Performance of the Arabic Book Translation Industry in Selected Arab Countries: Egypt, Lebanon, Morocco, Saudi-Arabia and Syria

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SUMMARY

Knowledge has always been at the heart of economic growth and development. It is disseminated chiefly through the different stages of education, R&D, the mass media and the translation industry. In Arab countries there has been a widespread impression that there is a low level of translation activities, which in turn has led to a low output of the translation industry in those countries. This research project addresses this issue; its overall objectives are (1) to describe the economic performance of the Arabic book translation industry in Egypt, Lebanon, Morocco, Saudi Arabia, and Syria; (2) to understand empirically the economic performance of that industry, the focus here being on qualitatively analyzing the major determinants (positive and negative factors) affecting the growth process of that industry; and (3) to provide policy makers and business leaders in the Arab region with theoretically sound and evidence-based advice on the issues analyzed in the project[1].

To provide an empirical base for answering those questions, both published data and fresh new data have been used. For the latter purpose, a questionnaire-based survey was conducted in the year 2005 among 190 experts, covering firm representatives and experts in industry and government. The Porter (Diamond) model has been used as a theoretical background. The empirical results were incorporated in five national case studies. In addition, a synthesis of the results of the national reports gives a comparative account of the performance of the Arabic book translation industry in the five Arab countries.

The overall results suggest that the Arabic book translation industry in these Arab countries has not yet achieved the level of development of other developing and developed countries. Underperformance of the Arabic book translation industry is attributable to (among other factors) severe coordination failures. This is a state of affairs in which the inability of the different agents (translators, book publishers, suppliers, customers, and supporting organizations, state, and so forth) to coordinate their behavior (choices) leads to suboptimal outcomes. Since the economic performance of the translation industry often involves complementary investments whose return depends on other investments being made by other agents, coordination is crucial. Obviously, neither market forces nor the state have undertaken this coordination activity sufficiently. The Arabic book translation industry seems to suffer from both market failure and government failure.

In light of these results the Arabic book translation industry offers great economic potential that should be mobilized systematically in the future. This paper discusses how this can be achieved, based on a well-designed and implemented process of upgrading and innovation in companies, industries, and clusters related to translation activities. Public policy, properly understood and adequately implemented, can play an important role in this process.

To overcome, or at least to mitigate, some of the major coordination failures in the Arabic translation industry, it is necessary to select an existing pan-Arab nongovernmental organization (NGO) or to create a new one, whose mission would include two major groups of activities:

[1] This research project was financially supported by the World Bank, Department of the Middle East and North Africa. We would like to thank here the World Bank, especially Mustapha Nabli, Regional Chief Economist.

The first action would involve the coordination of activities on the supply side of the Arabic translation industry. This group of activities would encompass the following:

1. Improving the documentation of Arabic translation needs. This can be achieved by creating a regional Internet-based database that would constitute an information base on what has been translated, what is being translated, and what will be translated from foreign languages into Arabic.
2. Designing and implementing translation support programs (including providing financial means) on a sustainable basis. This would create and maintain a critical mass of translators and publishing companies.
3. Promoting translation quality assessment programs. This would mitigate the widely known problem of poor quality translation.
4. Designing and implementing training programs for translators and publishing companies involved in the translation business. This would increase the number of translators and improve the quality of translation activities.
5. Promoting networks among writers, translators, and publishers that facilitate contacts and create opportunities for new translation projects. Such additional communication channels would spur new project development.

All these measures are intended to strengthen the supply side of the translation industry in Arab countries.

The second action would involve the coordination of activities on the demand side of the Arabic translation industry. The suggested NGO should support readership surveys and promote reading programs. This can be done in collaboration with radio and television stations, print media, schools and universities, and so forth. These measures would help to identify the real needs of the reading public and enhance the culture of reading, especially among young people.

ECONOMIC PERFORMANCE OF THE ARABIC BOOK TRANSLATION INDUSTRY IN SELCTED ARAB COUNTRIES: AN OVERVIEW AND SYNTHESIS

By Najib Harabi

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1 Introduction

Knowledge has always been at the heart of economic growth and development. The ability to invent and innovate, that is, to create new knowledge that is then embodied in products, processes and organizations, has served greatly to fuel economic and social development. For this to happen, efficient systems of both production and diffusion of knowledge have to be put in place.

In the context of developing, including Arab countries, international knowledge diffusion is critically important. These countries can take advantage – at relatively low costs- of the knowledge production that has taking place in developed countries. They can draw upon the capital, skills and technology of those countries[2]. The knowledge embodied in those factors of production is disseminated chiefly through the different stages of education and the mass media and the translation industry[3].

In addition to their contribution to international knowledge transfer, translation activities are also economic activities that generate income, create jobs, and contribute to the foreign trade of their countries of origin. In Arab countries there has been a widespread impression that there is a low level of translation activities, which in turn has led to a low output of the translation industry in those countries. Since there has been no systematic collection of data or statistics for verifying this impression, a systematic empirical study is needed to provide scholars, business leaders, and policy makers with sound advice and assist them in making informed policy decisions concerning this important issue.

However, it could have been quite costly and time-consuming to conduct such an analysis for the translation industry for all Arab countries. A selective approach was therefore required. This consisted of choosing five Arab countries (Egypt, Lebanon, Morocco, Saudi Arabia, and Syria) for which to conduct national case studies. Titles of the final reports of these case studies are provided in the attached reference list.

This paper synthesizes the results of the national case studies and thereby gives a comparative account of the performance of the Arabic book translation industry in the five selected Arab countries4. The rest of the paper proceeds as follows: section 2 describes the objectives of the study, section 3 outlines the methodology, and section 4 summarizes the major results. Section 5 concludes with recommendations for public policy makers.

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[2] A well known hypothesis advanced by Alexander Gerschenkron of Harvard University suggests that relative backwardness itself may aid development. Because they can lean on the technology of advanced countries, today's developing countries can grow more rapidly than did Britain or Western Europe in the period 1780-1850.

[3] For a detailed discussion of the knowledge society in Arab countries, see Arab Human Development Report 2003.

[4] In this synthesis report and in all national case studies we analyze that part of the Arabic translation industry that consists of books. Translation activities that cover other media and information instruments such as the Internet, mass media (electronic and otherwise) cultural products (for example, movies, advertising, and so forth) have not been explicitly covered in this research project.

2 Objectives of the Study

The overall purpose of the project is to help estimate the economic importance of the translation industry in five Arab countries, as well as to identify the main problems that the translation industry is now facing. It should therefore be seen as an important step toward fulfilling the following objectives:

(a) To describe the economic performance of the translation industry in Egypt, Lebanon, Morocco, Saudi Arabia, and Syria, including the contribution of this industry to gross domestic product (GDP), employment, and foreign trade
(b) To understand the economic performance of that industry, the focus here being on qualitatively analyzing the major determinants (positive and negative factors) affecting the growth process of that industry; the determinants include economic, legal (notably Intellectual Property Rights (IPR), social, technological, cultural and political factors, and last but not least the role of supporting industries and governmental policies related to Arabic translation
(c) To provide policy makers and business leaders in the Arab region with theoretically sound and evidence-based advice concerning the issues analyzed in the project.

3 Methodology of the Study

To achieve the objectives of the study, we have followed a standard approach used in applied economics. Inspired by the latest developments in this field, we first developed a common theoretical understanding of the questions at hand and then tried to find empirical evidence for those questions. Both steps are discussed in more detail below.

3.1 Theoretical Background

To illustrate the economic importance of the Arabic translation industry (the first objective of the study), economists have so far used the following three indicators:

- Gross Added Value of the Arabic translation industry as a percentage of total Gross Domestic Product (GDP)
- Share of employment in the Arabic translation industry as a percentage of total national employment
- Share of foreign trade in the Arabic translation industry as a percentage of total national foreign trade

However, the actual computation of the three economic indicators as applied to copyright-based industries—see, for instance, Miller & Stromberg (1993) and Siwek & Mosteller (1999)—came up against both methodological difficulties and the crucial problem of a lack of appropriate data (for a good discussion of these issues, see WIPO [2003]).

A major methodological difficulty is that of defining the (upstream and downstream) exact boundaries of the translation industry. In other words, which parts of the value chain of the translation industry should be included in the analysis? For example, connected to the central activity of translating and organizing the production of a translated publication is the manufacture of paper and the retailing of translated books. Should those peripheral activities be included in calculating the economic importance of the translation industry?

Another problem, the availability of reliable data (especially in developing countries such as the Arab countries), has to be emphasized. (For more country-specific data problems, the interested reader is advised to look at the national case studies.)

With regard to the second objective of the study, understanding the factors that affect the economic performance of the translation industry in five Arab countries, we have chosen a theoretical background based on a model (the Diamond Paradigm) developed and used by Michael E. Porter of Harvard University (see Porter 1990). The model is itself derived from the structure-conduct-performance (SCP) paradigm in industrial economics (Bain 1956). According to the model, the economic performance (or competitive advantage) of any industry is affected by the following four major forces:

1. Production factor conditions
2. Demand conditions
3. Related and supporting industries
4. Corporate strategy, structure, and rivalry

Production factors include basic inputs such as land, labor, capital, infrastructure, natural resources, scientific knowledge, and so forth. In addition to these general-purpose factors Porter emphasized the need for specialized inputs that include highly specialized pools of skills, applied technology, infrastructure, and even sources of capital tailored to the actual needs of particular industries. These specialized factors are not natural endowments: firms and governments create them. Their presence or absence in an industry is critical to its economic performance.

The second determinant of competitiveness is demand conditions. They include the contribution of both the size and the character of the home-market demand to the industry's product or service. National and international success grows out of having local customers who are among the most sophisticated and demanding in the world for products and services. Size, while important, is less crucial than character. Sophisticated, demanding local buyers provide a window on advanced customers' needs; they prevail on local firms to meet high standards in terms of product quality, features, and service. By meeting such demands local companies often gain a competitive advantage in foreign markets.

The presence or absence of suppliers and related industries that are internationally competitive is the third point of the Porter Diamond. A firm may not need local suppliers for all of its inputs, but it clearly benefits from having a critical mass of competitive suppliers of specialized components, machinery, and services nearby. Far more significant for competitive advantage than mere access, says Porter, is the advantage that home-based suppliers provide in terms of innovation and upgrading based on proximity and close working relationships. Suppliers and end users located close to each other can take advantage of quick and constant information flow, joint work on improvements, and mutual motivation to progress. In addition to supplier industries, home-based competitors in related industries or industries with similar skills, technologies, or customers provide similar benefits: information flow, technology interchange, and opportunities for sharing, which in turn increase the rate of innovation and upgrading.

The fourth determinant of performance and competitive advantage and the fourth point of the Porter Diamond are corporate strategy, structure, and rivalry. These determinants encompass the conditions in a country that govern how companies are created, organized, and managed, as well as the nature of domestic rivalry. According to Porter, intense local rivalry is one of the most significant pressures on companies to innovate and upgrade.

The four determinants of the diamond—production factor conditions, demand conditions; related and supporting industries; corporate strategy, structure, and rivalry— shape the environment for competing in particular industries. The determinants themselves are subject to the influence of two other variables: (1) government and (2) chance. It would be tempting, as Porter has argued, to regard government as a fifth determinant, especially because its role is so prominent in most discussions on competitiveness. Yet this would be wrong: government is best seen not as an independent determinant of competitiveness but as an agent that makes its presence felt through the four determinants of the diamond. The other outside influence on the diamond is chance. Such events as major technological discontinuities and significant shifts in key factor costs such as energy, not to mention wars and other massive economic and political dislocations, alter conditions in the diamond and can cancel out the advantages of entrenched competitors. While chance events may make for shifts in competitive advantage in an industry, the attributes of local environments determine which nation, state, or city exploits them. The locality with the most favorable diamond will be the most likely to convert chance events into competitive advantage.

Another point Porter emphasizes a great deal is that the four determinants of competitiveness constitute a dynamic system that is as important as its parts—or perhaps more so. The effect of one part of the diamond on competitive advantage depends on the state of the others. Serious weakness in any one determinant will hamper an industry's potential for advancement. The four determinants are thus self-reinforcing. In sum, the system (diamond) can work both as a virtuous and as a vicious circle of mutually supporting forces at industry level.

The last point in the Porter model that should be mentioned here is the relationship between the diamond and the building of clusters. On the basis of numerous industry case studies, Porter observes that a firm's ability to perform and upgrade continuously is strongly influenced by its proximity to advantages in the diamond. Having capable rivals, suppliers, sophisticated customers, and providers of specialized factors nearby ensures more rapid information flow, more fluid working relationships, and greater pressure to perform. Such dynamics lead to the formation of clusters of nationally or internationally competitive industries (including at a regional level involving two or more countries). Clusters of industries that compete nationally and internationally are the driving force behind economic development in a nation or region; their mutually reinforcing character energizes performance, fosters upgrading, spawns new firms and new industries, and stimulates demand for local industries.

3.2 Empirical Approach

With regard to the first objective of the study—estimating the economic importance of the Arabic book translation industry—we have relied basically on facts and figures published by national and international institutions. Unfortunately, data on the Arabic book translation industry from those sources are either unreliable or insufficient in the Arab countries under consideration. This is attributable to several factors: first, relevant economic data, if available, are highly aggregated (national accounts data), and cannot therefore be used for assessing the economic importance of the Arabic translation industry. Second, since the existing Standard Industrial Classification (SIC) used by national statistical agencies for collecting data at corporate and industry levels is also highly aggregated (mostly at the three-digit level), it is not suitable for adequately analyzing the value chain of the Arabic translation industry. Third, additional statistical sources (such as corporate and household surveys data) are not available in all five countries, and even if they are, they use heterogeneous definitions, concepts, sampling methods, and so forth.5

This last point is unfortunately also true for the national research teams working within the present study. They have not, for instance, always used the same definitions, sampling methods, and so forth for their country studies. For example, while the Saudi Arabia study considers the Arabic book translation industry exclusively in terms of the production of translated books, the other national case studies look also at the distribution and retailing of those books. For a comparison of the similarities and differences among the industry studies in the five Arab countries, see Tables 1 and 2.

[5] For example, in the terminology of publishers these sources always mention the number of printed copies, which does not reveal the value of their sales.

Table 1: Activities of the Arabic Translation Industry (Value Chain) covered by the study
(x: covered by the national case study; 0: not covered by the national case study)

	Egypt	Lebanon	Morocco	Saudi Arabia	Syria
Initiation of a translating idea, including funding	X	x	x	x	x
The act of translation	X	x	x	x	x
Production of translation	X	x	x	x	x
Distribution	X	x	x	0	x
Retail [sale]	X	x	x	0	x
(Academic translation training)	X	0	x	0	0
Translation of documents and work of interpreters	X				

The consequences of these problems are first, that we can say very little in quantitative terms about the economic importance of Arabic book translation industry in the selected Arab countries, and second, that, even if data are available at the national level, comparisons between the countries are very difficult to make. Finally, since the present study analyzes only the Arabic translation of books, the results can only partly reflect the importance of the entire Arabic translation sector in the economy; apart from which it is not appropriate to make international comparisons.

As for the second objective of the study—understanding the factors affecting the economic performance of the Arabic book translation industry in five Arab countries— the research teams collected original qualitative and quantitative data themselves. For that we developed a comprehensive questionnaire (88 items) based on the Porter model briefly described above. It covered all major aspects of the model and thus contained general questions on the firm (10); on the economic performance of firms (2); on supply conditions (13); on demand conditions (9); on related and supporting industries (13); on market structure and firm strategy (20); on government policies (13); and last, concluding questions on the future expectations of firms in the Arabic book translation industry (8). The questionnaire (its detailed structure can be found in Appendix A) was designed as a guide for conducting face-to-face interviews for a basically exploratory analysis of the Arabic book translation industry in the selected Arab countries.

Owing to the limited financial resources available, it was agreed that the survey would not cover a “representative” sample, in statistical terms, of all firms and experts in the five countries, but rather a limited number of “important” firms and experts located in the five Arab countries. The national research teams were thus able to conduct 190 interviews, not only with representatives of firms, but also with industry and government experts. Of those interviews, 18 percent were conducted in Egypt, 14 percent in Lebanon, 36 percent in Morocco, 18 percent in Saudi Arabia, 14 percent in Syria and (for more details see Table 2.) The survey was conducted in 2005.

Table 2: Number of Interviews for the Arabic Translation Industry

	Egypt	Lebanon	Morocco	Saudi Arabia	Syria	Total
Firms	13*	7	17*	3	11	51
Experts	22**	18**	52	32	15**	139
Total	35	25	69	35	26	190

* Book publishers and translation bureaus
** Including experts from government and international organizations

Last but not least, one important point should be kept in mind while reading and interpreting the results of those interviews given below: all the survey data used in this study were the product of subjective judgments based on imperfect information6. In sum, from a methodological perspective the present study is an exploratory, primarily qualitative analysis of the Arabic book translation industry in five Arab countries.

[6] See Bertrand and Mullainathan (2001) for a general discussion about problems related to subjective survey data.

4 Major Results

The purpose of this section is to present the main results concerning the two major objectives of the study: (1) estimating the economic importance of the Arabic book translation industry, and (2) understanding the factors affecting that performance. The comparison of those results among the five Arab countries will be emphasized. Table 3 gives a synthesis of the empirical results provided by the authors of the national case studies. The reader interested in the details of the individual countries is, however, referred to the national country studies presented separately.7

4.1 Economic importance of the Arabic translation industry

The economic importance of the Arabic book translation industry is measured, as mentioned previously, by three indicators: (1) Gross Added Value in relation to GDP, (2) share of national employment, and (3) share of foreign trade (export and import).

With regard to all three indicators, data are unfortunately unavailable for all Arab countries in the study except Saudi Arabia. In the case of Saudi Arabia, rough estimates suggest that 0.02 percent of the overall labor force is employed by the Arabic translation industry and thus contributes 0.03 percent of GDP of that country. As for the estimated contribution of the Arabic translation industry to foreign trade, an estimate is available for exports only: 0.03 percent of all exports come from the Arabic translation industry of this country.

Although there is no hard data to back up the following statement, there exists an overall consensus among all experts interviewed that the overall economic contribution of the Arabic translation industry, as estimated by the three indicators mentioned previously, is very small (if not negligible) in all five countries.

4.2 Factors affecting economic performance of the Arabic translation industry

The Arabic book translation industry is not only very small, in relative terms, but its overall economic performance is also poor, as measured by several indicators (such as growth of sales, market share, number of employees, profits [after taxes], and cash flow in the last two years). There is a consensus about this result among publishing companies and industry experts in all Arab countries under consideration, except for Lebanon (see Table 3).

[7] A word of warning: when reading and interpreting the figures given in this section, one should keep in mind all the methodological and statistical difficulties mentioned above.

Table 3: Synthesis of Results for the Translation Industry

Indicators	Countries				
	Morocco	Saudi Arabia	Egypt	Syria	Lebanon
Overall performance	-	-	-	-	+
Role of Supply					
Labor	+	-	-	+	++
Capital	-	+	-	+	+
Role of Demand					
Domestic demand	-	+	-	+	-
Export market	-	?	-	-	+
Role of Related Industries					
Upstream	?	-	-	0	0
Downstream	?	+	-	+	+
Other firms	?	-	?	0	+
Role of Market Structure					
Domestic competition and strategies	-	+	0	0	-
Foreign competition	-	++	-	-	+
Role of Public Policy					
Development of human resources and technology	++	-	-	+	+
Infrastructure and investment	-	+	0	+	+
Stimulation of demand	-	--		-	--
Enforcement of Intellectual Property Rights	?	+	0	--	+
Firms' Expectations	-	+	-	+	+

Note: 0 = None
- = Poor
- - = Very poor
+ = Good
+ + = Very good; (?) = Cannot be determined

What are the reasons for such overall poor economic performance? The answer to this important question will be structured, as already mentioned in the methodological part, around the four dimensions of Porter's Diamond: (1) production factor conditions, (2) demand conditions, (3) related and supporting industries, and (4) corporate strategy, structure, and rivalry. In addition, we will examine how government policies affect these four factors and therefore the performance of the whole industry. A summary of the interview results regarding these several determinants of the economic performance of the Arabic book translation industry is reported, as already mentioned, in Table 3.

4.2.1 Production Factor conditions

The lack of a sufficient number of qualified translators both in quantitative and qualitative terms (in Egypt and Saudi Arabia)8 and the lack of capital investment in the latest publishing equipment (in Egypt and Morocco) seem to be major handicaps for the development of publishing companies engaged in Arabic translation. In the case of Morocco, for instance, "Financial support provided to translators by public authorities is weak, raising private funds is very difficult, and banks are reluctant to finance translation activities as well as other cultural activities." (L. Achy)

Only Syria and Lebanon do not report particular problems with these two factors of production (labor and capital). On the other hand, "the rigid political control in Syria has isolated the country economically and considerably limited private initiative in the development of cultural industries. The totally arabised education system, censorship9 and religious considerations are factors that have limited supply and demand." (R. Melki)

Along the value chain of the translation industry the role of translators is very crucial. They act very often as initiators of translation projects, as consultants to publishers of translated books, and finally, as authors of the actual translation work. In spite of their central role, their training, status and salaries are in general—according to the experts interviewed—unsatisfactory10. In some countries, like Syria, they seem to be "in a fragile economic and social condition" (R. Melki). In addition, their profiles vary from one country to another. They are, for instance, best paid in the Gulf countries, followed by Lebanon, Tunisia, and Jordan, and finally by Syria, Egypt, and Iraq.

In addition to specialized labor, the lack of capital investment in the infrastructure that is tailored to the actual needs of this industry (for instance, in the field of information and communication technologies, both hardware and software), and the lack of sufficient and sustainable financing of translation programs seem to hamper the development of the Arabic translation industry.

4.2.2 Demand conditions

The second factor affecting poor economic performance of the Arabic translation industry is the market demand conditions. Neither the size nor the characteristics of the demand side is growth-enhancing for this industry. The contribution of the domestic demand to the economic performance of the Arabic book translation industry is poor in most countries under

[8] In the case of Egypt, for instance, there is an abundance of translators but they are not always specialized. In addition, quality control is lacking. Lahcen Achy reports similar observations about Morocco: "The quality of translation is also among obstacles that constrain translated titles' dissemination. Specialized translators in areas such as banking, insurance, engineering, science, and some modern branches of law are still lacking."

[9] The authors of the 3rd Arab Human Development Report 2003 report interesting examples of "Paradoxes of Arab censorship: the novel which won the prize for creativity in the Arab cultural capital in 2002 was banned from distribution in that same capital by the censor. In another case, the novels of the author who won the first prize in the largest book exhibition in the region in 2002 were subsequently banned.

[10] An example of how translators deal with their uncertain professional situation is to diversify their portfolio of activities: (1) they get involved in translating documents for international organizations and (2) they act as interpreters in international events. Both activities deflect them, of course, from translating books.

consideration (Egypt, Lebanon, and Morocco11), except in Saudi Arabia. This is attributable to the low average income level, the low percentage of educated persons able and willing to read (low literacy rates), the relatively poor quality of translated books, the lack of an overall culture that promotes reading, even among educated families (issue of values and tastes in Arab societies). In addition, more and more potential readers (for instance, the younger generation) prefers hearing or watching electronic and multimedia products (tapes, videos, CDs, DVDs, and so forth) over reading translated books.

In addition, the local market is highly segmented because of educational and other cultural policies12: The group of Arabic readers is practically separated from other segments of readers (French readers in the Maghreb, or English readers in the Mashreq and so forth). Moreover, there is a lack of knowledge about the reading public (both actual and potential demand). Hardly any surveys exist on reading habits: that is, what people read, how they read, why they read, and—perhaps more importantly—why people do not read. There is, in other words, a lack of systematic and regular readership surveys. Unlike the situation in other parts of the world, especially in developed countries, where this kind of survey is very common, we do not know the real characteristics of the actual and potential demand for books in general and in Arabic translated books in particular. We do not know, for instance, whether the poor performance of the Arabic book translation industry is partly owing to the result of a mismatch between supply and demand in this market. In the case of Morocco, for instance, there is "a clear mismatch between translated titles and the demand as expressed by readers."(L. Achy)

To fill in some of the knowledge gap in this area, Next Page Foundation conducted the first readership survey in five Arab countries (Egypt, Lebanon, Morocco, Saudi Arabia, and Tunisia) in 2005. The main conclusions of this survey can be summarized as follows:

- "With the exception of Egypt and Saudi Arabia, a share larger than expected of the literates in the other countries surveyed does not read.
- Among those who read the share of infrequent (up to 30 minutes per day) and low readers (31-60 minutes per day) makes up the majority.
- Reading is something children learn at school; there is almost no reading support by family members.
- Reading is stopped at ages 15–19; it is closely linked to leaving school or other institutions of education.
- Most who decrease or stop reading do not return to reading at all.
- School does not initiate reading for life but limits this to school only; deficits must be seen in school manuals and in the absence of young adult literature.
- Arabic is the preferred language of reading.
- More books in this language on topics of interest would make a considerable part of readers read more.
- There is a high religious-mindedness in terms of content and topics of reading.
- Interests professed for certain topics do not necessarily translate into the reading of such topics." (From Next Page Foundation Home Page: www.npage.org).

