



E2 “Digital education for Enhanced Editorial products”

WP5 Research & Didactics

National Research Report

Turkey

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17.05.2012

By Kalem Culture Association

a project coordinated by



This project has been funded with support from the European Commission. This communication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



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Executive Summary

This National Research Report aims to provide an overview of the Turkish publishing sector's current state, underlining the market's particularities and weaknesses.

Most of the information comes from one-on-one interviews conducted with the publishing scene's prominent actors during the 5th Turkish Publishers' Association Convention held on 3 and 4 May 2012, TUIK-Turkish Statistical Institute reports, newspaper articles and the expertise of Kalem Literary Agency on the subject. An extensive interview with Serhat Baysan who is the co-chairman of Yay-Fed was conducted during research for this paper as well as the Business Development Director of Timas Publishing.

Judging by the fact that Gutenberg started using his mechanical movable type printing around 1439 which was introduced to Turkey around 1727, centuries after its invention, publishing in Turkey is a relatively new phenomenon. The lack of documentation, archives and justifiable information might be related to this fact.

In Chapter I we tried to provide the reader with basic information on the traditional Turkish Publishing in terms of particularities, dimensions and statistical data, regarding number of books published. Note that actual sales figures are unattainable within the work ethics of Turkish publishers, who are traditionally reluctant to share this kind of information.

Chapter II highlights some of the structural and historical factors that challenge the establishment of e-publishing in Turkey. Among structural problems are incompatibility of copyright contracts to new needs related to digitalization of books, lack of qualified personnel and historical factors are the mistrust of foreign publishers to the Turkish market because of previous piracy experiences.

Chapter III encompasses the comparison of educational digital publishing practice of "One Laptop per Child" abroad and Turkey's recent venture in the area; the FATIH Project.

And finally Chapter IV will conclude with our findings and comments.



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1. Context and Background

The publishing sector in Turkey has been rapidly growing in the last few years in line with the growth of population and demographic trends. A young population, an expanding middle class and the fact that economical crisis of the past years did not have a devastating affect on publishing have resulted in a stabilized market and growing audiences.

Particularities

However, publishing is still not regarded as a ‘real’ sector in Turkey, because the financial transaction capacity and thus power of the market is low compared to other sectors.

A particularity of Turkish publishing is that it is a powerhouse of independent publishing with no foreign investors or global companies’ involvement in the market; the only counter example being Dogan Publishing-Egmont partnership. State subsidies are also virtually out of the equation although there are major cases of state censorship and auto-censorship in publishing.

Dimensions

In general, publishers regard the market as very competitive; their share is small because the market is small. When looking at companies that are solely focusing on publishing, it can be said that there are approximately 480 publishers in Turkey but total number of companies who are registered as publishers and doing publishing as a side activity is over 2000 according to Istanbul Chamber of Commerce. This is also the number of publishers that regularly attend the Istanbul TUYAP Book Fair, and who regularly purchase ‘banderol’, a little sticker that should be put on every copy of books that are printed and published to prevent piracy. The majority of these publishing houses, over 95%, are based in Istanbul, and amongst the biggest ones are Alfa Books, Timas Publishers, Can Publishers, YKY Publishers, Turkiye Is Bankasi Cultural Publishers and Dogan Books.

It is also worth noting that the dimensions of a publisher in Turkey perhaps may best be judged by looking at its influence in the market and the global number of books in their catalogue rather than number of employees. There are middle scale publishers whose titles are being reviewed frequently



although they are not actively advertising and/or they have a staff of less than 5 people.

Professional Associations

There are two professional associations in the Turkish publishing scene; Yay-Bir; (The Turkish Publishers' Association) and Bas-Yay Bir (Union of Press and Publishing).

Equally active and influential these two bodies are distinguished from each other by the ideological factors, Bas-Yay Bir being more religiously inclined.

Yay-Fed (Turkish Publishers' Federation) is an all embracing non governmental organization established in 2011 by a mutual decision of Yay-Bir and Bas-Yay Bir. One of their main objectives is to provide the banderol. Formerly banderoles were issued by the state as the proof of the payment of the tax for publishing but after YAY-FED took charge of this task the income from the issuing of the banderol is to be used by this professional association for the greater good of its member especially in the fight against piracy.

Yay- Fed's members are diverse enough to represent the common interests and goals and to conclude collective agreements with its counterparts in other countries.

Distributors

The total value of the publishing sector in 2011 is determined to be 1.490 million dollars.

