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COMMERCIAL BOOK PUBLISHING IN THAILAND

by

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A Doctoral Thesis

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ABSTRACT

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Title: Commercial Book Publishing in Thailand

The present study involves the gathering of data and information on book publishing in Thailand and an attempt to systematically develop a data base on the book publishing industry. Regardless of the seemingly continuing emergence and disappearance of publishing houses, the number of publishers has been steadily increasing through the years. The newly established enterprises tend to be non-family business and could successfully compete in the market, gradually catching up with the older establishments. Most publishers are faced with problems relating to manuscripts, either quantitatively or qualitatively or both. The current general business practice is informal having no written agreement between publisher and author. It is an exception rather than a rule that books are edited by professional editors. Distribution remains a major issue in the development of the publishing industry. Consequently, publishers tend to carry out their own distribution as soon as it becomes economically feasible.

Statistics on book production during the past two decades show an overall increase of more than 600 percent. Commercial publishers play an important role in the book publishing industry with commercial book production accounting for half or more of the total number of titles published, gradually increasing from slightly over 50 percent in 1981 to over 70 percent in 1986. The annual trade value is over 3,000 million bahts (US\$ 124 million), with no less than 20,000 titles in circulation. The survey indicates average spending on books is less than 1 percent of earning. There appears to be a significant correlation between the GNP per capita and book production. The study reveals that in 1986 there was one book for every 2 to 3 people compared to one book for every 4 to 5 in 1977. The publishing industry has been serving mainly the local market and, as such, is significantly affected by government policy and planning.

Major recommendations include: strengthening of the national machinery and professional organizations; systematic collection and publication of national statistics on book production; promotion of professional editorial in book publishing.

In Memory of Our Beloved Father

Siew Karnchanachari

Who has Always Inspired Us to Succeed

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ABSTRACT

The present study involves the gathering of data and information on book publishing in Thailand and an attempt to systematically develop a data base on the book publishing industry. The research gives emphasis to the private sector which has recently been encouraged by the government to play a leading role in national development. Critical analysis of the findings serves as a basis for recommendations to promote and develop commercial book publishing.

Almost all commercial book publishers in Thailand are based in the capital city of Bangkok. Regardless of the seemingly continuing emergence and disappearance of publishing houses, the number of publishers have been steadily increasing through the years. The newly established enterprises tend to be non-family business and could successfully compete in the market, gradually catching up with the older establishments. Most publishers are faced with problems relating to manuscripts, either quantitatively or qualitatively or both. The current general business practice is informal having no written agreement between publisher and author. It is an exception rather than a rule that books are edited by professional editors. Distribution remains a major issue in the development of the publishing industry. Consequently, publishers tend to carry out their own distribution as soon as it becomes economically feasible.

It is noted that Thai women are active in book publishing with the average rate of female employment among the majority of publishers under study being slightly more than half of the total employment.

Statistics on book production during the past two decades show an overall increase of more than 600 percent. Commercial publishers play an important role in the book publishing industry with commercial book production accounting for half or more of the total number of titles published, gradually increasing from slightly over 50 percent in 1981 to over 70 percent in 1986. The annual trade value is over 3,000 million bahts (US\$ 124 million), with no less than 20,000 titles in circulation. The survey indicates average

spending on books is less than 1 percent of earning. There appears to be a significant correlation between the GNP per capita and book production. The study reveals that in 1986 there was one book for every 2 to 3 people compared to one book for every 4 to 5 in 1977. The publishing industry has been serving mainly the local market and, as such, is significantly affected by government policy and planning.

The National Library of Thailand and the Book Development Centre are the two major national organizations promoting book development in addition to the relevant professional associations. In anticipation of increasing potential market for commercial book, certain major recommendations are proposed to further develop the book publishing industry. These include:

1. Strengthening of the national machinery and professional organizations.
2. Systematic collection and publication of national statistics on book production.
3. Promotion of professional editorial in book publishing.

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CHAPTER I

INTRODUCTION

1.1 Introduction

Developing countries around the world are undergoing rapid changes, socially, economically and politically. One area of common interest is communication. Regardless of the many recently developed electronic communication technologies, books are still considered one of the most effective means of communication. The book trade might appear relatively insignificant when seen from the purely economic angle. From the political and cultural viewpoints, the trade tells a different story which does not call for elaboration.¹ It is, therefore, justifiable to believe that book publishing is an important part of the larger equation of the social, economic and political structural changes that are occurring.

In the Asia and Pacific region, book publishing has received increasing attention regionally and nationally, due to a significant contribution by Unesco and to increasing awareness of the importance of books in educational development on the part of governments of developing countries. In spite of the increasing recognition of the role books play in national and regional development, data and information on book publishing in Asia in general and in developing countries in particular are to a great extent lacking. In the book entitled "Publishing in the Third World: Knowledge and Development" by Philip G. Altbach et al. (1985), which is the first study of Third World publishing on an international scale,² there is no chapter on book publishing nor book industry in Asia, as a region, although China, India and the Philippines are individually included. In a more recent publication on "Publishing in Asia/Pacific Today" by the Asian Cultural Centre for Unesco(1988),³ only brief accounts of children's book and textbook production are given.

As Asia and the Pacific region is rapidly growing and since Thailand is one of the fastest growing countries in the region, with an average growth rate of 7-8 percent during the 1960s and 1970s⁴ and

over 10 percent in 1988 and 1989 and is expected to continue to grow, it is desirable to undertake an in-depth study of book publishing in Thailand. Moreover, Thailand offers a unique focus for analysis of the role of publishing in an independent society with no direct influence resulting from colonization. The present study involves the gathering of data and information on book publishing in Thailand and an attempt to systematically develop a data base on the book publishing industry in Thailand.

1.2 Thailand : The Country Profile

A summary of background information on Thailand is useful in gaining a basic understanding of the social, economic and political contexts of the country. The book publishing industry, particularly in developing countries, can be significantly affected by socio-economic and socio-political situations. This is particularly true with regard to commercial publishing by the non-government sector.

Thailand is a small country of 54 million people (1987)⁵ situated in Southeast Asia. The population growth rate has declined significantly through the years and is expected to fall to 1.3 per annum by 1991.⁶ The Economist Intelligence Unit of London stated that, Thailand's population is usually considered one of the most uniform in South East Asia. About 95 percent of the population are Buddhists and the only common written language is Thai.⁷ Thailand has never been colonized and, as such, has not adopted a second language as her neighbouring countries have done.

Thailand is an agricultural country with 82 percent of the 1987 population or about 30 million people residing outside the municipal areas.⁸ While the 1985 literacy rate of the population 11 years of age and over for the whole nation was 92 percent,⁹ only about 70 percent of the rural population finished the mandatory primary education or higher.¹⁰ English is taught throughout the upper primary and secondary levels of education, but levels of spoken English remain below average for South East Asia. As is true for much of South East Asia, Thailand absorbed a substantial influx

of Chinese in the period of European colonial expansion; they have been widely assimilated. Many assimilated Sino-Thais have dominated the business sector,¹¹ including the book publishing industry.

Economically speaking, the country as a whole has been growing at an impressive rate of between 4-11 percent during the past decades¹² and is expected to continue at a high rate for some years to come. However, the income gap between the rich and the poor and between the rural and urban sectors is significantly large. About 30 percent of the total 1988 population are under the poverty line, by international standards.¹³ The average gross national product (GNP) per capita is approximately 23,021 bahts (US\$ 920) ranging from 71,566 bahts in the Bangkok area to 8,343 bahts in the Northeast region (1987).¹⁴ During the past few decades, the country has gradually shifted her economic base from agriculture to industry, while still maintaining her position as one of Asia's main agricultural exporters. The changes in economic structure have been brought about in the context of an open economic system which has promoted maximum private sector investment,¹⁵ particularly in the manufacturing and the service sectors. The country is also becoming an open market economy, enjoying increasing foreign investment and foreign trade.

Thailand is ruled under the system of constitutional monarchy. The present Thai Constitution has established a bicameral legislature which consists of an elected lower house and an appointed senate. Thailand currently has an elected prime minister, the first in the past several years. The country has long experienced internal insurgency problems and trouble along the borders with Laos, Cambodia and, lately, Burma. As such, the issue of national security is considered an important one and censorship in various forms is still practiced although to a much lesser degree and less frequently than before. Administratively, Thailand had, in 1987, 72 provinces excluding Bangkok, 743 districts and sub-districts, 6,610 communes and 59,508 villages.¹⁶

1.3 Historical Background of Book Publishing in Thailand

The historical perspective on book publishing and book production in Thailand has several aspects. These are the origin of the Thai alphabets, the introduction of printing technology, the initiating of book publishing and production, and, finally, the introduction of copyright law.

According to George Coedès, it appears that the Thais have been known to use written alphabets since before the 13th century,¹⁷ known in Thailand as the Sukhothai period. The earlier version had been adapted from the Khmer script, and was further improved by King Ramkhamhaeng to become the Thai script currently used in writing.¹⁸ Besides inscribing writing onto stones, there were other materials used for writing during those early days. Although these written materials, other than the stones, were not durable enough to remain as evidence, there are a number of books that refer to the fact that such stories as appear in the books were copied from those written in the Sukhothai period.¹⁹

Kamthorn Sathirakul stated that, Ampai Janjira discovered (1973) in the Journal of the Siam Society, Volume VIII (1911), an article by P. Petithuguenin on "L'Imprimerie au Siam" that movable printing press was brought into Thailand during the Ayudhya period by a Roman Catholic priest around 1662.²⁰ Mgr. Laneau, Head of the French Catholic Mission, wrote and published his work in the Thai language, using the Roman alphabets, in 1687, in 26 volumes.²¹ However, one of the earliest books that has resurfaced as evidence, discovered by M.L. Manich Jumsai in a Paris bookshop in 1983, is a book written by Mgr. Garnault entitled "Kham Son Christang, Phac Ton" (Catholic Teaching, First Part) which was printed in 1796 in the Thai language using Roman characters.²²

The first font of Thai type was reported to be cast about two decades later and not in Thailand. The first person to have anything printed in Thai characters was Ann (Nancy) Hazeltine Judson.²³ However the first book using Thai font of which copies are available in Thailand, was a book published in 1828 by the Baptist Mission in Calcutta. The book is entitled "A Grammar of the T,hai,

or Siamese, Language" by Captain James Low, a British scholar of Siamese.²⁴ The Thai font was brought from Calcutta to Singapore where it was used to print several religious pamphlets in the Thai language. It was not until 1835 that the Thai font and printing press were sent to Thailand from Singapore by the American Board of Commissioners for Foreign Missions in response to a request by the American Rev. Dan Beach Bradley.²⁵ With that press, the first Thai (then Siamese) government document was printed in Bangkok; the issue was 9,000 copies of a royal proclamation outlawing opium.²⁶

The first Siamese book for which the author received a copyright is a bestseller entitled "Nirat London", a poetic account of a trip to London of the author, Mom Rajothai, the then official interpreter to the first Siamese Embassy to Queen Victoria. The book was published, in 1861, by Bradley's press. It was the U.S. Minister to the Court of Siam who proposed to the King in 1900 that the Siamese Government should pass a copyright law.²⁷

Further discussion on discoveries and new proofs can be found in the articles "La Transmission de l'Imprimerie en Thailand" by Gerald Duverdier (1980)²⁸ and "Printing History in Thailand" by Kamthorn Sathirakul (1986).²⁹

1.4 Objectives of the Research

The research on publishing in Thailand is undertaken with the aim of providing a comprehensive background and overview of the book publishing industry in Thailand, as very little, if any, research work has been done on the subject.

As an open economy and a relatively fast-growing country in the Asia-Pacific region, which is rapidly becoming a politically and economically active region of the world, there is a high potential for development in the area of book publishing. The study also is timely and much needed in view of the current government's policy of giving priority to education, industrial development, and private sector participation.³⁰

Without adequate information and data on the current status of the book publishing industry, it will not be possible to plan

effectively for publishers to play an important role in national development. There is, therefore, a need to begin developing a data base for the book publishing industry and to identify major issues and problems experienced by the book publishers.

1.5 Scope of the Research

The research is confined to book publishing mainly in the private sector. Newspaper, journal and magazine publishing are not included. In areas where government publishing significantly affects private book publishing, as in school textbook production, relevant reference and discussion will be made. Non-profit non-government publishers which significantly contribute to the commercial book market are also included.

In the present study, books are defined as non-serialized printed matter produced in "book" form, ranging from 8-page comic books and monographs to dictionaries and encyclopedias but excluding mimeographed handbooks, lecture notes and the like.

Major areas of research activities include:

- review of available literature on book publishing, book production, and related subjects, including national and international statistics relating to book production, related industrial development and national development in general
- analysis of available data and data generated specifically for the purpose of the present study to establish baseline information on the current status of the book publishers and book production in the private sector in Thailand
- identification of major issues of the book publishing industry and problems encountered by private book publishers in the country
- identification of major areas for recommendation of measures that will promote the book publishing industry.

1.6 Approaches and Methodology

The approaches and methodology used in the present research are as follows:

1.6.1 Collection of data and information from existing literature was made by conventional means as well as by computer-search from libraries within Thailand, the ASEAN region and a few selected countries outside the region, i.e. England and Japan, in order to determine the extent of information availability concerning book publishing in the Third World and Asia in general and in Thailand in particular.

Initial investigations on book publishing and book publishers in Thailand began with information searches at major universities in Thailand, notably, Chulalongkorn University, Thammasart University, and Srinakharinwirot University as well as the Asian Institute of Technology, the regional graduate educational institution based in Thailand. These were followed by a computer search at Loughborough University Library and an information search at London University's Central Library and the Library of the School of Oriental and African Studies, at the Institute of South East Asian Studies (ISEAS) based in Singapore, where Asian scholars have conducted major research, and at the Asian Cultural Center for Unesco (ACCU) in Tokyo, Japan, where training courses and seminars on book production are regularly organized as part of Unesco's efforts to promote and upgrade book development in the Asian region.

Other key libraries and information centers visited included the Central Library at ESCAP in Bangkok, Bangkok's Unesco Regional Office's Library, the Siam Society Library, the National Library of Thailand, the Library of the Department of Curriculum and Instruction Development, and the Library of the Office of the National Research Council and Thailand Institute of Scientific and Technological Research.

1.6.2 Generation of primary data and information from sources within Thailand was carried out from 5 major sources, largely on the basis of questionnaires developed for the purpose:

(1) Publishers or publishing houses were contacted for interview, either by phone or in person or both. The cooperation of the Thai publishing community was indispensable and most valuable for

the research. Interviews with more than 100 individuals directly or indirectly involved in book publishing or book world provided much of the primary data for the study. Several publishers were visited more than once for follow-up verification and comments, after the questionnaire survey and interview. The list of book publishing and book world personnel interviewed is annexed as Appendix 1.1.

(2) Most distributors and all major booksellers(bookstores) in Bangkok as well as in large provincial towns such as Chiangmai in the north, Nakhon Ratchasima in the northeast, and Songkhla in the south have also been interviewed or visited to obtain information on their clients and operation. A number of distributors and bookshops kindly allowed the researcher to consult confidentially their internal records. The list of bookshops and book distributors personnel interviewed is annexed as Appendix 1.2.

(3) Government, university and key personnel who are authorities and/or experts on the subject of book publishing or related areas. Notable among these are the Director of the Book Development Center, the Director and Division/Section Chiefs of the National Library of Thailand, the Dean of the Faculty of Education and the Head of the Department of Educational Technology at the Srinakharinwirot University, the only university in Thailand offering courses in book publishing. The list of authorities and experts interviewed is annexed as Appendix 1.3.

(4) Book renting shops, both in Bangkok and the provinces, were also interviewed by questionnaire in order to determine the demand for their services and the impact on book distribution.

(5) Book readers, mainly in Bangkok and urban centers and some villages accessible by cars, were also randomly interviewed as to their acquisition of books, their preference, and their background.

1.6.3 Questionnaires.

Five sets of questionnaires were designed for publishers (publishing houses)(2), bookshops (booksellers)(1), book renting shops(1), and bookreaders(1). For each set of questionnaires, pretesting was carried out to ensure maximum comprehension and mutual understanding between the researcher and the interviewed. The

5 sets of questionnaires are annexed as appendices 1.4-1.8.

For specific studies and analyses, additional and specific, information on approach and methodology is again provided where appropriate under each chapter.

1.7 Limitation of the Study

As mentioned earlier, the present research is confined mainly to private publishers who primarily produce books. However, in actual business practice, several enterprises have been and are increasingly diversifying their business operation due to the increasingly strong business competition and business pressure to maximize profit. Furthermore, several private voluntary agencies or non-profit organizations, educational institutions throughout the country, and many individuals periodically or occasionally produce books for distribution to the general public at varying degrees of subsidy. Such production and practices are not considered as part of the commercial book industry in the present study.

More importantly, there is yet a substantial number of publishing houses which are constantly emerging or disappearing but, nevertheless, represent part of the publishing community at any one time. Because of difficulty in identifying them without continuous monitoring, their production and impact, thus, cannot and are not included in the major analyses.

Moreover, most entrepreneurs do not like to reveal trade information, particularly in relation to clients, markets and sales. Therefore, some reservation must be made in considering the data on production and sales.

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¹² Office of the National Economic and Social Development Board, National Income of Thailand, New Series 1970-1987 (Bangkok : Office of the National Economic and Social Development Board, Office of the Prime Minister, 1988), p.101.

¹³ Chatchai Na Chiangmai "Direction for future Rural

Development", p. 15.

¹⁴ Ibid., p.14.

¹⁵ The Economist Intelligence Unit, Country Profile Thailand, Burma, p.8-9.

¹⁶ National Statistical Office, Annual Statistics of Thailand 1988 (Abridged Edition) (Bangkok : National Statistical Office, Office of the Prime Minister, 1988), p.3.

¹⁷ George Coedès, Legend of the Thai Alphabets (Bangkok: The Department of Teacher Education, Ministry of Education, 1961), p.1. (Thai)

¹⁸ Ibid., p.22.

¹⁹ Kamthorn Sathirakul, 700 Years of the Thai Alphabets (Bangkok : Ministry of Education, Business Organization of the Teachers Council of Thailand, 1987; 3rd reprint), p.78. (Thai)

²⁰ Idem, History of Books and Printing (Bangkok : Ramkhamkhaeng University, 1982; 4th reprint), p. 196. (Thai)

²¹ Adrien Lauray, Histoire de la Mission de Siam 1662-1811 (Paris : Societe des Missions-Etrangère, 1920), p.44.

²² Manich Jumsai, "Thailand's Oldest Printed Book". Bangkok, 1983. (Mimeographed.) (Thai)

²³ Kamthorn Sathirakul, "Printing History in Thailand", The 5th Thailand Printing Exhibition, 12-21 December 1986 (Bangkok : Thailand Printing Exhibition Foundation and Sukhothaithammathirat Open University, 1986), p.6. (Thai)

²⁴ Ibid, p.6.

²⁵ Ibid, p.6-7.

²⁶ S. Sivaraksa, "American Influence on Books, Magazines and Newspapers in Siam", Siam in Crisis (Bangkok : Komol Keemthong Foundation, 1980), P.284.

²⁷ Ibid. p.285.

²⁸ Gerald Duverdier, "La Transmission de L'Imprimerie en Thaïlande", Bulletin de l' Ecole Française d'Extrême-Orient, Tome 68, (1980), p. 209-259.

²⁹ Kamthorn Sathirakul, "Printing History in Thailand", p.1-5.

³⁰ Premier Chatchai Choonhavan, " A Government Policy

Statement Paper". Bangkok : Office of the Prime Minister, 1988.
(Mimeographed.) (Thai)

CHAPTER II

BOOK PUBLISHERS IN THAILAND

2.1 Introduction

In the book world, the Publisher is considered to be one of the four key actors having major roles to play in the book industry; the other three are the Author, the Printer and the Bookseller. In his book entitled "A Guide to Book Publishing", Datus C. Smith, Jr. (1966) stated that, no matter what stage of development a country may have reached or how simple or complex its economy, four basic elements must exist or be created if there is to be a book industry.¹ Smith further stated that, the Publisher is the grand strategist and organizer of the whole undertaking, who brings the three other partners together² and is the director general of the whole enterprise of book publishing.³

In a more recent statement, John Feather (1987) sees the book publishing industry process as involving the Author, the Publisher, the Bookseller and the Readers. Feather stated that publishing has special characteristics in that it must be creative, educational and commercially viable. Feather also sees the publisher as the organiser of editorial, design, production, sales and distribution activities.⁴

In the case of Thailand, however, it is still not certain if the Publisher is presently accorded or could be accorded such high esteem for his/her role in the book industry. S. Sivaraksa made an observation that, in Thailand's book community, the Publisher is often referred to as the Broker.⁵ The unclear division of roles and the sharing of roles between and among the four key actors, and particularly between the Publisher and the Printer or the Bookseller, make it difficult to see clearly the role of the Publisher in the Thai context, because this role is closely related to other major elements as well as to distribution. Furthermore, the strong printing industry and its two professional associations, The Thai Printing Association and Thailand Association of Technical Printing Promotion, together with

the Printing Club under the Federation of Thai Industries, help to overshadow the important role of the Publisher. On the other hand, the association of the book publishers in Thailand is closely linked with the booksellers, officially known as the Publishers and Booksellers Association of Thailand. There is no comprehensive list of book publishers as such in Thailand.

The present chapter reports the attempt to develop a comprehensive list of book publishers in Thailand, with emphasis on publishers who publish books for sale, i.e., commercial book publishers. Included is descriptive information on their profile and activities in order to gain a better perspective on commercial book publishers in Thailand. The final list, obtained through a series of shortlisting processes, is used as a basis for further in-depth investigation and analysis of the book industry in the country, and assessing the potential impact of book publishing on national social and economic development.

2.2 Methodology

The following approaches were used to develop and to compile the list of commercial book publishers with descriptive profile information:

2.2.1 Review existing publications on book publishing in Thailand in order to gain a broad perspective on book publishing in Thailand in general and to obtain some indication of the country's status in the field and the magnitude of the book publisher community.

2.2.2 Review directories and lists of members of organizations or associations concerned with book publishing, book production and book selling. These are as follows:

(1) Directory of Members of the Publishers and Booksellers Association of Thailand (PUBAT). Two lists, compiled in 1982 and 1987-1988, were reviewed. The 1987-1988 list, which shows 102 members, was used in the present study as it serves as the official list currently used by the Association. In reviewing the list, additional information was sought from the

registrar of PUBAT.

(2) Directory of Publishing Houses developed by the Book Development Committee, Ministry of Education, Thailand. The Directory was compiled in 1987 and eventually published in 1989. In reviewing the list, additional information was sought from the compiler for verification.

(3) The International ISBN Publishers' Directory (Thailand : Code number 974). Three editions, 1983, 1985 and 1988, were reviewed and the 1988 edition was finally used for further study. In reviewing the list in the Directory, consultation and additional information were sought from the Head of the Library Data Information Section of the National Library of Thailand to verify certain data and to obtain an understanding of the process of developing such a list for international publication.

2.2.3 Survey of major bookshops and consulting the lists of clients of major book distributors to identify, if any, additional book publishers/publishing houses which were not included in the three lists mentioned in 2.2.2.

2.2.4 Shortlisting the lists acquired, as mentioned in 2.2.2, by screening for book publishers which are private, non-governmental and, at the same time, excluding universities and governmental organizations. The shortlisting process also excludes non-publishing enterprises, on the basis of telephone interviews and, whenever necessary, direct interviews in person for verification. The preliminary working list, therefore, comprises the combination of the short-list and the additional list as stated in 2.2.3.

2.2.5 Questionnaire Form 1, "Survey of the publishers", whose addresses are available or locations are known were then made, based on the preliminary working list. In most cases, personal interviews based on the questionnaires were made to ensure a large number of responses. The final working list of publishers and publishing houses, based on the number of the respondents, serves as the basis for further analysis of the book publishing industry. Follow up interviews were then made, based on Questionnaire Form 2.

2.2.6 Analyses of information and data from the questionnaires and interviews were conducted in order to develop characteristic profiles of the book publishers under study. Key characteristics to provide the descriptive information on the book publishers include the following:

(1) Number of years in operation of the enterprises, i.e., old vs. recent establishments.

(2) Type of management, i.e., family vs. non-family.

(3) Size of enterprises, based on manpower (employees) and number of titles published.

(4) Types of activities or roles relating to book publishing.

(5) Categories or types of books published.

2.3 Preliminary Findings Based on Existing Literature

Results from literature searches in Thailand and selected foreign countries, as mentioned in 1.5, were rather disappointing but not unexpected. There are fewer than 20 major publications concerned with book publishing in Thailand, and there are fewer such publications available in the Thai language than in English. The list of major publications on book publishing in Thailand is annexed as Appendix 2.1.

The more comprehensive and authoritative articles on book publishing in Thailand are as follows:

(1) Thailand's Country Report presented at the Meeting of Experts for Planning Book Development in Tokyo in 1987, which appears in the Asian Cultural Centre for Unesco (ACCU) publication, entitled "Publishing in Asia/Pacific Today"(1988), by the Director of the Book Development Center, Ministry of Education. The report stated that, book publication is undertaken by 241 private publishing houses and 44 government and semi-government offices. Among these 285 printing houses, twenty are producing children's books only, and fifty of them produce children's books along with others, and the number of book titles produced during 1984-1986 were 8,632, 7,289 and 13,455 respectively.⁶

(2) A publication on Country Study Series by the Asian and Pacific Centre for Transfer of Technology in Bangalor entitled "Technology Policies and Planning, Thailand" (1986) stated that, in Thailand, publishers are usually printing houses. Distribution of books is generally performed by the publishers themselves. Publishers in Thailand can be classified into 3 major groups.

1. Educational Institutes. At the university level; a number of universities have their own printing houses to produce textbooks. Some of them also possess sales outlets. At the sub-university level, books are prepared and published by the Ministry of Education.

2. Government Departments, Private Organizations and Associations. These institutions usually publish information related to their activities in the form of annual reports, folders, etc. These documents are distributed free of charge to the public.

3. Private Publishers. Certain publishers possess their own printing facilities while others have to rely on outside printers. There are two main groups of publishers; those publishing books in several disciplines and those publishing books in one particular field.⁷

(3) An earlier publication, the proceedings of the "Consultative Meeting of Experts on A Proposed Book Publishing Curriculum for Asia and the Pacific Region", held in Manila, in 1983, Thailand's Country Report on Book Publishing in Thailand, by Thamnoon Ruangsilp, then Vice President of PUBAT, provided the following account:

The private book industry began its modern growth around 1930 among a group of Chinese businessmen who moved from trade in secondhand books to the publishing of new books and reprints. After World War II, there was a rapid growth in the book industry as more highly trained people entered the industry, and as interest in education and literacy increased on the part of the government and the general population. By 1964, Thailand was one of the largest producers of book and pamphlet titles in East Asia, with an output

of 4,083 for that year.⁸

Ruangsilp referred to Thai Watana Panich as Thailand's largest private publisher and the creator of the best manufactured books in the Kingdom and stated that, other important private publishers are Aksorn Charoentas, Watana Panit, Prae Pittaya, Odeon Stores, Ruamsarn and Graphic Art. It was further stated that major children's book publishers are Bhannakij, Public Press, Panaya, Chomromdek, Muang Boran and Aksornbundit, etc. Ruangsilp also felt that Thailand is comparatively a large producer of book titles, the present print-run for most books is usually 2,000-3,000 copies, and the book market appears rather limited.⁹

Ruangsilp concluded that, publishing in Thailand is so far dominated by small businesses. Only a few of them can be regarded as big businesses. Most publishing firms are run by owners who are writers, translators, teachers, or university graduates who produce four or five volumes of their own writings. After staying in business for a while, if their books are not selling well, these publishers will eventually close down their businesses. In Bangkok, there are approximately 80 small publishers; among them about 20 have a permanent staff of 10-20 employed as editors, translators, salesmen, artists, etc.¹⁰

(4) It was found that the ACCU Newsletters, presently known as Asian/Pacific Book Development (ABD), generally include information on the current Asian/Pacific publishing scene. Unfortunately, reports on Thailand rarely appear. However, proceedings of the ACCU training courses on various aspects of book production almost always include commentary from each participant dealing with the theme concerned.

From the literature review, it may be concluded that there has been no systematic research carried out on book publishing in Thailand, although an extensive research project was commissioned by The Office of the Board of Investment under the Office of the Prime Minister in "A Study on The Development Policy in The Printing Industry".¹¹ This lack of statistical

information on the publishing industry in the Third World has been experienced by other researchers such as Philip G. Altbach, Amadio A. Arboleda and S. Gopinathan.¹²

In terms of national statistics on book production, data are submitted to Unesco for publication in Unesco Annual Statistical Year Books but not published for the local general public. Publications on book production, compiled and published by the National Library of Thailand, include the List of Books Received, the List of New Books Assigned ISBN, and the Thai National Bibliography. These publications are reviewed in 3.3.

2.4 Listings of Book Publishers in Thailand

2.4.1 Current Lists of Publishing Houses

2.4.1.1 List of Book Publishers Based on the List of Members of the Publishers and Booksellers Association of Thailand (PUBAT).

The Publishers and Booksellers Association of Thailand was founded during 1965-1966 with 40 initial members. After little over a year, it had to be dissolved due to a delay in registration. In 1972, coinciding with the United Nations International Book Year, the Association was reactivated by the Library Association of Thailand, and in 1976, it was registered as a legal body.¹³ PUBAT is a member of the International Publishers Association as well as a founding member of the ASEAN Association of Publishers.