These results suggest clearly there are strong structural problems on the demand side of each individual book market in the Arab countries under consideration. In addition, in spite of

[11] In Lebanon the demand is considered by local experts to be very limited: "Local demand for translated literary works and textbooks is too small to absorb potential output. Lebanese publishers target Gulf markets, where a high purchasing power exists. However, books produced in Lebanon are too expensive for Syrian, Egyptian, or North African markets."(R. Melki]

[12] In this regard, an element that deserves further investigation is the presumed bilingualism (or in some countries in North Africa, even "trilingualism"—Arabic, French, and several Berber languages) of the educational system and its impact on demand and supply of the Arabic translation market.

common language and culture, there is no common market for (translated) books.13 The export market is therefore not very important for the growth process of the Arabic book translation industry in almost all countries under consideration, except in Lebanon. For specific reasons, Lebanese publishing companies have developed ways and means of exporting books in other Arab countries.

This lack of openness of the Arab book market has several negative consequences. First, it makes the division of labor among the different Arab countries in the area of book production very difficult. Economics of scale and scope cannot be realized. Furthermore, duplication of effort is very often the result of this phenomenon. (There are many stories about the fact that the same foreign books have been translated into Arabic simultaneously in different Arab countries; or that an already translated book has been used under a different cover in another Arab country, without paying royalties to the copyright holder and so forth.)

4.2.3 Related and supporting industries

A third factor explaining the economic performance of the translation industry is the presence or absence of competitive suppliers and related industries (printing, paper, and so forth). In our case, upstream industries seem to have either a negative impact on the development of the Arabic book translation industry in Egypt and Saudi Arabia, or no impact at all (neutral) in Lebanon and Syria. On the other hand, downstream industries (retail, advertising, and so forth) seem to affect this industry positively in Lebanon, Saudi Arabia, and Syria, but negatively in Egypt. In the latter country, for instance, classical distribution channels seem to be a major problem.

The situation is even worse when it comes to modern marketing tools through the Internet, such as e-commerce. Across the Arab world it has a very limited existence14.

4.2.4 Corporate strategy, structure, and rivalry

In the field of Arabic translation, both the state and private companies have been involved; therefore, there are public and private sector strategies. Wherever the state has been involved in translation and publishing activities, political considerations have prevailed. Public sector strategies usually follow political priorities that do not correlate to business interests; in addition they lack financial means15. The state is particularly strong in Egypt and Syria, where the share of the number of titles published per year may be limited but print runs are high (see Next Page Foundation 2006).

In contrast, private, mostly family-owned publishing firms follow a market-oriented strategy. Since systematic readership surveys and other market research studies are not widely used, most private publishers follow a more intuitive, cautious business strategy. This is revealed in the way they select topics and authors of books. The selection process is risk-adverse: only well-established titles and writers are translated and published. When new titles are translated, the market risk is passed to their authors: they have to cover the printing costs and so forth themselves. This business strategy also reflects the existing bottlenecks on both the supply and demand sides of the Arabic translation industry, discussed previously.

The weakest point in the entire translation business is—according to a field study conducted by Next Page Foundation—“editing, as it is reduced to language checking and does not involve quality control in terms of contents.”

[13] A symbolic indicator for this phenomenon is the fact that there is (contrary to all expectations) no common Arab bestseller (author/title), as indicated by the Next Page Foundation readership survey.

[14] Unfortunately, international firms specialized in e-commerce—such as amazon.com—do not release country- or region-specific statistics.

[15] In Lebanon official public sector strategies regarding Arabic translation do apparently not exist.

The market structure of the Arabic book translation industry is an oligopoly in most countries. There are only a few big publishers in each country that bring out more than 70 titles a year (in countries such as Jordan or Syria, only five publishers). The rest of the market consists predominantly of small-scale publishers that publish up to 10 titles per year and some in the medium range (20 titles per year).

The contribution of domestic competition to economic performance of publishing companies is perceived as negative in Lebanon and Morocco, neutral in Egypt and Syria, and positive in Saudi Arabia. The perception about the role of foreign competition is clearer: it seems to have a negative impact in most countries (Egypt, Morocco, and Syria), with the exception of Lebanon and Saudi Arabia.

4.2.5 Government policies

As stated previously, government policies affect all four determinants of the economic performance of the Arabic translation industry. They have an impact on the supply and demand side as well as on the internal organization of the industry. The results in this section do not therefore relate to all aspects of government policies. A few examples will be selected. The role of the state in developing industry-specific human resources and technology, for example, has been perceived as very positive in Morocco, positive in Lebanon and Syria, and finally as negative in Egypt and Saudi Arabia.

The second aspect of government policies that has been seen as negative in all countries under consideration is the stimulation of demand for translated books. The state seems to perform poorly in this regard.

Finally, a very important task of the state in the book industry, as in other copyright-based industries, is the enforcement of copyrights. All five countries under consideration became parties of the Berne Convention for the Protection of Literary and Artistic Works of 1886. In addition, since all the countries throughout the region aspire to WTO membership, they try to develop their copyright laws along the lines of international standards. Trade-Related Aspects of Intellectual Property Rights (TRIPS) seems to become more important than the Berne Convention. This does not, however, mean that national law enforcement agencies take all necessary measures to sanction copyright abuses as they occur. The perception by the firms and experts interviewed regarding this aspect of government policies varies, therefore, from one country to another. It is seen as positive in Lebanon and Saudi Arabia and as very negative in Syria. In the case of the latter country there is “high piracy rate. The absence of copyright protection affects negatively publishers who are committed to rights.”(R. Melki)

4.2.6 Concluding remarks

The synthesis of the empirical results of national case studies and other international studies suggests that the Arabic book translation industry in the five Arab countries has not yet achieved the level of development (in either absolute or relative terms) of other developing and developed countries.

The underperformance of the Arabic book translation industry is attributable to—among other factors—severe coordination failures: this is a state of affairs in which the inability of the different agents (translators, books publishers, suppliers, customers, and supporting organization, the state, and so forth) to coordinate their behavior (choices) leads to sub optimal outcomes. Since the development of the translation industry involves complementary investments whose return depends on other investments being made by other agents, coordination is crucial. Obviously, neither market forces nor the state have undertaken such coordination activity to a sufficient degree. The Arabic book translation industry seems to suffer from both market failure and government failure. These coordination failures exist not only at the national (domestic) level, but also at the regional and international levels (Arab League and other pan-Arab and international organizations).

5 Recommendations

The third objective of the present study, as already mentioned, is to provide policy makers and business leaders in the Arab region with theoretically sound and evidence-based advice on the issues analyzed in the project. On the basis of the evidence submitted in the five Arab national case studies and on evidence from other studies, we will be able to draw up some general recommendations that can be implemented by different institutions (national governments or regional or international development agencies). For very country-specific recommendations, the reader is referred to the national case studies presented separately.

5.1 Recommendations for national governments

In light of the evidence that the Arabic translation industry in the Arab countries selected for this study has not yet achieved the level of development of other developing and developed countries, we can conclude that there is great potential, which should be systematically mobilized. This can be achieved only by a well-designed and implemented process of upgrading and innovation in publishing companies and the entire book industry. Public policy, properly understood and adequately implemented, can play an important part in this process; indeed it should play four fundamental roles in the process of development of the economy in general and of the Arabic translation industry in particular.

The first such role is that of improving the quality and availability of the generalized inputs that publishing companies draw on, such as educated human resources (qualified translators and other specialized personal), physical and technological infrastructure (hardware and software for information communication technology) and capital.

Second, government should encourage upgrading and innovation with the aid of rules, regulations, and incentives. Through regulations, tax policies, the enforcement of IPR, antitrust laws, and many other measures, governments influence the climate in which publishing companies compete. That influence should be used to encourage investment, innovations, and other determinants of economic performance.

Third, government should leverage its investment in skills, research capabilities and infrastructure to facilitate the process by which all local clusters form and develop. Such investment feeds whole groups of firms and industries. Thinking in terms of clusters rather than industries also encourages publishing companies to work closely with suppliers and customers.

Fourth, and perhaps most subtly, government leaders should challenge local companies and people in their regions to raise their sights and strive for greater competitiveness. The ability of government to signal the future fosters economic upgrading.

Looking at these four government roles more closely, we can see that they are consistent with a modern view of the role of the state in the economy. This view advocates neither a laissez-faire nor a strongly interventionist industrial policy, but operates in tandem with the Porter Diamond presented earlier (see Porter 1990). With reference to this model let us consider the types of actions policy makers in Arab countries should take to positively influence the different components (the dynamics) of the diamond as applied to their Arabic translation industry.

(1) Policies affecting production factor conditions:

- Improve the documentation of Arabic translation needs. This can be achieved by creating a regional Internet-based database that would constitute an information base on what has been translated, what is being translated, and what will be translated from foreign languages into Arabic.
- Design and implement translation support programs on a sustainable basis. This would create and maintain a critical mass of translators and publishing companies. The supply side of the translation industry would be strengthened.
- Invest in human resources by building a strong basic education system for all citizens, thus eradicating illiteracy; by setting high educational standards; by supporting institutions that develop specialized skills (such as specialized professional translators); and last, but not least, by creating incentives for company investment in training.
- Support science and technology by creating incentives for private research and development (for example, in the area of electronic publishing, e-commerce, machine translation software development, and so forth) and for promoting wide dissemination of basic scientific knowledge in areas that affect the development of the Arabic translation industry.
- Invest in physical infrastructure; the special needs of the Arabic translation industry should also be taken into consideration.
- Create some sort of accreditation body for translators to control for good quality and to lessen the costs of asymmetric information in the Arabic translation industry.

(2) Policies affecting demand conditions:

- Support readership surveys. This would help to identify the real needs of the reading public, as well as to monitor whether reading promotion policies in general and translation support programs in particular have a measurable impact, especially on young people
- Stimulate early demand for translated books in Arabic; for instance, for public schools, universities, and public administration
- Act as a sophisticated buyer in purchasing (ask for high quality of translated books)
- Promote translation quality assessment programs. To enhance demand for translated books, programs for translation quality control are needed.

(**3) Policies affecting related and supporting industries:**

- Facilitate cluster development along the lines of the value chain of the book industry
- Promote training programs among professional of the Arabic translation industry in the fields of marketing and distribution
- Improve distribution outlets
- Promote the role of nongovernmental professional publishing and translation associations in disseminating knowledge and mobilizing resources, thus creating positive externalities in the Arabic translation industry.

(4) Policies affecting strategy, structure and rivalry:

- Promote local competition by deregulating the structure of industry and strictly enforcing antitrust policy and IPRs
- Expand interregional and international trade and investment by opening book markets, promoting exports, and attracting appropriate foreign investment in those markets

5.2 Recommendations for pan-Arab NGOs

To overcome, or at least to mitigate, some of the major coordination failures in the Arabic translation industry, it is necessary to select an existing pan-Arab nongovernmental organization (NGO) or to create a new one, whose mission would include two major groups of activities:

(1) The first major group of activities involves the coordination of activities on the supply side of the Arabic translation industry. This group of activities would encompass actions for the following:

- Improving the documentation of Arabic translation needs. This can be achieved by creating a regional Internet-based database that would constitute an information base on what has been translated, what is being translated, and what will be translated from foreign languages into Arabic
- Designing and implementing translation support programs (including financial means) on a sustainable basis; this would create and maintain a critical mass of translators and private publishing companies
- Promoting translation quality assessment programs. This would mitigate the widely known problem of poor-quality translation
- Designing and implementing training programs for translators and publishing companies involved in the translation business
- Promoting networks among writers, translators, and publishers that facilitate contacts and create opportunities for new translation projects. All these measures are intended to strengthen the supply side of the translation industry in Arab countries.

(2) The second major group of activities involves the coordination of activities on the demand side of the Arabic translation industry. The suggested NGO should support readership surveys and promote reading programs. This can be done in collaboration with radio and television stations, print media, schools and universities, and so forth. These measures would help to identify the real needs of the reading public and enhance the culture of reading, especially among young people. Lately, as already indicated, Next Page Foundation has started conducting readership surveys in five Arab countries. Other pan-Arab NGO can capitalize on these experiences.

6 Summary

Knowledge has always been at the heart of economic growth and development. It is disseminated chiefly through the different stages of education, R&D, the mass media and the translation industry. In Arab countries there has been a widespread impression that there is a low level of translation activities, which in turn has led to a low output of the translation industry in those countries. This paper addresses this issue; its overall objectives are (1) to describe the economic performance of the Arabic book translation industry in Egypt, Lebanon, Morocco, Saudi Arabia, and Syria; (2) to understand empirically the economic performance of that industry, the focus here being on qualitatively analyzing the major determinants (positive and negative factors) affecting the growth process of that industry; and (3) to provide policy makers and business leaders in the Arab region with theoretically sound and evidence-based advice on the issues analyzed in the project.

To provide an empirical base for answering those questions, both published data and fresh new data have been used. For the latter purpose, a questionnaire-based survey was conducted in the year 2005 among 190 experts, covering firm representatives and experts in industry and government. The Porter (Diamond) model has been used as a theoretical background. The empirical results were incorporated in five national case studies. This paper synthesizes the results of the national reports, giving a comparative account of the performance of the Arabic book translation industry in the five Arab countries.

The overall results suggest that the Arabic book translation industry in these Arab countries has not yet achieved the level of development of other developing and developed countries. Underperformance of the Arabic book translation industry is attributable to (among other factors) severe coordination failures. This is a state of affairs in which the inability of the different agents (translators, book publishers, suppliers, customers, and supporting organizations, state, and so forth) to coordinate their behavior (choices) leads to suboptimal outcomes. Since the economic performance of the translation industry often involves complementary investments whose return depends on other investments being made by other agents, coordination is crucial. Obviously, neither market forces nor the state have undertaken this coordination activity sufficiently. The Arabic book translation industry seems to suffer from both market failure and government failure.

In light of these results the Arabic book translation industry offers great economic potential that should be mobilized systematically in the future. This paper discusses how this can be achieved, based on a well-designed and implemented process of upgrading and innovation in companies, industries, and clusters related to translation activities. Public policy, properly understood and adequately implemented, can play an important role in this process.

To overcome, or at least to mitigate, some of the major coordination failures in the Arabic translation industry, it is necessary to select an existing pan-Arab nongovernmental organization (NGO) or to create a new one, whose mission would include two major groups of activities:

The first action would involve the coordination of activities on the supply side of the Arabic translation industry. This group of activities would encompass the following:

- Improving the documentation of Arabic translation needs. This can be achieved by creating a regional Internet-based database that would constitute an information base on what has been translated, what is being translated, and what will be translated from foreign languages into Arabic.

- Designing and implementing translation support programs (including providing financial means) on a sustainable basis. This would create and maintain a critical mass of translators and publishing companies.
- Promoting translation quality assessment programs. This would mitigate the widely known problem of poor quality translation.
- Designing and implementing training programs for translators and publishing companies involved in the translation business. This would increase the number of translators and improve the quality of translation activities.
- Promoting networks among writers, translators, and publishers that facilitate contacts and create opportunities for new translation projects. Such additional communication channels would spur new project development.

  All these measures are intended to strengthen the supply side of the translation industry in Arab countries.

The second action would involve the coordination of activities on the demand side of the Arabic translation industry. The suggested NGO should support readership surveys and promote reading programs. This can be done in collaboration with radio and television stations, print media, schools and universities, and so forth. These measures would help to identify the real needs of the reading public and enhance the culture of reading, especially among young people.

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8 Appendix A: Structure of the Questionnaire

Section I. General questions on the firm

- Corporate name
- Fields of corporate activity (music, software, book publishing, audiovisual, and so forth)
- Position in the value-chain of the industry (supply of inputs translated—author of book, software and so forth—production, distribution, and so forth)
- Position in the firm of person interviewed
- Date of foundation
- Number of employees in 2000–2001
- Capital in 2000–2001
- Volume of physical output 2000–2001
- Volume of sales 2000–2001 (in national currency)
- Past evolution (growth rate) of sales over the past five years

Section II. Questions on the performance of firms

- Growth of sales in the last two years
- Growth of market share in the last two years
- Growth of number of employees in the last two years
- Growth of profits (after taxes) in the last two years
- Growth of cash flow in the last two years
- Growth of other indicators (specify) in the last two years
- Overall performance in the last two years

Section III. Questions on supply conditions

- Number, skills, training, and so forth of employees in the firm
- Availability, structure and sources of financing
- Price/quality ratio of other inputs (electricity, postal services, telephone, domestic transport, port services, airport services, shipment)

Section IV. Questions on demand conditions

- Size and determinants of domestic demand
- Consumers targeted
- Character of domestic demand (demanding, anticipating foreign demand, and so forth)
- Foreign demand (exports)

Section V. Questions on related and supporting industries

- Number of and cooperation with local suppliers
- Availability of specialized inputs
- Horizontal cooperation with other firms
- Contribution of supporting industries (insurance, legal services, banking, marketing, and so forth)
- Contribution of public institutions (universities, R&D organizations, and so forth)

Section VI. Questions on market structure and corporate strategy

- Market structure (number of firms, and so forth)
- Intensity of domestic competition
- Market access and other market entry barriers
- Entry barriers for foreign competitors (foreign competition)
- Existence of an explicit business strategy (number of people involved, goals, strengths and weaknesses of the firm, and so forth
- Image of the firm (held by customers, competitors, and so forth)
- Existence of an explicit IPR strategy

Section VII. Questions on government policies

- Government policies in human resource development (education, health, training, and so forth)
- Government policies in science and technology
- Government policies in physical infrastructure (transport, shipment, utilities, and so forth)
- Government as a buyer of cultural goods (demand stimulation)
- Government policies in industry-specific investment, building clusters, protecting IPRs, protecting competition, setting price controls, attracting foreign investments, and so forth

Section VIII. Concluding questions: future expectations (sales, profits, employment, market, and so forth)

ECONOMIC PERFORMANCE OF THE ARABIC TRANSLATION INDUSTRY IN EGYPT

by Ahmed Farouk Ghoneim

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1 Executive Summary

The report aims at providing a portray of the status of the books' translation industry in Egypt. Moreover, it aims at investigating the economic importance of such industry in the Egyptian economy. Lack of data prevented arriving at a clear cut estimate for the contribution of the books' translation industry in the Egyptian economy. However, it can be safely argued that the contribution of such industry in the Egyptian economy does not exceed 0.00005% by all means. The estimation of the contribution of such industry to employment and international trade was rather an impossible task due to voluminous problems related to unavailability of data, engagement of workers in these industries in more than one job, etc. whereas data on international trade in such industry is rather absent. The report mainly dealt with the various aspects of the industry in terms of investigating the demand and supply conditions, the role of supporting industries, government support, and finally the status of intellectual property rights (IPR) protection with special emphasis on piracy status. The market structure together with the business strategy of the firms is discussed. Finally, expectations of the industry and recommendations are put in place.

There are many reasons that initiated the undertaking of this report for Egypt. Among which is that the Cultural Industries in Egypt are well reputed for their long lasting history in the Arab countries and especially its reputation being a hub of translation industry in Egypt. Ranging from being accounted as one of the largest producers of Film Industry in the World, and a well-established Book-Publishing Industry including books' translation, a flourishing Sound Recording Industry to a dynamic Software Industry, the role of Cultural Industries in the Egyptian economy is on a rising trend. However, and despite such importance Cultural Industries in Egypt remain understudied. The untapped potential of an industry as the books' translation and its positive contribution it can provide to the economy triggered the initiative by the World Bank to study the status of the books' translation industry in Egypt as well as a number of Arab countries that are reputed to have a well established translation industry.

The report adopts a methodology of interviews with experts, free lance translators, and firms' owners in the field based on a standard questionnaire. It is complemented by the available data (national and international) and literature on those industries, which are scarce. Hence, the results of the report follow to a large extent the opinion of the performers in the market, experts (independent and in the government). The number of interviews undertaken reached 14 interviews.

The report revealed that the books' translation industry in Egypt has a number of characteristics. Among such characteristics is the lack of sufficient Intellectual Property Rights (IPR) enforcement, a problem that has been identified by the majority of interviews undertaken. Inconvenience of obtaining loans from banks and absence of insurance schemes is an evident problem in this industry. The industry does not suffer from lack of translators, but suffers from the absence of criteria required to assess the quality of their product, the high variation in their prices, and absence of fully specialized translators. Despite the availability of few educational institutions, the graduates are not equipped with the necessary skills required in such industry. The demand conditions related to the books' translation industry is weak compared to other translation fields as official documents translation and simultaneous verbal translation which enjoy high increasing demand.

The books' translation industry suffers from weak governmental support. It has weak institutional and political support. Hence, governmental policies affecting the industry have been either not effective or counter effective. Recently, the attention devoted by the government to such industry has revived some of the public projects, however efforts are not sustainable. The international donors play an important role in this industry where there exist several projects aiming mainly at spreading their culture in the Egyptian society by translating some of their books. The Americans and French are playing a leading role in this regard.

The role played by supporting industries was crucial in the case of the books' translation industry especially with regard to distribution which seems to suffer from several bottlenecks.

Despite such deficiencies in the governmental policies, the expectations for such industry to flourish can be positive provided certain conditions are met, among the most important of which is having a clear vision and a concrete plan for reviving this industry. Recommendations for better performance of books' translation industry includes securing a better means of finance, effective implementation of anti piracy polices.

2 Introduction

Egypt is well known for being a hub of Cultural Industries in the Arab World. Ranging from being accounted as one of the largest producers of Film Industry in the World (WTO, 1998), and a well-established Book-Publishing Industry, a flourishing Sound Recording Industry to a dynamic Software Industry, the role of Cultural Industries in the Egyptian economy is on a rising trend. Historically, Translation Industry has played an important role in the civilization of Egypt. In the 20th Century translation from foreign languages to Arabic has been revived where a number of intellectuals undertook several initiatives to revive the translation industry. The initiatives were led by the well know Egyptian writer “Taha Hussein”.

This study represents a step in trying to measure and understand the importance of Translation Industry in the Egyptian economy. The study is mainly based on a standard questionnaire that has been used for interviewing firms, experts, and individual translators working in the field of translation (for a summary of the results, see table 1. in annex). It is complemented by the available data (national and international) and literature on this industry, which are scarce. Hence, the results of the study follow to a large extent the opinion of the performers in the market, experts (independent and in the government). The number of interviews undertaken reached 14 interviews distributed unevenly among firms and experts, and individual translators (see table 2 in annex).

3 Historical Background and Overview of the Industry

The Translation Industry in Egypt has faced several cycles. In the beginning of the 20th Century, the industry experienced a period of flourishing, however such period was based on individual initiative. The initiative was then transformed to a public project for enhancing the Translation Industry and the industry experienced a flourishing phase in the 1960s which since then suffered continuous deterioration. Another project followed, however the efforts remained humble to a large extent leading to a weak industry that is highly vulnerable to individual decisions.

There are no concrete data or information on the industry, however all interviews showed that it does not have a significant weight in terms of contributing to the GDP, exports or imports (see table 3 in annex).

In fact the translation industry in Egypt is transformed to a byproduct with the exception of very rare cases that will be handled below. The translation industry has now focused on translation of documents rather than books where free lancer translators and specialized agencies undertake this mission for the various international organizations. Most of such translators are originally interpreters who decided to undertake this additional job. Moreover, it is very rare to find a publisher who specialized in publishing translated books where in the majority of cases we experience a publisher who subcontracts a translator to undertake the job of translation and then publish the book. Among the most important initiatives that have kept the translation industry surviving has been the role of the international donors in dissemination their culture where they subsidize the translation of certain books and use Egyptian publishers and translator to undertake the job.

In this study we focus on translation from foreign languages to Arabic and not from Arabic to foreign languages which has been described to be very modest. According to an interview with the head of the Egyptian and Arab Publishers' Union, the number of Arabic books in general translated into German language are around 10-12 books per year.

The status of weak translation industry is highly correlated with the status of book publishing industry in Egypt and availability of translators.

The book publishing industry in Egypt is considered large in absolute terms but very small in relative terms to GDP. A study has estimated the size of the book publishing industry (in terms of sales of books per year) to be in the neighborhood of 20 million US $ (less than 0.0002% of GNP) in the year 2000. The book publishing industry according to a WIPO study is diversified where some fields are experiencing flourishing and other fields suffer from deterioration. The performance of the industry in general is correlated with the economic status which is reflected in the purchasing power of customers, their specific tastes which have been diverted lately to political and religious topics, and the illiteracy rate which is relatively high in Egypt exceeding 40% population. On the other hand, the availability of translators does not seem to be a major constraint in Egypt. As will be shown below there is abundance of translators in Egypt, however there is a problem of quality and specialization.