Regarding the distribution channels, it may be said that there are approximately 10 fully operating, Turkey wide distribution channels for the Turkish publishing industry. In addition, there are also publishing houses with their own distribution channel. As for e-books, they are currently distributed by Idefix, D&R, KitapYurdu and Kitapyum, but their numbers are negligible.

Thus what we can see is that the Turkish publishing industry is developing, currently having over 480 different publishing houses. There are a number of aspects, however, that need to be improved, and on which publishers are working today, namely the archiving of information, and a fight against piracy.

Statistics



According to the statistics by TÜİK, the Turkish Statistical Institute, report number 10784 “International Standard Book Number (ISBN)” and the e-archives of Turkish Ministry of Culture and Tourism’s General Directorate of Libraries and Publications, the statistics on books published in Turkey in 2011 is as follows:

Topic of the material	Total	Book	Electronic books (DVD, VCD, CD)	Electronic books (web based)	Cassettes with book	Map	Other ⁽¹⁾
Total	41 386	39 247	258	1 037	60	127	657
General topics	528	442	51	17	-	-	18
Philosophy and psychology	1 316	1 243	8	29	-	-	36
Religion	2 798	2 715	8	54	8	-	13
Social sciences	13 812	13 395	109	181	21	32	74
Language and linguistics	580	569	1	4	-	-	6
Natural sciences and mathematics	424	394	4	19	-	3	4
Applied sciences	2 629	2 507	39	44	2	28	9
Arts (Fine arts)	1 411	1 338	23	33	1	3	13
Literature and rhetoric	14 853	13 891	11	488	24	-	439
Geography and history	3 035	2 753	4	168	4	61	45

(1) Covers braille, audio books, video, microform, film, pc software.

(Fig. 1 Republic of Turkey Turkish Statistical Institute, 2012. *International Standart Book Number (ISBN) Statistics, 2011*. Ankara: Republic of Turkey Turkish Statistical Institute.)

Number of publishers, 2011

İBBS - 3. Düzey SR - Level 3	Toplam Total	Özel sektör Private sector	Kamu ve eğitim kurumları Government and educational institutions	Sivil toplum kuruluşu Non-governmental organizations	
TR	Türkiye - Turkey	1 683	1 578	41	64

(Fig. 2 the total number of Publishing companies in Turkey. Note that this number includes companies that are not solely publishers but who are registered as publishers. (Turkish Republic Ministry of Culture and Tourism General Directorate of Libraries and Publications, 2012)

Number of published material by publisher and material type, 2011

Materyal türü Material type	Toplam Total	Özel sektör Private sector	Kamu ve eğitim kurumları Government and educational institutions	Sivil toplum kuruluşu Non-governmental organizations
Toplam - Total	41 386	35 724	3 704	1 958
Kitap - Book	39 247	34 473	3 479	1 295
Elektronik kitap (DVD, VCD, CD)				
Electronic books (DVD, VCD, CD)	258	164	88	6
Elektronik kitap (web tabanlı)				
Electronic books (web based)	1 037	743	68	226
Kitap kaseti - Cassettes with book	60	53	4	3
Harita -Map	127	62	63	2
Diğer -Other	657	229	2	426

Diğer: Braille, sesli kitap, video, mikroform, film ve bilgisayar programlarını kapsamaktadır.

Other: Covers braille, audio books, video, microform, film, pc software.

(Fig.3 Number of published material in 2011 by type. (Turkish Republic Ministry of Culture and Tourism General Directorate of Libraries and Publications, 2012)



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2. National analysis of best practices related to e-publishing

The current situation of e-publishing in Turkey could be analyzed from the following angles: production, distribution, users, and legal framework.

Challenges

Challenges that digital publishing in Turkey faces are mainly the absence of a legal framework, the absence of qualified personnel, and the absence of an archiving system that would motivate the publishers to invest and thrive in e-publishing.

Legal Framework and Copyright issues

Although there are products such as e-books, enhanced books and mobile book applications in circulation in Turkey, these e-pub products are small in numbers. One reason for this state of affairs is the lack of a legal framework regarding the digitalization of copyrighted (book) content. This problem could not be circumvented by resorting to the digitalization of orphan works or public domain content as some Turkish publishers thought it would, because in that case the copyright arising from the digital treatment of content (such as the editorial work done on the e-pub) still remained a puzzling issue.

