This organisation has continuously addressed various issues including textbook publishing system, fair trade practices, copyright, pricing and discount structures. MABOPA has also played an important role as the bridge between the government and publishing companies in the private sector.

Conclusions

A literate society is not conceivable without a market-based publishing sector, involving local authors writing books for local readers in local languages. Malaysian publishers must make a paradigm shift and re-engineer the way they publish to achieve a competitive edge in the publishing world of today. The demand for books, both printed and electronic,

still looks promising ahead and this is a strong reason for their existence and success. Publishers must be proactive and sensitive to changes and need to find a new lease of life and play their role in building the society.

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