4 The Economic Performance of Firms in the Translation Industry

In order to describe effectively the economic performance of the translation industry we have to differentiate between the economic performance of the industry itself and the economic performance of the translators.

Regarding the economic performance of the industry itself all interviews showed that it is not a profitable business. Several factors have attributed to making the industry not profitable. Among such factors are the following: the high fees asked for by translators where in many cases the quality cannot be guaranteed and in many cases the publisher has to use an editor to revise what has been translated or retranslate the book which leads to an increase in his costs. What adds to this problem is the asymmetric information of the translators' market. There are no clear criteria for differentiating between good and bad translators. The certificates or past record do not play a role. Moreover, in many cases the specific nature of the book translated might require a certain talent from the translator which might not be available. The uncertainty of the quality of translation and the high unjustifiable costs of translation are among the main reasons for the low profitability of the translated books. Other factors include the need to purchase the intellectual property rights from the original publisher which vary according to the number of translated copies and according to the name of the author and the book. This factor increases again the uncertainty prevailing. An example was given in one of the interviews of "Harry Porter" series where the translation was of very bad quality that caused the publisher to collect the copies in the market and cancel the translation of the book. Among the factors that affect the profitability as well is the efforts undertaken by international donors. Americans, French, and Japanese embassies in Egypt have certain programs where they choose a number of American and French books to be translated and distributed in the market. In many cases they pay for translation and subsidize the printing of the book. They intend to disseminate their own culture and hence the translated books are either sold with a very low price or distributed without a payoff. The end result is that publishers who take the initiative to translate the books face unfair competition with such books.

The government has two initiatives to enhance the translation industry. The first initiative is called the "National Project of Translation" which follows the Higher Council of Culture that is affiliated to the Ministry of Culture. The project in ten years which will end by 2005 will have translated 1000 books which imply that on average 100 books were translated per year. This is compared to 1,700 titles translated and published per year in Japan and 10,000 titles translated and published per year in Spain (Arab Human Development Report, 2003). In the whole Arab world, the total number of titles translated was 175 books over the period 1970-1975 which now increased to 330. But as the interview with the responsible official for that project revealed the pace of translation in some years has been slow and in other years has accelerated significantly specially in the last years. For example in some years the number of books translated did not exceed 3 books where in other years like 2005 it will reach 200 books. The books were translated from 28 languages to Arabic. Such project is a-non profit project so as well the second largest public project called "the series of 1000 books" which is produced by the Public Organization of Books, a government affiliated agency. However, this project has been experiencing some difficulties and is currently not performing due to the change of the head of the agency that according to interviews is re-planning the whole project. Private businesses interviewed showed that the translation of books is not profitable and what makes them survive in this industry is either their own self interest or cross subsidization from the translation of documents which result in high profits helping to subsidize the translation of books.

As for the book publishing industry in general, there is no obvious trend in the economic performance of the firms working in it. Some firms experienced an upsurge in their sales in the last five years where other firms experienced sluggishness in their sales. A theme that joins the good performers or the bad performers has been absent. In other words, performing well was not confined to large or small firms or firms dealing in a certain type of books. In the last five years, the number of employees has remained constant as a conservative estimate for the whole Industry but has increased for a number of firms by 2-5%. Profits have increased in some cases and decreased in others, again preventing any clear-cut trend that can be deducted for the whole industry. As a result, the evaluation of the firms' owners ranged from full satisfaction to complete dissatisfaction with the performance of their firms. However, the dissatisfaction in some cases was not related to the book publishing industry per se but was rather related to bottlenecks in other related industries, or the value chain, where distribution outlets have been a major problem. Moreover, according to some experts the book publishing industry in Egypt faces some obstacles that prevent its development. It faces an important problem regarding technology transfer and the adequate availability of the paper manufacturing and printing and book publishing equipments, such as printers, ink cartridges (WIPO, 2003). This is mainly due to the fact such equipments are not locally produced and hence their importers are obliged to absorb most of the continuous rise in their international prices as a result of their inability to raise the prices of their final product (books) because of the high demand elasticity. Moreover, the governmental policies (see section on governmental policies) do not help to overcome such problems.

On the other hand we find that translators' economic performance is excellent. There is a high demand on them in the market due to the proliferation of translation of documents of international organizations and working as interpreters. This raised their prices in the market, however as revealed from the interviews the market suffers from high uncertainty as big names do not necessarily imply good translation. Due to the imbalance between demand and supply in general and not confined to the books' translation industry the prices of translators skyrocketed and affected negatively the translation of books industry as it added to the costs of publishers and reduced their margin of profit significantly. Translators who work in the different fields prefer translation of documents as they are straightforward and the payoff is faster than the translation of books. They even prefer the work of interpreters where the payoff is much higher than the translation of books. It has been described in all interviews that translation of books is a daunting task that requires lot of time and the payoff is not rewarding. As a result there was a shift toward translating documents and working as interpreters where the demand is high and increasing and the payoff is much higher and faster than the payoff of the translation of books.

Experts and publishers interviewed showed great concern over the future of the industry. They emphasized that all conditions necessary for making the translation of books a profitable business are absent. They also ensured that without the subsidization of this industry whether from international donors or government this industry would have died. Some government officials have emphasized that the industry is picking up due to the aforementioned governmental projects, but it was deduced that the picking up is mainly based on the personality and own opinion of the heads of such governmental organizations. In other words there is no institutional setup that guarantees the sustainability of the high frequency of translation. Moreover, the performance of the two largest governmental projects is highly sensitive to the annual budgets available.

As a result of such unfavorable domestic conditions and due to the fierce competition arising from major players in the Arab World namely Lebanon, Syria, and Saudi Arabia, the weight of Egypt as the hub of books' translation has been lessened to a large extent.

5 Supply-side Conditions

The industry suffers from weak supply conditions. The market of translators as revealed above suffers from asymmetric information. The nature of the industry implies that the publisher often faces high risk as even if he subcontracts the translation job to a good translator there is no guarantee that his translation will be good due to the different types of goods translated which require a certain talent for each book.

According to some interviews the supply of translators suffers from severe problems. At a certain period of time there was a graduate school for translators which was closed down and replaced by undergraduate school for Foreign Languages. Such school by time has lost the quality of good education due to several problems. The end result was lack of good translators and surge in demand. Moreover, the education of the translation profession has experienced deterioration in the last years due to the overall educational problems prevailing in the Egyptian educational system. In fact the translation job became a job without clear criteria. In some cases there are excellent translators who did not graduate from the faculty of languages. They learned by doing and mastered the “talent” of translation. Moreover, as identified by the interviews when asked why there is lack of supply when there is so high demand it was revealed that working as a translator often imply an irregular job which lessen the certainty of working permanently and hence result in reluctance to work as translator. Moreover, there might be a negative view toward the translators in Egypt who are not highly admired as other professions in the Egyptian society as being academics, doctors or engineers. Such conditions implied the scarcity of the most important factor in the translation industry which is skilled labor or rather skilled translators who specialize according to nature of books. What is prevailing now is a pool of translators who undertake different assignments related to translation in different fields adding to their lack of specialization and affecting negatively the quality of their product.

Moreover, finance conditions are problematic. In general banks are reluctant to finance copyright projects due to intangible nature of the product and the high risk and uncertainty involved in the activity. Hence, publishers either have to depend on their own finance which is often limited to reduce the element of high risk or intentional donors subsidize the translation of certain books according to the choice of their own embassies to disseminate their knowledge. In few cases the translator himself approaches the publishing firm and identifies the importance of translating the book.

Despite the fact that the WIPO study (2003) emphasized that the book publishing industry in Egypt does not suffer from financial constraints as they depend on their own resources and are in no need of bank loans, the situation is different when it comes to translation industry. The high risk elements associated with translation in terms of costs of translation, quality of translation and unrevealed potential demand imply that there is a need for additional sources of finance for the translation industry to survive, which is not the case in Egypt, at least if left to market forces. The surviving books’ translation projects depend heavily either on governmental support or international donors support. Both sources of finance are in many cases directed by the interests of the government or international donors and hence do not reflect the intellectuals’ opinions who believe that certain books should be translated.

6 Demand-side Conditions

The demand conditions are not encouraging at all for several reasons. The high illiteracy rate prevailing in the Egyptian society and the weak economic conditions made the reading of books and especially expensive goods a luxury good that is not affordable. Besides, the Egyptian society lacks the conducive culture of reading. The amount of books read per capita is relatively modest (Arab Human Development Report, 2003).The affording class often prefers reading the book in its own language. Moreover as identified above most of the translated books prevailing in the market are subsidized or distributed without price which imply that demand of the market does not reflect the real demand if market was functioning properly.

The demand for translated books is highly associated with the demand on books in general. Some firms view domestic demand sufficient in absorbing their production, while others see that that reading books is a luxurious service, especially in a population with more than 40% illiteracy rate16 (World Bank, 2001). Given the low purchasing power of the majority of the Egyptian population17, the domestic demand is not sufficient, or in other words, the market is tight. This has been confirmed by some studies. According to Hassenin, 2002 the small size of the market combined with other factors as export barriers, the drop off of the role of public libraries and its undersized budgets has affected negatively the performance of the book publishing industry. The small market size led to a decrease in the distributed quantity of books which is an obstacle to the progress of this industry and prevents the use of high technology that require the printing of large amounts of books to utilize economies of scale.

The targeted consumers differ according to the niche of each firm ranging from children, to university students, to foreign language readers, to religious readers, etc.. Hence, there is no distinguished targeted consumer in that Industry. Thus, whether the consumers are demanding customers or not in that Industry depend on the niche related to each firm, however, the majority of the firms related the demand of their customers to the overall economic and political conditions that control the demand of their customers. The sensitivity of the demand in this Industry to the economic conditions prevailing has been asserted in a number of studies (e.g. Abdelgwad, 2000). Price was one of the main determinates that affect the demand on the products of the book publishing industry. To a lesser extent, most of the firms agreed that quality and cultural taste play a role in determining demand. The issue of price being a major determinant of demand is of paramount importance since it implies low price elasticity and if combined with the high costs associated with translation we observe that publishers cannot pass the increase in costs to consumers and have to absorb it all which make the translation industry a non profitable business.

In a nutshell, it appears that the demand for the book publishing industry and books' translation are highly correlated with the economic and political conditions prevailing. Each niche of the Industry is affected in a different way according to the circumstances that govern the demand on its products. On the one hand, price plays a role when the books are bought in the market, or in other words highly elastic products, such as literature, Romans, etc. On the other hand, income has no role when it comes to less demand elastic products such children, school and university books. The demand is also highly affected by unpredictable factors such as fashionability, herd behavior and experimentation. The small market size is a main limiting factor on the expansion of the book publishing industry in general and the translation industry in specific.

[16] The illiteracy rate was 33% for males and 56% for females in 2000.
[17] The GDP per capita was 1226 $ (constant US $ with base year 1995) in 2000 which decreased later due to the devaluation of the Egyptian pound by more than 40% reaching the year 2003.

It is wroth noting that such weak demand conditions which affect the books' translation industry are not the case for other fields of translation. On the contrary, the demand conditions are highly favorable for international documents' translation, mainly those related to the United Nations Organizations. Moreover, the demand for interpreters has been on a rising trend due to the proliferation of academic, political, and other events that require simultaneous translation. As a result the prices of translators skyrocketed which as aforementioned has increased the costs of books' translation as translators diverted towards such activities.

7 Related and Supporting Industries and Services

The supporting industries and services often constitute a major bottleneck. All translators, public and private, identified that distribution is a major bottleneck and that in many cases they have to sacrifice their profits, if any or even incur losses to ensure that the translated books are distributed. For example the “The National Project for Translation” has an agreement with more than 32 distributors, however it actually cooperates with 5 or 6 only. The private publishers have this problem magnified several times as they cannot afford influencing the distributors who control the market. Most of the published books find a better way of distribution in book fairs which even when sold at a large discount the quantity sold is large leading to an increase in revenue.

In general the book publishing industry has been characterized to be among the industries that suffer significantly from the lack of supporting industries. The distribution has been among the major constraints facing the book publishing industry where the distribution outlets are often controlled by the government and constitute a major bottleneck for publishers.

There is no insurance system that can guarantee the publishers which translate books sharing the risks of translation. Such idea is not even discussed at any level. Lack of insurance mechanisms when combined with lack of finance implies weak supporting activities that negatively affect the performance of the industry.

There is no association for translators which can defend their rights and ensure the quality of translators available in the market. This has been emphasized in the interviews and it was mentioned that it requires a collective action among the community of translators to undertake such initiative which will help this industry to perform on a rule based system similar to other professions as accountants, engineers, etc.

The translation specific education is absent, with the exception of the undergraduate language school (in fact there are two of them, one in Cairo University and one in El Azhar University). However training institutes or special programs for translators are absent. Specialized educational and training programs are considered among the major supporting related industries in this field, and unfortunately they are lacking. Even in the newly private universities which have proliferated in Egypt, there are no schools for translation, despite the desperate need of the market for them.

8 Market Structure and Firm Strategy

The market structure is segmented into two main public projects, a main quasi governmental firm affiliated to the largest newspaper, several international donors' initiatives, namely French and American, and few scattered private initiatives from publishers. In fact the number of private firms working in the field of books' translation reaches around 100 firms, however a handful of them are specialized mainly in book translation whereas the rest undertake the book translation as a marginal activity. The firms' strategies in this market were not clear, but they mainly depended on cross subsidization to finance the translation activity.

The market depends heavily on free lancers translators who are sub contracted by public and private publishers. Such free lancers are not strongly specialized but rather undertake different assignments ranging from official documents translation to interpreters to books' translation. The heavy demand on their services resulted in high prices. However, as aforementioned the prices are not based on any criteria except reputation which is often misleading as the interviews revealed.

There are no specific strategies identified by publishers in the field of books' translation. According to the interviews, the majority of cases work as follows where the publisher approaches the translator agree with him on the fees and he undertakes the job. In very few cases, the system is reversed where a writer or a translator approaches a publisher to translate a book.

The publishers in the market do not confine themselves to certain type of books to be translated. In other words, the publishers, in contrast with the book publishing industry in general, do not specialize by niches where you find publishers specialized in religious or political oriented books. In the case of translation there is no specialization which is a result of the very tight market.

9 The Role of Intellectual Property Rights

As identified by several interviews property rights represent a great problem. Even in public firms the interviews revealed that the copyrights issue was never a problem till three or four years ago where piracy was high and there was no intention to protect it. Now the issue is different and publishers, both private and public, contact the original publisher and buy the copyrights which add to the costs of the industry. In some cases if the book is a best seller the high fees of obtaining the copyrights can result in canceling the whole idea of translation as it will add tremendously to the costs. The copyrights when bought depends as well on the number of printed copies which implies that the larger the number of copies are printed the higher is the price of the purchasing the copyrights. This prevents the domestic publisher from enjoying the economies of scale that would have compensated for the high price of copyrights purchased. However, it should be identified that although the interviews revealed that there is a movement toward ensuring the purchase of copyrights, they also believe that to a large extent this has not been the case where several translated books in the market did not buy the copyrights. This was confirmed when a prominent Brazilian author visited Egypt in May 2005 and he found that a number of his books were pirated without the original publisher permission.

It is worth noting that the Government despite its enhanced efforts in the recent period to protect copyrights has focused mainly on software and films whereas the books have been largely neglected. As mentioned by a WIPO official there was a chance for Egypt to submit a demand in the Berne Convention in a specific period of time, by which Egypt could have got a waiver for translating and printing foreign documents without having to pay copyright fees. Although such demand would not have cost Egypt ay effort except submitting it in the dedicated time, no initiatives were undertaken.

It is worth noting that the issue of copyrights protection of books in general is among the major problems that face the book publishing industry in Egypt. According to the interviews there are even Egyptian books that have been translated to foreign languages and their copyrights were not protected. Moreover, the interviews emphasized that the copyrights of Egyptian authors and publishers is violated in a number of Arab countries and especially in Lebanon.

10 Government Policies

The government policies remain humble to a large extent in this industry. Regarding education there is a general dissatisfaction with the educational quality in the whole university system and hence there is nothing specific undertaken for the translation industry. The only initiative that is likely to revive the industry, however it is still an initiative is establishing “The National Center for Translation” which will be affiliated to the Higher Council of Culture and is planed to revive the translation of the literature translation, especially books.

Translation Industry has remained out of the agenda of policy makers, so as the cultural industries in general. There are no serious efforts undertaken to revive the industry, with the exception of the newly initiated project aforementioned. On all levels ranging from education to helping to establish a union or association to protection of copyrights the government efforts remain rather absent.

On of the major problems identified is the lack of the institutional setup that helps to sustain any good intentions to promote the industry. The efforts currently ongoing are rather “personal” and undertaken on ad hoc basis without clear vision on the importance of this industry.

11 Industry Expectations

The industry expectations has ranged from being optimistic among the public agencies basing their optimism on the large number of translated books under the context of the “National Project for Translation” and the newly initiated “The National Center for Translation” to very pessimistic views by private sector and experts due to the weak supply, demand, and supporting industries factors.

Our own assessment based on the interviews is that there is lack of vision on what is needed. Efforts are ad hoc. There is no plan on what types of books or what foreign languages should have the priority to be translated given the lack of necessary funds. The only clear vision available is among the international donors who want to promote their own culture and spread it in Egypt. The lack of vision implies that the industry is going nowhere and is severely deteriorating. A rescue plan with a clear vision should be designed and implemented to rescue the industry and revive the role of translation. The fierce competition from Egypt’s neighbors has shifted the lead from Egypt to other countries in the region and this trend is still ongoing. To regain the lead in this industry a pragmatic plan should be designed taking in consideration the full coordination among the different stakeholders and ensuring the sustainability of the pillars for its success including sources of finance and intellectual property rights protection.

12 Recommendations

Such industry cannot survive without a clear vision, which seems is the case where it has always depended on ad hoc individual initiatives. A strong vision on what is actually needed and a time horizon with a clear action plan should be set by the government. This industry cannot survive without clear subsidy program from the government due to the nature of high risk premium, low profitability and asymmetric information. A graduate school or a diploma for enhancing the book translation industry should be established. Moreover, on the regulatory dimension, there should be clear criteria for evaluation of translators. Moreover there should be a collective action undertaken by translator to establish their own union to be able to defend their rights.

ECONOMIC PERFORMANCE OF THE ARABIC TRANSLATION INDUSTRY IN LEBANON

By Roger Melki

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1 Executive Summary

Lebanon has numerous advantages over other countries in the region for developing cultural industries. At its core, Lebanon is an open country with solid cultural traditions that has bilingual/ trilingual school and university systems, and a great capacity to adapt to technological change. Even during the years of political and social unrest. Beirut attracted foreign visitors as the privileged capital for Arab and international conferences and conventions.

The translation sector in Lebanon remains one of the best in terms of quality. Translated books per million people are estimated to be above the Arab average. Although the Lebanese generally prefer reading foreign works in the original language, Lebanon is active on the export market and remains a net exporter of translated books.

Accurate estimations of the Lebanese translation output are not obtainable, mainly because statistics relating to gross national product, value added or income distribution by sector are incomplete. Despite the absence of figures, it is clear that translation industries are developing, and that Lebanon has the capacity to be competitive, provided favorable economic, social and political environments are ensured.

The translation business relies heavily on labor. The good reputation of Lebanon as a translation center in the Middle East is based on the high competence of translators. Skilled labor is however expensive and scarce. Employment is concentrated in Beirut and its suburbs where the main economic activity takes place.

Capital requirements vary according to the size of firms. Free lancers mainly work from home with minimum investment and operating costs, while small firms need a more substantial capital to run an office. Book publishers, who secure advance financing for copyright and translation rely on their own funds. Film dubbing and subtitling require investments in expensive machines.

Demand for translated books in Lebanon is limited to educated readers who either do not master a foreign language or cannot afford foreign publications. Lebanese publishers tend to choose their topics according to demand in the Arab markets where they built strong distribution networks. Arab demand for translated books is focused on important political and religious issues, on history, archeology, tourism, cooking, horoscope, health or fast learning. Publishers representing foreign companies are active in translating dictionaries, schoolbooks and children’s books.

The Lebanese market did not witness an increase in internal demand for large translation jobs (technical reports, law texts, university programs, encyclopedias, industrial projects) in the last two years. The lack of such projects is due to the slowdown of the Lebanese economy and the scarcity of foreign investments.

Lebanon faces intense competition from overseas, especially in technical fields. Demand from Arab countries is not increasing in proportions that satisfy Lebanese agents. External projects are hard to obtain as several Gulf countries have developed their own translation industries. Egypt and Syria compete with Lebanon with respect to prices, irrespective of quality. However, the competence and multicultural background of Lebanese experts is well recognized internationally, therefore Lebanon still has the potential to attract new foreign contracts.

Firms are isolated entities in the economy rather than a well-structured cluster of the cultural industry. There are no large general translation firms in Lebanon where only a few very small privately owned businesses are registered as translating firms.

Prices vary according to the nature of job, the level of competence and experience of the translator, and also depend on his willingness to lower rates. Price policies depend also on customer, volume of project, topic, and personal availability.

Internally, competition is high among translators. At the regional level, part of the translation of math and science school and university course texts is made in Syria and Egypt, where teaching in Arabic is dominant. Often, the final editing is done in Lebanon which remains a regional reference for quality.

The translation profession is not structured in a way to bring together demand and supply of services. Part of the demand is not well channeled to competent available professionals. The informal character of the industry is a major obstacle to accessing export markets. Professionals complain that translators face serious difficulties as they are not backed by any support institution. All the persons interviewed complained about the lack of available data on the industry, which negatively affects business conditions.

The Lebanese Government provides very little support to the industry. The role of the Ministry of Culture has been limited to informal contacts to encourage Lebanese publishing houses and to establish international agreements in favor of the translation and publication of Lebanese authors.

The translation industry in Lebanon cannot achieve its full potential in the long term without the formal organization of the profession, requiring: The creation of a translators association that works on improving terms and social benefits, as well as on improving legislation, mainly copyright protection; The creation of a data base to be the primary source of information to government, industry and the general public; A more supportive Government recognizing the importance of cultural industries and showing a political will to promote and defend them. The Ministry of Culture has an important role in promoting literary exchanges through partnerships with organizations engaged in the international promotion of literature and support for literary translation.

2 Introduction

Lebanon has numerous advantages over other countries in the region for developing a translation industry. At its core, Lebanon is an open country with solid cultural traditions that has bilingual/ trilingual school and university systems, and a great capacity to adapt to technological change.

The translation industry in Lebanon is strongly associated to cultural industries that play a major role in the Lebanese economy and provide an increasingly important avenue for economic development and employment creation. Since the end of the civil war, cultural industries have been significantly growing and have spread throughout the region.

The translation industry involves mainly the three languages most commonly used here: Arabic English, and French. This study conducts a comprehensive evaluation of the translation into Arabic industry in Lebanon. It identifies the main industry actors and analyzes their activities and performance. This evaluation leads to the identification of the sector's strengths and weaknesses and serves as a basis for recommendations for improving performance and enhancing competitiveness in the local as well as the regional market. While the study helps explain the dynamic competitive forces affecting the industry, the sector is at present so small that quantitative evaluations are difficult to make.

While assessing the performance of the translation industry in Lebanon, the study raises the issue whether production factors are available in terms of labor force, capital, management, marketing and related inputs. It also evaluates the effectiveness of investment environment, role of government authorities, and business expectations in the sub sectors. The study then provides recommendations to assist policy makers and aid agencies in making appropriate decisions to promote the translation sector.

The study moderately relies on available data and on few available published materials. The study relies on empirical findings and on specialist estimates. A preliminary list of representatives of main actors included translators, interpreters, publishers, scholars, students, lawyers, authors. In-depth interview were conducted with 25 key people. Major findings focus on performance of firms, supply and demand conditions, market structure, firm strategies, price policies, advertising and future expectations.

Table 1: Summary of interviews

Firms	3
Lawyers	1
Translators	4
Interpreters	2
Scholars	3
Publishers	4
Students	2
Government representatives	2
International institutions (UN, embassies, cultural centers)	4
Total	25

Translation activities remain mainly under the informal sector. Figures and issues raised during interviews could not be validated by official published figures. Targeting the right profile possibly offsets the uncertainty in data gathering.

3 Description of the Arabic Translation Industry

3.1 General trends and business environment

Lebanon has an open economy, an investor-friendly economic environment, a strong human resource base coupled with entrepreneurial talent. Within the reconstruction efforts, the receipt of substantial budgetary support following the outcome of the Paris II conference in November 2002 and increased confidence in the local currency have helped boost confidence in the economy. Moreover, strong ties with the European Union, through the association agreement signed in early 2002, should sustain the country's prospects.