There is a second issue concerning content when it comes to e-publishing in Turkey. Roughly 50% of the books that are being published each year are translated books. But most of the foreign publishers are reluctant to give away e-rights for two main reasons; the negative image of Turkish publishing related to piracy phenomenon in the 1990 is one factor, the general ambiguity in the global publishing sector about how to manage e-rights. To overcome this issue where mistrust and the “not-knowing” are intertwined Turkish Publishers’ Association has recently signed a collective agreement with Kevin Fitzgerald from its British copyright licensing agency counterpart. Turkish Publishers’ Association is also working on a right management system which will allow the right owners to track the e-sales easily. However, even if the content copyright puzzle could be solved via these systems, the question of translation copyright (as in the calculation of the translator fee) is



not resolved.

The rights concession agreements in Turkey are not adapted to the e-publishing system. Although Turkish publishers acknowledge e-publishing as a source of revenue and thus are motivated to launch their own e-pub production, they are having difficulties in integrating their work to the new system, whose outlines are not very clear at the moment.

Absence of Qualified Personnel

Ownership of content and the work force (editors, translators, designers...) who creates e-pub products is a difficult issue to figure out but the main challenge is perhaps the lack of qualified employees to work in the production.

Turkish publishers who are in need of qualified staff to digitalize the material at hand or create innovation products constitute almost 99% of the sector. The Business Development Director at Timas Publishing, Ihsan Sonmez, notes that such a person should be educated within the company, ideally being qualified as follows:

“A producer for e-pubs would need the ability to manage and organize the process of digitalization or enhancement of the content by mastering the tasks of the editor, webmaster, programmer and all other possible contributors to the treatment of content. Not surprisingly education in this area is a crucial must nowadays.”

Looking at the wider picture, it is safe to say that the E2 project will be most beneficial in the education of “producers” who will create enhanced books especially considering the market’s tendency is toward e-books which are easier to produce. In April 2012 the first workshop for the education of e-pub editors has been held in Istanbul aims at training publishers on Adobe software. In the end of May 2012 there will be another workshop organized by the British Council Istanbul office featuring two experts from Britain in a 4 day event comprised from a 1 day conference and 3 days workshop. We believe that E2- Enhanced Editor courses will fill a considerable gap in the Turkish scene and help Turkish publishers cross the threshold towards which they are already slowly approaching.

Distribution

In contrast to the publishing houses, who have not come to terms with the concept of e-pub yet, the traditional distribution channels are long established and perfectly adapted themselves in the distribution of e-books; there are a number of online distribution channels who also convert



published books' content to e-book as a service to the publishing houses. These distribution channels are not in competition with the international actors who are not yet investing in Turkey because of the current size of the market. Distributors are ready, willing and able to serve the ends, waiting for the e-pub companies to launch e-pubs (not just e-books), or the publishers to invest more in e-pubs. Also there are several distributors who are disseminating different kinds of e-pub products in formats that they have developed. The result is incompatibility with platforms engineered by other entrepreneurs.

Turkey's e-publishing Eco-system

Although publishing houses have to find a way to deal with the problems as described above, there are a number of successful initiatives in the Turkish publishing industry. The first one of these is **Idefix**. Idefix is an online website where paper books, but since 2010 also e-books, can be ordered. The e-books that have been sold since 2010 are Turkish-only, and since that period there have been 160 publishers that have started to publish e-books to distribute on Idefix. In 2011 there were 1450 e-books available on the Idefix website, and these have been sold 13.000 times. In this same year, the Idefix library app was downloaded 20.000 times. In order to login to this app, one has to be a member of the Idefix website and of the 20.000 downloads, 79% were first-time users of the Idefix website, and thus they registered for the first time. Since there are about 30.000 individual new titles available each year (including translations from foreign works), the availability of e-books is rather limited, which makes it hard for readers to find the popular titles they are looking for.

Another successful example is **Timas Publishing's ikitap** ("ibook"), which is user friendly and provides the fastest access to the greatest number of digital publications, namely the books published by Timas. The idea of "ikitap" is that one can download the app to their tablet and buy books from the collection of Timas, which will then be transferred to the user's personal 'library'. It can then be taken from the library to other devices. According to Ihsan Sonmez the greatest advantage provided by the "ikitap" application is that "it provides the reader with books that are no longer in print but still on demand and works as a virtual library." He sees that the new trend in the buyer's front is to build their own virtual library instead of traditional bookshelves at home with printed books.