The objectives of PUBAT include fostering relationships among members as well as promoting the production of quality books and writers.¹⁴ In 1985, the List of Members showed a total membership of 170, with 97 in Bangkok (including 8 individuals).¹⁵ In 1987-1988, the List of Members showed only 102 names with 87 in Bangkok and 2 in the vicinity of Bangkok.¹⁶ In both cases, members located in the province outside of Bangkok is comprised primarily of booksellers. The list of the Association's members (1987-1988) is used for further investigation.

2.4.1.2 Directory of Publishing Houses as Developed by the Book Development Committee (BDC), Ministry of Education.

In 1972, the Royal Thai Government established the Book Development Committee under the Thai National Commission for Unesco in an effort to promote quality books and readership in the country. The BDC is responsible for recommending policy on book development to the National Commission, conducting National Book Fairs, and seminars and training activities on book publication and development as well as on reading and writing. The Book Development Centre under the Department of Curriculum and Instruction Development, Ministry of Education, serves as the Secretariat of the Committee.¹⁷

One of the major activities of the BDC is the selection of good books for recommendation to libraries and the general public. The task is carried out through the Committee for the Selection of Good Books for Libraries and the Subcommittee for the Identification and Screening of Good Books for Libraries. Bibliographies and notes of the books selected are also published along with the List of Good Books for Libraries. The list was announced annually during the 3-year period 1985-1987. The 1989 edition of "Good Books for Libraries", which is the compilation of the three lists mentioned also includes a Directory of Publishing Houses in Thailand which provides 179 names.¹⁸ The list is used for further investigation.

2.4.1.3 The National Library of Thailand's List of Book Publishers based on the International Standard Book Number (ISBN)

Thailand applied to adopt the ISBN system in 1976 and has been assigned the country code 974 since 1977. The actual adoption of the system by users in Thailand began in 1978 with the Library Data Information Section (LDIS) of the National Library of Thailand acting as the national responsible body.¹⁹ At the end of 1987, or after a ten year period from the adoption of the ISBN system, the LDIS internal record shows a total number of 1,191 organizations and individuals who had requested ISBN numbers from the National Library.²⁰ With regard to the ISBN listing, it cannot be verified whether the ISBN numbers requested were put into use or not. Some of these names may have discontinued business. The list submitted to

the International ISBN is considered the official one.²¹ The lists for 1983, 1985 and 1988 which appeared in the International ISBN Publishers' Directory show 103 names for 1983²² and 1985,²³ and 149 in 1988.²⁴ The list for 1988 is used for further investigation.

2.4.2 Additional Listing of Publishing Houses Based on Survey at Major Bookshops and Major Book Distributors.

In reviewing the PUBAT, BDC and LDIS-ISBN listings it was noted that certain well known book publishers were not included. A review of the National Library of Thailand's "List of Books Received" and surveys at major bookshops and major book distributors (1984-1988) produced additional names of publishing houses (PHs). Most, if not all, of these PHs are involved in trade paperbacks or mass market paperbacks, and are new and unfamiliar to the major book publishers and booksellers. Nevertheless, it is desirable that this additional listing of PHs, totaling 262, be included for the record and future comparative studies. The list is annexed as Appendix 2.2. It does not, however, include individuals as publishers.

2.4.3 Final Listing of Book Publishers

For further in-depth analyses of the book trade in Thailand, the PUBAT, BDC and LDIS-ISBN listings were critically reviewed for the purpose of short-listing them to include only the private, non-government book publishers. Reviews were made by checking with the Thai Government Organizational Directory, by telephone interviews and by personal visits as well as by consulting with major booksellers and book distributors. Table 2.1 shows the results of the investigation of the 3 lists, i.e. PUBAT, BDC and LDIS-ISBN, which provides a breakdown as follows:

Of the PUBAT list of 102 names, 48 are commercial book publishers and 1 is soon to cease business, 32 are booksellers, 1 is a state enterprise shop, 2 are academic bookcenters and 2 are book distributors. Others include 7 educational media and/or stationery shops, 4 magazine publishers, 1 newspaper publisher, 2 printers, and 2 private voluntary organizations (PVOs).

Of the BDC list of 179 names, 15 have ceased

Table 2.1
Breakdown of PUBAT, BDC, & ISBN Listings

	<u>PUBAT</u>	<u>BDC</u>	<u>ISBN</u>
Book Publishers	48	57	36
Printers	2	14	24
Booksellers	32	28	1
Book Distributors	2	3	-
Educational Media/Stationery shops	7	6	-
Newspaper Publishers	1	12	1
Journal/Magazine Publishers	4	27	1
PVOs	2	4	3
Government Organizations	1	1	45
Academic Institutions	2	3	15
Int'l Organizations/Embassy	-	-	4
Other Businesses	-	5	-
Inactive/Ceased Operation	(1)	15	8
Not Able to Locate	-	4	11
Total	102	179	149

operation and 4 could not be located, 57 are commercial book publishers, 1 is a state enterprise publisher, 28 are primarily booksellers, 3 are academic bookcenters, 27 and 12 are magazine and newspaper publishers respectively while 14 are printers and 3 are book distributors (with one being a repetition of name). The remaining names represent 4 PVOs, 6 educational media and/or stationery shops and 5 in other businesses (two financial institutions, two law offices and one clothes exporter).

Of the International ISBN 1988 Edition's list of 149 names, 11 could not be located and 8 have ceased operation, 45 are government organizations/departments, 15 are academic institutions and 36 are private commercial book publishers while 24 are printers and 1 is a distributor. Others include 3 international organizations, 1 embassy, 3 PVOs, 1 newspaper publisher and 1

journal publisher.

Integration of the lists of private book publishers, with 48, 57, and 36 names from PUBAT, BDC and LDIS-ISBN respectively, and the 2 PVOs from the PUBAT's list, provided an Integrated List of 76 names of book publishers. The 2 PVOs, The Technological Promotion Association (Thai-Japan) and Komol Kheemthong Foundation, regularly publish books and sell to the general public along the same lines as commercial PHs.

The Integrated List of 76 names and the Additional List of 262 names, when combined, serve as a preliminary working list and a basis for further in-depth study through the use of questionnaires and interviews. A total of 338 questionnaires were sent out and 90 returned, mostly after follow-up interviews, giving a return of 26.6 percent. It should be mentioned that in Thailand there is the prevalent practice by several publishers in adopting several PH names. It is, therefore, not surprising to see the continuing emergence of new names of PHs and the disappearance of old ones in the book market. As several publishers represent more than one PH, the 90 respondents, in fact, represented a total of 127 PHs, or on such basis, a return of 37.6 percent.

The list of 90 book publishers/respondents which cooperatively provided information according to the questionnaire is considered the final working list for subsequent analysis of the book industry and is annexed as Appendix 2.3.

2.5 Book Publishers' Profile

The present section examines the publishing community in more detail. The information which provided the basis for the analysis and synthesis of the book publishers' profile was gathered from the returned questionnaires and follow-up interviews of 90 publishers.

The first finding is that almost all publishers in Thailand are Bangkok-based, a similarity to Britain, where publishing is mainly a London-based activity.²⁵ Of the 90 respondents, only 2 are located outside the capital city proper but still within the

Greater Bangkok area. It may be true that publishing activity as such goes on in, at least, major urban centres in the provinces, particularly around provincial universities, but it is generally accepted that Bangkok is the nucleus for commercial publishing.

Major issues which were examined include years in business, the management styles, size in terms of production and employment, roles in publishing and major types of publication.

2.5.1 New vs. Old Establishments. In the course of developing the list of publishers currently operating in Thailand, it has been noticed that a considerable number of new publishers have been established and some of them have been doing exceptionally well in the book publishing business.

TABLE 2.2
Number of Years in Business and Average Rate of
Increase of New Publishing Establishments

<u>No. of Years</u> <u>in Business</u>	<u>Number of Publishers</u>		<u>Number Increased</u>
	<u>Number</u>	<u>Percent</u>	<u>Per Year (by calculation)</u>
>30 (before 1959)	19	21.1	not applicable
21-30(1959-1968)	6	6.7	0.6
11-20(1969-1978)	21	23.3	2.1
6-10(1979-1983)	19	21.1	3.8
1-5 (1984-1988)	25	27.8	5.0

Table 2.2 provides information on years in operation of publishers and the average rate of increase in number of publishers during the past 30 years. Findings from the questionnaires revealed that the number of publishers have been steadily increasing through the years. The average rate of increase also rises, being approximately 2 to 3 publishers per year during the 1970's, about 4 in the early 1980's and 5 during the past 4-5 years. In comparison with the low rate of 0.6 or about one publisher in every two years during the 1960's, the growth of the publishing industry during the

past two decades has been impressive. Altogether, 44 publishers (40.9 percent) under study are less than 10 years old. Only one-fifth (21.1 percent) of the publishers have been in business for more than 30 years. Among the old establishments, the oldest is believed to have been established in 1916. The largest, most modern private publishing house at present, was established in 1934, two years after Thailand changed from an absolute monarchical state to a constitutional one.

2.5.2 Family Business vs. Non-Family Business. Most small enterprises are family businesses. It is, therefore, not surprising to see that many small publishing establishments are in family businesses. Publishing is sometimes referred to as a very personal business where the individual's special interest and contribution counts for much. Responses indicate that, in Thailand, about 36 percent of the publishing houses are run as family businesses or with family-style management. The non-family publishers are, however, larger in number, accounting for about 64 percent. This finding suggests that modern publishers tend to be professionally managed. Nineteen publishers, or about 22 percent of the respondents, operate as a business within the family, employing no outside staff.

Table 2.3 compares the number of publishers with family-type management and those which are non-family enterprises.

TABLE 2.3
Type of Business Management of Publishers

<u>Type of Management</u>	<u>Number of Publishers</u>		<u>As Percent</u>
	<u>Number</u>	<u>Percent</u>	<u>of Respondents</u>
Family business (within family)	19	21.1	22
Family-style business	12	13.3	14
Non-family business	55	61.1	64
No answer	4	4.4	-

The tendency to shift from family businesses to non-family businesses is in opposite correlation to the years in business of publishers, as indicated in Table 2.4. The data suggest that the more recently established enterprises tend to be non-family business while the older establishments show a tendency to shift away from the family-style business.

TABLE 2.4
Type of Business Management of Old and New Establishments

<u>No. of Years</u>	<u>Number of Publishers having</u>	
<u>in Business</u>	<u>Family Type Management</u>	<u>: Non-Family Type Management</u>
>30	11	: 8
21-30	5	: 1
11-20	3	: 16
6-10	6	: 12
1-5	6	: 18

2.5.3 Size Distribution of Publishers by Employment and by Number of Titles Published. In order to determine the size of publishing houses, three criteria are used, namely, the number of staff, the total number of books by title currently available, and the average number of new titles published per year during the past five years (1984-1989). It has not been possible to obtain substantial data and information on the amount of investment or the average annual income; a number of publishers are not registered as legal firms and do not have annual reports or financial statements.

2.5.3.1 Size Distribution of Publishers by Number of Personnel

Table 2.5 shows the size distribution of publishers according to the number of personnel working for the establishments, including family members. In terms of employment, 65.5 percent of the total respondents have less than 10 staff members, and, almost half of these (45.6 percent) have less than 5 staff members. The

TABLE 2.5
Size Distribution of Publishers by Number of Personnel

<u>No. of Personnel</u>	<u>No. of Publishers</u>		<u>as Percent of</u>
	<u>Number</u>	<u>Percent</u>	<u>No. of Respondents</u>
>100	7	7.8	8.1
51-100	2	2.2	2.3
21-50	10	11.1	11.5
11-20	11	12.2	12.6
6-10	31	34.4	35.6
1-5	26	28.9	29.9
No answer	3	3.3	-

findings confirm the general belief that most publishing houses are small establishments. The large establishments include the three largest school book publishers, and a comic book publisher.

2.5.3.2 Size Distribution by Number of Titles Published.

Two factors are considered in relation to the number of books produced, namely total number of titles currently available and number of new titles produced during the past five years. Findings are presented in Table 2.6 and Table 2.7 respectively.

Considering the total number of current holdings of all

TABLE 2.6
Size Distribution of Publishers by Number of Titles Currently Available

<u>Number of titles</u>	<u>Number of Publishers</u>		<u>Remarks</u>
	<u>Number</u>	<u>Percent</u>	
>500	12	13.3	large size
201-500	16	17.8	
101-200	21	23.3	medium size
51-100	10	11.1	
1-50	31	34.4	small size

TABLE 2.7
Size Distribution of Publishers by Number of New Titles Published
During 1984-1988

<u>Average Number of New Titles</u>	<u>Number of Publishers</u>		<u>As Percent of</u>
<u>Published per year</u>	<u>Number</u>	<u>Percent</u>	<u>No. of Respondents</u>
200(about 240)	1	1.1	1.0
101-200	4	4.4	5.0
51-100	5	5.6	6.2
21-50	14	15.6	17.5
1-20	52	57.8	65.0
none	4	4.4	5.0
no answer	10	11.1	-

titles, about 46 percent of the publishers are considered to be of small size, carrying fewer than 100 titles. Forty-one percent are of medium size with between 100 to 500 titles. Only about 13 percent are large enterprises with more than 500 titles, of which 3 publishers have more than 1,000 titles each.

When current production is considered, it was found that about 65 percent of the respondents produce, on the average, about 1-2 new titles per month (less than 20 titles per year) and only 1 percent produces more than 200 new titles per year. It was revealed that the only publisher with such high production of new titles is in fact the popular one-baht (US 4 cents) comic book publisher which puts out approximately 10 new titles of these extremely low-cost comic books every two weeks. About 17.5 percent of the respondents produce, on the average, about 2-4 new titles per month (between 21-50 titles per year) and about 11.2 percent produce an average of between 4-16 new titles per month (between 51-200 titles per year).

Those respondents which show no new titles published during the past few years (4 publishers or 5 percent) are publishers engaged primarily in reprinting of school books (3 publishers) and religious teaching books (1 publisher).

An attempt was also made to determine the relationship between the number of titles currently available (or the size of business) and the number of years in business, as shown in Table 2.8

TABLE 2.8
Number of Years in Business and Size of Business

<u>Years in Business</u>	<u>Size of Business, by no. of titles</u>				
	<u>>500</u>	<u>201-500</u>	<u>101-200</u>	<u>51-100</u>	<u>1-50</u>
>30	9	5	3	-	2
21-30	1	2	2	1	-
11-20	1	4	3	6	7
6-10	1	3	6	3	6
1-5	-	2	7	-	16

Although there appears to be some correlation between the number of years in business and the size of operation, based on the number of titles currently available, the data suggest that new publishers could also successfully compete in the market and gradually catch up with the older establishments. This is particularly true among the medium-size publishing houses. Of the 47 medium-size publishing houses, 9 are less than 5 years old while 8 are over 30 years. Of the remaining 30, 13 are between 11-20 years old and 12 are between 6-10 years while only 5 are between 21-30 years. The new establishments which seem to be gaining significantly increased recognition among the book publishing community are primarily children's book publishers.

2.5.4 Activities and Roles of the Publishers. It has been noted that, in Thailand, printer, publisher and bookseller are normally one and the same person and that many publishers began as printers, publishing books or magazines in order to keep their plant working. It has also been observed that only during the past decade or so have there arisen publishers who do not own printing plants but still operate their own bookstores.²⁶

In the present study, publishers were asked what activities they are engaged in among the four major business activities, namely, publishing (P), selling (S), printing (Pr) and distribution (D). The responses was 100 percent from among the 90 publishers questioned. Table 2.9 shows the role diversification of book publishers in Thailand.

TABLE 2.9
Diversification of Activities of Book Publishers

<u>Roles/ Activities</u>	<u>No.of Publishers with Years in Business</u>					<u>Total</u>	<u>%</u>
	<u>Yrs. >30</u>	<u>21-30</u>	<u>11-20</u>	<u>6-10</u>	<u>1-5</u>		
P + S + Pr. + D	9	-	1	1	1	12	13.3
P + S + Pr	1	-	2	-	-	3	3.3
P + S + D	7	5	9	11	11	43	47.8
P + S	2	1	7	2	5	17	18.9
P + Pr	-	-	-	-	1	1	1.1
P + D	-	-	2	4	4	10	11.1
P	-	-	-	1	3	4	4.5

The most significant activities among book publishers in Thailand seem to be sales and distribution. About 83.3 percent are engaged in selling and 72.2 percent in distribution, while only 17.7 percent have in-house printing facilities. Results of the study confirmed the general belief that in-house printing is declining in book publishing. This may be attributed to the rapid growth of the printing industry, especially during the past decade, independently of publishing industry development. Distribution remains a major issue in the development of the book publishing industry; publishers tend to carry out their own distribution as soon as it becomes economically feasible.

2.5.5 Classification of Publishers by Types of Publications

As already explained under the section on Methodology in

Chapter I, categorization of books as customarily practiced in Thailand varies among the various groups of publishers. After consultations with major booksellers, and pretesting of the questionnaire, categories were adopted for inclusion in the questionnaire used in conducting the survey as follows:

- general books
- fiction
- children's books
- school books (textbooks, exercise books and handbooks)
- supplementary readers for school children
- professional books (including university or academic books)
- religious books (mainly Buddhist)
- dictionaries and reference books (including encyclopaedias)
- translated books (may be fiction or children's or professional)
- comics

It should be pointed out that there may be some overlap between and among categories, particularly between the translated books category and other categories such as fiction, children's books and, especially, professional books. However, in the actual context, publishers specializing in translated books are known or referred to as translated book publishers. Publishers were asked to give estimates of the number of titles of books published under each category. Results were compiled and are shown in Table 2.10.

As several publishers are publishing more than one type of publication, the total number of publishers shown in the Table may not add up to the total number of publishers questioned or interviewed. Nevertheless, the data from the analysis, as shown in Table 2.10, do provide certain important indications, as follow:

- that 38 publishers out of 90 respondents tend to be specialized publishers, (column producing 100 percent) with 8 primarily producing professional books such as law books, 4 specializing in religious books, 1 in comic books etc.

- that the majority of publishers (52 out of 90 respondents) are not specialized publishers, producing more than one type of publication.

TABLE 2.10
Classification of Publishers by Types of Publications

<u>Category</u> <u>of Books</u>	<u>No. of Publishers Producing</u>					<u>Total No. of</u> <u>Publishers</u>
	<u>100%</u>	<u>75-95%</u>	<u>50-74%</u>	<u>26-49%</u>	<u>>25%</u>	
Fiction	2	4	2	1	11	20
General	16	5	8	7	16	52
Children's	2	2	1	5	18	28
School	1	1	3	3	1	9
Sup'mentary Readers	2	1		6	9	18
Professional	8	2	4	2	11	27
Religious	4	1	1	2	4	12
Dictionary/Reference				1	7	8
Translation	2	2	2	1	12	19
Comics	1	2			1	4
Total	38	20	21	28	90	

- that 20 publishers out of 90 respondents produce fiction books in varying amounts

- that more than half of the publishers (52 out of 90) produce general books, and so on.

Based on such analysis, it may be possible to classify publishers into various groups according to their number in each category as follow:

General Book Publishers	52
Children's Book Publishers	28
Professional Book Publishers	27
Fiction Book Publishers	20
Translated Book Publishers	19
Supplementary Reader Publishers	18
Religious Book Publishers	12
School Book Publishers	9
Dictionary/Reference Book Publisher	8
Comic Book Publishers	4

Such categorization is considered useful for business and trading purposes as well as for promotional purposes, as publishers with similar interests can be identified.

It should be noted that many more publishers (18) are engaged in publishing supplementary readers than in publishing school books (9). This is due to the fact that the market for primary school books is not open to private publishers. However, private publishers are encouraged to publish supplementary readers for use in schools and by school children. Endorsement is necessary to allow such books to be used in schools. Consequently, other publishers are also interested in producing supplementary readers for commercial reasons.

2.6 The Government-Owned Publishing House : The Business Organization of the Teachers Council of Thailand (BOTCT)

A brief account of the Government-owned publishing house is provided to give a better perspective on the book publishing community as a whole. The BOTCT, commonly known as Kurusapha, with large and modern printing facilities, has a monopoly for publishing school books, particularly at the primary level. It has been estimated that about 65 percent of the school book market is controlled by BOTCT.²⁷

The BOTCT was established in 1950 by merging the Kurusapha Printing Press (formerly the government's printing technicians school) with Kurusapha Bookshop. It is owned by the Teachers Council, established by the Ministry of Education under the Teachers Act 1945, as a legal entity within the Ministry. The initial objectives of the Council were to give advice to the Ministry of Education, supervise teachers' conduct, provide welfare and benefits to teachers, and act as the personnel management body for teachers in the public schools.²⁸

The objectives in setting up the BOTCT include generating income for the Council and to facilitate education. The BOTCT's major functions include the production of school books for the Department of Curriculum and Instruction Development, Ministry of

Education, which is in charge of curriculum development for all public and private schools. In addition to school book production, it has acted as a wholesaler since 1961, and by 1987, has under its control 6 book - cum - stationery shops as well as 5 wholesale distributors in Bangkok and 224 outlets in the provinces down to the district levels. In 1987, the annual income from sales was 632 million baht. The production of school books alone was 734 items, or about 35.86 million copies.²⁹

2.7 Book Publishing Practice in Thailand

It is generally agreed that publishing is a complex process, comprising a series of activities and involving several other components or players and factors beyond the control of the publisher. Book publishing, unlike many other subjects, is rarely taught in schools and universities. Thailand is one of the few countries in Asia that provides academic teaching, as a minor program, at the university level. Nevertheless, in Thailand, as in many other parts of the world, the art of book publishing is usually learned from practice and on-the-job training, often out of personal interest.

Although the main process of book publishing is generally the same in principle - beginning with a manuscript which goes to editorial, design and production before being distributed for sales to customers or readers - each step varies from country to country and from publishing house to publishing house in relation to corporate cultures.

The review of the state-of-the-art of book publishing practices in Thailand is part of the present study. The description does not represent the whole sequence practiced by a particular publisher or type of publishers but, rather, is a synthesis of information provided by several publishers on various aspects of book publishing. As such, the review should reflect general practices by Thai publishers as a group. The review is also presented from the point of view of the book publishers.

2.7.1 Acquisition of Manuscripts.

Manuscripts are either solicited, non-solicited or, in a number of cases, created in-house. Only four publishers among the 90 interviewed claimed to have no problems with obtaining manuscripts. These include three small publishers who create most of their own manuscripts and one large publisher of professional books who claimed to receive more manuscripts than could be handled. Most publishers are faced with problems relating to manuscripts, either quantitatively or qualitatively or both. In an extreme case, one publisher encountered an author who, after the book had been successfully edited and released by the publisher, published the same book himself in direct competition with the publisher. Such a case reflects the fact and the current general practice of not having a written agreement between the publisher and the author. Unfortunately, it has not been possible to obtain information, in numerical terms, on the number of publishers who have legal contracts with their authors.

2.7.1.1 Solicited Manuscripts. For solicited manuscripts, a number of publishers are known to retain, often informally, individual writers or groups of writers through regularly continuing working relationships but with no legal agreement. Some authors are kept on payrolls without contractual agreements, but they receive regular basic "salaries". The "salaries" paid are then deducted from payments for manuscripts upon receipt. In this connection, it was found that the practice tends to be prevalent in the groups of school and educational books, where the authors are employed as teachers or lecturers in other organizations.

In the area of fiction, soliciting can become a very fierce competition among several publishers. This is particularly true with regard to the popular stories which are either shown as television play series or serialized in popular magazines or daily newspapers. In this connection, it should be mentioned that, in Thailand, it has for some years become a popular practice to serialize fiction in daily newspapers in addition to the normal practice of serializing in popular magazines. It is not uncommon to see as many as three or four such stories in a daily newspaper. Popular stories are usually

solicited from authors who could bid for the highest fees among several publishers. Translated bestsellers are also included under the solicited type of manuscripts. At the peak of fierce competition to become the first to put translated bestsellers on the market, some publishers may engage more than one translator for one book, which, undoubtedly, results in a poor quality manuscript.

2.7.1.2 Non-solicited manuscripts. Most non-fiction and children's book publishers interviewed regularly receive non-solicited manuscripts. Included in this category are manuscripts which are produced by college and university students as part of their course work on book production. University lecturers often submit their lecture notes or manuscripts for review by publishers.

2.7.1.3 In-house production of manuscripts. As mentioned earlier, only a very small number of publishers employ writers as regular staff members of the organization. Publishers in this category are school books and supplementary readers publishing houses. In such cases, manuscripts are often, if not always, produced according to curriculum requirement specifications with no or very little variation in content or style.

Many small publishing houses are owned or operated by writers. As such, some or all manuscripts are created in-house, often based on the writer's own personal interest regardless of the market's preference or current demand. Such practice is clearly reflected by a statement of at least two publishers that good books sell poorly and bad books sell well. Professional books, such as law books, are written and published by a number of small publishers. Although the older establishments may change the practice in time in later generations, such new establishments can be expected.

With regard to the production of manuscripts, most publishers expressed the need for actions to promote new writers as well as to develop writers to meet the current and increasing demand for quality manuscripts, including introducing new incentives and measures as well as technical training. In the past few years, a

small group of publishers has organized seminars on "Literary for Society" aimed at promoting coordination among publishers, authors and would-be authors.

2.7.1.4 Costs of manuscripts. There are two main practices concerning payment for manuscripts, a one-time payment in a lump sum or a payment based on royalties by a percentage of the cover price. Responses obtained from the 54 publishers among the 90 interviewed are shown in Tables 2.11 and 2.12.

TABLE 2.11

Payment for Manuscript, One Time

<u>Range of Payment</u>	<u>No. of Publishers</u>
<u>(in bahts)</u>	
> 50,000	2
40,001-50,000	2
30,001-40,000	1
20,001-30,000	1
10,001-20,000	6
5001-10,000	7
less than 5,000	7

TABLE 2.12

Payment for Manuscript, by Percentage of Cover Price

<u>Range of Payment</u>	<u>Number of Publishers</u>
<u>(as Percent of Cover Price)</u>	
30	1
20	3
15	1
12	1
10	21
7	1

For the payment by royalties, the usual practice among 'handbook' publishers is to pay less for the second printing (about 7 percent) and third printing (about 7 to 5 percent).

As to the terms of payment, the practice varies from publishing house to publishing house and from author to author. Sometimes this depends on the current financial status of the publisher or, for that matter, of the author. However, it is fairly certain that a number of authors can command immediate payment or even advanced payment, especially bestselling authors.

There are also a number of cases where authors voluntarily provide manuscripts free of charge, either out of dedication, as with the case of some authors of quality children's books, medical books and religious books, or because of mutual interest, as in the case of university lecturers and their lecture notes.

2.7.2 Processing of Manuscripts Prior to Production

The most important part of the preparation of a manuscript before it is sent for printing is obviously the editing. Findings among the 68 respondents out of 90 publishers interviewed revealed that 13 do not have editorial services. Details of the breakdown of the remaining 55 publishing houses editorial activities are shown in Table 2.13.

It was learned that in the cases where no editing was carried out, the authors themselves were responsible for editing.

TABLE 2.13
Editorial Activities

<u>Editorial Activities</u>	<u>Numbers of Publishers</u>	
	<u>Number</u>	<u>Percent</u>
engage outside services	3	4.4
in-house & external	4	5.9
in-house	46	67.6
irregular	2	3.0
none	13	19.1

Interviews with most publishers and authorities on book production indicated that book editing is one of the areas which is in need of improvement. It is an exception rather than a rule that books are edited by professional editors. Only one publisher under study can boast of having employed two professionally recognized editors.

2.7.3 Production

It has already been mentioned that a large number (82.3 percent) of book publishers do not have in-house printing facilities. Manuscripts are sent to printers for production. As printing paper constitutes a major portion of the printing costs, and the price fluctuates significantly, printers and publishers sometimes prefer to have a separate quotation for the cost of the paper as part of the total printing costs. Also for the same reason, some publishers supply the printing paper to the printers and pay for the printing services only.

In recent years, the printing technology has been developed greatly. Technologies such as electronic computing and desktop publishing have been introduced to Thailand, upgrading the country's printing technology to a level which is acceptable to international clients. With such facilities, increasing numbers of publishers have ventured into pre-printing activities, including book design and illustration. On the other hand, with such rapid development of technology, there is a widening gap between the traditional letterpress printing technology with metal typesetting, which is prevalent in the provinces, and the modern printing technology available mainly in the capital city of Bangkok. Thongterm Smersuta expressed concern that quality control in the technical production of books is still very much lacking. Also book designers have yet to comprehend graphic design in book production, which is a combination of art and science.³⁰

2.7.4 Sales and Distribution.

Sales and distribution have become a major activity of the publishers in Thailand. As revealed in the survey of 90 publishers (Table 2.9) 83.3 percent of the publishers interviewed operate their own book shops and 72.2 percent undertake distribution. The same

survey revealed that the average cost for distribution, normally charged by the distributors, is relatively high in comparison with the production costs, being 37.5 percent of the book cover price for wholesale distribution against 33.5 percent for production.

TABLE 2.14
Variation in Costing of the Cover Prices of Books

<u>Cover Price as Ratio</u> <u>over Production Costs</u>	<u>Number of Publishers</u>	
	<u>Number</u>	<u>Percent</u>
1 : 4	4	9.3
1 : 3	18	41.9
1 : 2.8	1	2.3
1 : 2.5	2	4.6
1 : 2.2	1	2.3
1 : 2.0	14	32.6
1 : 1.85	1	2.3
1 : 1.5	2	4.6

Data presented in Table 2.14 shows wide variation in costing of the cover price. Further analysis revealed that the ratio of 1:2 approach is normally associated with publishers who are engaged mostly in direct sales. The general practice of 1:3 type of costing is normally found among publishers who release books through distributors, while the 1:4 type of costing practice is adopted by the so-called discount book publishers.