However, Lebanon's economic base suffers many weaknesses. State enterprises need restructuring. More efforts are needed to promote export-oriented industries and improve business environment. Large fiscal deficits, sluggish economic growth, and a lack of progress in the implementation of the government's privatization program have left the public sector heavily indebted. Gross public sector debt reached 178% of GDP at end of 2002 from 103% of in 1997.

Lebanon is an important cultural center in the Middle East, providing an appealing environment to cultural investments, even in worst days of political and social unrest. Beirut attracts many foreign visitors as the privileged capital for Arab and international conferences and conventions. With the return of peace, investments increased; firms updated their equipment and new cultural infrastructures were created.

Despite the current economic downturn, the cultural sector continued to expand, generating high value added and positive growth rates. At the regional level, Lebanon provides the best environment for cultural industries. Their economic weight exceeds direct value added generating positive externalities, mainly in the hospitality and service sectors. Lebanese companies enjoy definite comparative advantages over other firms in the region, offering up-to-date and high-quality goods and services. Besides, Lebanese households are the largest consumers of cultural products in the Arab world.

Beirut also attracts many foreign visitors as the privileged capital for Arab and international conferences and conventions.

The human factor remains a major asset to the economy. Human resources are available, and many of them have a high level of education and skills. Individual talent and creativity are backed by a good educational and academic system. Labor needs however extensive training and more experience to become more efficient.

The Lebanese cultural economy suffers from scarcity in financial resources, although some sub-sectors have experienced inflows of Arab funds. Most companies complain about the non-availability of cheap financing, while some of them fear the future. Few Lebanese companies have invested in the cultural industries in Arab countries like Egypt, the Gulf States or North Africa.

Cultural industries are growing thanks to private local and foreign initiatives that operate in a system where government provides limited support. Cultural industries do not receive any direct public assistance or funding with the exception of few works or festivals. The government concentrates its resources on reconstruction and on the support of more "vital" sectors.

French and English are the most widely used Western languages. Although French is not an official language, almost all government publications appear in French as well as in Arabic. In the last decades, the importance of English has been constantly increasing. Some Lebanese authors write in French and English; fluency in these two languages is widespread among the educated population.

Table 2: Reading languages in Lebanon - total adult population base

Reading language	September 1996	March 1998	January 2000
Arabic	83.7%	78.3%	82.5%
French	19.4%	21.5%	26.3%
English	6.5%	9.65%	12.5%

Source: Le Commerce du Levant, Stat IPSOS survey, Feb 2000

3.2 The economic weight of translation industry

Within the pessimistic picture given in the United Nations Arab Human Development Report (2003) which gave a critical overview of the Arab achievement in translation, the sector performance in Lebanon remains above the Arab average both in terms of quality and volume. Although the Lebanese generally prefer reading foreign works in original language, Lebanon is active on the export market and remains a net exporter of translated books.

The real economic dimension of the Arabic translation industry is difficult to define. Translation activities are not separate from some other sectors such as publishing (translation of books and magazines), film industry (sub-titling dubbing) and multimedia products (software, learning programs, internet sites, brochures and technical printed materials). Moreover translation is not a separate item in national accounts and no reliable statistical data exist for the sector.

Accurate estimations of the Lebanese translation output are not obtainable, mainly because of incomplete gross national product, value added or income distribution statistics by sector. Despite the absence of figures, it is clear that translation industries are developing and that Lebanon has the capacity to be competitive, provided favorable economic, social and political environments are ensured.

Value added is hard to estimate as long as translation activities are not recorded separately in the national accounting system. The high exposure of the Lebanese economy to western culture, associated with a high rate of arabization of cultural products ensures a positive trend in the translation sector's value added.

The market for translated books is not large, as educated readers prefer books in the original language rather than in translation. Lebanese readers are exposed to foreign languages since early schooling years, unlike the majority of Arab students. Both private and public school systems are bilingual, using French and English textbooks along with Arabic references. Official math and science exams are in French or English. The educated elite in Lebanon are fluent in Arabic, English and French.

3.3 Legal and regulatory framework

3.3.1 General Translation

There are no legal restrictions for the translation activity in Lebanon. Anyone can offer translation services whether officially registered or not. According to our sources, a significant portion of translation activities are settled in cash without being declared to tax authorities.

3.3.2 Certified public translation

Certified public translators are bound by law to the Ministry of Justice and are liable before courts for faults or law infringements. Official appointment is granted by the Ministry subject to passing a competitive entrance examination, and according to regional quotas.

At present, no official body represents the translation industry in Lebanon. Informal groupings and associations with no significant national impact exist mainly within universities. A few months ago, members of the profession submitted to the Lebanese Parliament a request for the establishment of an Order of Translators and Interpreters, which should soon materialize.

Unions and professional associations have a limited active role in dealing with industry concerns and in enhancing employment. They do not even have statistics and data bases that could be relied on to identify problems and needs of the industry. No data is available on the translation output in Lebanon which remains very informal.

3.3.3 Intellectual property

Lebanon is a member of the Paris convention of 1883 for the protection of industrial property, and joined the Berne convention of 1886 for the protection of literary and artistic works. It participated as well to the Madrid arrangement in 1958, the Geneva Convention in 1952 and the Rome convention in 1961. Until recently, the law that has regulated trademarks is that of 1924. Some of the above conventions have been integrated in the Lebanese Penal Code by decree no 152 dated July 1939.

The Lebanese IPR legislation was updated and amended by the parliament. Law number 75 of 1999 aims to improve and strengthen intellectual property protection by fighting illegal use or reproduction of literary and artistic works and software. It is also an attempt to bring Lebanon into compliance with international copyright laws. The new law has gone some way to meeting the industry’s demands for the protection of publishers and authors. However sources within the trade say that its provisions do not go far enough to allow the complete elimination of piracy.

4 Economic Performance of the Industry

4.1 Main actors and products

4.1.1 Official translation providers

Translation services are offered by companies and individuals that are registered with tax authorities as translation service providers. Identifying the group is possible through the survey of university graduates in languages and translation that are actually working in the sector. The Ministry of Justice files give an indication of the official public translators that have a license to practice. These are estimated at around 450, of which 100 belong to the Syndicate. Double counting is to be avoided as a number of literary and technical translators have also a license for official public translation.

4.1.2 Government agencies

Many government agencies do in-house translation. The Lebanese parliament has a specialized qualified team in charge of all translation jobs. The Ministry of Culture contrary to other Arab countries does not have a program or budget for translation and promotion of foreign books. The Ministry of Tourism produces a few brochures written in Arabic and occasionally translated by free lancers.

All translations at the Ministry of Foreign Affairs are done in-house by the regular staff of the Ministry; while foreign delegations usually come with their own translation and interpretation teams.

4.1.3 Publishers

Publishers are main actors in the translation industry. Some publishers translate only literary, political and religious works of foreign authors. Such jobs are usually given to scholars or journalists outside the company then are edited in-house. A major Lebanese publishing house has a team of 30 translation graduates within its structure doing exclusively Arabic translation and adaptation of American school textbooks. The same publisher uses also Lebanese free lancers for the translation of children's educational books. There are a few Arab publishers who have small branches in Lebanon where they can translate subjects that are banned or censored in their country.

4.1.4 Foreign cultural centers

The American Embassy's cultural center had a translation program promoting American books in the region that was interrupted in 1975 with the venue of the political events. The Arabic Book Program consisted of the translation of 50 to 60 books per year produced by American publishing houses, on various topics such as economics, management, politics, humanities, arts, and environment protection. The activity has now been transferred to Cairo and Amman. Translation of articles, press releases, speeches and reports to be published in the IIP (International Information Program) electronic journal are currently made in Lebanon by an external translation company.

The French Cultural Center in Beirut promotes translation into Arabic within the Publishing Assistance Program (Programme d'Aide à la Publication - PAP) that started eight years ago, which is extended not only to Lebanon, but also to countries of the Pan Arab World. The Program, financed by the Foreign Affairs French Ministry, aims to reduce costs by removing the translation and publishing cost burden of local publishers. The cultural center pays rights, finances and supervises translation, while Lebanese publishers are responsible for printing and marketing the books.

4.1.5 The Arab Organization for Translation (AOT)

AOT is specialized non-profit organization based in Beirut and founded by Arab intellectuals in view of promoting the transfer of culture and knowledge through translation. The organization, financed by private donors, sponsors the whole book production chain. After a specialized committee selects a title, the AOT decides on the translator, pays translation and printing costs, acting as the book publisher. 12 books were produced in the last five years. The OPEC Fund for International Development has approved a grant to help finance the AOT program for 2005, for the Arabic translation of specialized academic books, in the areas of technology and applied sciences.

AOT has not achieved all its objectives, particularly those related to establishing networks and information bases available to translators, and to promoting joint ventures. One of the founders of AOT regrets that funds are hard to collect, and that Arab the readership is not capable of appreciating their efforts.

4.1.6 Other parties

Subtitling companies, film distributors, and broadcasting companies have many translation projects especially for the external market. Some individuals (students, people working in other fields) practice translation informally as an extra job for additional earnings. This group is impossible to assess. There is a general feeling that those persons do not deliver quality translations.

4.2 Sales and market share

4.2.1 Written translation

It is extremely hard to estimate translation output in Lebanon. Main reasons are that translation is performed by several groups of persons belonging to various sectors of activity, and that no statistics by sector on the volume of translation activities are available in detail.

Literary translation, fiction and poetry remain limited compared to translation of titles for children and young adults, works on history and politics, biographies, essays, arts and culture, and guidebooks that are accessible to the general public. Academic, scholarly and educational books addressed primarily to students and academics are a large sub sector of the translation activity.

Examples describing general trends in the industry

-A publishing house that translates political and religious books locally has a volume of 12 to 15 works per year, representing 35 to 40 per cent of its activity.

-Another renowned publisher who translates children's educational books mentioned a volume of 50 books per year on average. Around 45 are translated in Lebanon by a team of free lancers; the remaining is done in Syria or Egypt depending on the topic. The same publisher has initiated in-house translation of the latest foreign education textbooks and their adaptation to Arab curricula. This large project is expected to go on for several years, as new fields such as social sciences are covered.

-A new established company representing a university in Great Britain acquired the rights for the Arab World to market its MBA and DBA programs in Arabic. The company subcontracted the Arabic translation of course texts to a team of professionals and academic experts.

None of the persons interviewed was able to estimate his market share. However, there are reasons to believe that the number of persons working in the sector has been constantly increasing in the last two years, that profits are rising, and that the overall performance of the firms is improving.

People particularly satisfied with their activity are small companies and individuals who receive more workload than they can produce. This applies to general translation and to legal official translation. Translators located around the tribunal and the official bodies like the General Security or the ministries experience a heavy work load. Those who are dissatisfied are companies that rely on large volumes to break even. They reported that the Lebanese market is not large enough to provide such volumes, and that the economic downturn currently reduces work opportunities associated with foreign investment or joint venture projects. Any well established translation firm that has to bear salaries and overhead relies on exports to make profits.

Table 3: Performance of the Lebanese translation industry in the last two years

	Overall performance
Literary works	constant
Children's books, comics, school and universit textbooks, dictionaries, law publications	increased
Reports: economic, technical, financial. TOR bids, offers	decreased
Magazines, journals, press articles	constant
Brochures, leaflets: and other advertising an	constant

communication material	
Learning programs - University course texts	increased
Computer software: business software, learning software, games	constant
Legal documents, for private and government use	constant
Film dubbing	decreased
Film subtitling	increased
Interpretation - Conferences	increased

Well established professionals who enjoy a good reputation are satisfied with their activity unlike new comers who strive do catch new opportunities.

4.2.2 Film dubbing and subtitling

Output of film dubbing is not significant. Arab and Lebanese consumers prefer original versions of foreign films (English is dominant on the market, followed by French), mainly because the Arabic language as spoken in Lebanon is different from the literary Arabic used for dubbing. Film dubbing is however extensively used in cartoons to suit children who cannot read, and in popular Mexican TV series.

Until 1975, one Lebanese company had the quasi-monopoly of the subtitling industry in the Middle East. Between 1975 and 1990 while the Lebanese cinema sector registered a sharp downturn, Egypt took Lebanon's share of movie subtitling. The company then dealt mainly with TV series. Upon recovery of the political situation, the company invested in new materials and recovered a large share of Arab subtitling. Starting 1999 most TVs invested in subtitling equipment and started in-house translation.

Measured in money terms, cinema movie subtitling is not significant. There are only around 100 foreign movies distributed yearly in Lebanon and the Gulf. The cost of subtitling a film amounts to around USD1000 for the first copy, and 400 to USD600 for additional copies. Translation fees are only paid once (around USD300 per film of 1200 to 1500 lines). Translation fees for advertising films that require high skills and creativity from the translator are much higher; they might reach as much as USD5000 for 30 seconds. No estimates are available of the volume of translated advertising films.

4.3 Financial performance

There is a general consensus among the persons interviewed that translation does not guarantee enough revenues to make a living. Public employees and university lecturers often take external translation projects. The uncertainty of financial incomes has driven many skilled translators towards other activities. Facing tight cost constraints, private publishers who finance translations from own funds try to cut on high translation costs. They worry about not selling enough copies on the regional market, as the Lebanese market is too limited to generate profits. Institutions that provide financial support to translation of foreign publications into Arabic are a few private associations and cultural centers.

4.4 Awareness and commitment to quality

4.4.1 Quality

All persons interviewed seemed to be highly committed to quality. But they mentioned that there are too many non professionals operating in the business reducing quality and price standards and harming the reputation of the overall industry.

Taking conscience of the necessity to commit to quality and to conformity with international standards, the translation school at the Saint Joseph University (ETIB) has set up a commercial structure (SIT) where they offer all kind of translation services and which is in the course of becoming a national as well as a regional reference. Their teams are composed of translation graduates who gather assistance from outside specialized experts when needed. Interpreters usually refer to the standards set by the International Association of Conference Interpreters (AIIC) especially with respect to work conditions required for quality, ethics and productivity.

4.4.2 IPR laws

In theory, translators are supposed to check the IP rights of all customers. In practice, very few free lancers check IP for the small projects they take. They rely on their conviction of the business ethics of their client and his good reputation. No one reported any incident following a translation job he carried out. Large projects are usually handed by well known firms or by official bodies and governments. According to our contacts, sources do not need to be checked. Things are different within publishing houses that check IP rights before acquiring them for translation.

5 Supply Trends

5.1 Employment and human resources

The translation business relies heavily on labor. The good reputation of Lebanon as a translation center in the Middle East is based on the high competence of people working in the field. Skilled labor is however quite expensive and scarce. Medium skilled persons are needed for routine and small projects and are easy to find. All persons interviewed confirm that many clients use cheap low skilled labor regardless of quality. Human resources are therefore available to firms in adequate terms provided they are willing to pay the “right price”.

Employment is concentrated in Beirut and its suburbs where the greater part of economic activity takes place. The recession does not seem to have affected employment significantly for small companies that have never stopped their activity.

The employment market is shared between graduates from translation and language schools - mainly females, and scholars and technical experts who deal with both literary and specialized translations who are in majority males. Human resources in the sector are not restricted to translation graduates; they come very frequently from various specialty fields: teachers, academics, students, authors, journalists, lawyers. Authors, scholars and journalists are often preferred by publishers to university graduates for literary and political translations. Publishers rely on well established names in literature and journalism to promote translated books at the regional level.

Translators complain that incomes are low compared to other sectors that require comparable skills and responsibilities. Salaries and remuneration are variable. Many translators accept low rates to stay active. Volume of work and income are not stable for free lancers who often have other remunerated activities

5.2 Translators background

The Lebanese translation market offers good translation skills. The market is theoretically accessible to anyone except with regards to certified translations. Translators are issued from various backgrounds. Some of them who have no academic qualifications rely on self knowledge and experience. Those are the old generation who were not offered the opportunity to follow specialized academic courses. Non academic translators operate mainly in the certified public translation sub sector. People with academic qualifications in literature, history, economics, politics, or journalism, are actively involved in the market together with translation graduates.

5.3 Universities

Some universities in Lebanon offer a translation degree (bachelor or masters degree), while others merely offer translation courses as part of the language studies program. The most renowned establishments are the St Joseph University (USJ) and the Lebanese University (UL) that have separate schools for translation studies.

At the private St Joseph University, the Ecole de Traducteurs et d’Interprètes de Beyrouth (ETIB), founded in 1980, is the first school dedicated to translation and interpretation. The

ETIB is considered as the academic reference in translation, enjoying high quality standards and well valued diplomas. Although the fees of the ETIB are not higher than of other language schools, the number of graduates remains low as the majority of students go into the free public education system.

Within the Lebanese University (UL), The Centre de Langues et de Traduction (CLT) attracts around half the Lebanese students. The CLT receives around 200 applications per year and accepts a maximum of 70 after a competitive entrance examination. The CLT is entirely funded by the government through the Ministry of Education budget. They share common professors with the USJ and the American University of Beirut (AUB).

Establishments offering translation degrees

*****Balamand University - - Faculty of Arts & Social Sciences

The Lebanese University - Centre de Langues et de Traduction (CLT)

Lebanon Islamic University

Notre-Dame University

*****St Joseph University - Ecole de traducteurs et d’interprètes de Beyrouth (ETIB)

Université Saint-Esprit-Kaslik

* Associate members of the International Federation of Translators (FIT)

Establishments offering language degrees

The American University of Beirut

Balamand University - Faculty of Arts & Social Sciences

Beirut Arab University

Haigazian University

Lebanese-American University

The Lebanese University - Centre de Langues et de Traduction (CLT)

Notre-Dame University

St Joseph University - Ecole de traducteurs et d’interprètes de Beyrouth (ETIB)

Université Saint-Esprit-Kaslik

Table 4: CLT and ETIB number of graduates in translation

	CLT	ETIB
1986		7
1995		11
2000		10
2001	28	0
2002	45	3
2003	41	13
2004	36	7

Source: CLT and ETIB

5.4 Training

Specialists in the market and within academic institutions insist on the importance of training. Basic academic programs include short training sessions. Universities send students for training sessions to embassies, news agencies, TVs, Ministry of Foreign Affairs, newspapers, etc. However professionals are not offered training programs to improve skills and to catch on new market trends and needs. A few offices of certified public translators accept fresh graduates for periods not exceeding six months.

The head of the ETIB mentioned the possible creation within the ETIB of an “Observatory of Translation and Translation Studies” open to all, that will be in charge of the follow-up of international trends, the periodical setup of an agenda for priorities, and the conduct of free training programs according to these priorities. He regrets the non availability of adequate financing for such a project.

5.5 Finance and capital investments

5.5.1 Written translation

No important capital is required for free lancers who mainly work from their homes, minimizing operating costs and overhead. They have available capital to acquire the computer and the reference books they need. Small firms need a more substantial capital to rent offices, purchase materials, and pay one or two salaries. Publishers find it difficult to secure financing in advance for copyright and translation expenses. They rely however on own funds, a way to be independent and to keep the autonomy of thinking and choosing subjects.

5.5.2 Audio translation

Film dubbing and subtitling require the investment in expensive machines. The leader in the subtitling business who has more than 80 per cent of the market has about one million US dollars of technologically up to date material, mainly hardware, all self financed.

5.5.3 Foreign investments

No foreign investments are reported in the Lebanese translation industry. Some external translation projects are made in Lebanon when they are not authorized in other countries due to religious or political reasons. Some partnerships focus on cultural exchanges but do not involve financial commitments.

5.6 Translation technologies

Few translators in Lebanon have the theoretical and practical expertise in language and translation technologies. Some universities offer courses introducing translation and language tools (translation memories, machine translation, electronic publishing, and internet technologies) but experts are not familiar with these new trends. Most translations are usually simply done and delivered in Word format while the electronic production is made by computer and website experts.

Translation memories are not widely used especially when translating into Arabic. Translators argue that Arabic data bases are not adapted to most of the work they receive, that editing computerized translations in Arabic is hard and time consuming, that programs are not user-friendly, and that many users do not have the opportunity or time to receive the adequate training. On the other hand new technologies need a substantial investment in software and material which the translators cannot afford as individuals working on a free-lance basis, especially when they are not under time pressure. It should be noted that not all software proposed on the market is legal. Some pirated copies are available at prices not exceeding 50 dollars.

In all cases, Lebanon has a well developed IT sector to support translation technologies, and enjoys the human resources to use them. Lebanese translators are up-to-date with the latest word processing systems software (such as desktop publishing). Translators often produce an Internet-compatible version of documents. Connection to the Internet for access to documentation and terminological databases as well as electronic mail is secured.

Audio and video equipment for conferences are widely available. Subtitling companies provide subtitling for all kinds of movies by the use of sophisticated systems. These companies continuously upgrade their equipment to comply with the fast-changing technologies and new media.

6 Demand Trends

A wide range of products are translated in Lebanon according to local as well as to regional demand. Demand comes from book and magazine publishers, from government, from associations and NGOs and from other businesses.

6.1 Size of demand

6.1.1 Books

Lebanese readers having an international cultural background prefer to read books in the original language. The demand for translated books in Lebanon is limited to a small portion of educated readers who do not master a foreign language or who have cannot afford imported publications. Lebanese publishers tend to choose their topics according to the demand in Arab markets where they have strong distribution networks.

Arab demand for translated books is focused on key political and religious issues (Iraq war, religion, terrorism), on history, archeology, tourism, cooking, horoscope, health or fast learning. Publishers representing foreign companies are active in the translation of school textbooks and children’s books to be sold in the Arab market.

Arab readers like translated political and religious western books for their objectivity and their methodical approach. References from the west help them build their own way of thinking. Publishers mentioned however that they are restricted to topics tolerated by Islam and that they often lack the courage to innovate fearing negative reactions and censorship. Translation of political books is done shortly after their publication, before interest in the topic is lost.

6.1.2 Other products

The Lebanese market did not witness an increase in internal demand for large translation jobs (reports, laws, university programs, encyclopedias, economic and industrial studies) in the last two years. The lack of such projects is due to the slowdown of the Lebanese economy and the scarcity of foreign investments. The persons interviewed reported that demand is growing for small projects, while demand for certified legal translation has been stable in the last two years. The demand for film subtitling is stagnant and is limited to class A foreign films, mostly American best sellers. There is a market for brochures, leaflets, technical notices, but Lebanon is experiencing more competition from the Gulf, which became a distribution center for cars and electronic products and where manufacturing industries are expanding (medicines, agro food, electronic products, etc.).

The annual Arab Book Fair is an occasion for publishers to meet a significant part of local demand.

6.2 Consumers

Limited domestic demand for literary translation is due to the small size of the market, to the increasing competition from the audiovisual sector, and to the lack of interest of the general public in cultural goods. Prices and income do not seem to affect demand significantly. Customers are very demanding and sophisticated when they are charged high rates. However many are not capable to judge the quality of work and therefore they only care about getting low prices. On the other hand, the market has witnessed increasing demand from English to Arabic and less demand from French to Arabic.

Targeted consumers are publishers, companies, professional associations, embassies, government, and conference organizers that are able to provide work on a regular basis. The end of the war coupled with the increase of reconstruction and aid projects have generated a high demand from government which remains a preferred customer.

6.3 Prices

Prices vary according to the nature of job, the level of competence and experience of the translator, and also depend on his willingness to lower rates. Asking for low rates is perceived as unfair competition that harms the reputation of the whole industry.

Some publishers fix the translation budget according to the selling price of the book, regardless of quality. International organizations and government often impose their own rates. Translators who have offices and overheads tend to charge higher rates than freelances working from their homes. Price policies depend also on customer, volume of project, topic, and personal availability.

Table 5: Indicative rates in US dollars

	High range	Low range
Average rate per translated page	15-28	8-15
Average rate per day of interpretation	360	200

Higher translation costs prevailing in Lebanon make the price of translated books produced in the country higher by at least 20 per cent than the regional average.

6.4 Foreign Demand

Lebanon faces intense competition from overseas, especially in technical fields. Demand from Arab countries is not increasing in proportions that satisfy Lebanese agents. External projects are hard to obtain as several Gulf countries have developed their own translation industries. Egypt and Syria compete with Lebanon with respect to prices, irrespective of quality. However, the competence and multicultural background of Lebanese experts is well recognized internationally, therefore Lebanon still has the potential to attract new foreign contracts. The demand from Western countries (Canada, the US, Europe) is low although these countries can get outstanding services at competitive rates.

Given the lack of structure of the translation industry and in the absence of any supporting institution, access to foreign demand is difficult. Personal contacts, word of mouth, acquaintances with publishers are ways of penetrating foreign markets. Advertising, marketing through the Internet, direct marketing have not given in most cases positive results and have involved useless expenses.

Publishers are active in exporting translated books thanks to their existing regional network and to their associations with foreign publishing houses and associations. Foreign competition puts high pressure on Lebanese firms to maintain the high quality of services.

7 Related Supporting Industries

Specialized inputs are available. Translators call for specialized experts when needed. Publishing and printing industries provide good support to the industry. These firms have strong local suppliers of inputs at all levels of production. All technical equipment, maintenance and services for written and audio translation are available: machines, audio material, computers, software, and reference books. The booming of the internet and communication sectors has largely contributed to the expansion of translation activities.