A third successful initiative is **Kitapyum**, an online e-book platform by "1 Publishers", set up by Mehmet Arslan Tunali, in partnership with The Turkish Publishers' Association. The association



foresees that digital migration is inevitable. Kitapyum uses a digital security system for copyright management and the controlling of distribution, which is internationally acknowledged. Mehmet Arslan Tunali has also been successful with another innovation before setting up Kitapyum, which consisted of the selling of an e-magazine through an sms service. Kitapyum is not only concerned with selling books; journals, magazines and catalogues are also available through the platform. In addition, publishers can upload their titles. Kitapyum reports to publishers about the sales, thus the publishers can keep track of how many copies have been sold in a certain amount of time. The publications on this platform are compatible for Android, Android tablet, Windows, Mac, Linux, Apple iPad, iPhone and social media plug-ins.

Benefits of e-publishing in Turkey

As a result of e-publishing, the online availability potential is much higher because it is cheaper and there are no geographical boundaries. In addition, there currently are no actual numbers of sales by Turkish publishers because they do not want to provide these numbers. For the digital market, however, this cannot be concealed, which is healthier for the market.

Readers Angle

Despite the technical and legal issues that are waiting to be solved, Turkey has an avid and curious e-pub clientele who download digital publications at first to test the price-efficiency balance and continue purchasing products according to their tastes and needs. The prices, the time spent on finding and purchasing the product, and the accessibility of products in digital platforms are almost incomparable to printed books' platform.

In the overall analysis, infrastructure, distribution channels and public investment from the Turkish state are all in place to serve as a basis of a system. However lack of legal arrangements and unwillingness of small and medium scale publishers to engage financially in a risky medium prevents full integration of the Turkish market to e-publishing.



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3. International analysis of best practices related to e-publishing

One largely successful practice regarding international e-publishing is the **‘One Laptop per Child (OLPC)’** project, a project supported by the Miami-based One Laptop per Child Association (OLPCA) and the Cambridge-based OLPC Foundation (OLPCF), two U.S. non-profit organizations set up to oversee the creation of affordable educational devices for use in the developing world. The project was originally funded by member organizations such as AMD, Chimei, eBay, Google, Marvell, News Corporation, Nortel, Red Hat, and Quanta. (Wikipedia, 2012)

On the official website of the project, the mission statement is described as follows: To create educational opportunities for the world's poorest children by providing each child with a rugged, low-cost, low-power, connected laptop with content and software designed for collaborative, joyful, self-empowered learning. When children have access to this type of tool they get engaged in their own education. They learn, share, create, and collaborate. They become connected to each other, to the world and to a brighter future. (One Laptop per Child (OLPC), 2012)

On a global level One Laptop per Child (OLPC) has so far delivered somewhere between 1.5 and 2 million of its XO laptops running the open source Sugar operating system —at a cost of roughly \$188 each— in approximately 40 different countries. More than half of these laptops can be found in Latin America with a number of countries and regions such as Argentina’s La Rioja province, Colombia, Nicaragua, Paraguay, Peru, and Uruguay having seen projects launched in the past few years. Additionally countries in the region have also started other large laptop projects with Argentina’s Conectar Igualdad program set to distribute 3 million netbooks in part of its secondary school system by the end of 2012 and Brazil’s government opening a line of credit for provinces to purchase up to 1.5 million netbooks over the coming years. (Association for Learning Technology, 2011)



Criticism

Dansokho said the project demonstrated misplaced priorities, stating that clean water and schools were more important for African women, who, he stated, would not have time to use the computers to research new crops to grow. Diop specifically attacked the project as an attempt to exploit the governments of poor nations by making them pay for hundreds of millions of machines. Others have similarly criticized laptop deployments in very low income countries, regarding them as cost-ineffective when compared to far simpler measures such as deworming and other expenses on basic child health.

The organization has been accused of simply giving underprivileged children laptops and "walking away". Some critics claim this "drive-by" implementation model was the official strategy of the project. While the organisation has learning teams dedicated to support and working with teachers, Negroponte has said in response to this criticism that "You actually can" give children a connected laptop and walk away, noting experiences with self-guided learning.

(Wikipedia, 2012)

Turkey's Educational E-Pub Venture

A similar project was established in Turkey in 2010, and began to be implemented in 2012. The official website of this project, the **FATİH project**, is: <http://fatihproject.com/>.