With regard to the variation in discount rates as shown in Table 2.15, the prevalent practices are between 25 and 35 percent which, together, account for 77.4 percent. The publishers (29 publishers or 41 percent) which offer a discount rate between 20 to 30 percent are normally those which distribute the books themselves and apply to books placed at the bookshops on consignment. The higher discount rates of 30 to 40 percent are generally offered to book distributors. The higher offers of 40 to 50 percent are normally

TABLE 2.15
Variation in Discount Rates Offered to Bookshops

<u>Discount Rate</u>	<u>Number of Publishers</u>	
	<u>No.</u>	<u>Percent</u>
>50	4	5.6
45-50	1	1.4
41-45	3	4.2
31-40	26	36.6
21-30	29	40.8
11-20	4	5.6
5-10	2	2.8

found in the cases where large orders are placed and on an individual basis. The somewhat unusually high offer over 50 percent is found among the discount publishers.

Major findings from the questionnaires of booksellers (75 in Bangkok and 85 in the provinces) revealed problems affecting business and profitability as follow:

- (1) Bad debt 67%
- (2) High taxation 33%
- (3) Monopoly by distributor 9%
- (4) Transportation problems 9%
- (5) Legal problems 9%

With regard to the publication of catalogues by the publishing houses or bookshops, it was found that 67 of the 90 publishing houses issue catalogues or book lists of their holdings either on a regular periodic or occasional and irregular basis. Catalogues are produced in various forms ranging from coloured publications to mimeographed sheets and from author and subject index to unclassified listing. Some publishers which operate bookshops as well, also include titles of other publishers on the list.

2.8 Women in Book Publishing

Another aspect of employment in book publishing which has been looked into (during the investigation) is the issue of women's participation in book publishing. The issue of women in development has been given considerable attention in Thailand during the past few decades. In Thailand, the rate of women's participation in the labour force has been among the highest in the Asia/ Pacific region.³¹ As far as book publishing is concerned, there are a quite a few leading women publishers, particularly among the more recently established publishing houses. Notable among the best known women publishers in the country are Carat, which is known locally as a quality trade paperback publisher, and Saengdad, a publisher of books about Thailand for the international market. In terms of employment, it was found that the average rate of female employment among the majority of publishers under study is over 54 percent.

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¹⁰ Ibid., p.83.

¹¹ Sakda Siripant et al., A Study on the Development Policy in the Printing Industry, trans. Suda Kiatkamjornwong (Bangkok: Chulalongkorn University, 1988), p.2.

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¹⁷ Kowit Pravalpruk, "Thailand", p. 151.

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ISBN Publishers' Directory Edition 1983 (Berlin: International ISBN Agency, 1983), p. 1423-24.

²³ Idem, International ISBN Publishers' Directory Edition 1985 (Berlin: International ISBN Agency, 1985), p. 1921.

²⁴ Idem, International ISBN Publishers' Directory Edition 1988 Part 2 (Berlin: International ISBN Agency, 1988) p.2619.

²⁵ June Lines, Careers in Publishing (London: Spottiswoode Ballantyre, 1983), p.8.

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CHAPTER III

BOOK PUBLISHING AND THE BOOK INDUSTRY

3.1 Introduction

Book publishing is not only a complex undertaking, involving a combination of activities and closely integrating with other industries, but also, as an industry, is quite small in Thailand, which is partly due to the country being a small developing nation and partly due to the fact that the language used, the Thai language, is not understood by any other nation with the partial exception of Laos. As such it is not surprising to learn that the publishing industry is not treated as a distinctive category in terms of national statistical collection and analysis. The country's only official source of statistical data on book production is the National Library of Thailand, Ministry of Education. At present, there are no reliable data, either on the publishing industry or the book industry.

Information and data used in the study and analysis are, therefore, mainly from the National Library of Thailand, from questionnaires and from interviews with book publishers, booksellers and book distributors. Data on book publication collected by the National Library of Thailand are submitted to Unesco and published in the Unesco Statistical Yearbook, normally with an approximately two-year time lapse.

3.2 Methodology

3.2.1 Data search from tertiary sources was initially carried out. The major source of data was the Unesco Statistical Yearbooks which provide statistics on book production on an annual basis, showing number of titles, as first editions and all editions, but excluding reprints. The number of titles given are classified by subject group according to the Universal Decimal Classification (UDC) classes. Statistics on two specific categories are also given, i.e., school textbooks and children's books. Thai and foreign publications are also separately treated.

3.2.2 Information and data search at the National Library of Thailand was made to identify the sources of and to determine the methods used in gathering the data submitted to Unesco. Three major published secondary sources of data were consulted. These are:

(1) List of Books Received by the National Library of Thailand (ISSN 0857-3020) which is produced monthly.

(2) List of New Books Assigned ISBN Numbers (ISSN 0857-5096), which is published monthly, beginning in August 1987, in response to the recommendation made at a national seminar on Universal Availability of Publications.

(3) Thai National Bibliography (ISSN 0125-1899) which is produced irregularly.

Unesco's questionnaires for the period 1968-1986, copies of which are maintained by the National Library of Thailand, were also consulted.

3.2.3 Questionnaires were also designed specifically for the study to gather information on the business aspects of book publishing. Pretesting of the questionnaires, which included questions on production volume, costs and sales, based on actual or estimated figures, produced negative responses from the publishers. Consequently, those questions were modified to be less specific, asking for averages or ranges instead (Appendices 1.1 and 1.2).

3.2.4 Interviews in person were also conducted. Interviews with certain major publishers and distributors were made more than once for either additional information or comments and opinions as experts in the field. Personal experience of the researcher as a small publisher as well as a printer was also maximally utilized, especially in clarification of statements and data.

3.2.5 Other major sources of information and data concerning particularly the trade and economic aspects of the industry include the publications which are annexed as Appendix 3.1.

3.3 National Statistics on Book Production : A Critical Review

One of the major functions of the National Library of

Thailand (NLT) is to collect and store all kinds of handwritten literature and printed matter which contains information relating to Thailand, regardless of origin or production.¹ Books received are processed by the Acquisition Section; a list is prepared and published, in mimeograph form, on a monthly basis as "List of Books Received by the National Library of Thailand". The series began in 1968 and is classified by subjects based on Dewey Decimal Classification and divided into two major sections, Thai and Foreign Languages. In 1988, the series was developed to include not only books but also serials and audio-visual materials received by the Library. The new version is entitled "List of Books, Serials and Audio-Visual Materials Received by the National Library of Thailand".²

Books are received by the Library from various sources and are obtained by different means, i.e., from government organizations, universities, commercial publishers, bookshops and printers, through exchange, donation, purchase and acquisition by other means, including particularly a requirement by law according to the Printing Act.³ Printers are required by law, the Printing Act B.E. 2484 (1941), to deposit two copies per title of books printed with the NLT.⁴ Appendix 3.2 shows the number of books received, by titles, by the NLT during the period from 1978 to 1986. The number of books in the Thai language received during the ten-year period, from 1978 to 1987, increased three-and-a-half times, from 4,765 titles to 16,733 while the foreign-language books increased only slightly, from 2,545 titles in 1978 to 3,442 titles in 1987. In 1987, the total number of books received, by titles, was over 20,000, increasing by 276 percent during the ten-year period or showing an average of 12,500 titles per year. Books received on the basis of the Printing Act in a particular year often included a number of books which were published in earlier years due to late submission. Books received by other means, especially by donation, were published in any year.

It is important to note that the Acquisition Section is also responsible for supplying data on book production to Unesco for

its annual publication entitled Unesco Statistical Yearbook, in response to Unesco's questionnaires on book production. As correspondence on book production data is made through the Thai National Commission for Unesco, such data may be regarded as official statistics. It is unfortunate that the NLT does not publish those data as Thailand's own official statistics on book production. The Library does, however, maintain a complete record of the data in the form of copies of the completed Unesco questionnaires (1968-1986). There are no data available on the number of copies of books produced as first editions, all editions or reprints. Besides the information gathered and compiled by the NLT, there is no other source of data on the total number of books published in the country each year. The Publishers and Booksellers Association of Thailand has no data available on book production published by its members.

Another major serial publication of the NLT, the Thai National Bibliography, was designed to provide reliable information concerning the country's publications, the trends and the status of publications produced in each year.⁵ Sources of information are the NLT itself as well as from 15 other libraries participating in the National Bibliography Project.⁶ The list of participating libraries is annexed as Appendix 3.3. The serial began in 1959 and has been published intermittently with varying frequencies, as annexed in Appendix 3.4. Although the publication aimed to provide information on books published each year, that objective has not been achieved. Based on the information available, an average number of titles of books processed each year was in the range of 2,000-3,000.

In addition to its function relating to book production as the depository of books printed in Thailand, the NLT, in response to the recommendation of a National Seminar on Universal Availability of Publication, held in Thailand in 1987, began publishing another monthly serial in August 1987 entitled, List of New Books Assigned ISBN. It was designed to provide a list of forthcoming books on a monthly basis.⁷ Table 3.1 shows the number of books assigned ISBN

numbers in 1987 (5 months only) and in 1988, which indicates an average of approximately 300 titles per month. It should be noted that the list presented includes books to be published by the government sector as well as by the academic and the commercial sectors.

TABLE 3.1
Number of Books Assigned ISBN in 1987 and 1988

<u>Year</u>	<u>No. of Books</u>
1987(5 months)	1455
1988	3792

SOURCE : National Library of Thailand, List of New Books Assigned ISBN, Vol.1 Nos.1-5, Vol.2 Nos.1-12 (Bangkok : National Library of Thailand, The Fine Arts Department, Ministry of Education, 1987-1988) (Mimeographed.)

It was estimated by the Library that only 65 percent of all books published in the country carry ISBN numbers.⁸ Based on that estimate, it may be stated that the number of books produced by title, in 1988, was projected to be approximately 5834, which would be only about 77 percent of the books produced in 1986 as indicated in Table 3.3. Therefore, in actuality, the percentage of books carrying ISBN would be considerably less than the current estimate of 65 percent. Table 3.2 shows the respondents on the usage

TABLE 3.2
Usage of ISBN by Commercial Publishers

	<u>No of Publishers</u>	<u>Percent</u>
Regular	39	48.1
Irregular	14	17.3
Never Use	28	34.6
No answer	9	-

of ISBN of which 81 out of 90 responded to the questionnaire.

It therefore appears that, as it is, the best available published data on book production in Thailand are data from the Unesco Statistical Yearbooks, and the best internal data on book production are the complete record of the data in the form of copies

Table 3.3

Number of Titles Published 1968-1986

First Editions and Re-Editions

(Inclusive of Government publications and University theses)

<u>Year</u>	<u>Total</u>	<u>First Editions</u>	<u>Percent</u>	<u>Re-Editions</u>	<u>Percent</u>
1968	1,071	1,071		n.a.	
1969	2,178	1,953	89.7	225	10.3
1970	1,826	1,697	92.9	129	7.1
1971	1,849	1,528	82.6	321	17.4
1972	2,323	2,134	91.9	189	8.1
1973	2,005	1,951	97.3	54	2.7
1974	2,157	1,618*	75.0	539	25.0
1975	2,212	1,657	74.9	555	25.1
1976	2,197	1,731	78.8	466	21.2
1977	3,062	2,530	82.6	532	17.4
1978	3,151*	2,566*	81.2	585	18.8
1979	3,224	2,823*	87.6	402	12.4
1980	3,370	2,911	86.4	459	13.6
1981	4,003	3,678	91.9	325	8.1
1982	4,950	4,380	88.5	570	11.5
1983	6,186	5,602	90.6	584	9.4
1984	8,392	7,442	88.7	950	11.3
1985	7,136	6,615	92.7	521	7.3
1986	7,620	7,008	92.0	612	8.0

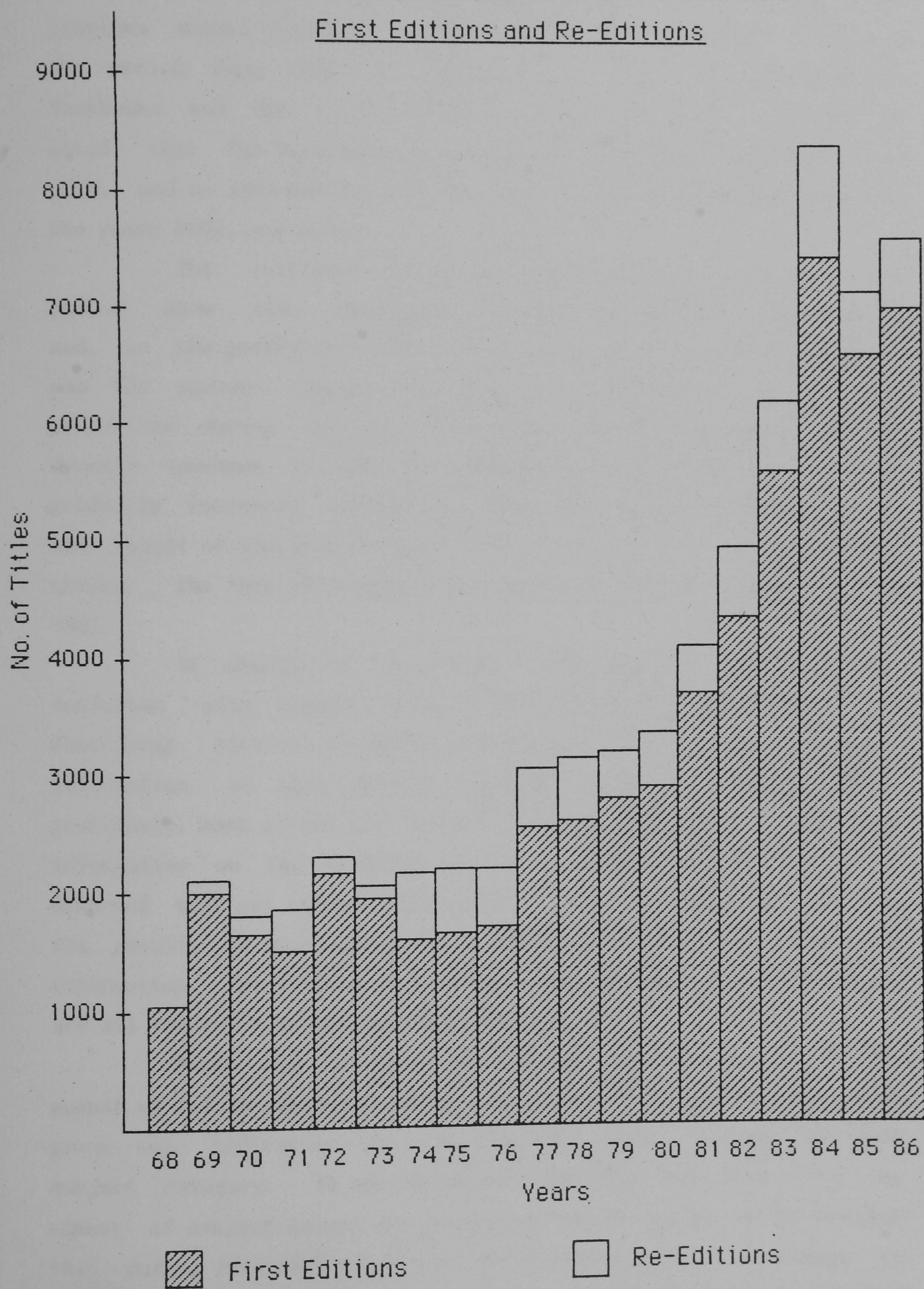
SOURCES : Unesco, Statistical Yearbooks, 1969-1988 (Paris: Unesco 1969-1988) and National Library of Thailand, (Internal Record), Bangkok.

* National Library of Thailand, (Internal Record), Bangkok.

FIGURE 3.1

Number of Titles Published 1968 - 1986

First Editions and Re-Editions



of the filled-out Unesco questionnaires at the NLT. Table 3.3 provides annual statistics on book production in Thailand covering the period from 1968 to 1986 based on the Unesco Statistical Yearbooks and the internal record of the NLT. It should be noted that the Yearbooks do not provide information for the year 1978, and no information on first editions and on subject group for the years 1974, and 1979.

The statistics on book production during the 19 - year period show that the numbers of books increased by 186 percent and, in the period 1978-1986 by 149 percent. The overall increase was 612 percent. Figure 3.1 shows the increasing trend of book production during the past two decades. With the exception of the drastic increase in 1984, it appears that the production of books gradually increases through the years. The increase appears to be the result of the production of new titles more than reprints of old titles. The rate of increase has been particularly impressive since 1981.

It should be noted that in Thailand there exists some confusion with regard to the terminology and language used in describing edition, re-edition and reprint and the lack of adequate information on this aspect. Maenmas Chavalit commented that, previously, most if not all commercial book publishers did not have information on the printing history of a book.⁹ It has also been observed that not enough importance is given to preliminaries. As the result, in many cases, books published lack certain necessary information for library cataloging. Books without such information are all treated the same as first editions.¹⁰

Table 3.4 provides the breakdown, by UDC classes, of the number of titles published during the 19-year period 1968-1986, which gives some indication of changes in the production trend in each subject category. It should be mentioned here that from 1976 the number of subject groups was increased from 23 to 25. It is noticed that during 1976-1982 production of the literature group dropped to below 1 percent of total annual production. Figures 3.2 and 3.3 show the production trend of literature and philology groups. This

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(INCLUSIVE OF GOVERNMENT Publications and University Theses)

UDC classes	1968	%	1969	%	1970	%	1971	%	1972	%	1973	%	1974	%	1975	%	1976	%	1977
Generalities	107	10.0	374	17.2	231	12.7	284	15.4	263	11.3	198	9.9	190	8.8	244	11.0	294	13.4	295
Philosophy	41	3.8	52	2.4	46	2.5	72	3.9	66	2.8	49	2.4	37	1.7	61	2.7	66	3.0	61
Religion	211	19.7	353	16.2	289	15.8	219	11.8	306	13.2	259	12.9	242	11.2	241	10.9	263	12.0	197
Social Sciences	288	26.9	627	28.8	563	30.8	585	31.6	875	37.7	819	40.9	853	39.6	995	45.0	932	42.4	1370
Philology	18	1.7	28	1.3	22	1.2	56	3.0	71	3.1	69	3.4	134	6.2	89	4.0	145	6.6	269
Pure Sciences	17	1.6	37	1.7	43	2.3	43	2.3	56	2.4	49	2.5	119	5.5	68	3.1	79	3.6	138
Applied Sciences	99	9.2	189	8.6	151	8.3	147	8.0	222	9.6	136	6.8	144	6.7	152	6.9	184	8.4	374
Arts/Recreation	46	4.3	72	3.3	65	3.6	57	3.1	80	3.4	59	2.9	89	4.1	79	3.6	62	2.8	108
Literature	148	13.8	255	11.7	290	15.9	273	14.8	212	9.1	242	12.1	193	9.0	177	8.0	16	0.7	13
Geography	96	9.0	191	8.8	126	6.9	113	6.1	172	7.4	125	6.2	156	7.2	106	4.8	156	7.1	237

UDC Classes	1978	%	1979	%	1980	%	1981	%	1982	%	1983	%	1984	%	1985	%	1986
Generalities	240	7.6	256	7.9	204	6.1	283	7.1	474	9.6	702	11.4	914	10.9	686	9.6	629
Philosophy	65	2.1	54	1.7	58	1.7	90	2.3	97	2.0	101	1.6	193	2.3	240	3.4	173
Religion	243	7.7	350	10.9	209	6.2	238	5.8	254	5.1	265	4.3	466	5.5	427	6.0	559
Social Sciences	1,573	49.9	1,414	43.9	1,716	50.9	1,664	41.6	2,099	42.4	2,569	41.5	3,431	40.9	2,667	37.4	2,755
Philology	353	11.2	280	8.7	290	8.6	282	7.1	306	6.2	241	3.9	377	4.5	237	3.3	195
Pure Sciences	135	4.3	133	4.1	189	5.6	298	7.4	372	7.5	448	7.3	524	6.2	509	7.1	625
Applied Sciences	257	8.2	445	13.8	449	13.3	790	19.7	870	17.6	998	16.1	1,240	14.8	1,261	17.7	1,419
Arts/Recreation	81	2.6	116	3.6	82	2.4	165	4.1	184	3.7	224	3.6	278	3.3	232	3.2	254
Literature	17	0.5	24	0.7	16	0.5	23	0.6	23	0.4	365	5.9	561	6.7	683	9.6	638
Geography	187	5.9	152	4.7	157	4.7	170	4.3	271	5.5	273	4.4	408	4.9	194	2.7	373

SOURCES : Unesco, Statistical Yearbooks, 1969-1988 (Paris: Unesco, 1969-1988)

and National Library of Thailand (Internal Record), Bangkok.

FIGURE 3.2

Number of Titles of Literature Group Books (1968-1986)

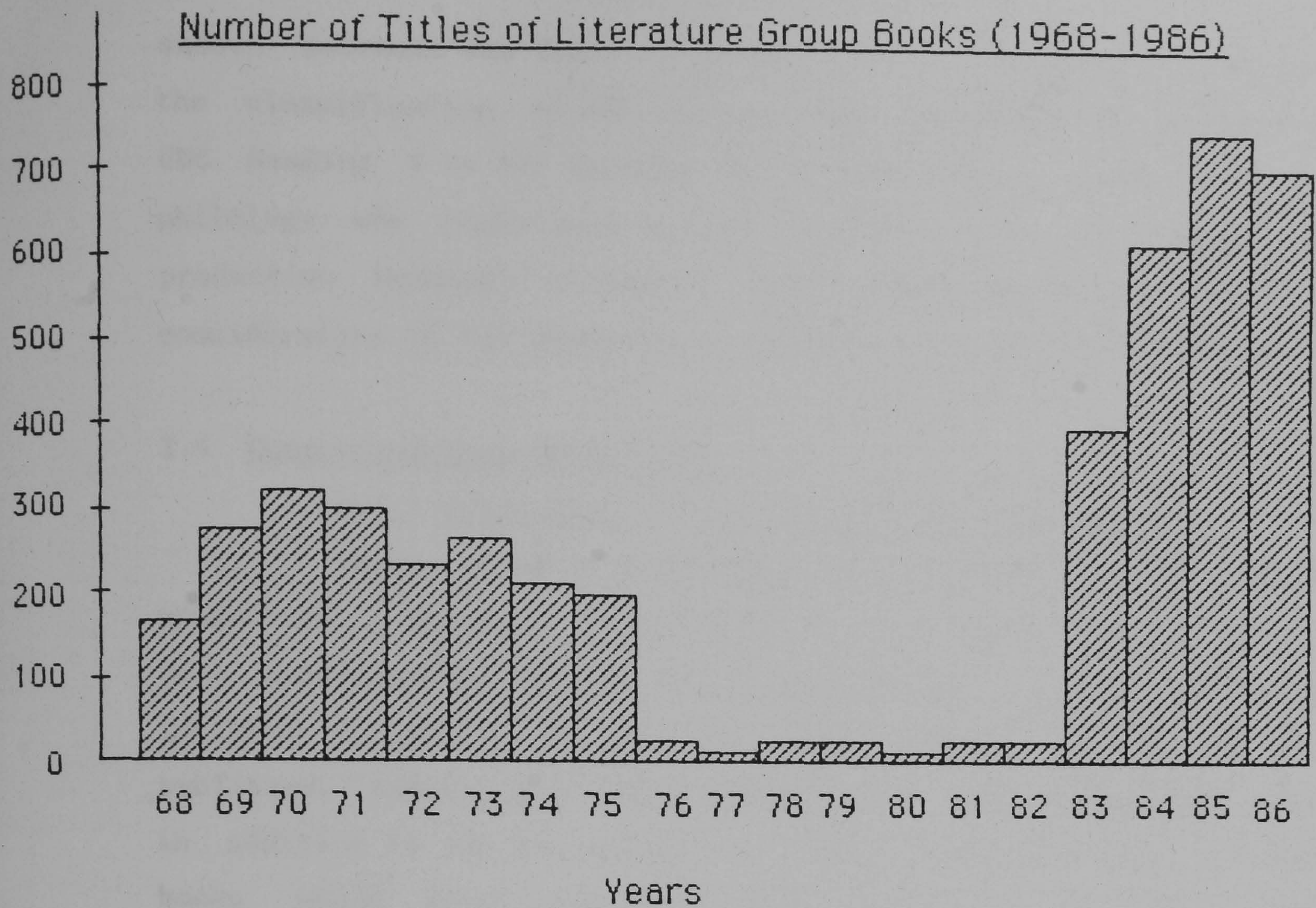
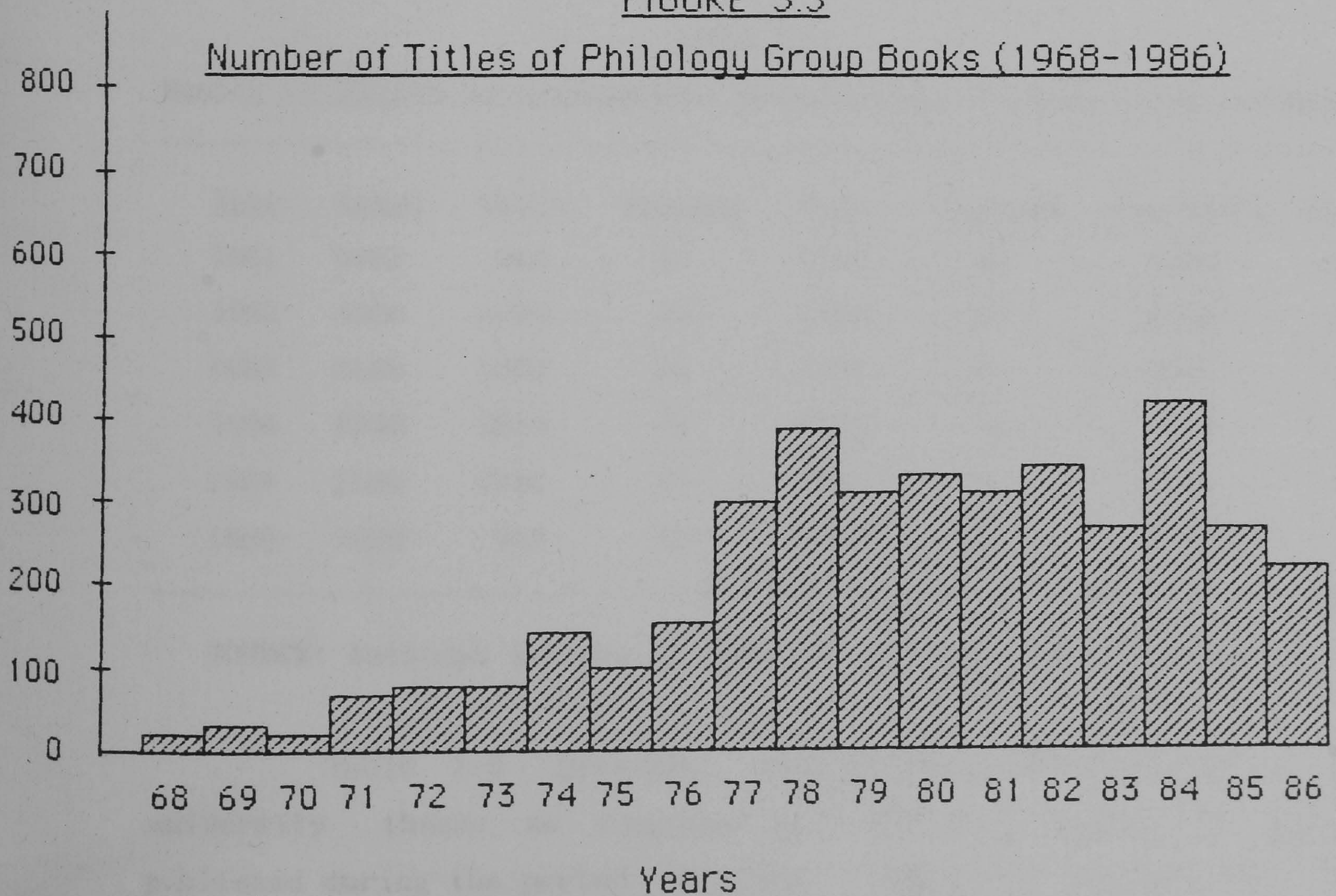


FIGURE 3.3

Number of Titles of Philology Group Books (1968-1986)



sudden decrease was found to be artificial, caused by the change in the classification of the UDC Headings. Philology was diverted from UDC Heading 4 to UDC Heading 80-81 (1976-1982). From 1983, when philology was reassigned to UDC Heading 4, the literature group production suddenly increase. This change has to be taken into consideration in the analysis of production trend for literature.

3.4 Commercial Book Production

3.4.1 Government vs. Non-Government Publications

There are no data available specifically on commercial book production. However, an estimate can be roughly deduced from the data submitted to Unesco. Since 1981, Unesco's questionnaires have included a section on two additional separate groups of books published, namely, government publications and university theses, in addition to the two groups on school textbooks and children's books which have previously been included. In 1985, another category, comic books, has also been included in the questionnaire, but data have yet to be collected and presented.