Firms consider that institutions in the fields of banking, insurance and legal services provide little support to the industry.

Seminars are organized occasionally, locally or in a neighboring country. Our contacts consider that seminars have not lead to significant outcomes for the promotion of the translation industry in the country. Advertising, marketing, trade journals, magazines and mass Medias appear to have very little contribution to the activity of translators. Informal networks and public relations however can tremendously improve the efficiency of firms.

While a few persons interviewed think that translators' rights are well-preserved in Lebanon even in the absence of a syndicate (this opinion is more spread among publishers), many professionals complain that translators face serious difficulties as they are not backed by any support institution (e.g. no social rights and medical coverage, no retirement plans); besides they think that many are often exploited in terms of remuneration.

All persons interviewed complained about the lack of available data on the industry, which negatively affects business conditions.

8 Market Structures and Firm Strategies

8.1 Structure of firms

Publishing and translation firms are isolated entities rather than a well-structured cluster of the cultural industries. Two main categories of translation firms could be mentioned according to the nature of their activity: certified public translation (mainly the translation of official documents), and general translation.

Certified public translators are around 450 of which 100 belong to a syndicate. These are small firms (1 to 4 employees), mainly concentrated around official bodies (ministries, courts, public establishments) and privately owned. Some are specialized (ex medical, military). According to our contacts, business is unfairly distributed and concentrated within few firms (15% of firms cover around 50% of the business volume).

Translation firms are only few small privately owned firms employing two or three translators. Graduates in translation are in majority females. Their number, estimated at around 300 in the last 25 years, gives a poor indication on the number of free lancers in the field. In fact people from different backgrounds accept translation jobs, companies translate in-house, and finally a number of female graduates never start a professional activity. Interpreters are all free lancers.

8.2 Strategies

Price policies are variable, depending on customers, on project volume, on topic, and on personal availability. International bodies offer rates in the high range; special deals are made with the government, depending on project volume and topic. Some translators give low quotations to attract new clients. Serious firms rely on their reputation and maintain a high price policy justified by the outstanding service they provide. Certified legal translations follow recommended standard tariffs.

Translators do not rely on advertising. In the last two years, a few companies and individuals have tried to sell their services through the web but did not observe any improvement in activity. For many, developing a reputation of quality and reliability is the best approach to expand business. Strategies are oriented towards improving existing business with the Gulf and opening new markets in Iraq, Libya and North Africa.

Some publishers have taken specific actions to enhance translation activities over the last two years. A Publishing House based in London with offices in Beirut has an agreement with Al-Babtain Translation Center in Kuwait to promote cultural exchange and improve interaction between the Arab world and the West. The role of the Lebanese partner is currently limited to the publication of around twelve books per year. The Lebanese publisher agrees with his partner on topics and works to be translated, but is solely responsible for marketing and distributing the books.

Publishers are increasingly promoting topics of interest to women that became a main target following their emancipation in some Arab countries.

Finally, strategies focus on keeping good relations with the press that may stimulate sales through the publication of articles and book reviews.

8.3 Competition

Internally, competition is high among translators. Those who accept low rates are often ready to further reduce fees to obtain business. Translators who deliver good quality work at more expensive rates find increasing difficulties to keep clients. Many translators lose old customers who cut translation costs by enrolling in-house translation staff.

Certified public translators complain about intermediaries –bookshops, stationeries, lawyers- who bias the market by passing on documents to their own acquaintance networks and by adding commissions to standard rates.

At the regional level, Syria and Egypt, where Arabic is the main teaching language, attract part of the translation of math and science course texts from the intermediate level and above. However, in these countries, translator’s foreign language skills are sometimes uncertain, leading to errors and discrepancies with original texts and methodologies. For many projects, the final editing is done in Lebanon where competencies in Arabic, French, and English are available. Lebanon remains the regional reference for the quality of the final product.

According to the persons interviewed, lower prices in other Arab countries are not a threat to translators who deliver quality. Low quality jobs need heavy editing which turns to be costly and time consuming.

The main competitors of the film subtitling industry are TVs that are equipped to carry out in-house translation and subtitling, and some film distributors that do subtitling themselves. Competition comes also from companies in the Gulf (mainly Dubai) that have the financial resources to acquire technologically up to date equipment for subtitling.

8.4 Strengths

-Translation industries benefit from the publishing industry’s good reputation as to quality and diversity of products. Many well known international publishers trust Lebanon for the quality translation of their school textbooks, dictionaries brand name titles to be distributed in the Arab World.

-Lebanese translators are known for their ability to master three languages (Arabic, English and French) and to offer a wide range of quality services in these languages. The good understanding of original texts gives Lebanese translators a great advantage on their colleagues in the Arab World.

-On time delivery was mentioned several times as contributing to the satisfaction and loyalty of clients who tend to come back and give good recommendations to their connections.

-The Lebanese subtitling company remains strong in the Arab market as it gets from the Lebanese film distributor most of the subtitling rights of western movies in the Gulf.

8.5 Weaknesses

-The translation profession is not structured in a way to bring together demand and supply of services. Part of the demand is not well channeled to competent professionals although those are available.

-The informal character of the industry is also a major obstacle to accessing export markets.

-Many translators who operate at full capacity feel they should take steps towards developing their business, but are not making efforts to expand.

-Censorship and cultural and religious habits in some Arab countries limit subjects of interest.

- Many translation jobs are diverted to other countries of the Middle East that do not have copyright constraints.

9 Government Projects and Policies

The school of translation and interpretation at the publicly funded Lebanese University (UL) is the only government institution that contributes to the translation industry in Lebanon. The school is financed by the general budget of the UL which is part of the Ministry of Education budget.

The ministries of Education and Culture do not sponsor substantial translation activities. The Ministry of Culture's role has been limited to informal actions to encourage Lebanese publishing houses and to promote the translation and publication of Lebanese authors. Government's role was weak during the 2004 Frankfurt Book Fair dedicated to the Arab World, as it did not keep its promise to provide publishers with financial assistance.

The Lebanese Government has made attempts to improve and strengthen the protection of intellectual property through fighting the illegal use or reproduction of literary and artistic works, and to bring Lebanon into compliance with international copyright laws (Law number 75 of 13/4/1999). The new law has gone some way to meeting the industry's demands for the protection of publishers and authors with respect to translations.

10 Future Expectations

-Small firms and individuals that are satisfied of their current level of activity expect their business to improve in the next two years. Firms that have registered unstable revenues are worried about the future.

-Long term trends were hard to anticipate. Two vital conditions for positive long term future expectations were mentioned: Maintaining Lebanon’s good reputation of quality and reliability and broadening exposure to foreign markets as Lebanese markets are coming to saturation.

-Expectations were more optimistic for the publishing sector that relies on the export market, and less optimistic for the advertising and communication products that are likely to face more regional competition in the future. Translators are not able to predict any positive development vis-à-vis western markets. They complain that absence of formal structure in the profession is a major handicap fore such openings.

-Apart from the Gulf market, many experts mentioned Iraq and Libya as offering interesting opportunities for Lebanese translators.

-Excellent services, good prices and updated technology are main conditions for long term positive growth.

-Expectations are low for film dubbing. Distributors have large unsold stocks of Mexican TV series. Dubbing TV cartoons has better prospects in the region.

-Demand for film subtitling is expected to increase as a result of a gradual rise of foreign film quotas throughout the Arab World.

11 Conclusions and Recommendations

11.1 Conclusions

- Beirut is best positioned among other cities of the Middle East to be a strategic center for translation. It has the adequate facilities and the required cultural background for a high quality output.

- The sector remains informal amid no awareness of its importance. It is now lagging behind without an organized framework and incentives to protect and promote it.

- The debate prevails as who is best qualified to translate a book, a specialized scholar or a translation graduate. Decisions are made depending on nature and degree of specialization of jobs. Heads of translation schools confirm that graduates have the necessary skills to deal with complicated subjects.

- Few translators in Lebanon have the theoretical and practical expertise in language and translation technologies, using them rarely. Pirated translation software is available at ridiculous prices.

- Translation jobs are not always financially and professionally attractive. Many translators have to spend time in other pursuits for additional income.

- Local demand for literary translations is limited. Lebanese publishers rely on Arab countries where a high purchasing power prevails like Saudi Arabia and the Gulf states. Books produced in Lebanon are too expensive for the Syrian, Egyptian or North African markets.

- Local demand for translated school and university textbooks is restricted to some establishments. Lebanese publishers who propose the latest educational methods in Arabic target the public educational establishments on a regional scope, mainly in Egypt, Syria, Jordan and the Gulf countries. Market access is difficult as these countries have strong and influent local suppliers and are reluctant to allow external competitors.

- Local demand for general and business translations is large enough to satisfy individual free lancers but is far below expectations of companies seeking large projects. The size of local demand has decreased since February 2005 due to political turmoil following the assassination of former Prime Minister Hariri.

- Lebanon and the Arab World face indifference and insensitivity to international cultural products. Most Arab readers are not genuinely interested in foreign fictions and authors on best-seller lists in the West, while political and religious topics are the most popular.

- Most literary translations are in the hands of well established publishers that respect intellectual property and acquire rights for all works. These publishers reported however the existence of illegal translations that remain marginal compared to the size of the Lebanese market and to the widespread piracy in other neighboring countries. No incidents were reported on small projects.

11.2 Recommendations

11.2.1 Business environment

Improve and set up a more favorable and supportive business environment and adopt measures that enhance market growth.

- Encourage the incorporation of firms by reducing administrative procedures and establishment costs;
- Help firms to expand by improving access to credit facilities.

11.2.2 Formal organization of the profession

Allow the formal organization of the profession to attract foreign contracts and face Arab competition.

- Create a Translators Association that is not only a trade union for professionals but also a center of individual advice on the business aspects of translating. The Association would contribute to build common support services among translators, more specifically: Bring together translators; Provide members with useful information and advice; Support moral and material interests of translators at a national level; improve terms and social benefits; improve legislation, mainly copyright protection; advocate and advance the recognition of translation as a profession.

- Create an Institute of Translation and Interpreting as an independent center of practicing translators and interpreters in Lebanon. The Institute aims to promote professionalism and to provide primary information to government, industry, the media and the general public. It will group all parties who understand the importance of translation and interpreting to the economy and society

- Create an Information and Data Base within the Institute of Translation and Interpreting. Make a survey of all actors involved in the translation activity: translators, publishers, academics, universities, private and public institutions, etc. Keep up to date records of service offered and needs of stakeholders.

- Build a website to share information and data and to provide a common communication base between stakeholders.

- Spread awareness as to the benefits of clustering and networking to achieve better levels of competitiveness. Build a cluster where firms, publishers, professional associations, learning establishments, and concerned public authorities cooperate.

11.2.3 Quality concerns

- Keep high quality standards in order to remain dominant. Adapt university programs to market trends and needs. Lebanese universities could take examples from abroad.
- Promote and finance training within the Translation Institute and other training institutions, within private and public universities, using public and private funds. Spread the awareness of the importance of new translation trends and technologies.
- Ensure financial facilities to firms to invest in sophisticated material through bank loans, tax incentives, grants, etc.
- Offer high quality translations at competitive rates. Target western markets where rates are high.

11.2.4 Role of public sector

Activate the role of Government. It is essential that the government recognizes the importance of cultural industries and shows a political will to promote and defend them.

- Reinforce legislations, especially IPR;
- Reduce administrative charges and procedures;
- Promote Lebanese entrepreneurship internationally in order to ensure a healthy environment for the industry and to promote exports;
- Enhance the role of the Ministry of Culture in the promotion of literary exchange. Establish partnerships with organizations engaged in the international promotion of literature and in support for literary translation. Ministry's action includes support to translators, publishers and book fair organizers that promote the translation into Arabic of foreign literature and writers in Lebanon or abroad

12 Abbreviations

AIIC	Association Internationale des Interprètes de conférence
AOT	Arab Organization for Translation
AUB	American University of Beirut
ETIB	Ecole de Traducteurs et d'Interprètes de Beyrouth
IIP	International Information Program
IPR	Intellectual Property Rights
NDU	Notre Dame University
PAP	Programme d'Aide à la Publication
UL	Université Libanaise
USEK	Université du Saint Esprit Kaslik
USJ	Université Saint Joseph

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THE ECONOMIC PERFORMANCE OF THE ARABIC TRANSLATION INDUSTRY IN MOROCCO

by Lahcen Achy

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1 Executive Summary

There is an increasing awareness that translation can play a critical role in facilitating language-based development and improves knowledge absorption capacity of a country. Recent developments in theoretical as well as empirical economics show that capital accumulation cannot explain entirely the “economic growth story”. Economic performance is increasingly attributed to the *knowledge management component* of the productive system, and understanding how knowledge is produced, disseminated, assimilated and effectively used by economic actors becomes an essential piece in any development strategy.

In particular, in an open and globalized world, no country can produce all knowledge it needs. A substantial component of knowledge arises from learning from others. New growth economics shows that growth performance depends on how quickly an economy learns. In the learning economy, individuals and firms will be able to create wealth in proportion to their capacity to learn and share innovation. Translation is indisputably one of the most prominent channels of sharing universal knowledge.

However, as a practice, translation has been assigned a little room if any, in Morocco. It was for years considered and it remained a secondary sort of practice. The term “translation industry” would not be appropriate to describe the current state of translation activity in Morocco.

The output of translation activity in Morocco is extremely weak by international standards. On average, the number of titles translated from foreign languages into Arabic over the period 1991-2002 stood at *19 titles per year* up from *8 titles per year* over the period 1980-1990.

Paradoxically, more than one third of translated titles in Morocco over the period are authored by Moroccans and written initially in foreign languages. The share of this category of titles increased from an average of 29% over the period 1980-1990 to almost 40% over the period 1991-2002.

In addition most titles translated are highly concentrated in a few fields of knowledge. One title translated out of four belongs to literature, 15% of titles are in history, 12% in politics and 10% in philosophy. These four fields all together represent 62% of all titles translated into Arabic in Morocco over the last two decades. As for geography, economics, psychology, education and arts translators have almost neglected them whereas scientific and technological issues, they have been annulled from their agenda.

In Morocco, translation of titles from their source languages into Arabic is very often an *individual decision* initiated by writers and researchers. Their main aim is to share with local readers the “*pleasure*” or the "*enlightening*" they felt while discovering a title written in a foreign language. However, over the last years translation in Morocco is becoming, as it is shown by the titles of translated books, a largely domain for foreign aid. French, German, American and other cultural centers promote translation of novels and other books they aim to familiarize the Arabic readers with, for specific purposes and probably for their own interest. Usually, translations are funded, while printing and distribution are not. Some of interviewees view this trend with some skepticism. Their fear is that cultural cooperation takes the form of *“cultural colonialism*". In their view, not “all voices” are represented in what is being translated, and most often translation output that emerges from cultural cooperation does not enlighten readers but tend shape their perception of the “other”.

Although, it has been admitted that the performance of the book industry in Morocco suffers from the tightness of its market due to high illiteracy rates and non-rooted habits of reading among literate individuals, the first obstacle that hinders dissemination of translated titles, according to our interviews, would be the existence of a clear mismatch between translated titles and the demand as expressed by readers. Almost one third of interviewed experts strongly agree with the fact that translated titles don't match the demand and 19% of the sample agrees with this statement. This finding would be largely due to the selection process of translated titles which is highly subjective, or "politically oriented". It can also be attributed to censorship either "self-censorship" at the book-publisher level on the basis economic viability argument, or "censorship" imposed by authorities for various reasons. Censorship hypothesis seems to be confirmed when looking at the demand for translated books as emerged from interviews with experts. It appears clearly that translated titles in politics are the first category that attracts readers.

Our surveys have also shown that some readers prefer for various reasons not to rely on translated titles as long as they master the source language. The quality of translation is also among obstacles that constraint translated titles' dissemination. Around 40% of experts interviewed either strongly agree or at least agree that the bad quality of translation is a serious issue.

Economic factors such as the publishers' margin or the book price don't seem to be as important as one might expect. More than two thirds of experts are either not sure or disagree to classify publishers' margin among obstacles. On the other hand, roughly half of the experts disagree with setting any direct relationship between demand for translated books and their price. Most of them confirm that translated books are usually cheaper than other books.

The frontiers of translation market are not easy to delimit. Except for official legal translation, there is no special license or permit required to operate as a translator or to run a translation company. Translators come from various backgrounds and a significant share of them has not received any specific training that would qualify them to offer translation services.

Book publishers involved in publishing and distributing translated works usually rely on freelance translators for a particular project, which is in general one specific title. The contract ends as soon as the project is accomplished. The tightness of the translation market implies that only a few book publishers are interested in this segment.

There seems to be no specific difficulty in finding qualified translators. Most translation companies as well as translators interviewed emphasized the quality of training provided by the "King's FAHD high School of translation" created in 1986 and located in Tangier in the north of Morocco. However, specialized translators in areas such as banking, insurance, engineering, science and some modern branches of law are still lacking. To overcome this shortage the Association of Legal Translators (ATAJ), for instance, is increasingly aware of the critical role of training and continuous education. Some initiatives have already been taken in areas such as communication, and management.

Translations bureaus are generally of small size and don't require large amounts of finance. However, book publishers operating in translation segment rely on various sources of financing such as their own funds, bank loans and suppliers credit. The later source is preferred because it involves much easier procedures and cost much less than banking credits. In order to avoid uncertainty, and solve their financial constraints it becomes common place that publishers make authors pay for printing their writing or translation instead of remunerating them for their work. The entire market risk is borne by the author or the translator.

The findings of this research corroborate economic theory predictions relatively to market failure paradigm. The inability to extract all the returns to knowledge supply in its various forms (translation being one form of knowledge supply) represents a disincentive to its supply by private agents, and requires pubic action to provide the right incentives. The risk of knowledge under-provision makes it necessary for the government to intervene setting up institutions, and funding translation related activities as to restore market failure.

One consensus that emerged from all interviews either among firms, translators or experts is the weakness of financial support provided to translation by public authorities. There is demand that translation into national language of outstanding universal knowledge should be among priorities. Interviewees consider that other cultural activities receive relatively generous subsidies from the government while translation activity operates in a very poor and chaotic environment left to individual initiatives. There is, for example, no specific service in the ministry of culture in charge of translation issues.

Our surveys reveal that translators as well as experts progressively understand that translation is not only becoming a fundamental device of intercultural communication that favours and stimulates translation of creative writings from other languages into the national language, but it is also increasingly considered as an economic and social project. Translation has a prominent role to play in disseminating existing body of international scientific knowledge, which helps to strengthen and consolidate the country's position in the world-wide competition.

Two issues have also emerged from interviews. The first is the competition from mass media particularly audio-visual, and essentially the advent of satellite television and the internet. Over the last years, some Arabic satellite channels acquired quite a great audience, and they are competing with the world most respected news-channels. Thus these channels become one of the most prominent sources of knowledge, reducing substantially other knowledge-acquiring activity such as reading. The second impediment to translation activity in Morocco that deserves further investigation is the presumed bilingualism of its educational system. Arabic is the official language of Morocco by constitution. However, in education as well as in everyday life things tend to be more complicated. A distinction should be made between literary or classical Arabic used for written purposes and dialectal Arabic used as the spoken language. There is a big difference between classical and dialectal Arabic, and literary Arabic skills are closely connected to the educational level and the familiarity with terminology in a specific field, which is not common even to highly educated people.

Various institutions are in charge of translation issues directly or indirectly. Some of these institutions are active at national level; others are designed and implemented through the Arab League or other Arab organizations. These institutions are aware of the necessity for Arab countries to collaborate in order to promote translation of universal knowledge into Arabic. However, this multiplicity of institutions has not been conducive to strong and effective translation policy. The level of coordination among these institutions is extremely weak. In addition, to our knowledge, there is no study assessing the effectiveness of these institutions or at least presenting in a systematic manner their contribution in the field of translation.

To sum up, translation institutions that set objectives and criteria, monitor selection processes of titles and translators, control quality of translation output, and promote distribution and marketing of translated tiles are still absent. Translation continues to be based on *individual decisions* initiated by writers, translators or publishers. There is no explicit translation strategy in Morocco that sets clear objectives, and postulates legal and financial provisions that govern contracts with translators.

Although numerous institutions are involved directly or indirectly in translation, their lack of coordination is a great impediment to the promotion of this activity. There is a significant need for a national institution or agency for planning and managing translation issues. Such an agency would be in charge of coordinating all activities pertaining to translation. Its first task is to work out a genuine translation strategy based on broad surveys among policy makers, translators and potential readers in order to identify major issues to be tackled, and set priorities in term of titles to translate.

It would be very suitable to define this national strategy in coordination with other Arab countries and organizations such as the Arab Organization for translation and the Arab Center or Arabization, Translation, Authorship and publication (ACATAP).

2 Introduction

Economic research has recently devoted substantial efforts to understand what makes some countries grow faster than other. It is by now widely established that capital accumulation cannot explain entirely the economic growth story. Economic performance is increasingly attributed to the *knowledge management component* of the productive system, and understanding how knowledge is produced, disseminated, assimilated and effectively used by economic actors becomes an essential piece in any development strategy.

A brief survey of the literature shows that three factors influence knowledge transfer to individuals and firms. The first is related to characteristics of knowledge getting transferred (Szulanski, 1996; Kogut & Zander 1995), the second is associated with motivation of recipients (Szulanski, 1996), and the third is in direct connection with absorptive capacity of recipients (Cohen & Levinthal, 1990; Lane, Balaji & Pathak, 2002). In the absence of absorptive capacity, motivation alone can not help knowledge transfer (Szulanski, 1996). Hence absorptive capacity emerges as the most critical factor influencing knowledge acquisition from external sources. In that regard, the language in which knowledge is available to the public is not the unique, but certainly a prominent determinant of absorptive capacity. In other words, translation can boost absorptive capacity and facilitate access and assimilation of knowledge.

Relying on this theoretical background, various questions immediately arise. What's currently the state of translation industry in Morocco? How does it operate? To what extent does this activity contribute to facilitate access to universal knowledge? And what measures one can suggest in order to improve its performance?

To begin with, there are very few studies on translation activity in Morocco. It has been assigned a little room if any and was for years considered and it remained a secondary sort of practice. Therefore, the term “translation industry” may not be too appropriate to describe the current state of translation activity in Morocco.

Until recently translation has not been considered as a professional activity that needs specific skills, talent and expertise. Almost every one who masters Arabic and another foreign language, usually, French can potentially claim the capacity to offer translation services. The lack of regulation helped the “wrong people” to enter the profession and compete with those who have actual translation training or education.

There is, however, an increasing awareness that translation can play a critical role in facilitating language-based development and improves knowledge absorption capacity of a country. In particular, in an open and globalized world, no country can produce all knowledge it needs. A substantial component of knowledge arises from learning from others. Translation is indisputably one of the most prominent channels of learning and sharing universal knowledge.

Some signs indicate that policy-makers, gradually, start recognizing the role of translation. In 2002, a national seminar was organized by the Ministry of culture in order to examine exchange and address translation issues. The theme of this seminar was: "*Translation in Morocco: What’s the current state? And what strategy?”*. The seminar’s main objective as stated by the minister of culture was to *think of translation issues not only in their technical aspects, but as also as a tool or strategy*.

The Minister of culture in his opening speech recognized the strong link between translation and globalization. He underlined the fact that translation is not only one of the most active channels of cultural communication but serves knowledge as well. The assessment he made on the current situation of translation in Morocco was very clear. “*We don’t ignore the situation in that vital area and obstacles to its development*, *specifically the absence of support in addition to difficulty of publishing. These obstacles are themselves related to readership issues and insufficient dissemination of books*”.

Our surveys reveal that translators as well as experts progressively understand that translation is not only becoming a fundamental device of intercultural communication that favours and stimulates translation of creative writings from other languages into the national language, but it is also increasingly considered as an economic and social project. Translation has a prominent role to play in disseminating existing body of international scientific knowledge, which helps to strengthen and consolidate the country’s position in the world-wide competition.

The present report, which is based on the finding of various surveys conducted among translation professionals and experts, reveals the weakness of translation output in Morocco. On average, the number of titles translated from foreign languages into Arabic over the period 1991-2002 stood at 19 titles per year up from 8 titles per year over the period 1980-1990. Paradoxically, more than one third of translated titles in Morocco over the period are authored by Moroccans and written initially in foreign languages. The share of this category of titles increased from an average of 29% over the period 1980-1990 to almost 40% over the period 1991-2002.

In addition most titles translated are highly concentrated in a few fields of knowledge. One title translated out of four belongs to literature, 15% of titles are in history, 12% in politics and 10% in philosophy. These four fields all together represent 62% of all titles translated into Arabic in Morocco over the last two decades. Translators have scarcely shown any interest in areas such as geography, economics, psychology, education and arts not to mention scientific and technological fields which have almost been eliminated from their sphere of interest.