The Movement to Increase Opportunities and Technology (FATİH) seeks to integrate state-of-the-art computer technology into Turkey's public education system. According to Prime Minister Recep Tayyip Erdogan, FATİH marks the beginning of a new era of information technology in Turkish education. The pilot phase of the project – which many educators praise, saying it will revolutionize the public school system – was launched with the delivery of tablet PCs and smart boards to 52 schools across Turkey. Concerning the criticisms that say this new project will give teachers no role in the learning process, Erdogan said the teacher's role will not be reduced; on the contrary, their responsibilities will increase. High schools around the country have been equipped with smart boards, and 12,800 tablet PCs have been distributed in 52 schools in 17 provinces within a pilot program. The project, which is expected to cost about TL 3 billion and will be paid for through the Transportation Ministry's Universal Service Budget, represents the largest single allocation of resources to education in the history of modern Turkey. With the project, textbooks will be thoroughly eliminated, as students will access course materials using their tablet PCs.



Undertaken by the Ministry of Education and supported by the Ministry of Transport and Communications, the giant project is expected, once finalized, to be in use in 570,000 classrooms in 42,000 schools all around Turkey. Note that currently in Turkey there are in total 16.700.000 enrolled students whom within the framework of FATIİH Project should receive tablets.

According to government plans, teachers will be able to instantly access any document around the world they may need for their class, projecting it on the interactive smart board. The project will also facilitate long-distance learning programs while encouraging a gradual transition to e-textbooks and other electronic-learning materials for each class. In the second component of the project, there will be 110 in-service training centers connected to each other through a network that covers Turkey's 81 provinces for educator training purposes, where all the participants will be able to interact with each other live through teleconferencing. The last component is the establishment of a secure and appropriate network infrastructure for all the schools across the country.

(Today's Zaman, 2012)

A Comparison

Just as for the "One Laptop per Child" project, there are also a number of aspects of the FATIİH projects that may be criticized. The tablets are personal, meaning that when a student receives a tablet his or her ID number will be linked to the tablet. This may breach their privacy; everything the student does can be tracked. Due to this possibility of everything being tracked, it may also limit the creativity of the students. Closely related to this is clearly the issue of censorship and state control – how free are students in what they are able to read and write?

From the perspective of publishing houses there are also a number of disadvantages. First of all, the project only gives way to the *right of usage* of the content; the user will not be the *owner* of the book. This will have a negative effect for publishers, since their books will not be purchased anymore. In addition, the right is given to use the book for a certain amount of time, which may result in loss of social capital accumulation for culture books: If you give someone the rights for 10 years, then this will prevent accumulation – children will no longer be able to read what their parents read because they no longer have the 'rights' to be able to read it. Although the tablet project may have its positive sides, these issues are definitely points of discussion for the implementation of the FATIİH project.



Some other problems encountered with these projects in general are that there is a lack of teacher-training. When teachers do not know how to effectively make use of educational e-publishing, its benefits may be scarce. Another issue is that of evaluating these projects. There is no digital evaluation system – how can a digital system be evaluated through a non-digital system?



4. Reflections and Conclusions

Rapidly developing in recent years and with more than 480 active and specialized publishers today, the Turkish publishing sector may be regarded as rather substantial. It is, however, still largely in a phase of development and by many not regarded as a 'real' sector. One of the problems the sector is dealing with is piracy, a rather large problem for which more and more solutions begin to be found. Another limitation is the lack of documentation and archiving, resulting in a rather limited overview of sales and publishing numbers.

With regards to e-publishing, there are also some limitations, but the Turkish publishing sector slowly begins to see the necessity to take part in this global development. There are some unsolved problems regarding copyright, but with a growing audience looking for digital books there also appears a growing awareness. A good example of e-publishing in Turkey can be found at the publishing house Timas which has developed an app for people to buy books on their tablets or e-readers. The distribution channels in Turkey are also ready to embrace the e-publishing world, currently supporting publishing houses largely through the creation of e-books.

Internationally there is an interesting development regarding e-publishing and digital education, such as the "One Laptop per Child" project, where governments spread tablets amongst students. Despite criticism, many countries follow the earlier examples. Turkey also has launched a similar project, the "FATIH project", which wishes to integrate state-of-the-art computer technology into Turkey's public education system. The first tablets have been handed to students in 2012, and with it the first criticisms have also appeared. Questions such as privacy, censorship and state control, as well as the role of teachers and evaluation are issues that need to be discussed for the next steps in this implementation.

Thus, what we may conclude is that Turkey is ready to embrace e-publishing, but is in need of more guidance in the process and employees with necessary vocational skills as well as of discussions and brainstorming regarding the topic.



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