TABLE 3.5

Number of Titles by Government, Universities (Theses) & the Private Sector

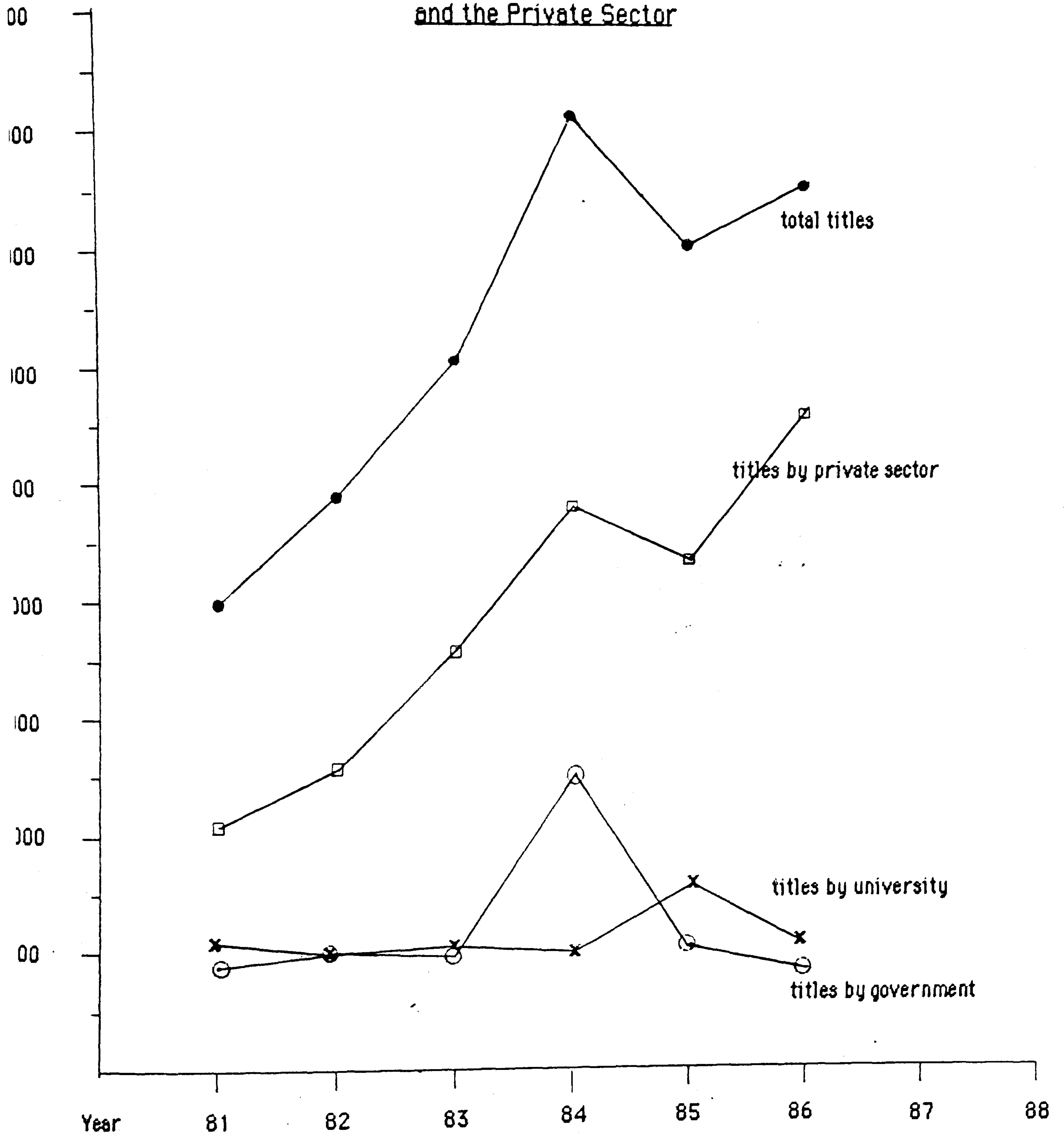
<u>Year</u>	<u>Total</u>	<u>Gov't</u>	<u>Percent</u>	<u>Univ.</u>	<u>Percent</u>	<u>Non-Gov't</u>	<u>Percent</u>
1981	4003	823	21	1112	26	2068	52
1982	4950	1004	20	1186	24	2758	56
1983	6186	1262	20	1277	21	3647	59
1984	8392	2516	30	1000	12	4876	58
1985	7136	1210	17	1622	23	4304	60
1986	7620	933	12	1122	15	5565	73

SOURCE: National Library of Thailand (Internal Record), Bangkok.

Table 3.5 provides data on government publications and university theses as compared with the total number of titles published during the period 1981-1986. Figure 3.4 demonstrates the

FIGURE 3.4

Number of Titles by Government, Universities (Theses)
and the Private Sector



production trend. Statistics show the increasing trend in the private sector's book production, ranging from approximately half (52 percent) of the total titles of books published in 1981 to almost three-quarters of the total titles of books published (73 percent) in 1986. Private sector publications include mainly commercial books published by commercial publishers and a few non-profit, non-government publishers.

3.4.2 Non-Government or Commercial Book Production

Survey by questionnaires and interviews of the 90 publishers revealed that the numbers of reprints produced by commercial publishers are slightly greater than those of first editions. Eighty publishers out of 90 responded to the question on the average titles of new books produced per year during the period 1984-1988, and 79 out of 90 responded to the question on the average number of titles of reprints produced per year during the same period. Responses to the questions appear in Tables 3.6 and 3.7.

TABLE 3.6

Average Number of New Titles Per Year (1984-1989) by Commercial Publishers

<u>No. of Publishers</u>	<u>percent</u>	<u>New Titles</u>	<u>Average No. of Titles/Publisher</u>
76	95.0	2,067	27
4	5.0	0	-
10	-	no answer	-

TABLE 3.7

Average Number of Reprints Per Year (1984-1989) by Commercial Publishers

<u>No. of Publishers</u>	<u>percent</u>	<u>Reprints</u>	<u>Average No. of Titles/Publisher</u>
68	86.0	2,313	34
11	14.0	0	-
11	-	no answer	-

The combined average total production of books as first editions and as reprints published by 79-80 publishers who responded was 4,380 titles, of which 2,067 or 47.2 percent were of first editions and 2313 or 52.8 percent were reprints. Four publishers did not produce new titles during 1984-1988, as was mentioned earlier in 2.5.3, and 11 publishers did not produce reprints. From such finding, it may be stated that the average production of new titles was about 25 per publisher.

In term of number of copies published per title, it was found that only a small number of publishers (5.75 percent) produced over 10,000 copies per title. Most publishers (81.6 percent) produced 1000-5000 copies per title and 6.9 percent produced only 500-1,000 copies per title. Table 3.8 shows the average number of copies per title produced by commercial publishers.

TABLE 3.8
Average Number of Copies Produced Per Title

<u>Number of Copies</u>	<u>Number of</u>	<u>Percent</u>
<u>Per title</u>	<u>Publishers</u>	
20,001-50,000	1	1.15
10,001-20,000	4	4.60
5001-10,000	5	5.75
3001-5000	20	23.00
2001-3000	24	27.60
1001-2000	27	31.00
500-1000	6	6.90
no answer	3	--

Based on the data presented in Table 3.8, it is reasonable to assume that, on the average, about 3,000 copies are usually produced for each title. Such assumption has been generally agreed to by most publishers interviewed and inquiry with book printers.

Table 3.9 shows the average price per copy. Survey on the

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5001-10,000	5	5.75
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2001-3000	24	27.60
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TABLE 3.9
Average Price per Copy

<u>Price Per Copy</u>	<u>Number of Publishers</u>	<u>Percent</u>
>200	1	1.1
101-200	4	4.5
51-100	18	20.0
26-50	44	48.9
11-25	21	23.3
1-10	2	2.2

book price revealed that about half (48.9 percent) of the publishers interviewed set the price of a book in a range of 26-50 bahts (US\$ 1-2) per copy. The majority (92.2 percent) of book prices is in a range of 11-100 bahts per copy. Few publishers lamented that there can no longer be books priced at 5 bahts. The cause is not only the constant price increases of paper but also the extravagant taste of the consumers. They choose books that are printed on unnecessarily high quality paper so the minimum price now begins at 15-20 bahts.

Table 3.10 shows sales volume against total production and Table 3.11 shows the period of sale.

Table 3.10
Sales Volume Against Total Production

<u>Percentage of sales</u>	<u>Number of Publishers</u>	<u>Percent</u>
>75	32	35.5
50-75	51	56.7
<50	7	7.8

The data shows that over 90% could achieve up to 50% or more sale for the books published. Approximately 70% of the

Table 3.11
Period of Sale

<u>Time</u>	<u>Number of Publishers</u>	<u>Percent</u>
3-6 mth	18	20.5
7-12 mth	20	23
1-2 yrs	25	28.4
2-3 yrs	13	15
>3 yrs	12	14.6
no answer	2	-

publications sell within 2 years or less.

3.5 Composition and Value of the Industry

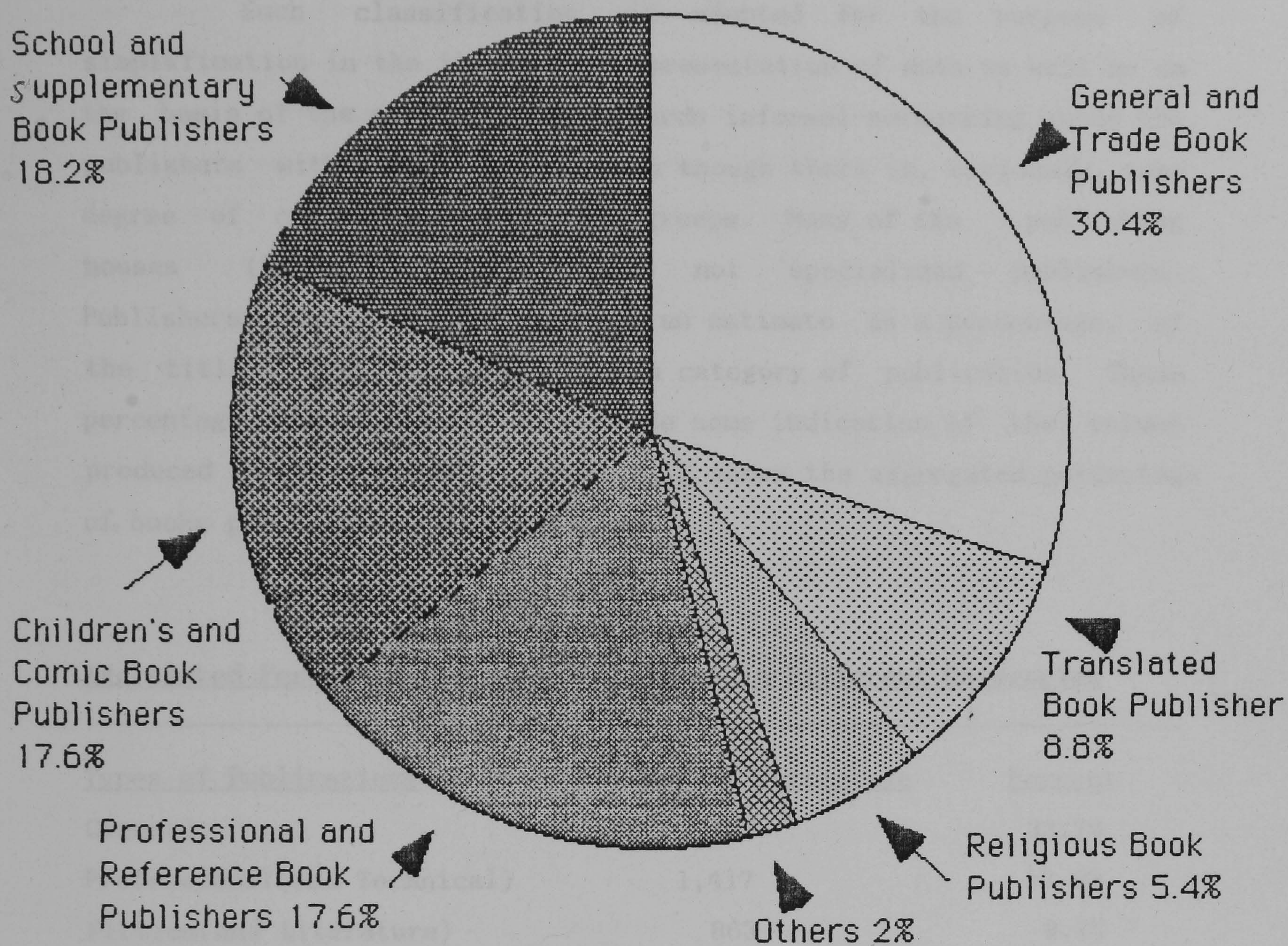
3.5.1 Composition of Publishing Industry by Types of Publications.

The book industry can be considered in two aspects, one in relation to the producers or publishers and the other in relation to the users or readers. Section 2.5 under chapter II deals with the book publishers' profile and 2.5.5 deals specifically with classification of publishers by types of publications. On the basis of the data presented in Table 2.10, the publishing industry may be classified into various sectors according to the types of products, such as general books, children's books, etc. The data in Table 2.10 may be illustratively presented in a different form as is shown in Figure 3.5. Detailed breakdown of the composition is annexed as Appendix 3.5.

Publishers are categorized into 6 major sectors, namely,

- (1) general or trade book publishers, which include fiction and literature publishers
- (2) professional and reference book publishers
- (3) children's and comic book publishers
- (4) school and supplementary reader book publishers
- (5) translated book publishers

FIGURE 3.5
Sectors within the Book Publishing Industry
by Types of Publications



(6) religious book publishers

(7) other miscellaneous.

Such classification is adopted for the purpose of simplification in the illustrative presentation of data as well as on the basis of the current trend towards informal networking among the publishers within such groups, even though there is, obviously, some degree of competition within the groups. Many of the publishing houses (Table 2.10) are not specialized publishers. Publishers were asked to give an estimate as a percentage, of the titles they published in each category of publication. These percentages are combined to provide some indication of the volume produced in each category. Table 3.12 shows the aggregated percentage of books published in each category.

TABLE 3.12

Aggregated Percentage of Books Published in Different Categories

<u>Types of Publications</u>	<u>Aggregated Percentage</u>	<u>Percent</u>
General	2,959	33.74
Professional(and Technical)	1,417	13.83
Fiction(and Literature)	863	9.75
Children's	860	9.66
Supplementary Readers	710	9.09
Religious	655	7.10
Translated	666	6.43
Text	497	4.85
Comics	270	3.07
Dictionaries(and references)	71	1.97
Others	32	0.54

3.5.2 Value of the Book Industry Based on the Market Survey

As it has been difficult to obtain accurate data and information on the total number of books produced and, even more so, on the total value of the production, an attempt is therefore made to

derive a realistic estimate of these items. Estimates are made on the basis of the catalogues or book lists made available by 65 publishers. The average book price for each publisher is derived from the catalogues or book lists and is used in determining the value of the books of each publisher. In estimating the number of copies produced, the average number of 3,000 copies per title is used, as it has been found in the earlier survey to be the case. The value estimate is made on the assumption of 100 percent sales within one year, for the purpose of simplicity in calculation. Results are given in Table 3.13.

Although the book market value under study does not represent the entire book industry, the findings provide some

TABLE 3.13

Composition and Value of the Book Industry

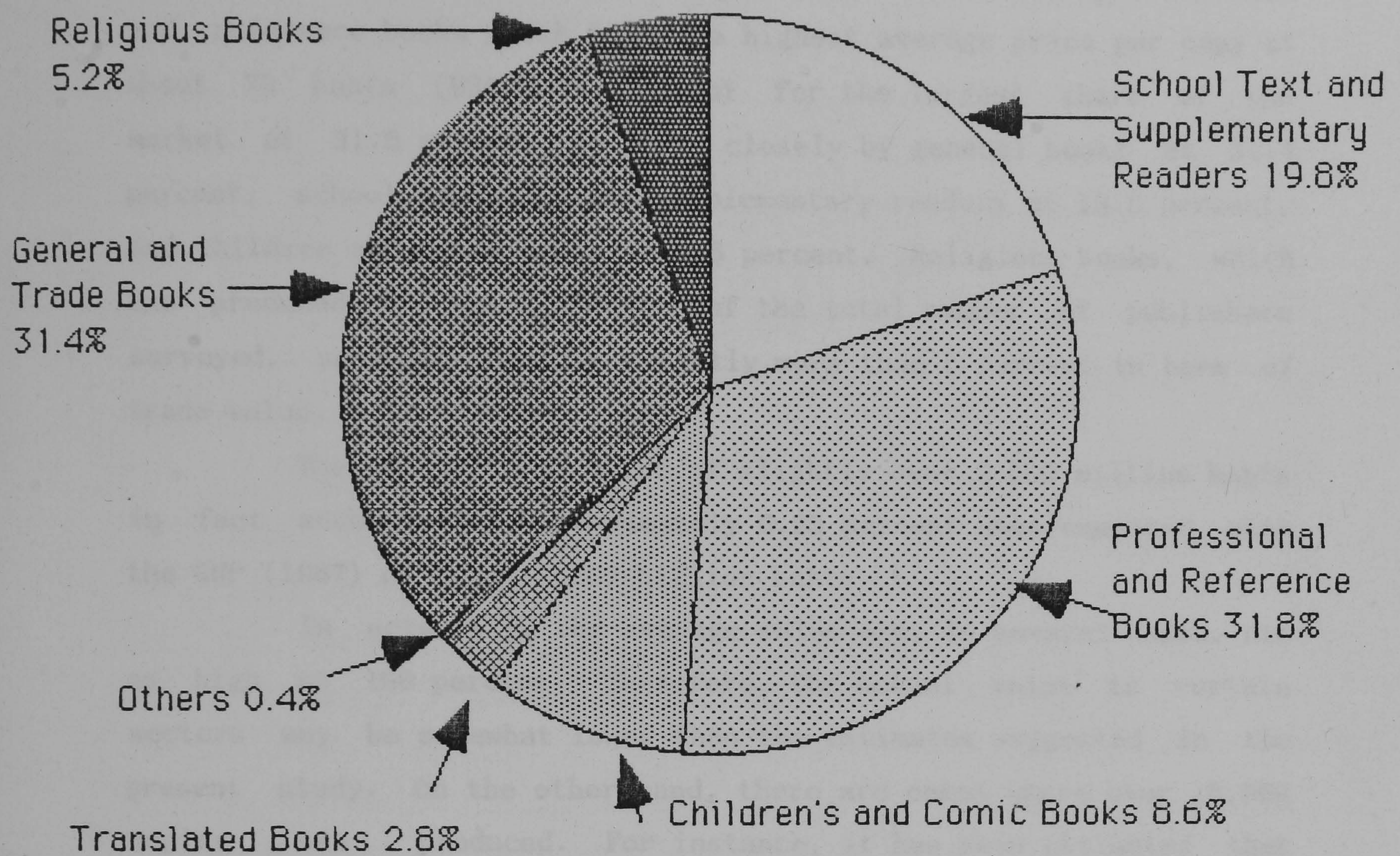
(on the assumption of 100 percent sales within one-year)

<u>Types of Publications</u>	<u>No.of Titles</u>	<u>No.of Copies</u> (title x 3,000)	<u>Average Price</u> Per copy	<u>Trade Value</u> (million baht)	<u>Remarks</u> (No.of Publishers)
General	2,958	8,874	45	399.33	30
Children	2,405	7,215	35	252.53	24
Professional	2,262	4,524*	70	316.68	20
Fiction	3,484	10,452	54	564.41	15
Translated	565	1,695	50	84.75	13
School	3,147	9,441	29	273.79	9
Supplementary	2,940	8,820	38	335.16	18
Religious	1,328	3,984	40	159.36	8
Dictionaries/ references	439	1,317	50	658.50	6
Comics	218	654	20	13.08	2
Others	85	255	44	11.22	3
Total	19,831			3,068.81	

* 2,000 copies/title

FIGURE 3.6

Value of the Book Industry by Sectors



indications of the relative value of the various sectors of the book industry, which is illustratively presented in Figure 3.6. The detailed breakdown of the value of the book industry, by sectors, is annexed as Appendix 3.6. In term of industrial value, professional and reference books which have the highest average price per copy at about 70 bahts (US\$ 2.80) account for the largest share of the market at 31.8 percent, followed closely by general books at 31.4 percent, school textbooks and supplementary readers at 19.8 percent, and children and comic books at 8.6 percent. Religious books, which are produced by about 7 percent of the total number of publishers surveyed, account for only slightly more than 5 percent in term of trade value.

The total trade value of slightly over 3,000 million bahts in fact accounts for approximately 0.25 percent when compared with the GNP (1987) of about 1,200 billion bahts.¹¹

In actuality, the average sales are, in several cases, not as high as 100 percent. Therefore, the actual value in certain sectors may be somewhat lower than the estimates suggested in the present study. On the other hand, there are cases where over 10,000 copies are produced. For instance, it has been estimated that translated comic book industry in Thailand has a value of more than 300 million bahts per annum.¹² It is essential that these considerations should be given due attention in assessing the results presented here.

3.6 The Book Markets

It has not been possible to find research reports on the book market in Thailand. There have been only a few brief articles in the business section of a local newspaper, the Prachachart Business Newspaper, concerning the comic book industry and the school book market. This section attempts to look at the book market in Thailand in term of readers and organization consumers, such as libraries and bookshops, etc.

3.6.1 Readers or Individual Consumers

3.6.1.1 The General Public. It is only natural that in any

society the general public is the most important user of general or trade books. Almost 90 percent of the Thai population age 10 and over, in 1980, is literate.¹³ However, a study conducted in 1979 indicated that almost 20 percent of the primary grade 4 graduates reverted to illiteracy against 5.6 percent among primary grade 6 graduates,¹⁴ which led to the National Literacy Campaign (1984-1987). Furthermore, it was reported that, in 1980, the illiteracy rate in the capital city of Bangkok was only 1.7 percent and in the central region 3.5 percent compared to between 19.0 to 21.3 percent in other regions of the country.¹⁵

Questionnaire on the Readers' Profile revealed the following:

(a) Of the 660 readers interviewed (200 in Bangkok, 160 in provincial urban areas and 300 in rural areas) 78.0 percent read books and 16.4 percent read newspapers only. However, 57.7 percent of the readers are people with higher than secondary level of education and 28.5 percent are primary level graduates.

(b) Only about half of the people interviewed (51.3 percent) buy books themselves while about 12.5 percent rent the books from book renting shops which are estimated to out number bookselling shops in term of numbers and distribution. It is interestingly revealed that as high as 26.9 percent of the people interviewed borrow books for reading and 9.3 percent receive books as gifts or donations.

(c) In term of spending, about 71.5 percent of the people interviewed spend 500 baht (U.S.\$ 20) or less on books per year while the average annual income of the interviewed is about 57,840 baht, indicating an average spending on books at less than one percent of earning.

Details of the findings from the questionnaires are annexed as Appendix 3.7. Although it is noted that the sample size is not representative of the population in the country in terms of distribution or income, the random sampling provides an indication of the reading population in general.

On the question of book reading; Kasama Varavan pointed out

that, the problem is not how to get people to read books, the problem is how to find ways so that books will reach the people.¹⁶ Kanok Samsen Vil expressed the view that, one of the best ways to entertain children and youth in the villages is to have books distributed, and all will be still and quiet.¹⁷ Kowit Worapipat summed up that the government and the private sector must cooperate so that there will be good and low cost books for the people.¹⁸ Utumporn Jamornmann reported that one of the top ten characteristics of Thai women, chosen from 100 characteristics listed, is in fact book reading.¹⁹

3.6.1.2 The Students The second largest group of readers is includes the students at all levels of education. In any commercial book world, particularly in developing countries where educational curricula are under strict government control, the student market is the most sought after market. In the case of Thailand, where mandatory primary education is enforced (the Compulsory Education Act was promulgated in 1921 and in 1960 was modified to expand compulsory education from 4 years to 7 years. In, 1978, a new national scheme of education was announced establishing 6 years of compulsory education²⁰), the primary school students totalled over 7 million in 1986.²¹

At present, the enrollment at the secondary level is less than one-third of that at the primary level, being approximately 2.2 million.²² However, both textbook and supplementary reader markets are open to private book publishers. The market at the secondary level is expected to increase to about 4 million when the government expands compulsory education to the lower secondary level as is contemplated.²³

At the university level, there are approximately one million students (366,305 students in regular universities²⁴ and about 565,453 in the two open universities²⁵ in 1986). For the open universities, textbooks and required supplementary readers are published by the universities themselves. In the early period, manuscripts were produced by the universities and outside printers were used. However, such practice is declining. The

that, the problem is not how to get people to read books, the problem is how to find ways so that books will reach the people.¹⁶ Kanok Samsen Vil expressed the view that, one of the best ways to entertain children and youth in the villages is to have books distributed, and all will be still and quiet.¹⁷ Kowit Worapipat summed up that the government and the private sector must cooperate so that there will be good and low cost books for the people.¹⁸ Utumporn Jamornmann reported that one of the top ten characteristics of Thai women, chosen from 100 characteristics listed, is in fact book reading.¹⁹

3.6.1.2 The Students The second largest group of readers is includes the students at all levels of education. In any commercial book world, particularly in developing countries where educational curricula are under strict government control, the student market is the most sought after market. In the case of Thailand, where mandatory primary education is enforced (the Compulsory Education Act was promulgated in 1921 and in 1960 was modified to expand compulsory education from 4 years to 7 years. In, 1978, a new national scheme of education was announced establishing 6 years of compulsory education²⁰), the primary school students totalled over 7 million in 1986.²¹

At present, the enrollment at the secondary level is less than one-third of that at the primary level, being approximately 2.2 million.²² However, both textbook and supplementary reader markets are open to private book publishers. The market at the secondary level is expected to increase to about 4 million when the government expands compulsory education to the lower secondary level as is contemplated.²³

At the university level, there are approximately one million students (366,305 students in regular universities²⁴ and about 565,453 in the two open universities²⁵ in 1986). For the open universities, textbooks and required supplementary readers are published by the universities themselves. In the early period, manuscripts were produced by the universities and outside printers were used. However, such practice is declining. The

Sukhothaithammathirat Open University (with 167,937 students in 1986) established its own high-technology printing press in 1985 and plans to upgrade it into the National Printing Technology Center.²⁶

For students at regular universities, the use of imported textbooks is general. Local textbook production for universities has been encouraged as part of the promotion system to a professorship. In most cases, lecturers produce their own typescripts and have them stencilled. Commercial publishing of university textbooks is still limited for a number of reasons as follows:

- Limited market for each subject
- Prevalent practice of photocopying.
- Uneconomical operation due to high costs of production and limited buying power of students. (For the purpose of comparison, the starting salary of a university lecturer with a Ph.D. degree is about 5,000 bahts (US\$ 200) per month. Cost for photocopying is about 0.40 baht per page).

The issue of quality textbook production has been regularly addressed by the authorities concerned. Attempts have been made by some universities to establish university presses. Notable among them are the Chulalongkorn University Press, Thammasat University Press²⁷ and Sukhothaithammathirat University Press which are officially established.²⁸

3.6.1.3 Buddhist Monks. This group of leaders deserves special treatment in the Thai book market analysis. The number of titles for this market has been increasing steadily throughout the years. It is a specialized market served by at least 7 commercial publishers and is worth approximately 159.36 million baht annually. In addition, there are a number of temples and PVOs which produce religious books. The size of the market, based on the number of monks and novices in 1986, is about 330,000 (284,429 monks and 144,446 novices). In terms of number of Buddhist religious schools and colleges, there are 5,593 (including 395 Sunday schools).²⁹

As 95 percent of Thailand's population are Buddhists, it is anticipated that the market for religious books will continue to be a major market. Recently, there has been increasing interest in

modernization and popularization of Buddhist religious teaching, including the translation of Pali language books into Thai. On this basis it is reasonable to anticipate a gradual increase of the market for religious books to include more young people in the future.

3.6.2 Organization Consumers/Buyers

From the publishers' point of view major buyers such as schools and bookshops are considered significant intermediate buyers which can absorb books in bulk. Organizations and agencies which serve as intermediate consumers are examined in order to gain a better understanding of the market structure of the book publishing industry.

3.6.2.1 Government Departments In a developing country such as Thailand where 30 percent of the population are still under the poverty line, educational subsidy in the form of books and other educational materials is widespread. The educational budget by types during the period 1983-1987 is annexed as Appendix 3.8 and the comparison between educational budget and the overall national budget is annexed as Appendix 3.9. It can be seen that the budget for primary education accounts for over 50 percent of the total educational budget. Primary education, which is compulsory, is under the responsibility of the Office of the National Primary Education Commission (ONPEC). There are altogether 31,334 schools (1986) under its control.³⁰ The ONPEC is, as such, the largest single buyer of the supplementary reading books produced by the private publishers for free distribution to schools throughout the country.

3.6.2.2 Libraries. There are altogether approximately 29,000 libraries or equivalent facilities throughout the country, of which 28,777 libraries are operated or supervised by the government.²⁶ The breakdown of the public libraries is annexed as Appendix 3.10. The combined budget for libraries, museums and adult education, most of which are under the responsibility of the Ministry of Education, amounts to about 750 million baht or about 2 percent of the total educational budget (Appendix 3.8). At present, the budget allocated for the Village Reading Centers does not cover books but only

newspapers. An evaluation of public libraries revealed that the budget allocated for books averaged about 50 percent of what was required, indicating the budget constraint faced by public libraries throughout the country.³²

3.6.2.3 Bookshops. There are two types of bookshop in Thailand, namely, bookselling shops and book renting shops. There are no statistics available on bookshops operating in the country. The estimates are derived from PUBAT as well as from major book distributors.

(a) Book Selling Shops. Book publishers' profile analysis revealed that the majority (83 percent) of the publishers interviewed are also booksellers. According to the Book Worm Program (1987) there are 231 bookshops in various parts of the country, of which 118 are in Bangkok and 113 are in the provinces.³³ Interviews with major book distributors indicate that there are 202-206 bookshops or the equivalent in the Bangkok area and 424 in the provinces, with a range of 1 to 8 bookshops in each province. In addition to the bookshops, there are, of course, small bookstalls in various communities throughout the country. It has been estimated that there are a minimum of 6,000 newspaper cum magazine stalls in Thailand. Most stalls normally carry mainly newspapers, magazines and sometimes mass market paperback books.