The frontiers of translation market are not easy to delimit. Except for official legal translation, there is no special license or permit required to operate as a translator or to run a translation company. Translators come from various backgrounds and a significant share of them has not received any specific training that would qualify them to offer translation services.

Book publishers involved in publishing and distributing translated works usually rely on freelance translators for a particular project, which is in general one specific title. The contract ends as soon as the project is accomplished. The tightness of the translation market implies that only a few book publishers are interested in this segment.

There seems to be no specific difficulty in finding qualified translators. Most translation companies as well as translators interviewed emphasized the quality of training provided by the "King's FAHD high School of translation" created in 1986 and located in Tangier in the north of Morocco. However, specialized translators in areas such as banking, insurance, engineering, science and some modern branches of law are still lacking. To overcome this shortage the Association of Legal Translators (ATAJ), for instance, is increasingly aware of the critical role of training and continuous education. Some initiatives have already been taken in areas such as communication, and management.

Translations bureaus are generally of small size and don't require large amounts of finance. However, book publishers operating in translation segment rely on various sources of financing such as their own funds, bank loans and suppliers credit. The later source is preferred because it involves much easier procedures and cost much less than banking credits. In order to avoid uncertainty, and solve their financial constraints it becomes common place that publishers make authors pay for printing their writing or translation instead of remunerating them for their work. The entire market risk is borne by the author or translator.

Our interviews show that translation of a given title from its source language into Arabic is very often an *individual decision* initiated by writers and researchers. The consequence of this highly subjective behavior in selecting titles to be translated is the existence of a clear mismatch between supply and the demand as expressed by readers. Almost one third of interviewed experts strongly agree with the fact that translated titles don't match the demand and 19% of the sample agrees with this statement. This finding would be largely due to the selection process of translated titles which is highly subjective, or “politically oriented”. It can also be attributed to censorship either “self-censorship” at the book-publisher level on the basis economic viability argument, or “censorship” imposed by authorities for various reasons.

Some readers prefer for various reasons not to rely on translated titles as long as they master the source language. The quality of translation is also among obstacles that constraint translated titles' dissemination. Around 40% of experts interviewed either strongly agree or at least agree that the bad quality of translation is a serious issue.

One consensus that emerged from all interviews either among firms, translators or experts is the weakness of financial support provided to translation by public authorities. There is demand that translation into national language of outstanding universal knowledge should be among priorities. Interviewees consider that other cultural activities receive relatively generous subsidies from the government while translation activity operates in a very poor and chaotic environment left to individual initiatives. There is, for example, no specific service in the ministry of culture in charge of translation issues.

The rest of this report is organized as follows. The first section examines in detail the level and the structure of translation output in Morocco over the last two decades. The second and the third sections address respectively the supply-side and demand-side determinants of Arabic translation activity in Morocco. The fourth section presents the main factors behind the weakness of translation output in Morocco, according to experts. Finally, the last section focuses on the future of translation and translation policy in Morocco.

3 Level and structure of translation output in Morocco

3.1 On average less than 20 titles per year have been translated into Arabic

The output of translation in Morocco is extremely weak by international standards. On average, the number of titles translated from foreign languages into Arabic over the period 1991-2002 stood at 19 titles per year up from 8 titles per year over the period 1980-1990.

These very low numbers strongly confirm the finding of the UNDP Arab Human Development Report (2003).

The survey conducted among professional translators, experts, book publishers as well as book sellers corroborate the dearth of the translations into Arabic in Morocco. The majority of two thirds of interviewees consider that translation output is weak, 30 percent believe that it is even very weak. Only a small minority that does not exceed 4 percent seems to qualify the current state of translation into Arabic as moderate. For this last category, access to knowledge written in foreign languages cannot be measured only on the basis of "how many titles are translated". But there is also a need to answer other questions such as why translate into Arabic? What to translate? And for whom you translate?

Table 1: Assessment of Translation activity in Morocco among experts and translators

Question	Very weak	Weak	Moderate	Strong	Very strong	Total
How do you assess translation activity in Morocco?	30	66	4	0	0	100

3.2 Over one third of translated titles are authored by Moroccan writers

Paradoxically, more than one third (exactly 35,1%) of translated titles in Morocco over the period 1980-2002 are authored by Moroccans and written initially in foreign languages. The share of this category of titles increased from an average of 29% over the period 1980-1990 to almost 40% over the period 1991-2002. These Moroccan authors live generally abroad and write in the language of their country of residence. The most frequent case is authors writing in French and living in France. These authors, although considered by local authors as second class writers, benefit from their "success" on foreign markets and then initiate directly or indirectly translation of their titles as to target readership of their country of origin.

Table 2: Number of titles translated into Arabic in Morocco over the period 1980-2002

Year	Titles translated into Arabic (1)	Among which titles authored by Moroccans (2)	Share of (2) in the number of titles translated
1980	3	1	33,3
1981	2	0	0,0
1982	5	1	20,0
1983	3	2	66,7
1984	8	1	12,5
1985	9	4	44,4
1986	8	2	25,0
1987	14	5	35,7
1988	12	1	8,3
1989	15	2	13,3
1990	11	6	54,5
1991	13	3	23,1
1992	7	4	57,1
1993	19	6	31,6
1994	15	7	46,7
1995	19	5	26,3
1996	22	8	36,4
1997	20	10	50,0
1998	20	17	85,0
1999	24	7	29,2
2000	24	6	25,0
2001	23	5	21,7
2002	23	9	39,1
Total	**319**	**112**	**35,1**
Average 1980 to 1990	**8**	**2**	**29**
Average 1991 to 2002	**19**	**7**	**39**

Source: Reference Maghrebines, Al Saoud fondation, Casablanca (2003)

3.3 High concentration of translation output in a few areas

The most important finding that emerges when looking at the data on translation into Arabic in Morocco is their high concentration in a few fields of knowledge.

One title translated out of four belongs to literature, 15% of titles are in history, 12% in politics and 10% in philosophy. These four fields all together represent 62% of titles translated into Arabic in Morocco over the last two decades.

Translators have scarcely shown any interest in areas such as geography, economics, psychology, education and arts. The same finding applies to books on other religions, or even those written on Islam in foreign languages. As for books in scientific and technological fields, they have almost been eliminated from their sphere of interest. One very relevant issue that needs to be further investigated is whether the distribution of translated titles by field of knowledge is supply or demand driven.

Figure 1: Distribution of translated titles by field in %

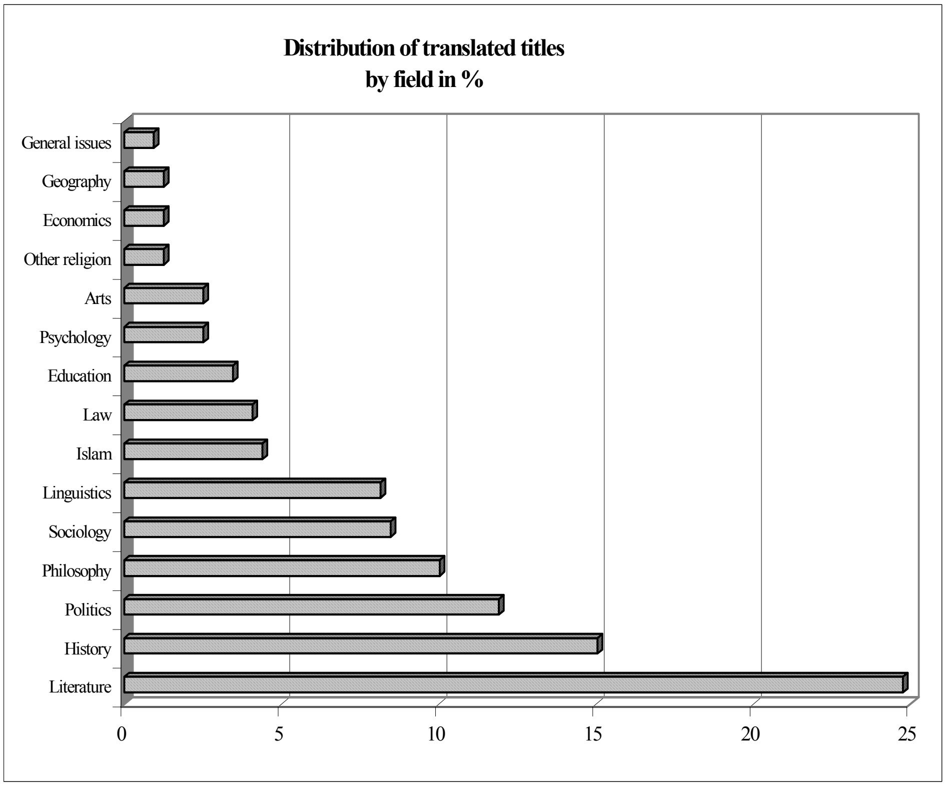

Table 3: Number of titles translated into Arabic in Morocco over the period 1980-2002 by field

Topics	Titles translated into Arabic (1)	Among which titles authored by Moroccans (2)	Share of (2) in the number of titles translated
General issues	3	3	100
Islam	14	2	14,3
Other religion	4	1	25,0
Philosophy	32	8	25,0
Psychology	8	1	12,5
Sociology	27	7	25,9
Politics	38	15	39,5
Economics	4	2	50,0
Law	13	4	30,8
Education	11	3	27,3
Arts	8	4	50,0
Linguistics	26	1	3,8
Literature	79	43	54,4
Geography	4	2	50,0
History	48	16	33,3
Total	**319**	**112**	**35,1**

Source: Reference Maghrebines, Al Saoud fondation, Casablanca (2003)

4 Supply-side determinants of translation output

Theoretically, translation activity can be viewed as any other service provision activity. It is affected by supply-side and demand side factors. Whether translation from foreign languages into national language should be a public or a private service can still be debated.

4.1 How the decision to translate is made?

In Morocco, translation of titles from their source languages into Arabic is very often an individual decision initiated by writers and researchers. Their main aim is to share with local readers the "*pleasure*" or the "*enlightening*" they felt when discovering a title written in a foreign language. This trend is confirmed through interviews among experts and translators. Nine out of ten either strongly agree or at least agree that the first motivation of translation is dissemination of knowledge, culture and science. However, other experts put emphasis on financial incentives and academic promotions as also being relatively important determinants of translation initiatives.

Table 4: Translators' incentives

SA: strongly agree,
A: Agree, NS: Not sure,
D: Disagree, SD: Strongly disagree

	SA	**A**	**NS**	**D**	**SD**	Total
Dissemination of knowledge, science and culture	19	71	10	0	0	100
Academic promotion	5	19	42	34	0	100
Financial gain	0	52	18	30	0	100
To become famous	0	28	48	24	0	100

There are also cases, where some specific titles are suggested to translators generally through foreign cultural cooperation services. However, over the last years, translation in Morocco is becoming, as it is shown by the titles of translated books, a wide field for foreign aid. French, German, American and other cultural centers promote translations of novels and other books they aim to familiarize the Arabic readers with. Usually, translations are funded, while printing and distribution are not.

Some of the experts interviewed tend to consider the decision-making process in latter case very biased and highly subjective. Some of the interviewees think that "*cultural cooperation takes in some cases the form of post-colonialism*". In their view, not all voices are represented in what is being translated. Most often translation output does not enlighten readers but tend to alienate and contributes in shaping their perception of the world".

4.2 Profile of translators and access to human capital

The frontiers of translation market are not easy to delimit. Except for official legal translation, there is no special license or permit required to operate as a translator or to run a translation company. Translators come from various backgrounds and a significant share of them has not received any specific training that would qualify them to offer translation services. Therefore, there are no official statistics on the translation activity. To make things simple, operators on the translation market are made of individuals and companies

Individuals who offer translation services belong to one of three categories:

- ✓ **In house translators** or translators that work for a governmental department, public or private companies on a full time basis and perform translation either exclusively or as one of their main tasks. For example, all laws and regulation in force in Morocco are translated by in house translators.
- ✓ **Full-time freelance translators** or independent translators that have no professional activity but translation. They earn their living exclusively from offering their translation services.
- ✓ **Part-time freelance translators** are those individuals who have another professional activity but do offer their translation services as extra-activity. They generally come from a wide variety of backgrounds such as journalists, professors, consultants, and writers.

Translation companies include any legally formed entity that provides translation services but not necessarily exclusively.

- ✓ **Translation bureaus**: are those entities whose core business is translation. These entities specialize, generally, in a certain number of languages or "combination of languages". Translation bureaus are in most cases very small firms operated by one translator and some support staff.
  - ✓ **Book publishers** who are involved in publishing and distributing translated works. These entities usually recruit translators for a particular project, which is in general one specific book. The contract with the translator ends as soon as the project is accomplished. The tightness of the translation market implies that only a few book publishers share its output.
  - ✓ **Other entities** whose core business is not translation but they provide translation as part of their services. Common examples are marketing firms, advertising agencies, or business consulting companies.

Generally, individual translators don't provide their services directly but via translation companies through outsourcing. However, in some cases independent translators are in direct contact with final clients. This makes any statistical assessment of the number of people working in translation activity even harder.

Companies involved in translation activity don't experience any specific difficulties in finding qualified translators, except in specialized area such as banking, insurance, engineering, science and some specialized branches of law. However, to overcome the shortage in some of these areas the Association of Translators (ATAJ) is increasingly aware of the critical role of training and continuous education. Some initiatives have already been taken in areas such as communication, and management.

Most translation companies as well as translators interviewed emphasized the quality of training provided by the "King's FAHD high School of translation" created in 1986 and located in Tangier in the north of Morocco.

ECOLE SUPERIEURE ROI FAHD DE TRADUCTION

Established in 1986 in Tangier, the *School King Fahd For Translation* is the first center in Morocco dedicated to training translators of a high level of professional competence. The school offers a complete translation training including linguistic, textual, cultural, and research skills.

Over the two decades of its existence, the school trained some 400 qualified translators, thus contributing to serve the foreground translation as a discipline and as a profession in its own right and to provide a remedy for the ever-increasing national demand. Some graduate translators from this school are working in government ministries, international organizations, private business, embassies and banks.

Though it’s still difficult to find all these trainees working as translators on a full time basis in public sector, all laureates manage to trade successfully their translation assets on the labor market in various areas such as journalism, tourism, and communication. Some of them have also their own translation bureaus and work as independent translators.

4.3 Translation companies and access to finance

Translations bureaus are generally of small size and don't require large amounts of finance. However, book publishers operating in translation segment rely on various sources of financing: their own funds, bank loans and suppliers credit. The later source is preferred because it involves much easier procedures and cost much less than banking credits. On the basis of data collected from interviews, external financing stands on average at one third of total liabilities. Reinvested profits stand as the main source of finance as it covers on average around two thirds of mobilized funds.

As has already been underlined by Achy and Sekkat (2003), book publishers involved in translation tend to agree on the impact of access and cost of finance on their economic performance.

Notwithstanding, credit constraints are very specific to firms established in translation-related activities. Various surveys carried out by the Ministry of trade and industry show that most of the small and medium enterprises in the manufacturing industries suffer from credit rationing, and high collateral requirements.

In order to avoid uncertainty, and solve their financial constraints it becomes common place that publishers make authors pay for printing their writing or translation instead of remunerating them for their work. The entire market risk is borne by the author or translator.

4.4 Other determinants of performance

Other supply factors such electricity, transport, and telephone have not been mentioned by firms as being among obstacles to their performance. The cost of inputs in particular imported paper and energy are however frequently cited as impacting negatively their margins. The cost of energy has a direct effect on their production costs and an indirect effect on their distribution costs.

4.5 Market structure and firms' strategies

The book market in Morocco tends to be very fragmented as the number of firms on this market exceeds its potential. As a consequence, most publishers tend to specialize in terms of type of book and of language. There is only few publishers producing books both in French and Arabic and covering various fields of knowledge. Book publishers complain about competition they face from public sector publishers. For instance, almost each Moroccan University has its own publishing department. Since the book publishing industry is extremely demanding in term of physical capital, and is characterized by a relatively long pay-back, such segmentation does allow firms to benefit from economies of scale.

Three out of four interviewed firms describe the book market in Morocco as an oligopoly with a limited number of large firms setting the rules. Such a situation may be positive in term of scale economies' exhaustion but it may be negative in term of monopoly power. The oligopoly situation is not the result of any regulatory or legal barriers to entry into the book market. There is a consensus that such "legal" barriers to entry are non-existent and that entry is free for any investor. The absence of barriers to entry holds for national as well as foreign investors.

As far as strategy is concerned, very few firms have a genuine strategic plan. Most of the interviewed firms consider that there are too many technological and regulatory changes that it becomes extremely difficult to plan for more than two or three years. On the technological side, the accessibility of a large number of TV channels and the effect of internet threaten seriously the capacity of the sector to attract more readers. In addition to technology, piracy and infringement of copyright made access to "non-paper" means of information and knowledge storage much cheaper.

Under these circumstances, the majority of firms adapts and react gradually without explicitly designing strategies or setting targets.

Interviewed firms are very concerned with copyright issues. They all suffer from illegal copying of books even within universities and public administrations. The capacity of the public authorities to enforce copyright law has been very limited and very few resources have been allocated to this activity, which does not in any case stand as a priority for the authorities.

4.6 Public policy

One consensus that emerged from all interviews either among firms, translators or experts is the weakness of financial support devoted by public authorities to translation. They all consider that translation into national language of outstanding universal knowledge should be among priorities. There is, for instance, no specific service in the ministry of culture in charge of translation issues.

Other aspects of public policy in book industry have already been stressed by Achy and Sekkat (2003). These aspects cover public support to investment, demand of books, export promotion and copyright enforcement. Some national publishers suggested that the government restrict access to the industry by foreign investors because of its role in preserving local culture and shaping citizen's cultural identity.

4.7 Expectations

Book publishers in general and those involved in translation activity are not very optimistic regarding the future. Their pessimistic view is supported by the trend in their turnover. In order to corroborate their view some indicated that the number book shops has been declining over the years, and former book shops have been transformed into cafés, fast-food or Internet-points. Book publishers also worry about the potential increase in competition in their market due to high quantities of low quality unsold books in Europe by super markets and even by some book shops.

5 Demand-side determinants of translation output

It is admitted that the performance of the Book industry in Morocco is handicapped by the tightness of its market due to relatively high illiteracy rates and non-rooted habits of reading among literate individuals. However, attitude towards reading is not irreversible and might be changed through education from primary school, family and in public sphere. This needs a strong commitment from Moroccan leaders and policy-makers. This section presents the main obstacles that reduce dissemination of translated books in Morocco.

5.1 Mismatch between translated titles and demand

Interviews conducted on the specific segment of translated books show that although demand has an impact on the performance of translation, it has not been considered as the key issue, according to interviews. The first obstacle that hinders dissemination of translated titles would be attributed to the existence of some mismatch between translated titles and demand expressed by readers. Almost one third of our sample of experts strongly agrees that translated titles don't match demand and 19% of the sample agree with this statement. This finding would be largely due to the selection process of translated titles which is mainly subjective rather than demand-driven, or subjected to any objective opportunity criterion

Table 5: Obstacles that limit dissemination of translated books

SA: strongly agree,
A: Agree, NS: Not sure,
D: Disagree, SD: Strongly disagree

	SA	A	NS	D	SD	Total
Translated books don't match the demand	32	19	44	5	0	100
Weak demand	28	48	14	10	0	100
High margin for the publisher	14	19	43	24	0	100
Bad quality of translation	10	29	38	23	0	100
High price	10	20	18	52	0	100

Nevertheless, it should be noticed that 44% of experts were not sure whether or not translated books match demand. This high proportion reveals that book market is an extremely under-investigated area, and data collection and surveys that would help understand the current state and the dynamics of this market are certainly among the prerequisites to design appropriate educational and cultural policies in Morocco.

Interviews among experts and translators show that titles dealing with politics in the region attract more readers than other categories of titles. This can be matched with censorship phenomenon that constrains both production and translation of titles dealing with political issues. It has been however recognized that political openness experienced in Morocco over the last years tends to substantially soften this constraint. Some experts even suggested that Moroccan translators and publishers could benefit from this political environment and expand their sales overseas, particularly in other Arab countries.

Table 6: Topics of interest for readership of translated books

SA: strongly agree,
A: Agree, NS: Not sure,
D: Disagree, SD: Strongly disagree

	SA	**A**	**NS**	**D**	**SD**	Total
Politics	57	33	10	0	0	100
Literature	29	43	19	10	0	100
University programs	5	62	29	5	0	100
Sciences	5	14	38	43	0	100
School books	0	33	43	24	0	100
Children oriented books	0	29	33	38	0	100

5.2 Weakness of demand for translated books

The weakness of demand emerged as the second most important obstacle that reduces the dissemination of translated books. Some 70% of experts put emphasis, with various degrees, on shortage of demand for translated books. However, two components are mixed up when assessing demand. The first is the weakness of demand for books in general; the second is more specific to translated books compared to original versions written in foreign languages, and more particularly French.

5.3 Translation quality

Some readers prefer for various reasons not to rely on translated titles as long as they master the source language. The quality of translation which appears in the fourth position among obstacles that constraint translated titles' dissemination, is one of the reasons that affect demand. Around 40% of experts interviewed either strongly agree or at least agree that the bad quality of translation is a very serious issue. For the moment, there is no formal or systematic process of translation quality control. Academic works dedicated to assess the quality of some translated titles revealed frequent translation mistakes and misunderstanding with respect to the source title. The risk of “misinterpretation” increases when translation into Arabic is not based on the original title but on its translation in a language mastered by local translators.

Our surveys show that the quality of translation is not a minor issue, and it is not exclusively a technical problem that can be related to the capacity of translators to deliver “truthful” and high quality output. Some interviews consider that “corrupted” or “biased” translations may generate ambiguity and confusion and can lead to reject the source title and its complete background. Instead of being an active and powerful channel of communication and exchange among nations, translation may become a tool that reinforces misunderstanding among people.

5.4 Other economic factors

Economic factors such the as publishers' margin or the cost of book, don't seem to be as important as one might expect. More than two thirds of experts are either not sure or disagree to classify publishers' margin among obstacles. On the other hand, roughly half of the experts disagree with setting any direct relationship between demand for translated books and their price. Most of them confirm that translated books are usually cheaper compared to other books.

6 How experts explain the weakness of translation output in Morocco?

Access to universal knowledge can be achieved either through learning foreign languages by individuals or through translation of universal knowledge. Unlike learning foreign languages, translation is a collective choice and experts underlined that in a developing country such as Morocco, the state has a major role to play in the development process.

6.1 Absence of any public support to translation

The weakness of translation output and its low quality are largely due to inadequate cultural and linguistic policies. Experts consider the state cannot just wait for the invisible hand to make translation records better.

Roughly two thirds of experts strongly agree and 29% agree that the weakness of translation in Morocco is directly linked to the absence of any governmental support allocated to this activity. Without any public funds to promote translation, supply and demand mechanisms left alone lead to an under-provision of the market. Expected financial returns for both the translator and the publisher are so low that most translation initiatives are economically not viable.

Table 7: Factors that explain the weakness of translation activity

	SA: strongly agree, A: Agree, NS: Not sure, D: Disagree, SD: Strongly disagree					
	SA	**A**	**NS**	**D**	**SD**	Total
Absence of any support to translation	66	29	5	0	0	100
Weak financial return for the translator	56	29	10	5	0	100
Weak financial return for the publisher	42	43	10	5	0	100
Absence of foreign partners interested in translation	35	40	20	5	0	100
Complex administrative procedures to publish	19	33	48	0	0	100
Non availability of qualified translators	10	24	38	28	0	100
High cost of property rights	5	14	62	19	0	100

6.2 Weak and biased foreign partnership

Foreign partnership could have been used to remedy to translation market deficiencies. However, most of experts agree (35% strongly agree, and 40 agree) that absence of foreign partners interested in translation is a key issue. Even when foreign funds can be mobilized they cannot usually be used freely. It seems from answers that this is a very sensitive and polemic issue. Some of the experts suggested that there should be a national policy for translation, and public funds either from local or foreign sources should be allocated according to priorities.

6.3 Book publishers are mainly business oriented

In pure economic terms, book publishing is an economic activity that operates on the same business model as any other activity. The economic viability of every editing project needs an assessment before its implementation. The tightness of domestic market and "readership crisis" can seriously threaten any creative initiatives. In the absence of public funds to support these initiatives, book publishers are very often accused for their mercantile attitude. Most of interviewed experts (95%) either strongly agree or simply agree that financial gain is the first and the main motive for publishers involved in translation. Some of the experts consider that some book publishers are also using translation to expand their market shares or to diversify their range of products. These results are rather expected and appear to be coherent with the economic nature of the book editing and publishing activities.