The majority of bookshops do not normally purchase books outright except for selected bestsellers and special discount books. Credit of 1 to 6 months, with an average of 3 months, is usually allowed by book distributors. All the book distributors interviewed maintain a list of bookshops but such lists are not presented here out of respect for the distributors for trade reason. There has been no market research on books available, although there is a great need for such a study. A similar research need has been expressed by the Director of the Book Development Center concerning reader surveys to find out about needs and reading status of people, particularly in the rural areas, so that suitable and appropriate books can be developed.³⁴

(b) Book Renting Shops. In a developing country such as

Thailand, where 30 percent of the population is still under the poverty line, books are still considered a luxury by many people. This has led to the establishment and popularization of another means of low-cost access to books, the book renting shops, particularly in provincial areas. Although statistics on book renting shops are not available, it is believed that the number far exceeds that of bookshops. Estimates by major booksellers and book distributors are between 5,000 and 20,000 located throughout the country, mainly at urban centers in the provinces, including Bangkok, as well as the district and subdistrict levels where bookshops are rare or non-existent.

As it is believed that the book renting shops play a very significant role in increasing the availability of books to the general public, particularly the low-income population; an in-depth investigation was carried out as part of the present study. Fifty-eight book renting shops - 31 in the Bangkok area and 27 in the provinces - were interviewed, on the basis of the questionnaire for book renting shops which is annexed as Appendix 3.11. Findings indicated that the book renting business has boomed during the past decade and has become increasingly popular due to low-cost availability of books. Table 3.14 shows the size and types of holding of books available from the book renting shops. Length of

TABLE 3.14

Size and Types of Holding of Books at Book-Renting Shops

	<u>Bangkok</u>	<u>Provinces</u>
<u>Number of Books</u>	<u>No.</u>	<u>No.</u>
range	700-20,000	300-6,500
average	5,853	2,300
<u>Types of Books</u>	<u>percent</u>	<u>percent</u>
Thai Fiction	74.2	59.2
Translated Fiction	9.3	3.6
Comics/Children	16.5	37.2

year in business of the book-renting shops is shown in Table 3.15.

TABLE 3.15

Length of Years in Business of Book-Renting Shops

<u>Years</u>	<u>Bangkok</u>	<u>Provinces</u>	<u>Total No.</u>	<u>Percent</u>
1969-1978	2	5	7	12.1
1979-1988	20	17	37	63.8
since 1988	9	5	14	24.1

It is noted that comics are more popular in the provinces, probably due to the lower buying power of the children and youth there. Translated books are naturally more popular in the Bangkok area, with size of holdings being about two-and-a-half times higher than that in 13 provinces. However, Thai fiction is equally popular regardless of location.

Findings on the rental charges and average expenditure of the borrowers or clients confirmed the general belief that the average spending of book readers through book-renting shops is lower in the provinces; the rental fee is generally lower than in Bangkok. Table 3.16 shows the average rental fee per book and average expenditure on book renting.

TABLE 3.16

Book Rental Fees and Expenditure by Borrowers

<u>Fees and Expenditures</u>	<u>Bangkok</u>	<u>Provinces</u>	<u>Differences</u>
first-day rental fee, B/d			
range	2-5	1-4	
average	2.67	2.20	0.47(18%)
<u>Expenditure per person/time</u>			
range	2-15	1-20	
average	10	6.8	3.2(32%)

Answers to the questions on the number of clients are available only from shops in the Bangkok area, which give the range of 20 to 80 people per day and an average number of clients at about 40 persons per day. Analysis of the profile of the clients indicated that, in the Bangkok area, working people comprise the largest group of 44 percent, followed by students at 30 percent, children at 15 percent and housewives at 11 percent.

It was also found that about half of the book-renting shops in the Bangkok area engaged in other business activities while almost all of the book-renting shops in the provinces engage solely in book-renting business. Finally, it should be mentioned that it was discovered during the course of the study that one book renting shop in Bangkok provides services free of charge. It was learned that the owner is an avid reader and has been sharing the books with the shop's customers.

3.7 Copyright Act and Printing Act

3.7.1 Copyright in Thailand

Thailand first gave protection to literary works through the announcement of the Royal Vajirajan Library dated 29 August 1892 prohibiting publication of the library's written materials printed in its newspapers without permission of the library committee. It was enacted into a law in 1901 known as The Act of Literary Work Ownership. The duration of the protection was for the life of the author and 7 years after the death of the author or the equivalent of 42 years. The author of the literary work was required to submit three copies of the work, one each to the Royal Library, the Royal Vajirajan Library, and the Buddhist Monks' Library. The Act was revised in 1914 and superseded by a new Act in 1931 when Thailand joined the Berne Convention for the Protection of Literary and Artistic Works. The word "copyright" was first introduced in 1978 when the Copyright Act B.E. 2521 (1978) was promulgated to replace the 1931 Act.³⁵ The 1978 law still is in effect.

3.7.1.1. Thailand's Copyright Act, B.E.2521 (1978)

The Department of Fine Arts (Literature and History

Division), Ministry of Education, is the designated body responsible for the administration of copyright matters in Thailand. The present Copyright Act B.E. 2521 (1978) ³⁶ contains these selected provisions:

Copyright Chapter 1, Section 6 stipulates that the author shall be entitled to the copyright in the work he(she) has created under the following conditions: (1) in the case where the work has not been published, the author must be a Thai national or stay in the Kingdom at all times or most of the time during the creating of the work; (2) in the case where the work has been published, the first publication must have been effected in the kingdom or the author must be qualified according as prescribed in (1) at the time of the first publication.

Protection Chapter 1, Section 13 and 14 stipulate that the owner of the copyright shall enjoy the exclusive right of (1) reproduction or adaptation; (2) publication; (3) granting benefits accruing from the copyright to other persons; and (4) granting licence to other persons. In the case there is no written agreement imposing any specific condition, the licence shall be regarded as a non-exclusive licence.

Infringement Chapter 4, Section 29 stipulates that no action for infringement of copyright shall be entered later than three years from the day when the owner of the copyright becomes aware of the infringement and the identity of the offender but it must not be entered later than ten years from the date of infringement of copyright.

Exceptions from Infringement Chapter 5, Section 30, 33 and 41 stipulate that exceptions are accorded for the following purposes: (1) research or study; (2) use for one's own benefit or use for one's own benefit and for the benefit of family members, relatives and friends; (6)... by a teacher for teaching purposes; (7)... by a teacher or educational institution, for distribution or selling to students in the class or in an educational institution, provided that it shall neither be made for profit or cause to the owner of the copyright greater injury than should be reasonably expected, having due regard to social justice in conferring benefits

to the owner of the copyright and to the necessity of providing education to the public.

Exceptions are also accorded to the librarian for, (1) reproduction for use in the library or for supplying to other libraries; (2) reasonable reproduction of certain part of the work for supplying to other persons for the purpose of research or study, provided they are not being made for profit-making purposes.

Moral Rights Thailand's copyright law also recognizes the Moral Rights of the authors. Chapter 2, Section 15 stipulates that in the case where the copyright had been assigned under Paragraph 2, the author still has a personal right to prohibit the assignee from distorting, abridging, adapting or doing any acts in relation to the work to such extent as to cause injury to the reputation or goodwill of the author.

3.7.1.2 International Copyright under Thailand's Copyright Act

Thailand became a member of the Berne Convention on 17 July 1931 but has yet to accept the Universal Copyright Convention.

Chapter 6, Section 42 of the Copyright Act deals with international copyright as follows: any work copyrighted by virtue of the law of a Contracting State to the Convention relating to the protection of copyright to which Thailand is also a Contracting State and the law of such country extends a reciprocal protection to the copyrighted works of the other Contracting States to the said convention or any copyrighted work of an international organization of which Thailand is a member, shall enjoy protection by virtue of this Act, subject to the conditions to be provided by a Royal Decree.

At present, the government is in the process of enacting legislation to include international copyright. Past attempts to legislate have not been successful and, at one time, led to the dissolution of the Parliament. During the past decade and with the rapid development and utilization of audio-visual technology, copyright has received increasing attention. In view of its rapid

economic development, Thailand is increasingly under pressure to revise the Copyright Act, particularly with regard to the improvement of clarification concerning copyright, patents and trademarks. Furthermore, it is noted that the country's copyright law protects only librarians in copying for research and study. Other librarian-like persons, such as directors of information centers, who are gradually and increasingly replacing librarians also need protection.³⁷ With the development of computer technology, more complications are encountered, particularly in relation to international copyright.

3.7.1.3 Infringement of Copyright in Thailand

In promulgating the copyright laws, Thailand has recognized the needs of society for access to knowledge, as indicated in the many exceptions for education purposes. There have not been many legal cases involving infringement of copyright for books. In general, publishers and authors are unwilling to seek judicial interpretation and to go to court, seeing it to be not worth the money and, especially, the time. Test cases are therefore rare. In all, there have been fewer than 10 cases involving infringement of copyright for books published in the country. The Supreme Court Judgement Relating to the Protection of Literature and Art Act is annexed as Appendix 3.12.

At present, translation works are increasing in number, judging from their availability in the market. Many of these translations appear to be carried out without proper licensing. Most translated works are popular bestsellers and comic books. It is obvious that the enactment of national copyright legislation alone is not enough, for it does not automatically bring about the desired results. Creating awareness and providing education to the public concerning the rights of those affected is vital and necessary to make the system effective.

3.7.2 Printing Act

As the relationship between publishers and printers in many cases is more than just a working relationship, information on the Printing Act is considered useful and desirable. Several printers

are publishers and many publishers operate their own printing presses. Thailand's current printing laws are based on the Printing Act, B.E. 2484 (1941). The Ministry of Interior has been designated as its administrator. The Printing Act is designed to deal with newspaper publication more than book publication. The Printing Act³⁸ contains these selected provisions:

The four persons mentioned in the Act, article 4, are (1) the printer (2) the publisher (3) the editor and (4) the newspaper owner. The printer means the person who manages and is responsible for printing. The publisher means the person who is responsible for the production of the printed matter and arranges for its distribution. The editor means the person responsible for making, correcting, selecting or controlling written articles or others in the newspaper. The owner means the person who owns the newspaper.

Printed matters printed in the kingdom must have the name of the printer and the name of the publisher. In book printing, one often sees "printer/publisher" as one and the same person. Such person is responsible for the printing press.

The Printing Act does not apply to the government's publications, minister's publications, cards, by-laws, or reports for business or personal uses.

The functions of the "Printer/publisher" (P/P) include: the following, (1) p/p must notify the authority of who and where they are (2) p/p must provide evidence that he/she is qualified as the p/p and is the p/p. (3) p/p must provide the name and location of the printing press (4) In case the printing press belongs to a person other than the p/p, permission to use the press must be obtained. Article 47 stipulates that the person who owns or controls the printing press is normally considered the p/p. All printed matter must bear the year of printing and name of printer, name and location of the printing press and name and address of the publisher. The fine for omission is 50 Baht (U.S.\$2.00). The publisher is required to submit printed matter (2 copies) to the National Library within seven days after printing. The fine is 12 Baht (U.S.\$0.50).

As of 1988, there have been a total of 285 titles on the

learned list carried in the official publication. The authors' names include several outstanding writers and personalities, including the chairman of the current Prime Minister's advisory council, the current Minister of Science, Technology and Energy, the current Vice Rector of Thammasat University, and several well known political scientists and poets. The Printing Act, B.E. 2484 (1941) is indeed one of the most outdated laws in the country. In practice, the Thai press has in general enjoyed considerable freedom, when compared with several other countries in the region. Attempts to have new legislation have not been successful but a draft is in the process of being prepared for submission to Parliament.

3.8 Supporting Industries and Institutions

3.8.1 Industries Supporting Book Publishing

3.8.1.1 Paper industry. Paper is probably the most important raw material for the printing industry, accounting for at least 30 percent of the book production cost. In addition to the cost factor, regular supply of the paper is also vital. Thailand has been fortunate in having a large pulp and paper industry. However, there is still a need for import of printing paper which is largely confined to special quality papers, such as for book covers. The consumption is theoretically within the country's total production capacity. Appendix 3.13 shows the supply and demand of printing and writing paper in Thailand, and Appendix 3.14 shows the supply and demand of newsprint, in relation to the country's production capacity.

3.8.1.2 The Printing Industry. The printing industry is an integral part of the publishing industry, both in theory and in practice. As earlier mentioned, survey of 90 publishers in Thailand revealed that about 18 percent have their own printing press, either in-house or as a subsidiary organization. As the printing industry increasingly develops and diversifies to include non-book printing activities, the need to have in-house printing facilities to meet the publishers' deadlines and commitments may not be as strong as it used to be when the printing industry served mainly

the publishing community. Printing is listed as item number 19 on the List of Target Export Industry of the Ministry of Commerce.³⁹ The growth of the printing industry, in terms of number of new establishments, investment and employment in the Bangkok area during 1969-1986, has been very impressive and is annexed as Appendix 3.15. The number of presses in the regional area has also been included for comparison, and is annexed as Appendix 3.16.

3.8.2 Professional Organizations.

There are a number of professional organizations directly and indirectly involved with one or more aspects of book publishing. Under the National Book Development Policy and Plan, there is a program to promote and support professional organizations concerned with book development. Another program under the National Book Development Plan is the establishment of the Office of the National Book Development Committee, with the Committee being the legal entity as a national body charged with book development and overseeing the activities under the Plan. Several associations involved in or related to book development are represented in the Committee.⁴⁰ These are as follow:

- The Writers Association of Thailand
- PEN Thailand
- The Library Association of Thailand
- The Publishers and Booksellers Association of Thailand
- Association for Technical Printing Promotion
- The Readers Association of Thailand
- The Federation of Newspapers of Thailand

It should be noted that the Thai Printing Association and the Printing Club within the Federation of Thai Industries as well as the more recently established Export Printing Club are not represented in the Committee.

Among the above-mentioned associations, the Publishers and Booksellers Association of Thailand (PUBAT) is the major professional association directly involved in book publishing. Its major activities include serving in the Book Development Committee, organizing national book fairs, and participation in international

book fairs and publishers conferences, as well as organizing periodic seminars and training workshops on subjects relating to book publishing and bookselling. PUBAT is in need of strengthening, technically and organizationally, in order to support effectively the development of the publishing industry.⁴¹

3.8.3 Education and Training for Book Publishing : Institutions and Program

Education and training for book publishing in Thailand may be categorized into 4 major groups of activities, as follows:

1. Formal education and training at colleges and university
2. Training workshops and seminars in and outside of Thailand
3. On-the-job training
4. Education and training in subjects closely related to book publishing.

At present, there is no degree program on book publishing. However, Srinakharinwirot University in Bangkok has offered a minor undergraduate program on book publishing since 1980. Courses offered are annexed as Appendix 3.17. As of 1989, a total of 145 students have opted for such program. Although the first group of students has joined the publishing industry after graduation, the majority of graduates are working in the area of their major degree.⁴²

In response to the country's need to upgrade the quality of book publishing, the University adopted, in 1985, a plan to offer a major degree program in book publishing. Consequently, Unesco's Division of Book Promotion, Audio Visual Archives and International Exchanges responded to the Royal Thai government's request for technical assistance and provided an expert to assist in curriculum planning.⁴³ The proposal to establish a new degree program on book publishing has yet to be approved, partly because of lack of teaching personnel and partly due to bureaucratic complications.⁴⁴

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CHAPTER IV

BOOK PUBLISHING AND NATIONAL DEVELOPMENT

4.1 Relationship Between Population, Income and Book Production

Thailand has a population of approximately 54 million (1987) and an annual growth rate of less than 2 percent. The average increase in population during the 11 year period, from 1977-1987, is approximately 1 million per year, from 43.4 in 1977 to 53.6 million in 1987.¹ For a small country with only slightly over half a million (514,000) sq.km., the population density is over 105 people per sq. km. In terms of GNP per capita, the increase is two and a half times for the same 11 year period, being 8,850 bahts (U.S.\$ 354) in 1977 and 22,370 bahts (U.S.\$895) in 1987.² The economic growth during the past several years has been impressive, and reached above 10 percent in 1988 and 1989.

With regard to book production, statistics for the same period show the increase in number of titles of books of about two and a half times, from 3,062 in 1977 to 7,620 in 1986. However, the increase has not been as gradual. Nevertheless, there appears to be a significant correlation between the GNP per capita and book production. Based on the average estimation of book production of 3,000 copies per title, it is revealed that in 1986 there was one book for every 2 to 3 people compared to one book for every 4 or 5 in 1977, indicating a significant improvement in the past decade. Table 4.1 shows the changes in population and GNP per capita in relation to book production. The relationship is also illustrated in Figure 4.1.

4.2 Book Publishing and National Educational Development

Book publishing in Thailand, as in many other countries in the Third World, is linked closely to the educational system, which is the major purchaser and user of books.³ After a long history of development of the educational system and a huge amount of resources allocated to the educational sector, Thailand is now claiming that it has reached universal enrollment in mandatory primary education.

TABLE 4.1

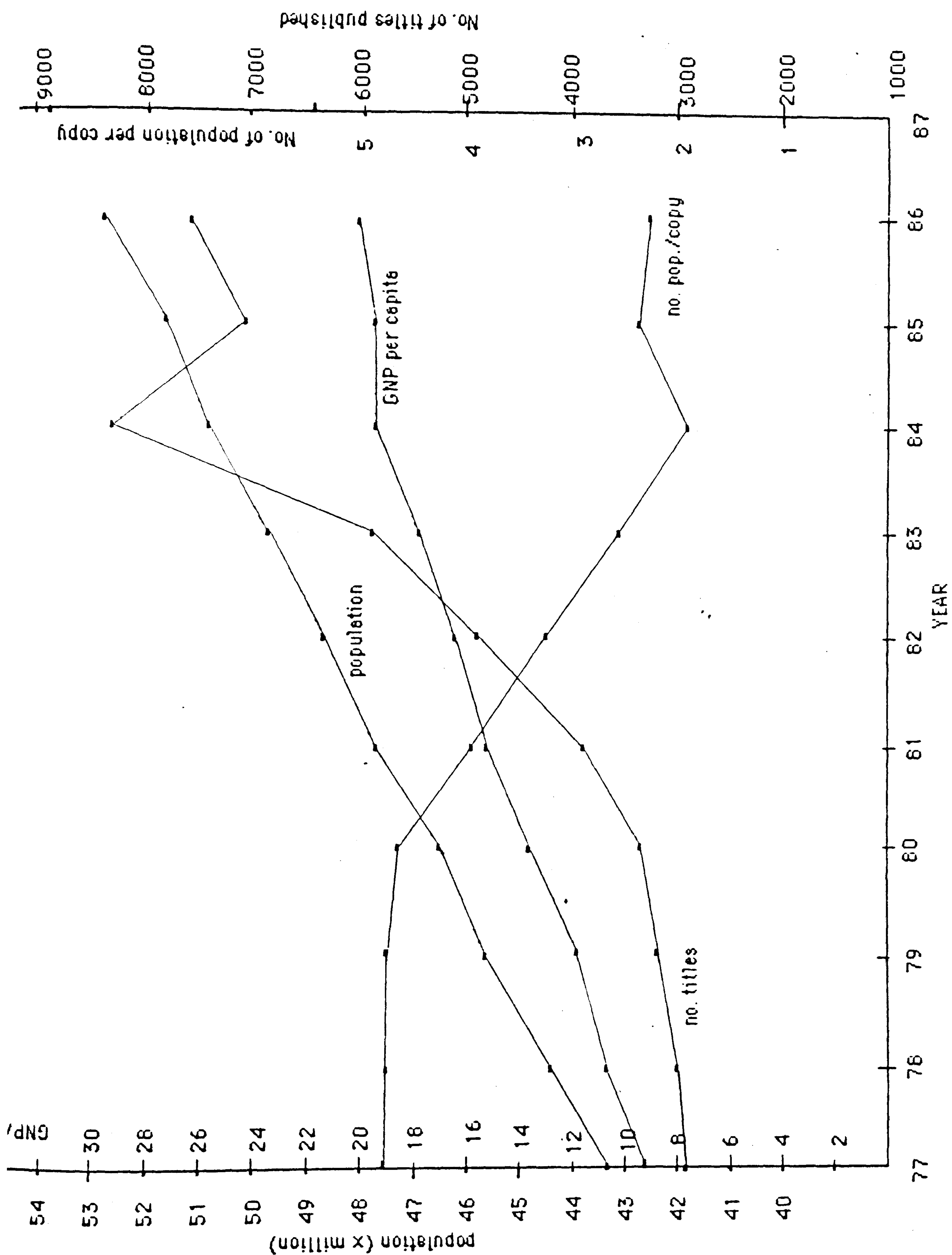
Relationship between Population, Economic Status and Book Production

	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>
Population(million)*	43.4	44.5	45.5	46.7	47.7	48.7	49.7	50.7	51.7	52.6	53.6
GNP per capita(B 1,000)*8.85	10.90	11.98	13.98	15.67	16.56	18.16	18.97	19.29	20.46	22.37	
Economic Growth(%)*	9.9	10.4	5.3	4.8	6.3	4.1	7.3	7.1	3.5	4.7	7.1
No. of Books(titles)	3,062	3,151	3,224	3,370	4,003	4,950	6,186	8,392	7,136	7,620	-
No.of Population/title	14,174	14,123	14,113	13,858	11,916	9,838	8,034	6,041	7,255	6,903	-
No.of Population/copy**	4.7	4.7	4.7	4.6	4.0	3.3	2.7	2.0	2.4	2.3	-

SOURCE : * Economic and Social Commission for Asia and the Pacific, Statistical Yearbook for Asia and the Pacific 1988

(Bangkok: Economic and Social Commission for Asia and Pacific, United Nations), 1989

** based on the average estimate of 3,000 copies per title.



With a decline in the population growth rate and the need to develop a middle level of manpower to cope with the country's rapid industrialization, the government is currently contemplating the possibility of extending compulsory education to the lower secondary level.⁴ The number of students in the formal school system at various levels of education during 1983-1987 is annexed as Appendix 4.1 and the projected number of students enrollment for the period 1987-1991 is annexed as Appendix 4.2. From the book industry's viewpoint, schools and universities represent a substantial market for books, particularly textbooks and supplemental reading books. In Thailand, the Government, through the Ministry of Education, issued a ministerial rule, ME 419/2522 (1979), regarding the use and control of the use of books for primary and secondary schools where by endorsement or approval by the Ministry is required.⁵

Appendix 4.3 provides average general expenditure on education in public schools, and suggest that expenditure on books, materials and equipment account for about 20 percent of total expenditure on education. The expenditure on primary education, which is mandatory, is, according to data presented in Appendix 4.3 only about 4 percent of the average GNP per capita, being 748 bahts against 18,160 bahts, compared to about 16 percent for lower secondary education. The Government, thus, is heavily subsidizing education, allocating enormous resources for educational development. The annual educational budget during the past two and a half decades is annexed as Appendix 4.4 while Appendix 4.5, budgetary appropriations by functional classification, shows that educational budget is among the highest in comparison with the other sectors.

The estimation of the trade value of the school book industry, including supplementary readers, as presented in chapter III (3.5.2) is in the level of 608.95 million bahts, which is the third highest among the various sectors of the book industry. The current emphasis in education is on expanding compulsory education, developing functional education and organising various types of non-formal education in rural areas. Primary education has been

allocated the largest amount during the past several years. The request for 1989 fiscal year is about 56 percent of the total education budget.⁶

4.3 Impacts of Government Policy and Planning on Book Publishing

Thailand's publishing industry has been serving mainly the local or internal markets. As such, it may be significantly affected by government policy and planning.

4.3.1 National Book Development Policy The policy which is directly related to the book industry is the National Book Development Policy from which is derived a national book development plan. The policy and the development plan, which had been developed by the Book Development Committee under the Thai National Commission for Unesco, were approved by the Cabinet in 1987.¹¹ The Policy provides strong support to the book publishing industry. The National Book Development Plan¹² outlines six major programs as follows:

- Program to promote and support the creation of manuscripts of standard quality through personnel development, research, education and training as well as creating awareness and understanding of intellectual property rights and protection.

- Program to promote and support publishing through market and need assessments, introduction of tax measures to lower production costs and personnel development.

- Program to promote and support printing and binding to improve quality as well as lower production costs.

- Program to promote and support sales and distribution through research, book promotion activities, setting up cooperatives for distribution and postage measures.

- Program to promote reading habits through education and training, reading habit campaigns, increased library services both in quantity and quality, including community reading centers.

- Program to support professional organizations concerned with book development through the formal establishment of a high-level Office of the National Book Development Committee.

It should be noted that, at present, the Book Development Committee operates under the framework of the Thai National Commission for Unesco, while the Book Development Center, the committee's Secretariat, is a division under the Department of Curriculum and Instruction Development. For these programs to be implemented, the Plan calls for the legislation of the National Book Development Committee.¹³ However, such legislation has yet to materialize.

4.3.2. Educational Policy The aspect of policy which has the greatest impact on book industry is undoubtedly education policy. Eighteen percent of the total population, or about 10 million people, were in school in 1986; this constitutes a huge market for the book industry. Of the student market of 10 million, 70 percent is at the mandatory primary level. Nevertheless, the government's policy of strict control and monopoly over school book production, especially at the primary level, has undoubtedly affected commercial book production.

The status of private book publishing began to improve in 1978 when the Ministry of Education included supplemental reading in the school curriculum.⁷ In 1983, the government launched a campaign to promote reading habits in response to a resolution of the World Congress on Books held in London (1982) organized by Unesco.⁸ As part of the campaign 'Towards a Reading Society', the government encouraged the private sector to produce books to supplement production by the government. One of the incentives introduced was the scheme of selecting 'good' books for recommendation to schools and libraries. In 1985, as many as 1,200 titles published during 1981-1984 were reviewed and 124 selected.⁹ Such measures resulted in a drastic increase in book production in 1984, as shown in Figure 3.1.

As the government is contemplating extending mandatory education to the lower secondary level, there is a great expectation among commercial book publishers with regard to the potential increase of the school book market. School curriculum change in 1991 will also require production of new school books.¹⁰

4.3.3 Science and Technology Policy In the Fifth National Development Plan (1982-1986) science and technology was emphasized for the first time. Consequently, the production of books on science and technology subjects was substantially increased during the 5-year period, as can be seen in Figure 4.2 for pure science group books and in Figure 4.3 for applied science group books, respectively.

Details of book production by subjects is annexed as Appendix 4.6.

4.4 Book Production and Availability Contributing to Social and Cultural Development

4.4.1 Unesco's Book Development Program and Cultural Development The contribution of book publishing, and the role books play in the social and cultural development of a nation, have been generally and widely recognized. Unesco has for many years been active in promoting book publishing and production with the objective of helping developing member countries in their social and cultural development. Notable among the various programs initiated or supported by Unesco is the creation in 1971 of the Asian Cultural Center for Unesco (ACCU) which was established for the promotion of book development, culture and literacy in the Asia/Pacific region.¹⁴

Under the Book Development Program are the following major activities:

- Co-Publication of Children's Books Program, launched in 1970, with a view to providing good and inexpensive books for children in the region and also to promote international understanding and a sense of solidarity through these books. Under this program, ACCU organizes annual meetings of experts from Unesco member states in Asia and the Pacific to prepare work plans to develop materials for ACCU to compile and publish as English master editions from manuscripts and illustrations submitted from participating countries. The English master editions are then distributed to the respective countries, which in turn arrange

FIGURE 4.2

Number of Titles of Pure Science Group Books (1968-1986)

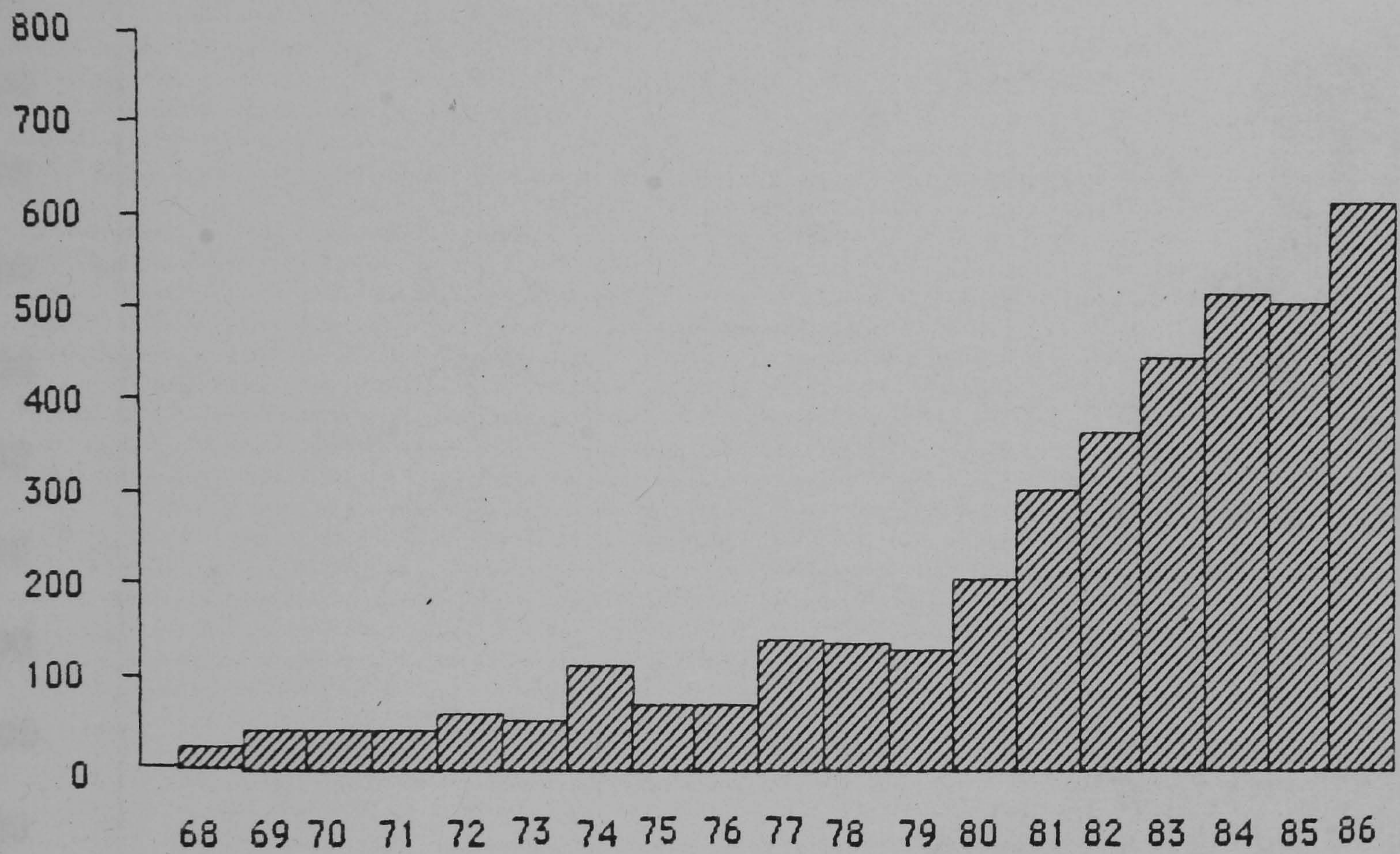
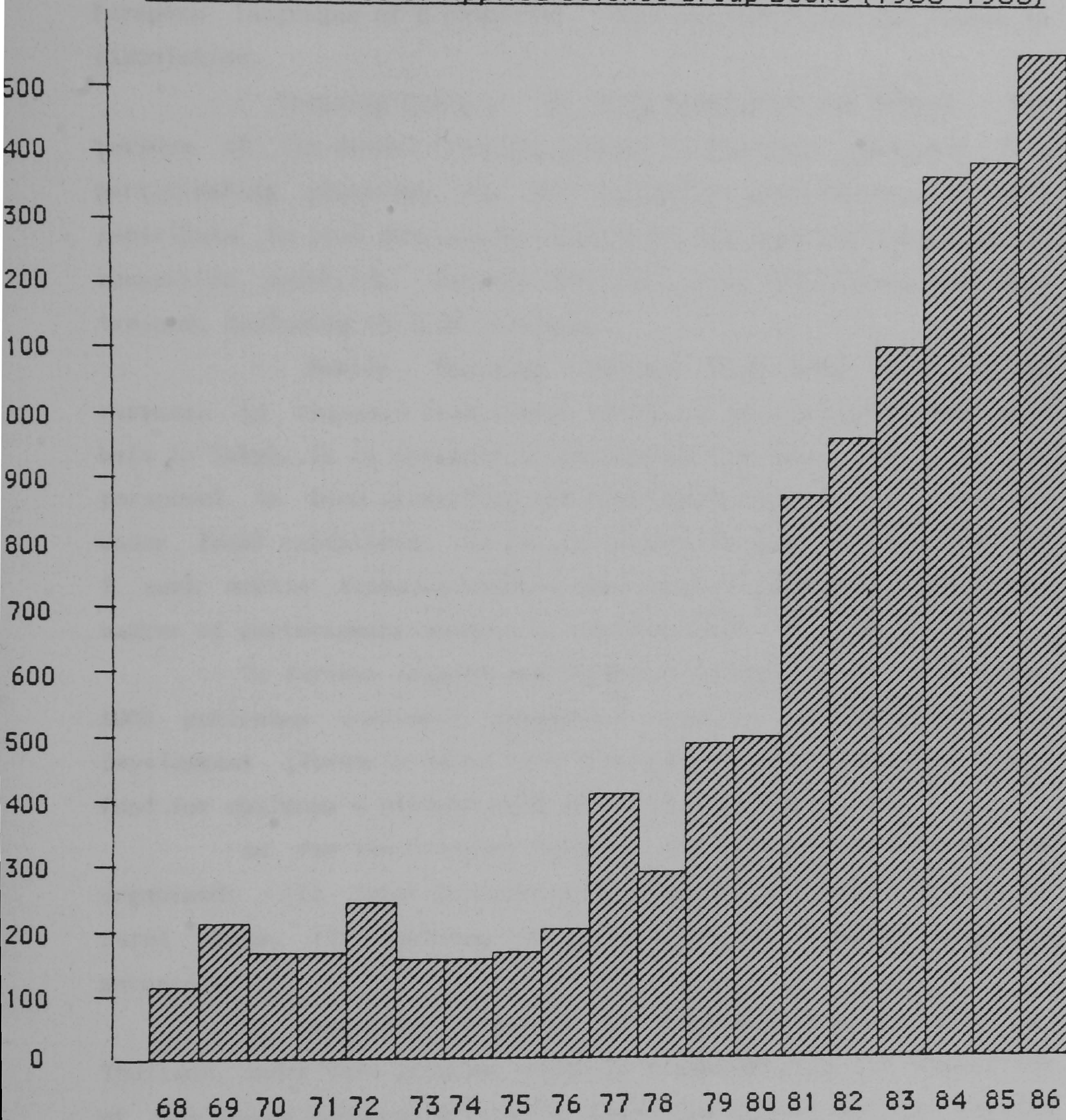


FIGURE 4.3

Number of Titles of Applied Science Group Books (1968-1986)



national language editions for their children. Twenty titles have been published as of 1988. These master editions have been translated and published in 26 Asian languages of 18 countries, and 9 European languages of 8 countries, reaching over 3,134,000 copies in circulation.

- Training Courses on Book Production (in Tokyo). The purpose of the annual training courses is to train personnel from participating countries who are currently contributing or will contribute to book development activities and book publishing in the respective countries. Between 1967-1988, over 380 persons have been trained, including 40 from Thailand.

- Mobile Training Courses have been organized in response to requests from member countries in addition to the ones held in Tokyo. It is designed to strengthen the capability of national personnel in book production and book publishing through activities under local conditions. So far, 15 countries have been visited, and 2 such mobile training courses were held in Thailand. The total number of participants amounts to approximately 900.

To further support and promote such and related activities, ACCU publishes quarterly newsletter entitled Asian/Pacific Book Development (formerly Asian Book Development) and established a Noma Fund for children's picture book illustrations competition.

As for the Literacy Program, the following activities are organized: (1) joint production of materials for neo-literates in rural areas. (2) Workshop on preparation of literacy follow-up materials.

Of particular interest to developing country, such as Thailand, under this program, which is organized with the cooperation of the Unesco Regional Office for Education in Asia and the Pacific (ROEAP) in Bangkok, Thailand, is the joint production of a guidebook for Development and Production of Materials for Neo-literates, published in 1983.¹⁵

The importance of books in cultural development is highlighted by the Editor-in-Chief's Notes in a 1988 issue of the Asia/Pacific Book Development (ABD) Newsletter that, Asian/Pacific

countries are undergoing rapid modernization affecting even the most remote rural villages, and consequently, cultures and traditions which have been passed down from generation to generation may soon be irretrievably lost. Each country in the region is striving to preserve and foster these traditions. As part of this effort, ACCU has produced numerous books, music tapes and slides, contributing to greater awareness and understanding of the cultures of the region among both children and adults.¹⁶ Collection of oral traditions is included within Unesco's programs. It is further strengthened by Toshio Ozawa's statement in his article on "Collecting and Writing Stories from Oral Folklores" (1988) that "publications make possible the handing down of many tales to many children."¹⁷

In recent developments, in the 1988-89 program budget of Unesco, activities relating to books and reading have been transferred to Major Program XI, "Culture and the Future", and brought together in a new program, "Development of Books and Reading". The transfer of books to Major Program XI results from a concern to reinforce the cultural approach to the problems linked to the development of books and reading, in order that books should be seen both as a means of communication and as a vehicle for cultural dissemination.¹⁸

Thailand has actively participated in ACCU and ROBDAP programs. Along with China, Japan, Malaysia and the Republic of Korea, Thailand has been among the most active.¹⁹

4.4.2 Funeral Books. Thailand has had a tradition of producing books for distribution at the funeral in memory of the deceased. The tradition was started in 1880 during the reign of King Rama V and has since been widely adopted.²⁰ Funeral books are generally educational in nature and are on various subjects. The book usually includes a biography of the deceased, in memory of whom the book has been produced. They are considered to be valuable and rare books. A special library for such books has been set up and open to the public since 1972. It is located at Bavornives Temple in Bangkok and is operated by volunteer librarians from various institutions.²¹

4.4.3 Book Production and Donation During the National

Literacy and Reading Promotion Campaigns. National programs such as the National Literacy Campaign (1983-1987) and the Reading Promotion Campaign (1984-1987) have contributed significantly to the wider availability of books among the general public, particularly the rural poor. In 1986, as part of the Literacy Campaign, over one million books were donated by the general public to 2,771 Buddhist temples throughout the country, to set up village reading centers, in response to the appeal made by the Ministry of Education to make merit in the form of book donation.²²

In order to increase the supply of reading materials to the rural areas, several other measures were carried out,²³ including the following:

- a series of 50 pictorial booklets dealing with a wide variety of topics developed with the cooperation of professional writers, were distributed to every village of the country.

- a major campaign to donate used books for villagers was conducted. Over a one-year period, about 10 million books and magazines were donated by the general public. These printed materials were selected and sent to rural schools, village reading centers and public libraries throughout the country.

- a private organization named "Good Books for Villagers" was set up to promote production and distribution of appropriate books for villagers. The organization produces low-cost printed materials for sale, certifies books which are appropriate for villagers and encourages both book publishers and the general public to support increased supply of books to rural areas.

Along with the campaigns to eradicate illiteracy and to increase the flow of reading materials to the rural areas, the Government also launched a nationwide Reading Campaign in 1984, aimed at promoting the reading habit among children, young people and the general public. Activities, which are still being undertaken, include reading competitions, book exhibitions, reading circles, animated book presentations and story-telling, training workshops, and development of reading promotion manuals.²⁴ In addition, each of the Village Reading Centers receives two newspapers per day and

other periodic reading materials and handbooks. Through these measures, rural communities have greater access to quality books at no or very little cost to themselves.

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- ⁶ Office of the National Education Commission, National Educational Plan, Sixth Plan (1987-1991) (Bangkok : Office of the Prime Minister, 1986), p.161. (Thai)
- ⁷ Preecha Laebangoh, "1000 Million Baht Textbook Trade War", Prachachart Business, 27-29 July 1989, p. 39 (Thai)
- ⁸ Department of Curriculum and Instruction Development, "Campaign to Promote Reading Habit Project", Report of Workshop on Campaign to Promote Reading Habit October-december 1985 (Bangkok : Ministry of Education, 1986) p.447. (Thai)
- ⁹ Ibid., p. 505.
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- ¹¹ Book Development Committee, National Book development Policy and Plan (Bangkok: Book Development Committee, Book

Ministry of Education, 1986) p.447. (Thai)

⁹ Ibid., p. 505.

¹⁰ Preecha Laebangoh, "1000 Million Baht Textbook Trade War", p. 40.

¹¹ Department of Curriculum and Instruction Development, Policy and National Book development Plan (Bangkok: Ministry of Education, 1988), p. foreword.

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¹³ Ibid., p.8.

¹⁴ Asian Cultural Centre for Unesco, Asian Cultural Centre for Unesco 1989-90 (Tokyo : Asian cultural Centre for Unesco, 1989). p. 1.

¹⁵ Ibid., p. 12-14.

¹⁶ Taichi Sasaoka, "Editor-in-Chief's Notes", Asian/Pacific Book Development Newsletter, Vol. xix, No. 1 (1988), p.2

¹⁷ Toshio Ozawa, "Collecting and Writing Stories from Oral Folklore", Asian/Pacific Book Development Newsletter, Vol.xix, No.1 (1988), p.3.

¹⁸ "ROBDAP News", Asian/Pacific Book development Newsletter, Vol. xix, No. 1 (1988), p 23.

¹⁹ Asian Cultural Centre for Unesco, Asian Cultural Centre for Unesco 1989-90, p.41.

²⁰ S. Sivaraksa, "Tradition of Book Giving", Song Siam (Bangkok : Song Siam, 1989), p.20. (Thai)

²¹ Nualchan Ratanakorn, Chutima Satchanun, and Marasi Sivaraksa, Miscellaneous on Books during the Ratanakosin Period (Bangkok : By the Authors, 1981), p. 248-249. (Thai)

²² Ministry of Education, Department of Non-formal Education, Thailand's Experiences in the Promotion of Literacy (Bangkok : Minsitry of Education, 1987), p. 33.

²³ Ibid., p. 29.

²⁴ Ibid., p. 29-30.

CHAPTER V
CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

5.1.1 The development of book industry in Thailand has been largely influenced by Unesco's various educational and development assistance programs (see para. 2.4.1.2 and 4.4.1) as well as the country's relatively high economic growth rate, especially during the past two decades (see para. 4.1). Other contributing factors include the fact that the Thai language is the one and only written language for the nation of over 54 million people and the impact of westernization, social movement and political reforms, leading to greater public education, democratization and freedom of the press.

5.1.2 Although book production has significantly improved in terms of quantity, reaching an annual average total production of over 7,000 titles since 1984, it is unfortunate that editorial work, considered one of the most essential components of quality book publishing has yet to play a significant role in book publishing, in Thailand (see para 2.7.2). Concerned professional organizations such as the Writers Association of Thailand and the Publishers and Booksellers Association of Thailand have not been adequately recognized as potential tools for the development of quality book publishing (see para. 3.8.2). Furthermore, the Book Development Committee's current status and scope of responsibilities are limited within the mandate of the Thai National Commission for Unesco (see para. 2.4.1.1 and 4.3.3).

5.1.3 Commercial publishers play an important role in the book publishing industry with commercial book production accounting for half or more of the total number of titles published, gradually increasing from slightly over 50 percent in 1981 to over 70 percent in 1986. Economically speaking, the total trade value of commercial book production appears to be insignificant in terms of the country's gross national product, being approximately 0.25 percent in 1987 (see para 3.5.2). Constraints on the development of commercial book

publishing include (a) the lack of basic understanding between book publishing and book production or book printing (b) the lack of appreciation of a need for market research in the book industry in general, and (c) weak professional organizations (see para. 3.7.2, 3.6 and 3.8.2 respectively). Consequently, manuscripts reach printers without proper editing and the books produced are often unattractive to potential readers or do not meet with market demand.

5.1.4 The availability of books to readers, estimated to be about one book for every 2 to 3 people in 1986, is considered somewhat low for a country with a good transportation system and a high literacy rate of almost 90 percent. The increasing popularization of book renting shops and recent research findings indicate a strong interest and demand for good but low-cost books by readers, particularly among those with secondary education and higher. The projected continuation of high economic growth rate and the government's plans to extend the mandatory education into the lower secondary school level as well as to give strong emphasis on non-formal education are some of the bright prospectives for further development of book publishing in general and commercial book publishing in particular (see para. 4.1 and 4.2).

5.2 Recommendations

5.2.1 As reliable statistics are a prerequisite for effective development planning, it is recommended that national statistics on book production be compiled and published as part of the regular national statistics compilation, and not merely in response to Unesco's international statistics compilation program as is the case at present. Moreover, it is strongly recommended that the Book Development Committee, currently operating under the Thai National Commission for Unesco, be upgraded to become a National Book Development Committee independent of the National Commission for Unesco. It is desirable to also upgrade the Book Development Center to become the National Book Development Center serving as secretariat to, and office of, the National Committee with expanded responsibilities to include non-textbook development and promotion.

To achieve the above, it is necessary to integrate the National Book Development Center and the National Library of Thailand into a single national machinery for the promotion of book development and distribution, possibly at the departmental level with a legal entity.

5.2.2 Commercial publishers, being responsible for a larger share of the country's total book production, should be given a greater role to play in the promotion of book development. Specifically, it is recommended that the private sector be given a greater role in the National Book Development Center. To accomplish the above, the Publishers and Booksellers Association of Thailand must first be strengthened to become a more effective professional association with increased credibility which can command due recognition from all concerned. The association could and should actively participate in the Federation of Thai Industries which is represented in the high-level Joint Public-Private Sector Consultative Committee. The government's policy to encourage the private sector to play a leading role in industrial and national development provides an excellent opportunity for commercial publishers to consolidate their position in lobbying for greater participation in the development of book publishing industry.

5.2.3 Finally, serious attention should be given by all concerned to the educational aspects of book publishing, ranging from creating awareness and basic understanding for the need and role of editorial to the development of a standard style manual by key organizations concerned with book development, and from organizing informal training workshops to degree programmes on publishing in universities.

APPENDIX 1.1

List of Personnel in Book Publishing and/or Book World Interviewed

1. Akkapin, Pisnu; Manager, Suriyaban
2. Ande, Diethard; Owner, Manager, White Lotus
3. Anunart, Aree; Secretary to the manager, Aksarapipat
4. Apinantanapongse, Kiat; Sales Manager, SE Education
5. Aroonsiri, Prasert; Owner, Manager, Dheerasarn
6. Artniam, Marisa; Account, Suksaporn
7. Aswakul, Chakphan; Owner, Murkchin
8. Atsawanaranan, Sunee; Owner, Manager, Prannokvithaya
9. Attajariya, Wuthiwat; Manager, Samosorn Nakkai
10. Banditwatanawongse, Poolchai; Owner, Manager, Panya Book
11. Bhaigasuyee, Chintana; Assistant Secretary General, Book Development Center
12. Boonpeng, Areerat; Relative, Bongkot
13. Bubpasiri, Kasem; Employee, Kled Thai
14. Bunkrob, Songklod; Employee, Carat
15. Chaipanich, Thongdee; Owner, Bangkok Medical
16. Chaiwongkeit, Deeprom; Manager, Agricultural Technology Transfer Forum
17. Chalermchaikit, Buncha; Employee, Sukapabjai
18. Chaovanabutvilai, Prachark; Manager, Klang Vidhaya
19. Chirabandarnsook, Nittaya; Owner, Manager, Bandarnsarn
20. Chonglertchanya, Amnuay; Owner, Amnuaysarn
21. Chonglertchanya, Tananakorn; Manager, Amnuaysarn
22. Chongpipatanasuk, Roengchai; Directing Manager, Watana Panit
23. Chongsatitwatana, Suwadee; Manager, Nan Mee
24. Choomwattana, Pornthip
25. Chotrat, Uthit; Employee, Nititham
26. Chotsorayut, Tanong; Employee, Science Engineering & Education
27. Chot-Arun, Vanisa; Sales, Saeng Dad
28. Comwatjanung, Siripen; Employee, Sainum Book
29. Dhevaaksorn, Surapol; Technical Division Manager, Aksorn Charoentat
30. Dhevaaksorn, Sutat; Managing Director, Aksorn Charoentat
31. Gururatana, Somwang; Lecturer, Faculty of Education, Srinakarinviroj Univ.
32. Homtientong, Charun; Owner, Sangdao

**PAGE
NUMBERING
AS ORIGINAL**

33. Hongwiwat, Nidda; Owner, Managing Director, Saeng Dad
34. Hosakultai, Jiranan; Employee, Saeng Dad
35. Intanon, Suchit; Library Data Information Section, National Library of TLD
36. Janjamaras, Rungroj; Employee, Panaya
37. Jermplang, Suthin; Sales, Far East Publilcations
38. Jongpipatyiang, Thanomsak; Owner, Manager, Liang Chiang
39. Jongrak, Anongnuj; Secre. to the Manager, Chet Studio and Graphic Design
40. Jubdhabuddha, Montira; Manager, Pasit
41. Jubdhabuddha, Montira; Owner, Soms
42. Kaewvised, Sunisa; Employee, Murkchin
43. Kangwarntsaichol, Amornrat; Assistant Manager, Bhannakij
44. Karnchanachari, Karnitha; Manager, SVITA
45. Keatkajonchai, Piya; Employee, Thanyanij Marketing
46. Khowbo, Preeda; Owner, Maekampang
47. Kiewploy, Anong; Library Data Information Section, National Library of TLD
48. Kittiwangchai, Niwat; Assistant Manager, Bandarnsarn
49. Kulruangsap, Yupadee; Manager, Editor, Dokya
50. Kumphai, Buphawan; Employee, Sukapabjai
51. Lakanantakul, Siriporn; Deputy Manager, Aksornbundit
52. Lamnao, Arun; Employee, Saichai
53. Lamaytong, Sunya; Employee, Far East Publications
54. Laohakasemwongse, Suchai; Bangkok Guide
55. Laorlodwongse, Sittichai; Manager, Saiaksorn
56. Leemahasarn, Ekain; Assistant Technical Manager, Aksorn Charoentat
57. Limpichart, Maitra; Publisher
58. Limmumethee, Adchara; Owner, Nang-Ja
59. Lohthong, Kitt; Sale Manager, Siam Sport
60. Loohakasemwong, Suchai; Owner, Manager, Bangkok Guide
61. Lowatanatrakul, Somsri; Chief Accountant, Aksorn Charoentat
62. Manasnom, Tawin; Owner, Gor Gai
63. Meechit, Surachot; Sales and Administration, Media Focus
64. Meesawat, Supot; Information, Ota House
65. Meewong-Ukot, Lamon; Relative, Siambun
66. Mitrakul, Thida; Sales, Kanok Bannasan
67. Muangpan, Kamontip; Employee, Vocabulary Center

68. Mungkalakeeree, Kittiphot; Employee, Muangboran/Pla Ta Pien
69. Nampon, Ratchansek; Employee, Sitsadue
70. Nichailak, Roungrai-Rachanee; Owner, Nitiwaid
71. Ninpet, Sirinee; Secretary to the Directing Manager, Watana Panit
72. Nitchoroennam, Nittaya; Manager, Hor Samutklang 09
73. Niyomket, Tesapak; Owner, Tesapak
74. Nopkit, Suchin; Proj. Manager, Tech. Promotion Asso. (Thai-Japan)
75. Panyangarm, Pranom; Director, National Library of Thailand
76. Petnamek, Chairat; Owner, Manager, Krobkrua
77. Petnamek, Tientip; Manager, Koobkona
78. Phadungath, Suwakhon; Head of Library Data Information Section, National
Library of Thailand
79. Phopiti, Rachanee; Employee, Nititham
80. Pinchaleo, Vatin; Owner, P.V. Publication
81. Pipitarangsri, Chantana; Owner, Bongkot
82. Pipitarangsri, Siriporn; Owner(Daughter), Bongkot
83. Pluwungkhan, Vanich; Manager, Chakkarn
84. Poome, Montree; Employee, Kamol Keemthong Foundation
85. Pongsathit, Puangthong; Library Data Information Section, National
Library of Thailand
86. Praepanich, Chit; Owner, Managing director, Prae Pittaya
87. Praepanich, Thanom; Owner, Manager, Prae Pittaya
88. Praepanich, Vichai; Owner, Manager, Odeon Store
89. Prasertkitwong, Varin; Employee, Ruamtat
90. Pravapruk, Kowit; Director of Book Development Center
91. Pruksapong, Prapas; Owner, Nitibunnakarn
92. Puangmanee, Suasri; Employee, Far East Publications
93. Pruksapong, Sopis; Relative, Nitibunnakarn
94. Puapoomcharoen, Thavil; Marketing Manager, Plan
95. Puennak, Supa; Manager, Aksornwattana
96. Puennak, Supa; Owner, Ekkalak
97. Putta, Suparat; Sales, Ota House
98. Rabiltosporn, Chinda; Employee, Bannakarn
99. Rattanamongkol, Poonsap; Employee, Sangdao
100. Rattanatayatikoon, Angkana; Relative, Sukasaporn

101. Rattanavich, Saowalak;
102. Raungpaka, Rinda; Employee, Murkchin
103. Ritcharoen, Prinya; Assistant Secretary, Book Development Center
104. Ritruang, Sureeya; Account, Poombandit
105. Rojanaprapayon, Rasri; Shareholder, Chokchai Dheves
106. Rojpojjanarat, Wisit; Owner, Manager, Pattana Saksa
107. Ruchiravanitthep, Taveesak; Owner, Niyomvithaya
108. Saetiew, Pisamai; Employee, Aksorn Charoentat
109. Sakhatham, Suthirak; Owner, Dhanmasapa
110. Sankapitak, Sod; Manager, Abhidhamma Foundation
111. Santivatana, Pornpimol; Manager, Odeon Store
112. Santivatana, Prasarn; Marketing Manager, Odeon Store
113. Sanya, Sriduam; Manager, Daipan Interact
114. SatapornSatit, Santi; Marketing, Komol Keemthong Foundation
115. Satchukorn, Yenrudee; Head of Serials Section, National Library of Thailand
116. Seedaeng, Sutin; Employee, Kled Thai
117. Sinlapadeelertkul, Yuwadee; Owner, Managing Director, Buraphasarn/Silapa
118. Sinsoongsud, Warin; Owner, Manager, Saichai
119. Siributr, Siri; Former Director of Book Development Centre
120. Siripaisarnkul, Sirisak; General Manager, Tanaban
121. Sirisingh, Wiriya; Owner, Manager, Chomromdek
122. Siriwarangkul, Danai; Owner, Manager, Buraphasarn/Silapabanakarn
123. Siriwarangkul, Maliwan; Owner, Assistant Manager, Buraphasarn/Silapabana
124. Somanawattana, Somkhuan; Owner, Manager, Duang Kamol (siam Square)
125. Soongsawang, Nussara; Owner(wife), Manager, Electronics World
126. Soongswang, Suk; Managing Director, Duang Kamol
127. Sukavaj, Harin; Production Designer, Kled Thai
128. Sumanik, Mara; KU Book
129. Sumnawong, Pravrit; Owner, Sernvidh Bannakarn
130. Susomboon, Oraphin; Assis. to the Sales Manager, Siam Rath
131. Suthiwong, Ampa; Employee, Pasit
132. Suwanakul, Pongkaset; Owner, Chevij
133. Tabnanon, Atchara; Employee, Metsai
134. Taeng-orn, Prateep; Employee, Bangkok Medical
135. Tandabatra, Boonsong; Relative, Sermvidh Bannakarn

136. Tantiniran, Watin; Owner, Manager, Panaya
137. Tarapornsakulwong, Manit; Coordinator, Bangkok guide
138. Taweewatanasarn, Bamroong; Owner, Managing Director, Bumroongsarn-Ruamsarn
139. Taweewatanasarn, Nongyao; Owner, General Manager, Bumroongsarn-Ruamsarn
140. Taweewatanasarn, Piti; Owner, Manager, Bumroongsarn/Ruamsarn
141. Techakasem, Chumsri; Assistant Sales Manager, Kasembannakit
142. Techakasem, Serm; Manager, Kasembannakit
143. Techakasem, Somsak; Owner, Managing director, Bhannakit
144. Techakasem, Usanee; Supervisor, Bhannakit
145. Techawanit, Amongnart; Head of Aquisition Section, National Library
of Thailand
146. Techawattananant, Pijit; Manager, Pittayakarn
147. Temsamrit, Sirikul; employee, Supa
148. Thasai, Surin; Manager, Medical Media
149. Treenetsumpun, Boonlert; Marketing, Sangsarn-Vichakarn
150. T. Suwan, Teera; Owner, Manager, Thai Wattana Panich
151. Umpaivan, Malee; Owner, Manager, Aksarapipat
152. Upalapan, Thanapong; Owner, Manager, Sainum Book
153. Utamote, Pakavadi; Owner, Carat
154. Vaikayee, Daranee; Library Data Information Section, National Library of
Thailand
155. Valanasathien, Ladawan; Daughter, Punditthai
156. Vatananukit, Prakit; Owner, Ton-Or
157. Vatanasathien, Komkrit; Owner, Pubditthai
158. Vejsuwan Arun; Owner, Arunwitthaya
159. Viengnon, Buapan; employee, Panaya
160. Visarata, Chuan; Owner, Liang Siang Chongcharoen
161. Wasanapachok, Sriarun; Sales, Saeng Dao
162. Wattananusit, Prachak; Head of Gifts, Exchange and Interlibrary Loan
Section, National Library of Thailand
163. Witkoontien, Gaew; Manager, Folk Doctor
164. Wongchanachai, Prasit; Owner, Supa
165. Wongchanachai, Supa; Owner, Manager, Supa
166. Wongchanajitchok, Likit; Production, Kanok Bannasan
167. Wongthaveekiet, Thaveechai; Relative, Prasarnmitr

- 168. Wuthichaisaranont, Sanya; Owner, Manager, Prapasarn
- 169. Wuthiwai, Siwawut; Owner, Thamabucha
- 170. Yamkaew, Panya; Relative, Arunwitthaya
- 180. Yinnang, Somkuan; Sale Manager, Prae Pittaya
- 181. Yodchomyan, Somsak; Employee, SE Education