However and surprisingly, 43% of interviewed experts agree that book publishers are also concerned by dissemination of knowledge and culture, 33% disagree on that and 24% are not sure. It has been emphasized by some experts that "*in any case those people who choose to invest their money in the "book business" in Morocco may not be exclusively profit-seekers, otherwise, they would have given up this activity a long time ago";*

Table 8: Book publishers' incentives

SA: strongly agree, A: Agree, NS: Not sure, D: Disagree, SD: Strongly disagree

	SA	**A**	**NS**	**D**	**SD**	Total
Financial gain	65	30	5	0	0	100
Increase market share	24	24	32	20	0	100
Output diversification policy	0	62	24	14	0	100
Dissemination of knowledge, science and culture	0	43	24	33	0	100

6.4 Complex procedures and copyrights

Interviews reveal that most experts are not sure whether complex administrative procedures and costly copyright stand as real obstacles that constrain translation. But the general idea that emerges is that translation activity is facing the same problems as the publishing industry. Both of them suffer from under-regulation and lack of effective implementation of existing rules and regulations. Although in various conventions signed by Morocco, there are provisions specifying that any publisher or translator must obtain a formal licence from the author and the legal system requires a compulsory licence for translation, cases of infringement of copyright and piracy exist.

7 Major determinants affecting growth of the translation industry

7.1 Political roots of translation issues

Translation is not a usual cultural issue; it is a political economy issue. One prominent feature in contemporary Arab history, according to the AHDR (2003), which has a substantial impact on *knowledge-culture,* is the dominance of the political stability obsession over knowledge generation. Autocratic regimes have restricted freedom of expression and the flow of knowledge, ideas, information that are effectively or potentially critical to the ruling regime. Some political openness has been recorded in some countries recently. This is particularly the case of Morocco.

Translation can be related to democracy since translation into Arabic prevents from "*linguistic discrimination*" and ensures that there is no monopoly of knowledge by those reading French (or other foreign languages) at the expense of those mastering Arabic only, which is also the official language. Some experts consider that linguistic policy in Morocco has been a highly politicized issue in Morocco.

According to M. FASSI FIHRI, Director of the *Institute of studies and research for arabization* (IERA) there is a strong link between translation and socio-economic development. Various statistics published in Arab Human Development Report (2003) support this argument. Learning foreign languages, although necessary, is only a complementary dimension of any linguistic policy and can never be a complete substitute for translation. In a developing country, the state has a major role in the development process. The weakness of translation activity and its low quality are due to the weakness of our cultural and linguistic policies. The state cannot just wait for the invisible hand to make translation records better.

7.2 Multiple institutions are involved in translation but they lack effectiveness and suffer from absence of coordination

There are various institutions directly or indirectly involved in translation-related issues. This multiplicity of institutions has not been conducive to strong and effective translation policy in Morocco. Some of these institutions are active at national level; others are designed and implemented through the Arab League or other Arab organizations.

7.2.1 National institutions involved in translation

General secretariat of the government (SGG): The SGG, attached to the Prime Minister, includes a whole department dedicated to translation. It provides positions for translators on a full time basis and is in charge of translating laws, decrees, legal provisions issued by the government or by the parliament in the official bulletin. In Morocco every legal provision issued in Arabic is systematically translated in French.

Ministry Of Foreign Affairs: Unlike other ministries, the ministry of foreign affairs is endowed with a specific translation department with full time translators. In other ministries such as the ministry of cultural affairs, a translator may be used on a full time basis but there is a special department or service actually dedicated to translation.

Moroccan Royal Academy: Created in 1977 and inaugurated in 1980, this institution is composed of 65 members, 30 residents, 30 associates and 5 corresponding members. Members meet in two plenary sessions each year. Moroccan royal academy also organizes seminars, symposiums and conferences on major topics. It publishes a magazine called "*Academia*". The MRA is highly involved in promoting arabization and Arabic language through various activities of its *Arabic language commission.* The constitutive decree of the MRA stipulates that this Arabic language commission: "endeavor, in collaboration with other specialized institutions, to promote the use of Arabic in Morocco and to enhance a quality translation from Arabic and into Arabic" Its publications are in both French and Arabic. MRA provides positions for translators on full time basis.

University Institute for Scientific Research (IURS): Established in 1962 within Mohamed V University, and contains "*documentation and translation department*". IURS publications are in Arabic and French. The main journals of this institution are in the area of human and social sciences. They also cover translation issues from and into Arabic.

The Institute of Studies and Research for Arabization (IERA): It is a national *planning language institution*. It was established in 1961, as a recommendation of the first conference on arabization held by the Arab League. The IERA belongs to the University Mohamed V in Rabat. The main objective of this institution is to lead the process of linguistic modernization and promote the use of Arabic in all sectors and activities in the country. Translation and terminology are the two pillars of the IERA mission. To this end, the institute publishes several bilingual and multilingual scientific and technical dictionaries to upgrade Arabic in terms of terminology and support translation efforts. The institute has also been involved in outsourcing of translation works for different public administrations.

King Abdul Aziz Foundation: The foundation King Abdul Aziz for Islamic and Human Sciences Studies was established in 1985. It is a private institution constituted as a Moroccan common law association. The foundation is managed through an administration board. It is actively involved in translation through its partnership with Arab World Institute (Institut du Monde Arabe) located in Paris. This collaboration aims at creating and updating a comprehensive database containing all translated works in the Arab countries, funding of a literary award for translation as well as endeavoring to re-establish the notoriety and fame of *Toledo translation school* through cooperative initiatives with the Spanish.

7.2.2 Arab institutions involved in translation and translation related activities

Coordination Bureau of Arabization: It is an Arabic planning agency ensuring and strengthening the pre-eminence of Arabic not only within national borders, but also within a geographical reach. The **Coordination Bureau of Arabization** is a specialized institution established in Rabat, Morocco, as a follow up recommendation from the first conference on arabization held in Rabat in 1961. In that regard, it is an affiliated institution to the *Arab League Educational, Cultural and Scientific Organization*

(ALECSO)[18] in 1972. It is in charge of leading the unification of Arabic scientific and technical terminology helping translators by allowing them to access to the unified dictionaries. But despite excellent intentions, its efforts have not shown a great success so far.

Arab Center for Arabization, Translation, Authorship and Publication (ACTAP): The ACTAP is an institution established according to an agreement signed between the Syrian Republic Government and the Arab League, Educational, Cultural and Scientific Organization (ALECSO). It is one of the specialized agencies of the ALECSO. It has its own legal personality and carries out its activities according to the ALECSO constitution. The ACTAP was established in 1989. It aims at "the Arabization of scientific and technical subjects related to different specialization of higher education in the Arab countries. It also aims to enrich and illuminate Arab culture with "highly refined works of intellectual production of foreign origins" by translating such work. So far, this center has translated some 48 valuable and recent scientific and technical books (10 other translations are under press). Along with translation activities, ACATAP is also editing a magazine called "*Attaarib*", issued twice a year. This magazine regularly publishes high quality scientific and research studies translated into Arabic.

Arab Organization for Translation (AOT): The AOT was officially established in 1999. Its creation was preceded by a survey and studies aimed to describe the reality and the situation of translation all over the Arab world. The Center of Arab Unity Studies (CAUS) in Beirut largely promoted its creation. This organization is a specialized, international, non-governmental organization with headquarters in Beirut. The general task of AOT is to promote translation from other languages into Arabic and from Arabic into other foreign languages in different fields of knowledge, contribute to the dissemination of high quality scientific knowledge in the Arab World, especially in institutions of tertiary education. This organization also aims at promoting and extending demand for translated work. It elaborates a strategy plan for translation into Arabic of major scientific books, periodicals, as well as coordinating translation efforts within the Arab World. The AOT revenues consist of an endowment and its returns as well as donations approved by the executive committee. It has issued eleven translations and signed agreement for the Arabic edition with major foreign publishers (John Wiley&Son, Harper Collins Publishers, Blackwell Publishers, A. Fayard, Humann Editors, Granta Books, Librairie Philosophique, J. Vrin, Edition du Seuil, Taylor and Francis Books, Routledge, Flammarion, University of Chicago Press….).

Higher Arab Institute for Translation: On the 24 of March 2005, General Secretary of the Arab League, M. Amr Moussa, inaugurated the Higher Arab Institute for Translation in Algiers. It is a scientific institution affiliated to the Arab League. This institute will start receiving students at the beginning of the next university year. The organizational framework of this institute consists of a Superior Council, a Scientific Council, a Director and Scientific and Administrative Structures. The budget allocated to this institute amounts to 200 millions dollars divided among the state members of the Arab League. The purpose of this institution according to its Director (Imaan Byoud) is to promote and reinforce translation in the Arab countries, improve the Arab translators' skills and their

[18] The Department of Culture of the Arab League was created in 1945 on the basis of an agreement signed by the participant Arab States. The agreement emphasized the necessity to promote and reinforce translation of foreign books, classical and contemporary into Arabic. In 1970, this department was transformed into the Arab League, Educational, Cultural and Scientific Organization (ALECSO).

awareness of translation-related issues from and into Arabic, use new technologies in the translation field and facilitate contacts to share experiences and best practices in this field.

The number of institutions "active" in translation field seems impressive. It reveals the existence of some degree of awareness on the necessity for Arab countries to collaborate in order to promote translation of universal knowledge into Arabic. However, to our knowledge, the degree of coordination among these institutions is extremely weak. In addition, there is no study on the effectiveness of these institutions.

7.3 Bilingualism seems to be an obstacle to the development of translation as a large-scale activity

By constitution, Arabic is the official language in Morocco. However, in education as well as in everyday life things tend to be more complicated. A distinction should be made between literary Arabic (*fusha*) used for written purposes and which is common in all Arab countries, and *dialectal* Arabic used as the spoken language and which is generally specific to each country. There is a big difference between classical and dialectal Arabic, and literary Arabic skills are closely connected to the educational level and the familiarity with terminology in a specific field, which is not common even to highly educated people.

Therefore, one has to be careful in considering Arabic (fusha) as the mother tongue of Moroccans because it is a language that needs to be acquired through education and hardly ever used in real life exchanges.

Now even in education, Arabic is not always the main language of learning. The *Arabization policy* in education experienced highs and lows from independence and has never been implemented properly for various reasons that go beyond the main purpose of this paper.

Despite the existence of some degree of Arabization in primary and secondary education, some fields such as economics and sciences are completely taught in French at universities.

Although the Arabization process is going on, the “*educated bourgeoisie*” is quite bilingual through the educational system, especially in private schools. This *bilingualism* seems to be an obstacle to the development of translation as a large-scale activity. In fact, these categories of the population, the most educated, do not feel the need for translation. They have access to their culturally close neighbours through the literary shared Arabic and, they are able to access the culture of other languages, due to their proficiency in their first “foreign language” (French).

7.4 High concentration of Moroccan trade with France negatively affected translation activity

The intensity of trade among countries has been shown to be a substantial incentive to learn trade partners' countries languages, or to translate their knowledge output. On the other hand, trade between individuals is facilitated when all traders share a common culture and language (Lazear 1999).

Moroccan foreign trade is geographically very concentrated both for imports and exports. The European Union represents by far the Morocco’s first trading partner. For historical as well as proximity reasons, France and Spain stand as the two main trading partners of Morocco. Moroccan foreign trade with other parts of the world (United States, Latin America, Asia or even with Maghreb and Middle Eastern countries) remains negligible. This high concentration of Moroccan trade with Europe and France more specifically leads Moroccans to adopt French language and culture and to “*look to the world from the French eyes*”.

Morocco is recently willing to diversify its trade especially with the US (free trade agreement with US), Arab countries (GAFTA and Agadir agreement) and Latin America. As trade diversifies, it becomes difficult to learn all trade partners' languages and translation acquires its status as the main tool to disseminate universal knowledge among population.

8 Towards an effective translation policy in Morocco

Translation has a critical role to play in facilitating language-based development and improves knowledge absorption capacity of a country. Recent developments in theoretical as well as empirical economics show that economic performance is increasingly attributed to the *knowledge management component* of the productive system.

In particular, in an open and globalized world, no country can produce all knowledge it needs. A substantial component of knowledge arises from learning from others. New growth economics shows that growth performance depends on how quickly an economy learns. Translation is indisputably one of the most recommended channels of learning and effectively sharing universal knowledge.

Despite the critical role of translation, there has been no effective translation policy in Morocco although an increasing awareness can be noticed over the last few years. In 2002, for instance, a national seminar was organized by the Ministry of culture in order to examine exchange and address translation issues. The theme of this seminar, which was "*Translation in Morocco: What's the current state? And what strategy?"* was very revealing of the level of awareness. The seminar's main objective as stated by the minister of culture was to *think of translation issues not only in their technical aspects, but also as a tool or strategy*.

Various papers presented in this seminar acknowledged the role of translation not only as a cultural issue but also as an economic issue that needs to be dealt with by involving various components of the government. The ministry of culture can lead the process but cannot rely exclusively on its human and financial resources to design and implement a potential translation strategy. In fact; translation should involve other departments such as the Ministry of Education and Scientific Research, the Ministry of Industry and Trade, the Ministry of Foreign Affairs in addition to translators' representatives and civil society.

The main recommendation of this seminar was "*the necessity to design a national transitory project for translation that aims at translating 100 books from various areas into Arabic over a maximum of three years*". This means that the objective set for this national transitory project is 33 titles a year compared to an average of 20 titles per year translated over the period 1991-2002.

Although this objective may seem itself very modest it has not been accompanied by any institutional changes that effectively reinforce translation status in Morocco. So far, there are no translation institutions that set objectives and criteria, monitor selection processes of titles and translators, control quality of translation output, and promote distribution and marketing of translated tiles. Translation continues to be based on *individual decisions initiated* by writers, translators or publishers.

There is no explicit translation strategy in Morocco that sets clear objectives, design criteria for selection of translators and titles to translate, and indicates legal and financial provisions that govern contracts with translators.

Although numerous institutions are involved directly or indirectly in translation, their lack of coordination is a great impediment to the promotion of this activity. There is a significant need for a national institution or agency for planning and managing translation issues. Such an agency would be in charge of coordinating all activities pertaining to translation. Its first task is to work out a genuine translation strategy based on clear objectives. The strategy needs to be based on broad surveys among policy makers, translators and potential readers in order to identify major issues to be tackled, and set priorities in terms of titles to translate.

It would be very suitable to define this national strategy in coordination with other Arab countries and organizations such as the Arab Organization for translation and the Arab Center or Arabization, Translation, Authorship and publication (ACATAP).

Among other pillars of this national strategy:

- Promote networks among writers, translators and publishers that facilitate contacts and create opportunities for new translation projects

- Create a database that will document book production in the Arab world covering all the translated work

- Establish programs of sponsoring translation works by the private sector or by international organizations

- Tackle issues related to marketing and distribution both at the national level and among Arab countries. Economies of scale can have a substantial impact of the viability of translation projects as well as on the price paid by the readers.

- Provide grants on a competitive basis for translation of predefined titles or subsidize translation costs of titles suggested by authors or translators depending on priorities

- Set up scholarships that would be awarded for the purpose of building professional capacities for translators and promote excellency

- Set up prizes and awards that provides further incentives for translators and publishers

- Cerate a periodical magazine and/or Web site that would review trends and developments of translation in Morocco as well as in Arab world

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10 Appendix: An overview on interviews

Nominative list of interviewed experts
(Non exhaustive list)

Name	Position
El Hassani Said	Institute of Studies and Research for Arabization (IERA)
Fassi Fihri Nourreddine	Translator and Journalist
Essaouri Adelaziz	Ministry of Culture
Ait Taleb Saadia	Institute of Studies and Research for Arabization (IERA)
Nourreddine Saidi	Translator and Secretary General of Legal Translators' Association (ATAJ)
Mezouar Idrissi	Professor and active in translation of literature
El Ghzaoui Aziz	National library
Yaktine Said	Professor and active in translation of literature
Adiouane Mohamed	Professor and active in translation of literature
Abdeljalil Nadim	Professor and active in translation of literature
Nouzha Zoujal	Professor with expertise in translation of Economics
Benouna Najat	Professor with expertise in translation of humanities
Touhami Abdelkhalek	Professor with and active in translation in economics
Idrissi Bouyahyaoui Bouchaib	Former Director of Translation School King Fahd

Other interviews covered the following institutions: Ministry of Culture, Translation School King Fahd, Legal Translators' association (ATAJ), ISESCO (coordination Bureau of Arabization), Institute of Studies and Research for Arabization (IERA), University Institute for Scientific Research, Al Saoud fondation for culture.

Interviews with book publishers: 12 (among which 6 in Casablanca and 4 in Rabat), with **translation bureaus** (3 in Rabat and 4 in Casablanca) , with **general "experts"** (civil servants involved in translation, freelance translators, translators, professors, book sellers and a sample of readers).

ECONOMIC PERFORMANCE OF THE ARABIC TRANSLATION INDUSTRY IN SAUDI-ARABIA

By Pr. Mamdouh ALKHATIB

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1 Executive summary

The Kingdom of Saudi Arabia is the largest country in the Arabian Peninsula. Saudi Arabia is not only the largest producer and exporter oil but also it has the largest oil reserve in the World. The economic development of the country depends in a large part on the oil revenues that fluctuate severely in function of the oil market components (supply, demand and market structure). The economic growth was very fast during the oil prices boom, and was accompanied with significant and fast changes in the economic structure, the society, the education and the environment of the country. During the last decades, Saudi Arabia has realized an important economic development. Nowadays, oil prices observe a spectacular record Saudi Arabia, is expected to live another oil and development boom.

Saudi Arabia has a special importance in the Arabian and Muslim countries. The presence of the two holy mosques affects clearly the public environment and culture. Millions of Muslims visit Saudi Arabia every year to accomplish the pilgrimage and the alomrat

English is the second language in Saudi Arabia after the native Arabic language. Also, English is obligatory learned in the different education levels (elementary, intermediate, secondary and university). The system of education is based on the English language, but in different intensities. In some universities (like King Saud University and King Abdulaziz University) medicine, dentistry, engineering, pharmacy and computer sciences are lectured exclusively in English. Other fields like law, economy, agriculture, literature, physics, mathematics, accounting etc. are lectured in Arabic. King Fahad University learns all sciences and disciplines in English. By consequence, the need to translate books to Arabic is not the same from a field to another. Students studying for example medicine or pharmacy do not need to read Arabic translated books in their disciplines because they do not have any difficulties to read English books and references.

The public administration has to use officially the Arabic language for secretary and correspondence needs. The closed relationships of the Saudi public administration with external world imply that some reports, studies, annual reports, development plans, publications, statistical yearbooks, etc. must be written in English and/or Arabic. Many publications were translated to Arabic or to English by the translators of the public administration. For examples, the annual reports of Saudi Arab Monetary Agency (SAMA), the development plans of the Ministry of economy and planning, many publications of the Supreme Commission for Tourism and the General Commission for Investment are published in English and Arabic.

The public sector participates actively in the translation activities. The Saudi universities support the Arabic translation industry in different ways. First, some universities like King Saud University have a college for Languages and Translation. Second, the Arabic translation is considered in the requisite credits to get a promotion of the teaching staff in the Universities. Third, most of the Saudi universities contain a Translation Center organizing the publishing of Arabic translated books in different sciences. Some ministries and public institutes have also great efforts in the translation activities (Public Administration Institute for example).

Most of the of the private sector companies like banks, supermarkets, tourism agencies and airlines agencies use English in their accounting, administration, transaction and correspondence. The medical sector like public hospitals, private hospitals, medical centers, pharmacies, etc. also use English as first language. For that, translation efforts are very necessary if these institutions deals with the public administration or the private sector that use Arabic language only.

The importance of the oil sector in the economy of Saudi Arabia, led a small importance to the industry and a very small importance to the Arabic translation industry. For this reason, the contribution of the Arabic translation industry in the economic activities is low. The economic openness policy followed by Saudi Arabia, permits to the translated books published in some Arab countries like Lebanon to inflow inside the country. The high costs of printing and publishing in Saudi Arabia compared to the competitive costs in the other Arab countries accentuates also the inflow of the imported Arabic translated books.

The labor activities of the Arabic translated books industry like the labor activities in the other sectors of the industry, are dominated by the foreign labor force. Furthermore, many translators in the Saudi universities and centers are also non Saudis. It is very difficult to estimate the part of the Saudi or the foreign translators to the total translation activities in Saudi Arabia. In fact, "guest workers" in Saudi Arabia play an important role in the economy in general and in the industry in particular.

The private sector of the Arabic translation industry is very concentrated. Only, a few private publishers allow the Arabic translated books a moderate importance in their activities. Jarir, Obeikan and Mars publishers are the most important private publishers of the Arabic translated books in Saudi Arabia.

During the period 1955-2004, the number of Arabic translated books is about 1260 books. The annual average of the Arabic translated books is about 52 books. This average is greater than other Arabic countries like Syria and Egypt, but it is very low compared to the number of books translated from English, in other countries like Russia, Japan, and Greece. Regarding the size of the economy, the number of the population, the magnitude of GDP per capita and the role of public education sector, the average number of Arabic translated books is Saudi must be greater than the mentioned figure.

To promote Arabic translation industry, divers measures can be taken in Saudi Arabia: adoption of a clear strategy for translation in the national level, integration of the national strategy with an Arabic level strategy for translation, offering public support and subsides for translation industry, allowing translation activities more importance for the staff universities promotion, giving more importance to the subjects of translated books, reducing public administrative control, simplifying formalities for publishing translated books and protection of the Property Right for translators and publishers.

2 Introduction

In the last few years, the World assists in un-preceded explosion in knowledge, information and data in the different languages. This explosion was accompanied with the innovation of new tools to transfer these information and knowledge from a language to others in a very high speed.

The Arab World needs to assimilate this huge volume of knowledge in the mother tongue and appoints it to develop the Arab societies. The Arab World stands outside the knowledge stream isolated from what happens in the world. Facing the critical shortage in the knowledge requires local and national efforts in Arabic translation to make a jump in quality and quantity of the Arabic translation books and exploit information technology to overcome this shortage. The gap between Arab societies and developed countries is a knowledge gap before being economical or technical gaps.

Any scientific, cultural and social revival must be accompanied with broad Arabic translation activities. Arabic translation take off in the Arab World needs to evaluate the quantitative and qualitative aspects of the Arabic translation activities, analyzing obstacles of their development and extract recommendations to improve and enhance this industry. This study of Arabic translation in Saudi Arabia represents an integral part of similar researches in Egypt, Morocco, Syria and Lebanon. The results of these researches can be used as guidelines to investigate similar studies for other Arab countries. The World Bank supports these studies to evaluate the performance of Arabic translations industry in the Arab World.

2.1 Study objectives

This study aims to describe the Arabic translation industry in Kingdom of Saudi Arabia from its establishment in 1930 until 2004. In other words, the description of Arabic Translation activities in Saudi Arabia covers theoretically a period of 75 years. But because the starting of the Arabic translation activities were in 1955, the period covered by this study will be reduced to 1955-2004 (50 years) by excluding the period 1930-1954 This description attempts also to restrict the number of published translated books and their distribution according to some criteria like publication year, publication location, original languages, topics of translated books and publishers[19]. Special attention will be done to the Arabic translation industry by focusing in supply, demand and market structure of this industry. The study aims also to determine the obstacles facing the translation industry in Saudi Arabia.

By analyzing Arabic translation activities in Saudi Arabia, the study aims to conclude some recommendations to help the efforts of the World Bank to develop and enhance the Arabic translation industry in the Arabic World.

[19] The term Arabic translated books (or translated books) means in all this study, books translated to Arabic language from other languages in the Kingdom of Saudi Arabia.

2.2 Time frame and data resources

This study covers the period from 1955 to 2004. It is based on two methodologies of collecting data and information:

- Collecting statistical information, (from previous studies, directories of libraries, publications etc.) to describe the translation activities in Saudi Arabia: number of Arabic translated books, topics, publishers and years of publication.
- Collecting data, information and opinions through questionnaires prepared for this purpose.

2.2.1 Data collected from books and previous studies:

Unfortunately, no accurate, authorized and published data of Arabic translated books are available in Saudi Arabia. Because of the shortage of information, this study depends on approximated data collected from two principal sources:

- The first source covered the period 1955 -1991. The data collected for this period depend on a previous study prepared by Mrs. Norah Saleh Alnaser as a thesis of Master Degree from Imam Muhammad Bin Saud Islamic University. This study was entitled "Study of Translation Fact in Kingdom of Saudi Arabia" and published later as a book entitled: "Books' Translation to Arabic language in Kingdom of Saudi Arabia: A Bibliometric study"

  Alnaser's study counted the number of translated books without accurate criteria classification. In our study, we spent great efforts to categorize and classify the translated books according to some meaningful criteria to get a useful description for the translation activities in Saudi Arabia.

- The second source of data for the translated books in Saudi Arabia covers the period 1992 – 2004. The data are collected through individual, hard and long research to complete and update the data obtained from the first source.

  Data and information about Arabic translated books are collected from the directories of some public libraries (King Fahad National Library, King Saud University Library). In addition some lists issued from publishers in Saudi Arabia about their translated books are used to update the previous data.