APPENDIX 1.2

List of Personnel in Book Shops and Book Distributors Interviewed

1. Ammataphan, Sutat; Manager, Sichaisuksaphan, Sakon Nakhon
2. Ammataphan, Tatsana; Sales Manager, Sichaisuksaphan, Sakon Nakhon
3. Amornpimon, Manus; Manager, Pittayakarn, Yala
4. Anantakul, Upin; Owner, Manager, Bannakit, Phangnga
5. Anessaranon, Boonchuay; Owner, Suphan Karnreain, Suphan Buri
6. Anessaranon, Preecha; Owner, Suphan Karnreain, Suphan Buri
7. Banyatnopparat, Prapon; Manager, Praponsarn, Mukdahan
8. Boon Vanich, Thongpoon; Manager, Srithai Panich, Phetchaburi
9. Boon Vanich, Watjana; Manager, Srithai Panich, Phetchaburi
10. Boonthong, Boonchuay; Assistant Manager, Nara Panich, Nan
11. Boonthong, Nara; Owner, Manager Nara Panich, Nan
12. Boonyaphaisarncharoen, Taweesak; Owner, Vidhaya Center, Sing Buri
13. Boonyaphaisarncharoern, Prakit; Owner, Simuangsingha, Sing Buri
14. Buasuwan, Sunee; Owner, Charoenphan, Nan
15. Buasuwan, Surachart; Owner, Charoenphan, Nan
16. Bunkhrob, Banchong; Choomnoom Nangsue Distributor, Bangkok
17. Cha Cha, Adul; Owner, Farida, Satun
18. Cha Cha, Fatima; Owner, Farida, Satun
19. Chainapong, Jongjit; Owner, Lamthong Panich, Yala
20. Chaleowsak, Pairoj; Owner, Suwannapoom, Yala
21. Chanapong, Prawaid; Relative, Lamthong Panich, Yala
22. Chatmanop, Preeprem; Manager, Sahayon Newspaper, Nakhon Sawan
23. Chitchopjai, Praphon; Owner, Chantrathit, Chachoengsao
24. Chitchopjai, Veeraporn; Owner, Chantrathit, Chachoengsao
25. Duangsai, Krachang; Manager, Krachang Vidhaya, Satun
26. Duangsai, Yubol; Assistant Manager, Krachang Vidhaya, Satun
27. Facthongyoo, Chalong; Manager, Charoenkarnka, Tak
28. Gromgriang, Seksan; Marketing, Chonniyom Distributor, Bangkok
29. Hanthong, Bua; Owner, Manager, Sinsombat, Tak
30. Hanthong, Sin; Owner, Sinsombat, Tak
31. Homsang, Suthep; Manager, Wuthakrai Sing Buri, Sing Buri
32. Hwangcherdchusakul, Jintana; Manager, Amnuaysilp, Phetchaburi

33. Jarantakarn, Nualnit; Owner, Bannasarn, Ubon Ratchathani
34. Jinda Intra, Sawat; Manager, Kingthong Panich, Suphan Buri
35. Jinda Intra, Vivinda; Kingthong Panich, Suphan Buri
36. Jitnuad, Supranee; Owner, Adams Book Store, Chachoengsao
37. Jittitecharak, Joy; Owner, Managing Director, Suriwongse Book Center,
Chiangmai
38. Kae Udon, Pong; Manager, Pongchai, Surat Thani
39. Kaew prapa, Satit, Manager, Sittichart, Lamphun
40. Kallayanalarb, Chaiporn; Manager, Lim Geng Lee, Mukdahan
41. Kamchai; Owner, Kamchai, Ubon Ratchathani
42. Kasempook, Sermsak; Owner Kasemsamai, Chachoengsao
43. Kitrattanakarn, Somchai; Manager, Niyom Suksa, Lop Buri
44. Kitrattanakarn, Waewmanee; Owner, Niyom Suksa, Lop Buri
45. Koratana, Maneerat; Sales manager, Bangkok Book Center, Bangkok
46. Korcharoensakul, Sakol; Manager, Sakon Karnka, Yala
47. Kritsadasima, La-Or; Owner, Or-Panich, Yala
48. Kulruangsap, Yupadee; manager, Samakkee Sarn, Bangkok
49. Kunawutitrakul, Somchai; Manager, Dokya (Branch 3 Huamark), Bangkok
50. Kupkharn, Jitti; Manager, Ruamsarn, Sukhothai
51. Laicharoen, Somchai; Owner, Tani Stationary, Pattani
52. Lamaiden, Suporn; Manager, Mitr Ying, Satun
53. LaoYoodong, Vaivit, Manager, Holliwood, Ubon Ratchathani
54. Lertbuddharak; Owner, Tanin Book Center, Chachoengsao
55. Lymphol, Jear; Owner, Pittayakorn, Phangnga
56. Luangpatarawong, Sumitr; Manager, Borriboon Panich, Yala
57. Lumthong, Nongnuj; Manager, Lamthong Pittayakom, Nakhon Phanom
58. Maitree; Owner, Maitree Jet, Lob Buir
59. Marutpong, Sanong; Manager, Sanongphan, Pattani
60. Nachai, Samran; Manager, Modern Lamphun, Lamphun
61. Nao Ward, Aree; Owner, Pattani Book Center, Pattani
62. Nao Ward, Mingkwan; Relative, Pattani Book Center, Pattani
63. Natthaset, Derasak; Owner, Manager, Srimaturee, Nakhon Sawan
64. Net Harn, Angkarb; Relative, Borwornphan Book Center, Si Sa Ket
65. Net Harn, Nakhon; Manager, Owner, Borwornphan Book Cen, Si Saket
66. Nilvacharamanee, Prapas; Owner, Pittayaphan, Surat Thani

67. Ongratanapongse, Supawan; Sales, Bangkok Book Center, Bangkok
68. Ontongard, Chamruang; Public Relation, Tower Brain International
69. Oui Sakul, Leo; Owner, Prateep Panich, Phangnga
70. Oui Sakul, Sudchai; Manager, Prateep Panich, Phangnga
71. Patanachumchom, Kaew; Owner, Manager Tak Book Center, Tak
72. Pearbut, Samruay; Owner, Samruay, Phetchaburi
73. Phatkit, Somboon; Manager, Samliam Poster, Sakon Nakhon
74. Piempiti, Sanguanwan; Manager, T. Thaworn, Nakhon Pathom
75. Praisuwan, Boonma, Owner, Prapakorn, Samut Prakan
76. Prattanachuanom, Malee; Owner, Tak Book Center, Tak
77. Pupaichitkul, Anat; Owner, Silp Charoen, Pattani
78. Ratanapoom, Prajuab; Assistant Manager, Aksornthong, Surat Thani
79. Rattakul, Prasit; Owner, Yeanthai, Yala
80. Roongpanich, Pranee; Head, Media and Branch Sales, Business Organization
of the Teachers Council of Thailand
81. Rujjanawaid, Poonsin; Relative, Semathong, Suphan Buri
82. Rujjanawaid, Sa-Oad; Manager, Semathong, Suphan Buri
83. Sae kow, Pratana; Relative, Ruamsarn, Sukhothai
84. Sae Lue, Ngor Kwuang; Owner, Vidhayakom, Ubon Ratchathani
85. Sae-Tung, Nu; Shareholder, Manager, Sakon Pittaya, Sakon Nakhon
86. Sae. Eue, Chairkuang; Owner, Amnuaysilp, Phetchaburi
87. Sai Wong, Chansak; Owner, Manager, Sak Pittaya, Satun
88. Sakarin, Olan; Manager, Charng 2, Yala
89. Sakulkoo, Jongjit; Relative, Nong Khai Amnuayporn, Nong Khai
90. Sakulkoo, Suwimol; Owner, Manager, Nong Khai Amnuayporn, Nong Khai
91. Samantararat, Saman; Owner, Mitr Ying, Satun
92. Sang Arunchai, Karuna; Relative, Thai Vidhaya, Lop Buri
93. Sang Arunchai, Manap; Owner, Thai Vidhaya, Lop Buri
94. Sangkaphan, Sunthorn; Owner, S. Sangkaphan, Suphan Buri
95. Sanviset, Amlae; Manager, Mukdahan Pittaya, Mukdahan
96. Sariswanit, Yongyuth; Manager, Ngandee Distributor, Bangkok
97. Sarttrasatit, Nakul; Owner, Satit, Phetchaburi
98. Sinaha Watana, Rattana; Manager, Rattana, Mukdahan
99. Sing Suwan, Chorpaka; Employee, Suan, Suphan Buri
100. Sing Suwan, Suan; Owner, Suan, Suphan Buri

101. Sirichan, Kamneng; Owner, Sirithai, Samut Prakan
102. Siripaisarnkul, Sirisak; Manager, Tana, Bangkok
103. Siriphan, Anupong; Manager, Sirithai, Samut Prakan
104. Sripattaya, Boonchu; Owner, Ampornsarn, Ubon Ratchathani
105. Su Panich, Kasem; Owner, Watana Panich, Phangnga
106. Sumetha Aksorn, Piyapot; Manager, Aksornthong, Surat Thani
107. Sunrit, Phaisak; Owner, Chok Phaisan, Lop Buri
108. Taechatada, Yingyong; Owner, Manager, Padung Suksa, Bangkok
109. Tae Suwan, Ampai; Owner, Manager, Pai Panich, Nong Khai
110. Tansakul, Somchai; Owner, Manager, Trai Rat, Phangnga
111. Tantrakul, Wilai; Chief, Padungsuksa, Bangkok
112. Tearranapramot, Pajon; Owner, Pajon, Sing Buri
113. Thammasatit, Taksina; Owner, Ruamsarn, Nan
114. Toprasert, Sunthon; Manager, Srikrailad Book Center, Nan
115. Tuwichien, Prinya; Owner, Nok, Prachuap Khiri Khan
116. Tuwichien, Yodniyom; Owner, Nok, Prachuap Khiri Khan
117. Wangkittikarn, Vidhaya; Manager, Nanaphan, Samut Prakan
118. Wangsuekul, Chaiwuth; Manager, Reaindee, Nan
119. Worasuwat, Derasak; Owner, Vidhayaphan, Pattani
120. Worasuwat, Sirithorn; Manager, Vidhayaphan, Pattani
121. Yingsamarn, Paisarn; Owner, Klung Vidhaya, Yala

APPENDIX 1.3

List of Authorities and Experts Interviewed

1. Chavalit, Maenmas. Former Director of Unesco Regional Office for Book Development in Asia and the Pacific; Former Director of the National Library of Thailand and Founding President of the Library Association of Thailand, Bangkok.
2. Jarnarnwej, Wimolsiri. Head of the Department of Civil and Commercial Law, Faculty of Law, Chulalongkorn University; Vice-President of the Women Lawyers Association of Thailand and Former Minister of University Affairs, Bangkok.
3. Kumut, Pruang. Dean of Faculty of Education and Former Head of the Department of Educational Technology, Srinakharinwirot University, Bangkok.
4. Ruangsilp, Thamoon; Owner of Ruangsilp Publishing House and Former Vice President of the Publishers and Booksellers Association of Thailand, Bangkok.
5. Samsen Vil, Kanok. Senator and Founding Director of the Girl Guides Association of Thailand, Bangkok.
6. Sivaraksa, S. Scholar, Writer, Translator and Publisher, Bangkok.
7. Smersuta, Thongterm. Chairman of Scientific Terms Subcommittee-Printing of the Royal Institute and Former Chairman of the Printing Club under the Federation of Thai Industries, Bangkok.
8. Sunhachawee, Aree. Former Dean of Faculty of Education, Srinakharinwirot University and Former Headmistress of the Srinakharinwirot University Demonstration School, Bangkok.
9. Varavan, Kasama. Director of National Literacy Campaign and Director of Planning and Research Division, Department of Non-Formal Education, Ministry of Education, Bangkok.
10. Vorapipatana, Kowit. Director General of the Department of General Education; Former Director General of the Department of Non-Formal Education and Former Director General of the Department of Curriculum and Technical Development, Bangkok.

APPENDIX 1.4

Questionnaire Form 1

Book Publishers in Thailand (1)

Date

1. Name of Organization
Address Tel.
Established how many years ☐ 1-5 ☐ 6-10 ☐ 11-20 ☐ 21-30 ☐ >30
Activities ☐ publishing ☐ sales ☐ printing ☐ distribution ☐ others
Name of person answering
Position ☐ owner ☐ manager ☐ relative ☐ employee ☐ others
Personnel are ☐ family member ☐ employee
No. of personnel ☐ 1-5 ☐ 6-10 ☐ 11-20 ☐ 21-50 ☐ 51-100 ☐ >100
Being female ... % working as ☐ labour ☐ office ☐ technical
☐ management ☐ others
2. Types of books published
☐ fiction...% ☐ general...% ☐ children...% ☐ school textbook...%
☐ supplementary reader...% ☐ professional...% ☐ religious...%
☐ reference/dictionary...% ☐ academic/scholarly...% ☐ translated...%
☐ comics...% ☐ other...%
Catalogue/book list available ☐ yes (please give) ☐ no
3. At present how many titles available ☐ 1-50 ☐ 51-100 ☐ 101-200
(1989) ☐ 201-500 ☐ > 500
2-3 yrs ago how many titles ... 5 yrs ago how many titles ...
Each year publish how many new titles ... how many reprints ...
Print run/title ☐ 500-1,000 ☐ 1,001-2,000 ☐ 2,001-3,000 ☐ 3,001-5,000
☐ 5,001-10,000 ☐ 10,001-20,000 ☐ 20,001-50,000 ☐ >50,000

Average price of book/title ☐ 1-10 ☐ 11-25 ☐ 26-50 ☐ 51-100
☐ 101-200 ☐ > 200

Sale volume against production ☐ > 75% ☐ 50-75% ☐ <50%
Time required ☐ 3-6 mth ☐ 7-12 mth ☐ 1-2 yr ☐ 2-3 yr ☐ >3
ISBN usage ☐ everytime ☐ infrequent ☐ never used

Appendix 1.5

Questionnaire Form 2*

Book Publishers in Thailand (2)

1. Name of Organization
Name of Person Answering
Position in Organization ☐ owner ☐ manager ☐ relative ☐ others
2. Author Employed ☐ no ☐ irregular ☐ regular persons
Monthly Salary ☐ <5,000 ☐ 5,001-10,000 ☐ >10,000
3. Royalty Fee ☐ per time ☐ <5,000 ☐ 5,001-10,000 ☐ 10,001-20,000
☐ 20,001-30,000 ☐ 30,001-40,000 ☐ 40,001-50,000 ☐ >50,000
☐ paid in % from cover price ...% Term of payment ...
4. Editorial ☐ no ☐ yes ☐ by organization ☐ hired
5. Production
Type of book ☐ hard ...% ☐ soft ...% ☐ paperback ...%
Typesetting ☐ self ☐ outside Art work ☐ self ☐ outside
Print ☐ self ☐ outside Illustration ☐ self ☐ outside
Fold ☐ self ☐ outside Photo ☐ self ☐ outside
Cover ☐ self ☐ outside Paper ☐ self ☐ printer
Calculation of cover price from total cost ☐ twice ☐ three times
☐ 4 times ☐ others(pls state) ...
6. Sales & Distribution
Wholesale ☐ self ☐ no Retail ☐ self ☐ no
Distribution ☐ self ☐ no Publicity ☐ no ☐ yes ☐ hired
Reduction for bookshops and/or distribution(in %)
☐ 5-10 ☐ 11-20 ☐ 21-30 ☐ 31-40 ☐ 41-45 ☐ 46-50 ☐ >50
7. Present Situation (strong/weak point, problem/obstacle)
8. Future Trend

* By personal interview

APPENDIX 1.6
Questionnaire Form 3
Bookselling Shops

1. Name of Shop
AddressTel.....
Answered by ☐ Owner ☐ Manager ☐ Employee ☐ Others.....

2. Types of books available
.....
.....

Books supply obtained by
☐ Direct order to distributor ☐ Order through sales representative
☐ Direct order to publishers ☐ All 3 channels

Books purchased by ☐ consignment ☐ credit
Credit term ☐ 1 month ☐ 2 month ☐ 3 month ☐ >3 month

3. How many percentage of profit margin received from sales revenue:
☐ 5-10 ☐ 11-20 ☐ 21-30 ☐ 31-40 ☐ 41-50 ☐ >50

4. Problems or Obstacles.

5. Comments or Remarks.

APPENDIX 1.8

Questionnaire Form 5*

Book Readers

(not including newspapers, or magazines)

1. Sex ☐ male ☐ female
2. Resident ☐ Metropolitan ☐ Province in town ☐ Province out of town
(urban) (rural)
3. Age ☐ 5-12 ☐ 13-18 ☐ 19-25 ☐ 26-40 ☐ 41-55 ☐ >55
4. Education ☐ below ☐ secondary ☐ vocational
☐ associate degree ☐ degree
5. Occupation ☐ student ☐ teacher ☐ government
☐ business ☐ independent ☐ housewife ☐ others
6. Income/mth ☐ 1-1,000 ☐ 1,001-3,000 ☐ 3,001-5,000
☐ 5,001-10,000 ☐ > 10,000
7. Types of Books enjoy reading
1 ☐ bought ☐ rent ☐ borrow ☐ given
2 ☐ bought ☐ rent ☐ borrow ☐ given
3 ☐ bought ☐ rent ☐ borrow ☐ given
4 ☐ bought ☐ rent ☐ borrow ☐ given
5 ☐ bought ☐ rent ☐ borrow ☐ given
8. Expenses on books/year
☐ 1-100 ☐ 101-200 ☐ 201-500 ☐ 501-1,000 ☐ >1,000
9. Price of book ☐ not expensive ☐ resonable ☐ quite expensive
☐ very expensive
10. Comments (if any)
.....
.....

APPENDIX 2.1

List of Major Publications on Book Publishing in Thailand

1. Altbach, Philip G.; Arboleda Amadio A; and Gopinathan S., eds. Publishing in the Third world: Knowledge and Development. p.4. New Hampshire: Heinemann, 1985.
2. Altbach, Philip G., and Rathgeber Eva-Maira Publishing in The Third World : Trend Report and Bibliography p. 62 and p.124-125. New York: Praeger, 1980.
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8. Kalwantawanich, Chusri. Development of Softcover Books in Thailand. Bangkok: Chulalongkorn University, 1974. (Thesis) (Thai)
9. Pravalpruk, Kowit. "Thailand", Publishing in Asia/Pacific Today. p.150-153. Tokyo: Asian Cultural Centre for Unesco, 1988.
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 - 14.* _____. "Problems of Academic Book Publishing in Thailand", Scholarly Publishing In SE Asia. ed. B. Lim, p. 159-61, Kuala Lumpur: Association of Southeast Asian Institutions of Higher Learning, 1975.
 - 15.* _____. "Scholarly Publishing in Thailand", Scholarly Publishing In Asia, ed. S. Minowa and A. A. Arboleda. p. 97-102. Tokyo: University of Tokyo Press, 1973.
 16. Taubert, Sigfred and Weidhaas, Peter, eds. "Thailand", Book Trade of the World, Vol.III, Asia, p.268-271. München: K.G. Sant Verlag K G, 1981.
 17. Visessurakorn, Suradej. "Thailand", Textbooks and Reading Materials, Vol. 3, p. 162-172. Bangkok: Unesco Regional Office and Wellington: Department of Education, 1984.

* Cited in Publishing in the Third World: Trend Report and Bibliography by Philip G. Altbach and Eva-Maira Rathgeber.

Appendix 2.2

Additional Listing of Publishers and Publishing Houses

1 Adeet	33 Chaoakson
2 Advance Media	34 Chaopraya
3 Aksarapipat	35 Chatuchuk
4 Aksonprasert	36 Chertchai
5 Aksonsans	37 Chet Studio
6 Aksonsiam	38 Chetha
7 Aksornsuksa	39 Chevij
8 Al Yihad	40 Chevin
9 Anajak (Romance)	41 Chindasan
10 Anakot	42 Chorada
11 Aram	43 Chormafai
12 Aramboon	44 Chormakok
13 Arnthai	45 Chunhasan
14 Artit	46 Churee
15 Arts and Sign	47 Daoprasuk
16 A.O.T.	48 Daoruang
17 Banchuen	49 Daorurt
18 Bangkok Block	50 Dinsor
19 Bangkoksan	51 Dokbua
20 Bannawit	52 Dokkhew
21 Banrakdek	53 Ekkalak
22 Banroong Bandit	54 Electronics World
23 Book Publishing International	55 Fongnam
24 Bookol	56 Gor Gai
25 Boonchai (B.C.)	57 Gorpai
26 Bualuang	58 Hadao
27 Bunnasilp	59 Hinghoi
28 Busbaban	60 Hunsa
29 Butterfly	61 Image
30 Chab Krae	62 Intrasan
31 Chaiyod	63 Jaturong
32 Chanung	64 Jindasan

65 Jingjo	100 Mahachai
66 Jumbo	101 Mahachon
67 K C	102 Mahanak
68 Kaewkan	103 Mai Ngarm
69 Kaewprakai	104 Maiketfai
70 Kaiwan	105 Malai
71 Kampaeng	106 Mingmit
72 Kanchana	107 Miti
73 Kanitsorn	108 Mitrmaitree
74 Kanok Bannasan	109 Mooban
75 Kansuksa	110 Mungkarp
76 Kanya	111 Nakorn
77 Kaofang	112 Nakornluang
78 Karan	113 Nangta
79 Karuna-Chatuporn	114 Nangnuan
80 Kasem Bannakij	115 Nippan
81 Kasetyukmai	116 Nisaidee
82 Kitichaisan	117 Nokradat
83 Kitisarn	118 Nongmai
84 Kitiya	119 Noparat
85 Klangsamut	120 Nor Cham
86 Kojitmet	121 Numsao
87 Koknungsue	122 Nungjet
88 Kombang	123 Nungsue Maelek
89 Komkit	124 Nungsue Saikam
90 Konglar	125 Nungsue Thai
91 Krupee	126 Nungsue Yaowachon
92 Kunapapchevij	127 Ota House
93 Ladawan	128 P Ed.
94 Lai-akson	129 P S P
95 Mac	130 Padoongwit
96 Maeboon	131 Panchat
97 Maekampang	132 Panya
98 Maenam	133 Panyachon
99 Maewtai	134 Pasa

135 Pasatangpratet	170 Rahat
136 Peeknok	171 Rajida
137 Peesua	172 Rapeepan
138 Physics Center	173 Ratanapruk
139 Pilap	174 Reader
140 Pimmack	175 Regina
141 Pimvad	176 Roong
142 Pipitwithaya	177 Roopravee
143 Pitakakson	178 Ruanakson
144 Plern	179 Saengdao
145 Ploi	180 Saengtakieng
146 Pomphet	181 Saengtam
147 Ponaret	182 Sahasan
148 Poombandit	183 Saiakson
149 Pornchai	184 Sairung
150 Po-Mae	185 Samapan
151 Prachachang	186 Samdao
152 Prai	187 Samkloe
153 Praina	188 Samosorn Nungsue
154 Prakaipruk	189 Samsi
155 Prakobmetri	190 Santipap
156 Pramuanarn	191 Santitam
157 Prap	192 Saratat
158 Prapaipan	193 Sataset
159 Prasnee	194 Sawasdee
160 Prathuavit	195 Sermitwitaya
161 Preeyanuj	196 Sermsuksa
162 Prungnee	197 Siam
163 Puan	198 Siam Communication
164 Puanchevit	199 Siam Sport
165 Puandek	200 Siampatana
166 Puanmai	201 Siamsilp
167 Pusajika	202 Siamsuksa
168 Putuchon	203 Sirisarn
169 Racha	204 Sitsadue

205 Smit	234 Theeranun
206 Songserm Silapasuksa	235 Theeranusorn
207 Soon Nungsue Kaset	236 Thong
208 Soon Songserm Krungthep	237 Thonggao
209 Space Publication	238 Tusadee
210 Srithep	239 Udom
211 Suannungsue	240 Vannasilp
212 Sufan	241 Vataneer
213 Sukanya	242 Waela
214 Suksansarn	243 Walailak
215 Supa	244 Wan
216 Supap	245 Wanasilp
217 Suradet	246 Wanmai
218 Surapat	247 Wantip
219 Suriyaban	248 Wanwipa
220 Suriyasan	249 Wanwisa
221 Suweeriyasarn	250 Wata
222 Talejan	251 Wichakarn
223 Tamachart	252 Winanta
224 Tanaban	253 Wiratham
225 Tanapon	254 Wisarut
226 Tapnangsu	255 Witawat
227 Taruta	256 Withayasart Srangsan
228 Tepakson	257 Wongsawang
229 Tesapak	258 Wongwaen
230 Tewson	259 Yinyang
231 Thaipatana	260 Yodtida
232 Thamasant	261 Yukmai
233 Tharn Kasetkam	262 Yuwawitaya

Appendix 2.3

List of Publishers responding to questionnaire

- | | |
|-----------------------------------|-------------------------------|
| 1. ATTF | 33. Kasembannakit |
| 2. Aksarapipat | 34. Klang Vidhaya |
| 3. Aksornbundit | 35. Kled Thai |
| 4. Aksorn Charoentat | 36. Komol Keemthong |
| 5. Aksorn Wattana | 37. Liang Chiang |
| 6. Ammuaysan | 38. Liang Siang Chong Charoen |
| 7. Arunwitthaya | 39. Maekampang |
| 8. Bandansarn | 40. Media Focus |
| 9. Bangkok Guide | 41. Medical Media |
| 10. Bangkok Medical | 42. Muang Boran - Platapien |
| 11. Bannakarn | 43. Murkchin |
| 12. Bhannakij | 44. Nan Mee |
| 13. Bongkot | 45. Nitibunnakarn |
| 14. Bumroongsarn - Ruamsarn | 46. Nititham |
| 15. Buraphasarn - Sinlapabanakarn | 47. Nitiwaid |
| 16. Carat | 48. Niyomvithaya |
| 17. Chakkarn | 49. Odeon |
| 18. Chevij | 50. Ota House |
| 19. Chokchai Dheves | 51. P Vatin |
| 20. Chet Studio | 52. Panaya |
| 21. Chomromdek | 53. Pasit |
| 22. Design & Products - Met Sai | 54. Pattana Suksa |
| 23. Dhammasapa | 55. Pittayakarn |
| 24. Dheerasan | 56. Plan |
| 25. Dokya | 57. Poombandit |
| 26. Duang Kamol | 58. Prae Pittaya |
| 27. Ekkalak | 59. Prannokvithaya |
| 28. Electronic World | 60. Prasarnmitr |
| 29. Folk Doctor | 61. Pundit Thai |
| 30. Gor Gai | 62. Ruamtat |
| 31. Hor Samutklang | 63. Saengdad |
| 32. Kanok Bannasan | 64. Saichai - Wanthip |

- | | |
|-----------------------------|--|
| 65. Sainam | 78. Supa |
| 66. Samosorn Nakkai | 79. Suriyaban |
| 67. Samsi | 80. SVITA |
| 68. Sangdao | 81. Tanaban |
| 69. Sangsan-Vichakarn | 82. Tesapak |
| 70. SE Education | 83. Thai Japan Technological Promotion |
| 71. Sermvidh Bannakarn | 84. Thai Wattana Panit |
| 72. Siam Rath | 85. Thamabucha |
| 73. Siambun | 86. Thanyanij |
| 74. Siam Sport | 87. Ton-or |
| 75. Sitsadue | 88. Vocabulary Center |
| 76. Soon Songserm Wichakarn | 89. Watanapanich |
| 77. Sukapabjai | 90. White Lo tus |

APPENDIX 2.4

List of Book Selling Shops Interviewed

Northern Region

- | | |
|---------------------|----------------------------|
| 1. Chamroenkarnka | 8. Sahayon Newspaper |
| 2. Charoenpan | 9. Sinsombat |
| 3. Modern Lamphun | 10. Sittichart |
| 4. Narapanich | 11. SriKrailad Book Center |
| 5. Reaindee Co.Ltd. | 12. Srimaturee |
| 6. Ruamsarn | 13. Tak Book Center |
| 7. Ruamsarn | |

Central Region

- | | |
|---------------------|------------------------|
| 1. A. Navin | 15. Samruay |
| 2. Adam Book Center | 16. Satit |
| 3. Amnuaysilp | 17. Semathong |
| 4. Chantratit | 18. Sirithai |
| 5. Chok Chaisarn | 19. Srimuangsing |
| 6. Kasemsamai | 20. Srithai Panich |
| 7. Kingthong Panich | 21. Suan |
| 8. Maitree Jitkk | 22. Suphan Karnrian |
| 9. Nanaphan | 23. T. Thaworn |
| 10. Niyom Suksa | 24. Tarin Book Center |
| 11. Nok | 24. Thai Vidhaya |
| 12. Pajong | 26. Vidhaya Center |
| 13. Prapakorn | 27 Wuthikrai Sing Buri |
| 14. S. Sanghaphan | |

Northeastern Region

- | | |
|----------------------------|------------------------|
| 1. Amporn Sarn | 10. Nongkhai Amnuaypor |
| 2. Bannasarn | 11. Pai Panich |
| 3. Borwornphan Book Center | 12. Praponsarn |
| 4. Dee Udorn | 15. Rattana |
| 5. Holliwood | 15. Sakon Pittya |
| 6. Kamchai | 14. Samliam Poster |
| 7. Lamthong Pittayakan | 15. Sri Suksaphan |
| 8. Lim Geng Lee | 16. Ubonsarn |
| 9. Mukdahan Pittaya | 17. Vidhayakarn |

Southern Region

- | | |
|-------------------------|-----------------------------|
| 1. Aksorn | 15. Pittayaphan |
| 2 Bannakit | 16. Pongchai |
| 3. Borriboon Panich | 17. Prateep Panich |
| 4. Charng 2 | 18. Sak Pittaya |
| 5. Farida | 19. Sakon Karnka |
| 6. Klung Vidhaya | 20. Sanongphan |
| 7. Krajang Vidhaya | 21. Silp Charoen Stationary |
| 8. Lamthong Panich | 22. Suwannapoom |
| 9. Mitr Ying | 23. Tani Stationary |
| 10. On Vidhaya | 24. Trai Rat |
| 11. Or Panich | 25. Vidhayaphan |
| 12. Pattani Book Center | 26. Watana Panich |
| 13. Pittyakarn | 27. Yean Thai |
| 14. Pittayakom | |
| 14. Pittayakom | |

APPENDIX 3.1

List of Publications on Trade and Economic Aspect of the Book Industry

Customs Department, The Foreign Trade Statistics of Thailand 1983-1987.

Bangkok: The Customs Department, Ministry of Finance, 1984-1988.

Economic and Social Commission for Asia and the Pacific, Foreign
Trade Statistics of Asia and the Pacific 1982-1986. Bangkok:

Economic and Social Commission for Asia and the Pacific, United
Nations, 1988.

Economist Intelligence Unit, The. Country Profile Thailand, Burma.

London: The Economist Intelligence Unit, 1988.

Taubert, Sigfred and Weidhaas, Peter. ed. Book Trade of the World
Vol.III Asia. Munchen: New York: London: Paris, 1981. p.268-271.

Unesco. Unesco International Trade Statistics Yearbook 1988. Paris:
Unesco, 1988.

United Nations, 1986 International Trade Statistics Yearbook, Vol.V.
New York: United Nations, 1988.

APPENDIX 3.2

Number of Titles of Books Received by the National Library of Thailand

(1978-1987)

(according to the budget year)*

<u>Year</u>	<u>Total</u>	<u>Thai</u>	<u>English-Others</u>
1978	7,310	4,765	2,545
1979	9,983	6,889	3,094
1980	10,191	7,194	2,997
1981	10,896	7,259	3,637
1982	13,504	9,243	4,261
1983	12,809	9,778	3,031
1984	17,197	13,143	4,054
1985	9,422	7,020	2,402
1986	13,455	10,290	3,165
1987	20,175	16,733	3,442

* budget year begins in October

SOURCE : National Library of Thailand

Appendix 3.3

Co-Libraries in the National Bibliography Project

1. Library Bureau, Kasetsart University
2. Central Library, Institute of Witthaya Borikan, Chulalongkorn University
3. Library, Political Science Faculty, Chulalongkorn University
4. Library, Communication Science Faculty, Chulalongkorn University
5. Library, Engineering Science Faculty, Chulalongkorn University
6. Library, Bangkok Bank
7. Library and Information Center, Bank of Thailand
8. Library Bureau, Thammasat University
9. Library Division, Mahidon University - Sirirat Hospital
10. Library Bureau, Ramkhamhang University
11. Library Bureau, Sinakarinwirot University
12. Bannasan Kanphattana Bureau, National Institute of Development Administration
13. Library, National Statistical Office
14. Library Division, Science and Services Department
15. Library, Science Faculty and Ramathibodi Hospital, Mahidon University
16. National Library, Fine Arts Department

SOURCE: National Library of Thailand

APPENDIX 3.4

List of Thai National Bibliography Publication Series*

<u>Years</u>	<u>Publications</u>	<u>No.of Titles</u>
1958	1 Vol.(mimeograph)	n.a.
1962-1967	1 Vol.	8,582
1968-1973	Vols. 1, 2 & 3	12,097
1975	Vols.1 & 2	2,262 (1,112 & 1,150)
1976	Vols.1 & 2	2,687 (1,239 & 1,448)
1977	Vols.1 & 2	3,041 (1,514 & 1,527)
1978	Vol. 1	1,393
1982	Vol. 1	744
1983	Vol. 1	1,481
1984	Vols.Jan-Mar, Apr-Jun, Jul-Sep, Oct-Dec	2,233(545, 559, 534 &595)
1985	Vols.Jan-Mar, Apr-Jun Jul-Sep, Oct-Dec	1,395(348, 348, 349 &349)
1986	Vols.Jan-Mar, Apr-Jun	577(272 & 285)
1987	Vol. Jan-Mar	343

* As of January 1989

Remarks : 1979 Vol. 1 being published

1978 Vol. 2, 1979 Vol. 2, 1981 Vol. 1 in computer print-out

SOURCE: National Library of Thailand

APPENDIX 3.5

Breakdown of the Composition of the Publishing Industry
by Types of Publications

<u>Types</u>	<u>Number</u>	<u>Per cent</u>
General and trade book publishers	45	30.4
general	30	
fiction	15	
Professional and reference book publishers	26	17.6
professional	20	
dictionaries and references	6	
Children and comic book publishers	26	17.6
children	24	
comics	2	
School and supplementary book publishers	27	18.2
school books	9	
supplementary readers	18	
Translated book publishers	13	8.8
Religious book publishers	8	5.4
Others	3	2.0

Remarks: One publisher may publish more than one type of publications

APPENDIX 3.6

Breakdown of the Value of the Book Industry by Sectors

<u>Types</u>	<u>Value</u> <u>(million baht)</u>	<u>Percent</u>
General and trade books	963.74	31.4
general	399.33	
fiction	564.41	
Professional and reference books	975.18	31.8
professional	316.68	
dictionaries and reference	658.50	
Children and comic books	265.61	8.6
children	252.53	
comics	13.08	
School text and supplementary readers	608.95	19.8
school textbooks	273.79	
supplementary readers	335.16	
Translated books	84.75	2.8
Religious books	159.36	5.2
Others	11.22	0.4
Total	3,068.81	100

APPENDIX 3.7

Book Readers Profile

Size of Sampling : 660 (200 in Bangkok, 160 in provincial urban, 300 in rural areas)

Children and Youth (5-25 yrs)	18.9 %
Adults (25-40 yrs)	41.8 %
Elders (over 40 yrs)	39.3 %

Findings

Reading books	78.0 %
Reading newspaper only	16.4 %
Not reading	5.6 %

Educational Background

Book Readers with - higher than secondary education	57.7 %
- secondary education	13.2 %
- primary education	28.5 %
- lower than primary education	0.6 %

Occupation/Employment

Students/Teachers	37.6 %
Government employee	20.5 %
Business employee	20.0 %
Self-employed	14.8 %
Others	5.4 %

Book Spending (per year) average B 500

Readers - who do not buy books	3.5 %
- spending < B 100	12.1 %
- spending < B 200	25.3 %
- spending < B 500	30.6 %
- spending < B 1,000	17.8 %
- spending > B 1,000	10.7 %

Earning (per month) average B 4,820

< B 1,000	11.1 %
< B 3,000	40.0 %
< B 5,000	22.7 %
< B 10,000	17.8 %
> B 10,000	6.2 %
no earning	2.1 %

Average spending on books per year = $\frac{500 \times 100}{4820 \times 12} = 0.86 \% (<1\%)$

Access to Books

Buying	51.1 %
Renting	12.5 %
Borrowing (free)	26.9 %
Given/Donated	9.3 %

Type of books Read :

General	63.4 %
Comics	18.4 %
Professional/Technical	9.4 %
Religious	5.0 %
School	3.7 %

APPENDIX 3.8

Educational Budget by Types During 1983-1987 (million B)

<u>Year</u>	<u>Total</u>	<u>Admin</u>	<u>lry Ed</u>	<u>2ry Ed</u>	<u>Higher Ed</u>	<u>V Ed</u>	<u>A Ed&L/M</u>	<u>Others</u>
1983	37,142	1,732	20,505	5,977	4,499	3,437	633	359
1984	38,670	675	21,734	7,144	4,530	3,601	677	309
1985	38,566	652	22,005	7,323	4,023	3,601	714	248
1986	39,438	661	22,628	7,460	4,228	3,520	725	216
1987	41,112	708	23,781	7,755	5,032	2,856	746	234

lry=Primary 2ry=Secondary V=Vocation A=Adult L=Library M=Museum

SOURCE: Educational Planning Division, Educational Statistics in Brief, Academic Year 1987 (Bangkok: Office of the Permanent Secretary, Ministry of Education, 1988), P.74.(Thai)

APPENDIX 3.9

Comparison between Educational Budget and National Budget against
Gross Domestic Product (million baht)

<u>Year</u>	<u>GDP</u>	<u>National Budget(NB)</u>		<u>Educational Budget</u>		
		<u>Amount</u>	<u>% GDP</u>	<u>Amount</u>	<u>% GDP</u>	<u>% NB</u>
1985	1,041,354	209,000	18.7	38,565.6	3.4	18.5
1986	1,098,362	211,650	16.9	39,438.7	3.1	18.6
1987	1,197,000	227,500	17.8	41,111.0	3.2	18.1

SOURCE: Educational Planning Division, Educational Statistics in
Brief, Academic Year 1987 (Bangkok: Office of the Permanent
Secretary, Ministry of Education, 1988), p.74. (Thai)

APPENDIX 3.10

Number of Public Libraries throughout the Country

<u>Libraries</u>	<u>No.</u>
National Libraries (and branches in the provinces)	10
Non-Formal Education Centers	
- provincial	72
- regional	5
Vocational Training Center at the Border	1
Public Libraries	
- provincial (total no.of provinces : 73)	72
- district (total no.of districts : 631)	333
- tambon (total no.of tambons : 6,482)	20
Village Reading Centers (total no.of villages : 58,632)	28,264
Municipal Libraries	24
Private Public libraries (estimate)*	200

* Estimation by the Society of the Rangsit Personnel Administration

SOURCE: Educational Planning Division, Educational Statistics in Brief Academic year 1987 (Bangkok: Educational Planning Division, Office of the Permanent Secretary, Ministry of Education, 1988), p. 29.

APPENDIX 3.11

List of Book Renting Shops and Position of Persons Interviewed

Bangkok

Bangkhae	Owner
Barnyen Video	Employee
Boat Book Center	Owner
Chokechai 4	Owner
Chokedee	Owner
Ladprao 1	Owner
Ladprao 2	Owner
Maneesarn	Owner
Pasicharoen	Manager
Pattanasarn	Owner
Petchakasem	Owner
Puakhun	Manager
Perl	Owner
Rang Tor	Owner
Ruam Aksorn	Employee
Ruamvit	Owner
Rungsarn	Employee
Sak Book Store	Owner
S.C. Center	Employee
Sermkit Kehaphan	Owner
Shop No. 319	Owner
Sinchailai	Employee
Soonruam Nangsue Chao	Owner
Tanaram	Owner
Tapra	Employee
T. Arun	Owner
V.S. Book	Owner
Vitton Store	Owner
Waew	Owner
Warasarn	Owner
Yannawa	Owner

Northern Region

Boonyuen	Owner
Copy Service	Owner
Dawin Book Shop	Owner
Hatori	Manager
Hong Nangsue Muenthong	Manager
Kim	Owner
Kornpan	Manager
Pop Pop	Owner
Ruamsarn	Owner
Somsong	Manager

Central Region

Chaimongkol	Employee
Duangsamorn	Owner
Note	Owner
Srifar	Owner

Northeastern Region

Amnuayphan	Owner
Sakol	Employee
Wiwat	Owner

Southern Region

Book Shop	Owner
Cholthicha	Owner
Jirapong	Owner
Look Is	Owner
Pittayakom	Owner
Raengtien	Owner
Siri Aksorn	Owner
Somchai	Owner
Suda	Owner
Tansamai	Owner

APPENDIX 3.12

Supreme Court Judgements Relating to the
Protection of Literature and Art Act, B.E., 2474

881/2472 (1929) Anyone may compile or reproduce for publication books which have been in existence since the olden days. The first compiler who published such a book is not entitled to claim the ownership under the Ownership of Authors Ror. Sor. 120 as amended in B.E. 2457.

954/2476 (1933) Anyone who knowingly copies (reproduces) any book which another has compiled/written for publication shall be deemed to have committed the offence under the Protection of Literature and Art Act, B.E. 2474, Article 25, even if the original copy of that book has never been advertised.

466/2478 (1935) The defendant published a new book by copying from another book in every way (reproduction). Therefore, this is an offence under the Protection of Literature and Art Act, B.E. 2474, and not the offence of copying under the Penal Code, Articles 222-223.

974/2478 (1935) Anyone who violates the copyright of another, negatives or plates used to print the book shall be considered the property of the owner of the copyright. The owner of the copyright shall be empowered to take court action of demand for such property.

The publisher who conspired with the person who ordered the printing in violation of the copyright of another shall be jointly liable for the payment of damages to the owner of the copyright.

92/2480 (1937) The plaintiff hired the defendant to print the plaintiff's book. The defendant finished the printing and the plaintiff accepted some copies of the books while the remainder was returned to the defendant because the pages were placed out of order. The defendant sold the books that were returned. It is not considered that the books sold by the defendant are copies (reproductions) within the meaning of the Protection of Literature and Art Act, B.E. 2474, and the defendant has not committed an

offence under Section 25 of this Act. This case is considered a civil offence (tort).

876/2496 (1953) Wordings written on the medicine bottle, envelope, label, are not considered to be copyright, within the meaning of the Protection of Literature and Art Act, B.E. 2474.

1263/2496 (1953) Teaching manuals which the Ministry of Education published for use as teaching guidelines are copyright. The defendant reproduced these manuals and even if source of reference is made, it is still in violation of the copyright under Sections 11 and 20 of the Protection of Literature and Art Act, B.E. 2474, because consent or permission was not given by the owner of the copyright.

508/2508 (1965) The damaged party translated the Civil and Commercial Code, Section 1669, into English and published for sale. This translation is considered literature under the Protection of Literature and Art Act, B.E. 2474, Section 4, and the damaged party is entitled to the copyright under Section 5 of the said Act.

408/2510 (1967) Under the Protection of Literature and Art Act, B.E. 2474, Section 4, the wording "musical song" denotes musical composition with or without lyric. The plaintiff is the author of the music score, another person who is the author of the lyric transferred the copyright as the author of the lyric to the plaintiff. Therefore, the plaintiff has the copyright of the musical song which includes the music score as well as the lyric. The plaintiff has the right to forbid the play of that music to the public, and has the right to forbid others from reproducing the music for sale. the defendant reproduced the lyric without permission which is therefore in violation of the copyright of the plaintiff, and if the music score is printed it is also the violation of the copyright of the music score.

368/2512 (1969) The right to protection of art must be a work of art that was created in the field of art. Therefore, the picture of Superman belonging to the plaintiff, wearing the cape and hands on the waist is not a work of art, but is merely trademark and is not copyright in art. The plaintiff cannot take action to rescind

the trademark of the defendant by claiming that there has been violation of the copyright of the plaintiff.

2358/2520 (1977) Claims for damages for violation of copyright under the Protection of Literature and Art Act, B.E. 2474, Section 24, must be instituted within 3 years (statute of limitation) from the date the offence was committed, that is, the date of sale of the books, and not the time limit under the statute of limitation as provided under the Civil Code, Section 448.

89/2521 (1978) Book which has printed text that copyright is reserved with sufficient details to understand that the owner has followed the procedure under the requirements of the laws of England which is the origin of the copyright of that book (of literature) is protected under the Protection of Literature and Art Act, B.E. 2474, Section 29 (Kor.) which Section 28 deems that the literary work was advertised for the first time in Thailand. Thailand and England are parties to the bilateral treaty to protect literature and art according to the announcement of the Ministry of Foreign Affairs dated July 31, B.E. 2474, therefore, the acquisition of copyright need not be registered. The possession of negatives or plates for printing copies as well as the printing of copies without permission from the owner is an offence under the Protection of Literature and Art Act, B.E. 2474, Section 4, 20, 25; and the offence of using the picture of the sailing boat and the name "Longman" thereby misleading the public is an offence under the Penal Code, Section 272 (1) as well.

402/2524 (1981) Copyright for work of art must be in the field of art; cartoon picture of a dog is not a work of art but is merely the picture resembling any dog in general. Cartoon picture of a dog is, therefore, not copyright for work of art within the meaning of the Protection of Literature and Art Act, B.E. 2474.

3830/2525 (1982) The co-plaintiff bought a film from Wor. who bought it from Or., the producer. The contract did not specify that Or. has sold the copyright of that film to Wor. The co-plaintiff, therefore, is not the owner of the copyright or the transferee of the copyright of that film. Therefore, when the

defendant made a copy of that film for rent and someone showed it, there is no violation of the copyright of the co-plaintiff.

(This case was brought before the court as a criminal offence for the violation of copyright under the Copyright Act, B.E. 2521, Articles 27, 44. It seems to be the first Supreme Court Case in which judgment was made that the co-plaintiff is not a damaged party.)

SOURCE: Somporn Promhitatorn and Srinida Promhitatorn, Copyright Handbook (Bangkok: By the Authors, 1984), p.183-6. (Thai)

APPENDIX 3.13

Supply and Demand of Printing and Writing Paper

	<u>Year</u>	<u>Capacity</u>	<u>Production</u>	<u>Import</u>	<u>Export</u>	<u>Consumption</u>
Actual	1982	106,400	70,751	10,414	328	80,837
	1983	103,400	70,953	29,069	435	99,587
	1984	115,625	74,518	19,828	439	93,907
	1985	161,800	95,323	20,186	1,949	113,560
	1986	158,800	109,408	19,617	3,754	126,271
Projected	1987	170,500				131,000
	1988	170,500				134,000
	1989	170,500				141,500
	1990	170,500				151,000
	1991	170,500				160,500

SOURCE: The Thai Pulp and Paper Industries Association, 1987

Directory of the Thai Pulp and Paper Industries

Association (Bangkok: The Thai Pulp and Paper Industries Association, 1987), p.6.

APPENDIX 3.14
Supply and Demand of Newsprint

	Year	Production	Import	Export	Consumption
Actual	1982	0	96,535	0	96,535
	1983	0	129,634	0	129,634
	1984	0	108,852	0	108,852
	1985	0	137,828	0	137,828
	1986	0	119,837	0	119,837
Projected	1987	0	129,000	0	129,000
	1988	0	139,000	0	139,000
	1989	0	147,000	0	147,000
	1990	0	155,000	0	155,000
	1991	0	164,000	0	164,000

SOURCE: The Thai Pulp and Paper Industries Association, 1987 Directory of The Thai Pulp and Paper Industries Association (Bangkok: The Thai Pulp and Paper Industries Association, 1981), P.6.

APPENDIX 3.15

Number of New Presses, Initial Investment and Initial Employment 1969-1986,
(Bangkok Metropolitan)

<u>Year</u>	<u>No. of Presses</u>	<u>Investment</u>	<u>Employment</u>
1969	21	9,474,000	163
1970	29	16,139,940	195
1971	29	18,978,400	181
1972	208	128,929,000	2,651
1973	26	24,443,000	257
1974	25	23,470,760	240
1975	31	119,804,000	834
1976	45	301,460,470	1,747
1977	77	139,473,487	687
1978	67	131,897,000	735
1979	96	218,621,000	1,264
1980	99	378,245,333	1,706
1981	93	231,864,400	902
1982	98	243,402,320	948
1983	104	239,295,385	1,252
1984	111	275,900,913	944
1985	129	226,656,006	894
1986	57	511,428,277	1,150

SOURCE: Karnitha Karnchanachari, comp., Number of New Presses
1969-1986 (Bangkok: SVITA, 1988), p.1. (Thai)

APPENDIX 3.16

Number of New Presses, Initial Investment and Initial Employment 1969-1986
(Regional)

<u>Region</u>	<u>No. of Presses</u>	<u>Investment</u>	<u>Employment</u>
Central	71	117,647,500	1,023
North	25	7,312,700	140
North East	25	8,196,000	185
South	32	33,916,500	195

SOURCE: Karnitha Karnchanachari, comp., Number of New Presses
1969-1986 (Bangkok: SVITA, 1988), p.2. (Thai)

APPENDIX 3.17

Book Publishing Program at Srinakharinwirot University

<u>Type of courses</u>	<u>No. of Credits</u>
A. Required courses	12
- Introduction to book Publication	2
- Introduction to book Printing	2
- Book Promotion and distribution	2
- Book Editing	2
- Book Design and Illustration	2
- Writing for Publication	2
 B. Electives	 6-14
- Reading Activities	2
- Intermediate Tech. for Book Printing	2
- Writing for Children and Young	2
- Writing for Neologerates	2
- Writing for Non-Fiction	2
- Writing School Text Books	2
- Children's Book Illustrations	2

SOURCE: Srinakharinwirot University Bachelor Degree Program
and Handbook 1987 (Bangkok: Srinakharinwirot University
1987), p.431-432. (Thai)

APPENDIX 4.1

Number of Students in Formal School System by Educational Level

Academic Year 1983-1987

<u>Level</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>
Pre-primary	471,597	531,941	672,080	1,009,131	1,158,466
Primaryary	7,272,153	7,233,541	7,151,054	7,160,494	7,100,226
Lower Secondary	1,224,140	1,304,647	1,308,872	1,277,619	1,217,228
Upper Secondary	967,573	944,307	934,501	907,231	892,981
Higher Education	344,753	392,605	383,240	366,305	358,707
As Percentage of population 4-24 yr	42.09	42.08	41.78	42.22*	45.91*

* 4-22 yrs

SOURCE : Educational Planning Division, Educational Statistics in Brief, Academic Year 1987 (Bangkok: Office of the Permanent Secretary, Ministry of Education, 1988), p.58. (Thai)

APPENDIX 4.2

Projected Number of Student Enrollment in Formal School System
by Educational Level : Academic Year 1987-1991

<u>Level</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>
Pre-Primary	1,132,430	1,227,810	1,301,910	1,254,580	1,399,840
Primary	7,002,890	6,972,990	9,958,270	6,948,860	6,933,460
Lower Secoondary	1,291,350	1,348,180	1,436,210	1,533,420	1,638,340
Upper Secondary	954,870	961,960	971,190	957,620	981,240
Higher Education	452,700	483,360	508,700	527,510	541,140

SOURCE : Office of the National Education Commission, National Educational Plan, Sixth Plan (1987-1991) (Bangkok: Office of the National Education Commission, Office of the Prime Minsiter, 1986), p.87, 94, 99, 102. (Thai)

APPENDIX 4.3

Average Annual Expenditure on Education per Person (1983)
in Public Schools (baht)

<u>Type of</u> <u>Expenditure</u>	<u>Primary</u>	<u>Lower</u> <u>Secondary</u>	<u>Upper</u> <u>Secondary(G)</u>	<u>Upper</u> <u>Secondary(V)</u>
School fees	12	518	713	1,914
Books, materials and equipments	159	437	556	936
Uniforms	213	506	579	715
Transportation	12	276	438	636
Food taken outside	324	1,002	1,410	1,980
Others	28	143	199	366
Total	748	2,882	3,895	6,547

G = General

V = Vocational

SOURCE: National Statistical Office, quoted in Sukanya Nitungkorn,
"The Problems of Secondary Education Expansion in Thailand",
Southeast Asian Studies, Vol.26 No.1 (June 1988), p.29.

APPENDIX 4.4

Educational Budget by Level, 1961-86

(Million Baht)

	<u>First Plan</u>	<u>Second Plan</u>	<u>Third Plan</u>	<u>Fourth Plan</u>	<u>Fifth Plan</u>
	<u>1961-66</u>	<u>1967-71</u>	<u>1972-76</u>	<u>1977-81</u>	<u>1982-86</u>
Primary and preprimary	6,034	10,771	22,848	56,026	106,203
Secondary(general)	1,751	2,380	5,228	16,046	50,592
Vocational	741	1,679	2,228	6,379	20,142
Teacher training	450	978	2,214	2,839	5,049
University	1,121	2,684	5,708	12,786	22,912
Nonformal education	49	137	499	1,643	4,522
Other education promotion	920	1,277	2,860	4,297	8,325
Total	11,066	19,906	41,585	100,016	217,745

SOURCE: Office of the National Education Commission, quoted in Sukanya Nitungkorn, "The Problems of Secondary Education Expansion in Thailand", Southeast Asian Studies, Vol.26, No.1 (June 1988), p.31.

APPENDIX 4.5

Budgetary Appropriations by Functional Classification

<u>Function</u>	<u>Fiscal Year 1988</u>		<u>Fiscal Year 1989</u>	
	<u>million Bahts</u>	<u>%</u>	<u>million Bahts</u>	<u>%</u>
Economic services	38,088.5	15.6	47,039.8	16.5
Education	43,860.7	18.0	47,550.7	16.7
Defence	42,985.1	17.7	46,307.1	16.2
Public health and services	27,334.5	11.2	30,410.6	10.8
Internal security	11,634.9	4.8	12,598.5	4.4
Debt services	59,746.7	24.5	66,563.7	23.3
General adminis- tration	6,693.2	2.8	8,528.7	3.0
Others	13,156.4	5.4	26,000.9	9.1

SOURCE: Budget Bureau, quoted in Economic Review 1988 (Bangkok:
The Post Publishing, 1988), p.22.

APPENDIX 4.6

Number of Titles by Subjects, 1968-1986

	<u>68*</u>	<u>69</u>	<u>70</u>	<u>71</u>	<u>72</u>	<u>73</u>	<u>74</u>	<u>75</u>
1. Generalities	107	374	231	284	263	198	190	244
2. Philosophy, Psychology	41	52	46	72	66	49	37	61
3. Religion, Theology	211	353	289	279	306	259	242	241
4. Sociology, Statistics	34	69	20	32	124	97	91	108
5. Political Science	33	55	24	19	86	51	106	96
6. Law, Public Administration	89	152	83	89	120	212	188	200
7. Military Art and Science	22	33	55	36	190	6	7	22
8. Education	52	280	330	350	295	407	451	542
9. Trade, Communications, Transport	34	12	10	7	15	6	3	2
10. Ethnography, Manners and Customs	24	26	47	52	45	40	7	25
11. Linguistics, Philology	18	28	22	56	71	69	134	89
12. Mathematics	4	16	33	25	38	44	66	22
13. Natural Sciences	13	21	10	18	18	5	53	46
14. Medical Sciences, Public Health	24	60	43	47	66	57	34	41
15. Technology, Industries, Trades and Crafts	22	19	13	21	33	23	34	18
16. Agriculture, Forestry, Stockbreeding, Hunting	30	46	42	45	53	23	24	53
17. Domestic Sciences	12	15	31	21	27	14	20	17
18. Commercial and Business Management	11	49	22	13	43	19	32	23
19. Town planning, Architecture	33	30	30	23	42	50	63	53
20. Entertainment, Pastimes, Games, Sports	13	42	35	34	38	9	26	26
21. Literature	95	255	7	273	272	242	193	177
a. History of Literature	30	-	283	-	-	-	-	-
b. Literary Texts	23	-	-	-	-	-	-	-
22. Geography, Travel	57	30	31	37	69	26	40	30
23. History, Biography	39	161	95	76	103	99	116	76

* First Editions only

APPENDIX 4.6 (cont.)

Number of titles by Subjects, 1968-1986

	<u>76</u>	<u>77</u>	<u>78</u>	<u>79</u>	<u>80</u>	<u>81</u>	<u>82</u>
1. Generalities	294	295	240	256	204	283	474
2. Philosophy, Psychology	66	61	65	54	58	90	97
3. Religion, Theology	263	197	243	350	309	238	254
4. Sociology, Statistics	125	88	55	61	123	157	250
5. Politics Economics	132	247	176	252	264	348	397
6. Law, Public Administration	141	232	264	280	246	197	322
7. Military Art and Science	17	23	12	16	9	14	16
8. Education, Teaching, Training,	474	724	990	743	927	853	1038
9. Trade, Communications Transport	10	19	11	9	98	47	27
10. Ethnography, Cultural Anthropology	33	37	65	53	49	48	49
11. Mathenatics	22	47	48	36	38	68	306
12. Natural Sciences	57	91	87	97	151	282	65
13. Medical Sciences, Public Health	53	53	47	73	126	68	307
14. Engineering Technology, Industries	42	180	77	104	120	230	237
15. Agriculture, Forestry, Stockbreeding	33	58	58	143	122	178	247
16. Domestic Sciences	20	36	33	73	24	201	210
17. Management, Administration	36	47	42	52	57	274	61
18. Physical Planning, Town and Country	8	15	9	10	15	51	115
19. Plastic and Graphic Arts, Photography	6	20	17	39	25	86	53
20. Music Performing Arts, Theatre, Film	17	26	18	33	25	40	56
21. Games and Sports	31	47	37	34	17	26	31
22. Languages Linguistics, Philology	145	269	353	280	290	63	44
23. a. History of Literature Criticism	16	13	17	24	16	23	23
b. Literary Texts	-	-	-	-	-	-	-
24. Geography	39	60	49	21	34	35	52
25. History, Biography	117	177	138	131	123	135	219

APPENDIX 4.6 (cont.)

Number of Titles by Subjects, 1968-1986

	<u>83</u>	<u>84</u>	<u>85</u>	<u>86</u>
1 Generalities	702	914	686	629
2 Philosophy, Psychology	101	193	240	173
3 Religion, Theology	265	466	427	559
4 Sociology, Statistics	223	587	303	607
5 Politics, Economics	526	577	572	436
6 Law Public Administration	372	453	335	318
7 Military Art and Science	26	56	41	119
8 Education, Teacher-Training,	1313	1608	1278	1141
Leisure				
9 Trade, Communication, Transport	42	71	62	60
10 Ethnography Cultural Anthropology	67	79	76	74
11 Philology, Languages, Linguistics	241	377	237	195
12 Mathematics	138	324	242	148
13 Natural Sciences	310	200	267	477
14 Medical Sciences, Public Health	301	425	511	533
15 Engineering, Technology	227	336	206	202
16 Agriculture, Forestry, Stockbreeding	282	242	332	373
17 Domestic Sciences	77	75	65	67
18 Management Administration	111	162	147	244
19 Physical, Architecture	51	145	135	73
20 Plastic and Graphic Arts	72	23	23	70
21 Performing Arts, Theatre	72	107	63	39
22 Games and Sports	29	3	11	72
23 a. History & Literary Criticism	365	561	683	638
b. Literary Texts	-	-	-	-
24 Geography	75	158	159	78
25 History, Biography	198	250	35	295

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