  The researcher of this study depends on the directories of books deposited in King Fahad National Library in Riyadh. These directories include all the books translated into Arabic from all different languages, then the books translated outside the kingdom separated from books translated inside and classified according to topics, years, publishers and publisher's location in the Kingdom.

  Located in Riyadh, King Fahad National Library is considered as the National Library in Saudi Arabia. All published books in Saudi Arabia should get an ISBN number from this library before their publication and distribution in Saudi markets. Copies of each published book should be provided to this library to get the permission of printing, publishing and distributing. In this way, most (if not all) of the books published in Saudi markets are registered in King Fahad National Library. Furthermore, the directory of King Fahad National Library is automatically updated.

In addition to King Fahad National Library lists, other lists from some publishers and publication centers are used. An accurate revision for these lists was done to prevent duplication from other sources (until the end of 2004).

Major difficulties were faced during data collection due to the absence of a unique and complete bibliographic list for the Arabic translated books in Saudi Arabia. We can say that, data collection and classification process can be described as personal efforts to provide the research with the necessary statistical data to accomplish the quantitative analysis.

Despite that, we believe that, all Arabic translated books in Saudi Arabia is not perfectly estimated in our study; we believe also that our data is underestimated of not more than 20% of the total number of translated items.

2.2.2 Data collected through questionnaires

Two types of questionnaires were prepared to serve the study purposes:

2.2.2.1 Experts, translators and academics questionnaire

This questionnaire starts with general questions to detect job, site of work, major activities, the educational degree and specialization of the respondent.

The overall appraisal of translation activities (from the respondent point of view) are determined by questions with five digits Likert scale. The questionnaire aims to analyze the following aspects of the Arabic translation activities:

- The effect of some factors related to Arabic translated books like prices, market's size, quality, style weakness, topics, translator economic return, IPR expenses, publication difficulties, absence of supporting sectors and reader's attention on translation activity.
- The major group readers concerned in buying translated books (school students, university students, general readers, and researchers)
- Translator motivations (educational, promotional, income revenue and celebrity or prestige motivations)
- Publishers' motivations (income revenue, educational, market size and products diversification).
- Factors acting as barriers in translation to Arabic (low revenue for publisher and translator, lower number of readers, administrative publication procedures, absence of foreign partnership, high IPR costs, copyright opportunity of the translated books, absence of governmental support and difficulties in finding the scientific terms).
- Topics of Arabic translated books that interest readers.
- Factors improving translation activities in Saudi Arabia (governmental support, increasing the market size, opening the external markets, reducing control and administrative publication procedures.)

(A copy of this questionnaire is annexed in the appendix B)

2.2.2.2 Private publishers questionnaire

This questionnaire contains the eight following major sections:

- General information: firm classification, general activity, year of establishment, number of employees, capital, productivity, volume and growth sales during the last five years.
- Economic performance of the firm: change in sales value, market share, number of employees, profits, exports, credit loans, number of translated and sold books between 2003 and 2004, and the effect of this change in firm's economic performance.

- Supply side: average number of employees, labor (current and by the end of 2004) .The percentage distribution of low, medium, high skilled labor .The percentage distribution of medium and top management.). Problems faced in finding different labor skills, labor training, sectors financing labor training. The finance problems in the firm are also detected: sufficiency, volume, source, reasons of choosing these sources, own debt ratio, evaluation of expense quality for the supportive services, and effect of different supply factors on the firm's economic performance.
- Demand side : target customers, internal demand sufficiency, external demand for the translated books, percentage of exported translated books, reasons to export (or not to export) of translated books, main factors affecting translated books demand and to what extent this factors affect the firm's economic performance.
- The contribution of supporting industries as well as their effect on firm's performance: educational companies, economic and trade newspapers, local institutions collecting and classifying data of translated books and advertising companies.
- Firm’s strategies: translation competitions, presence of restrictions for new firms entrance to the translation markets, market share for foreign firms, major firm's concern in the last two years, firm's fields restructured periodically, IPR strategy and strategic problems in the firm.
- Governmental policies: governmental supports and procedures effect on the translation production.
- Expectations for the next two years: market share, sales size, profits, employees' number, product mix and internal and external market growth and the long-term outlook for the firm.

  (A copy of this questionnaire is annexed on the appendix C)

2.3 Methodology

The methodology of this study is based on two approaches. The first is a descriptive approach that analyzes the literature review and the previous studies of the Arabic translation activities in Saudi Arabia. It focuses on collecting data and information of Arabic translated books in Saudi Arabia then classified them according to certain criteria. The second approach is analytic, it aims to analyze the collected data from questionnaires distributed to experts, academics and publishers. The SPSS software is used to analyze the collected information. The first type of questionnaire is distributed and supported by personal interview. The number of questionnaires collected is about 32, while the number of the second type of questionnaire is only three. Most publishers refused to fill the questionnaire and to give any information about their activities.

2.4 Difficulties

The study of Arabic translation industry in Saudi Arabia faced the following difficulties:

- Difficulties in obtaining relevant data about Arabic translated books in Saudi Arabia: number, classification according to subject, publishing date, publishers, publishing location, etc. In fact, there is no accurate bibliographic list for the Arabic translated books in the past. In addition, there is no unique responsible organization to coordinate, organize and enhance translation activities in the Kingdom.

- Difficulties of obtaining information from private publisher sector. The private publishers were not cooperative in providing useful information about finance, labor, projects, strategies, profits, exports, and costs. Most of them refused to fill questionnaire. They considered these information as confidential to maintain profit and competition in the market.
- Limitation of the private and public organizations participated in translation activities. In fact, the efforts of Arabic translation activities can be mostly described as individual and random.

3 Quantitative analysis of Arabic translation industry

To evaluate Arabic translation activities, this study is based mainly on data and statistics of Arabic translated books in the studied period. To facilitate the analysis, Arabic translated books are divided into the following main groups (table 1):

- Social sciences divided into the following sub-groups: sociology, economy, political sciences, law, public administration, military sciences, education and instructions, commerce, mores and tradition.
- Applied sciences divided into the following sub-groups: medicine, engineering, agricultural, business administration and accounting.
- Pure sciences divided into the following sub groups: general pure sciences, mathematics, physics, chemistry, geology, zoology and botany.
- Literature divided into the following sub groups: letters and criticism studies, novels, poems, kids' stories, theaters and literature biographies.
- General knowledge divided into the following sub groups: scientific research, data analysis, computer sciences, bibliography, information and library sciences.
- Humanity sciences divided into the following sub groups: psychology, new philosophy, moral, biography, religions, languages, arts, sports, archeology, history and geography.

Table 1: Sciences' main groups and their sub-groups

Social sciences	Applied sciences	Pure sciences	Literature	General knowledge	Humanity Sciences
Society	Medicine	General Pure sciences	Letters and criticism studies	Scientific research	History
Economy	Agriculture	Mathematic	Novels	Data analysis	Geography
Politics	Engineering	Physics	Poems	Bibliography	Archeology
Law	Business administration	Chemistry	Theaters	library science	Biography
General administration	Accounting	Geology	Kids' stories	Information	Moral
Military		Zoology	Literature biographies	Computer science	Psychology
Education and instructions		Botany			New philosophy
Mores and traditions					Religions
Commerce					Languages Arts
					Sports

3.1 Arabic translated books trend

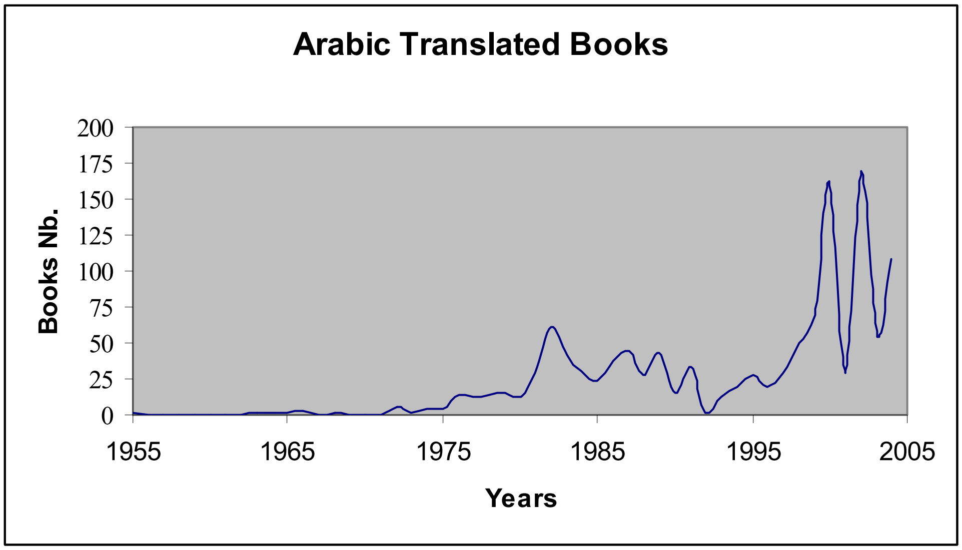
Table (2), shows the Arabic translated books' distributions, according to mains and sub-mains groups. The total number of Arabic translated books in Saudi Arabia during the period 1955-2004 reaches 1260 book. Considering the long period covered by this study, which is 75 years, this number can be qualified as "moderate" compared with the number of Arabic translated books in some Arab countries or with other foreign countries.

Table 2: Arabic translated books distribution in Saudi Arabia from 1955 to 2004

Years	Number of Arabic translated books	Years	Number of Arabic translated books	Years	Number of Arabic translated books
1930-1954	0	1974	4	1992	1
1955	1	1975	4	1993	13
1956-1962	0	1976	14	1994	19
1963	1	1977	12	1995	28
1964	1	1978	14	1996	20
1965	1	1979	15	1997	29
1966	3	1980	13	1998	50
1967	0	1981	29	1999	70
1968	2	1982	61	2000	163
1969	0	1983	41	2001	29
1970	0	1984	31	2002	170
1971	0	1985	23	2003	56
1972	5	1986	37	2004*	109
1973	1	1987	44		
		1988	28		
		1989	43		
		1990	15		
		1991	33		
		Undated	27		
Total	15		488		757

- Note that 12 books are translated in the beginning of 2005 by Mars House Publisher, this number is added to 2004, because the public directories do not cover the Arabic translated books of 2005.

Figure 1: Arabic Translated Books trend 1955-2004



The annual average of the Arabic translated books over the period 1955-1979 is 3.12 books, 33.17 books over 1980-1991, 58.23 books over 1992-2004, and 25.2 books for all the period 1955-2004. These averages include all translated books to Arabic by different governmental sectors (commissions, universities, institutions, ministries and research centers), individuals and private publishers.

These numbers indicate also the weakness of translation activities in Saudi Arabia that can be considered as individual experiences or random efforts more than planed activities. Therefore, the translation process has no standards, criteria, or plans except the case of some private publishers like Mars, Jarir and Obeikan Bookshops.

A quick look at table 2 shows that the first translation work was in 1955 (25 years after the Kingdom establishment).The big change in number of translated books was in 1976 which became 14 books instead of 4 in 1975. This period was the beginning of economic boom, associated with high petroleum income and quick economic growth.

If we consider the year 1955, as the beginning of Arabic translation activity in Saudi Arabia then, the translation activity is distributed over only 50 years. Therefore, the average number of translated books is about 25 books per year, and 2 books per month that is also very small according to endowments, population and economic size of the Kingdom.

The following remarks can be concluded from table 2:

- The first Arabic translated book in Saudi Arabia was in 1955.
- The maximum number of Arabic translated books per year was 170 book in 2002.
- The number of translated books exceeded 50 books in the years: 1982, 1998-2000, 2002, 2004.
- There was a high fluctuation in books translation activities in the Kingdom. In other words, there is no clear trend of the translation products, but the variation from year to other was widely important.
- About 805 books were translated during the period 1990 - 2004 that represent 64% from the total number of translated books in Saudi Arabia.

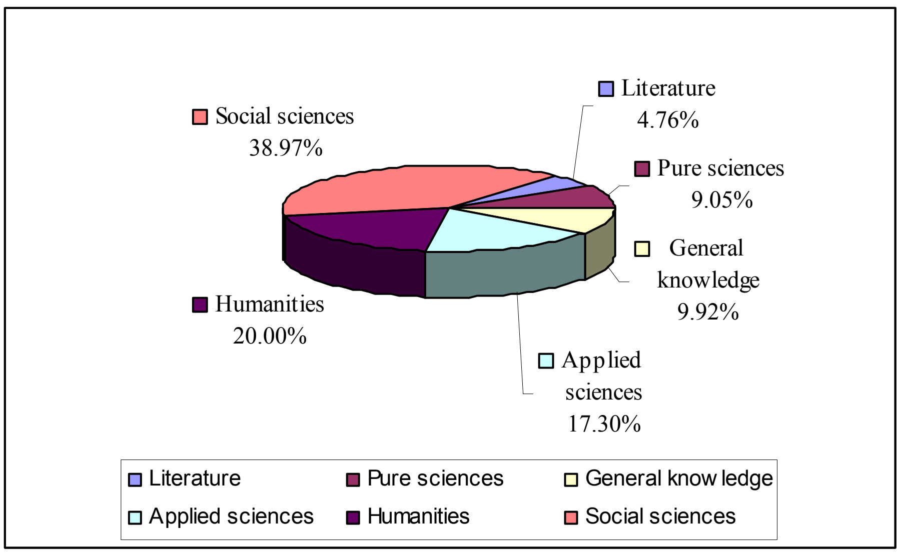
3.2 Arabic translated books distribution according to main sciences

Table 3 shows that the number of Arabic translated books according to main sciences and its percent distribution during the period 1955-2004 in Saudi Arabia:

Table 3: Arabic Translated books distribution according to main sciences

Sciences main groups	Number of translated books	Percent (%)
Literature	60	4.64
Pure sciences	114	9.05
General knowledge	125	9.92
Applied sciences	218	17.3
Humanities	252	20
Social sciences	491	38.97
Total	1260	100

Figure 2: Arabic Translated books distribution according to main sciences



From table 3, the total number of translated books was 1260. About 38.97% from the translated books were in social sciences (491 books), 20% in humanities (252 books), 17.3% in applied sciences (218 books), 9.92% in general knowledge (125 books), 9.05% in pure sciences (114 books) while only 4.76% from the translated books were in literature (60 books).

Each science main group contains several sub- groups that can be described as follows:

3.2.1 Social sciences

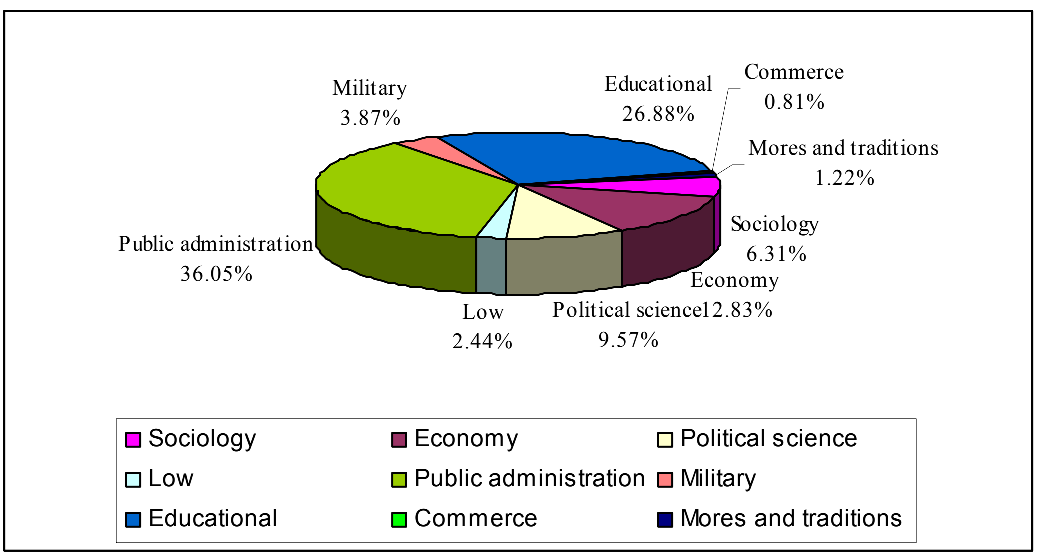
The social sciences occupied the first rank between the other sciences in the number of books translated to Arabic language. About 39% from all translated books were in this field this equals to 491 books.

The number of translated books in public administration was 177 books, which represent 36.05% from social sciences translated books and 14.05% from the total number of translated books. The books in education come in the second rank with 132 translated books representing 26.88% from social science translated books and 10.47% from the total number of translated books. Moreover, books in economy come in the third rank with 63 translated books that represent 12.83% from social sciences translated books and 5% from the total number of translated books.

Table 4: Number and distribution of social sciences translated books

Social Sciences sub-groups	Number of translated books	% of social sciences translated books	%of total translated books
Sociology	31	6.31	2.46
Economy	63	12.83	5
Political science	47	9.57	3.73
Low	12	2.44	0.95
Public administration	177	36.05	14.05
Military	19	3.87	1.51
Educational	132	26.88	10.47
Commerce	4	0.82	0.32
Mores and traditions	6	1.23	0.48
Total	491	100	38.97

Figure 3: Distribution of Social Sciences Arabic Translated Books



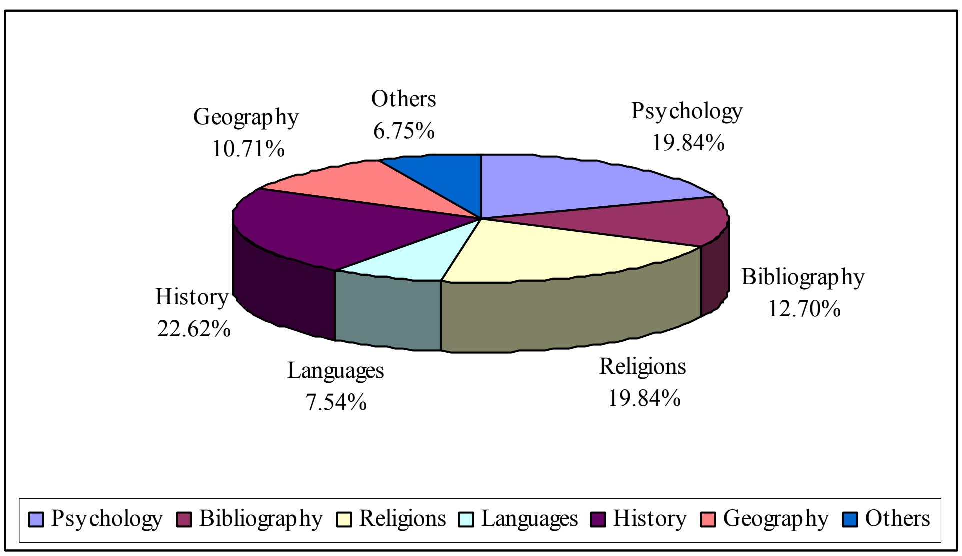
3.2.2 Humanities

Humanity books come in the second rank after social science books. The total number of books translated in humanity field reaches 252 books representing 20% from total translated books. 57 books that represent 22.62% from humanity translated books and 4.52% from the total number of translated books were in history while the religions and psychology books come in the second rank with 50 books each representing 19.84% from books translated in humanities and 3.97% from all translated books. The bibliographies books come in the third rank with 32 books representing 12.7% from books translated in humanities and 2.54% from all translated books.

Table 5: Number and distribution of humanity sciences translated books

Humanity sciences	Number of translated books	%of humanity sciences	%of total translated books
Psychology	50	19.84	3.97
Moral science	1	0.4	0.08
Philosophy	5	1.98	0.4
Archeology	3	1.19	0.24
Bibliography	32	12.7	2.54
Religions	50	19.84	3.97
Languages	19	7.54	1.5
Arts	4	1.59	0.32
Sports	4	1.59	0.32
History	57	22.62	4.52
Geography	27	10.71	2.14
Total	252	100	20

Figure 4: Distribution of Humanity Sciences Translated Books



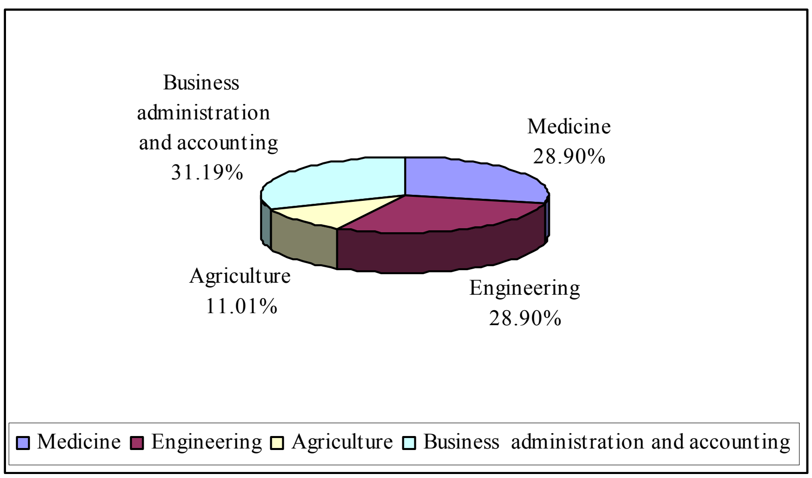
3.2.3 Applied sciences

The number of books translated in applied sciences reaches 218 books representing 17.3% from the total number of translated books (table 6). More specifically, the number of books in business administration and accounting translated to Arabic language were 68 this equals to 31.19% from translated books in applied sciences and 5.39% from the total number of translated books. The number of books translated in medicine and engineering was the same (63 books each) this represents about 28.9% from applied sciences translated books and 5% from the total number of translated books in Saudi Arabia. Translated books in agriculture come in the third rank (24 books) with 11.01% from applied science translated books and only 1.91 % from the total number of translated books.

Table 6: Number and distribution of books translated in applied sciences

Applied science branches	Number of translated books	% from applied science	%from total translated books
Medicine	63	28.9	5
Engineering	63	28.9	5
Agriculture	24	11.01	1.91
Business administration and accounting	68	31.19	5.39
Total	218	100	17.3

Figure 5: Distribution of Books Translated in Applied Sciences



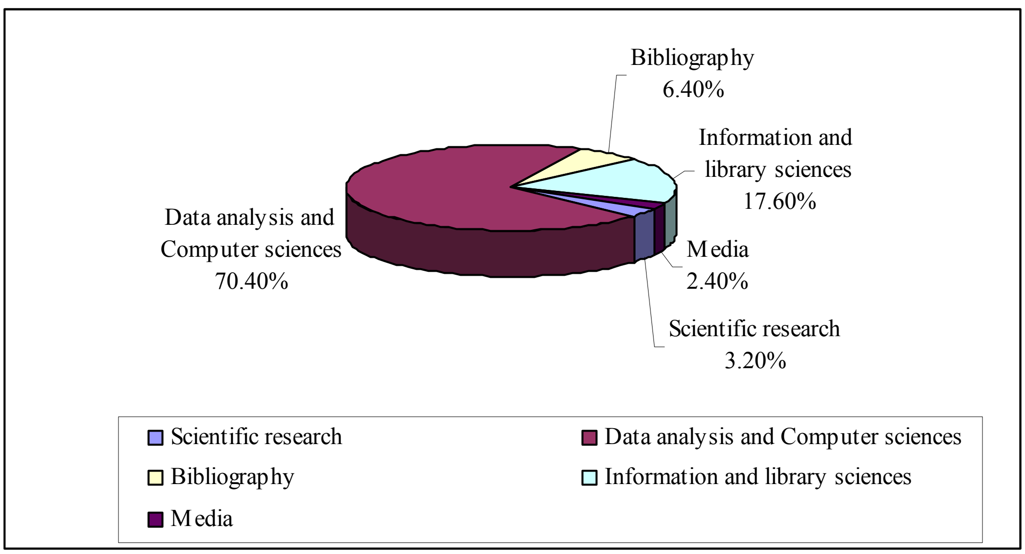
3.2.4 General knowledge

The total number of general knowledge books translated to Arabic language reaches 125 books (table 7). The majority of these books were in data analysis and computer sciences that reach 88 translated books representing about 70.4% from books translated in general knowledge and 6.98% from the total number of translated books. Moreover, 22 books translated in information and library sciences representing 17.6% from books translated in general knowledge and 1.75% from the total number of translated books. Bibliographic translated books come in the third order with 8 books only this make 6.4% from general knowledge translated books and 0.63% from the total number of translated books.

Table 7: Number and distribution of general knowledge translated books

General knowledge branches	Translated books number	% from general knowledge	% from total translated books
Scientific research	4	3.2	0.32
Data analysis and Computer sciences	88	70.4	6.98
Bibliography	8	6.4	0.63
Information and library sciences	22	17.6	1.75
Media	3	2.4	0.24
Total	125	100	9.92

Figure 6: Distribution of General Knowledge Translated Books



3.2.5 Pure sciences

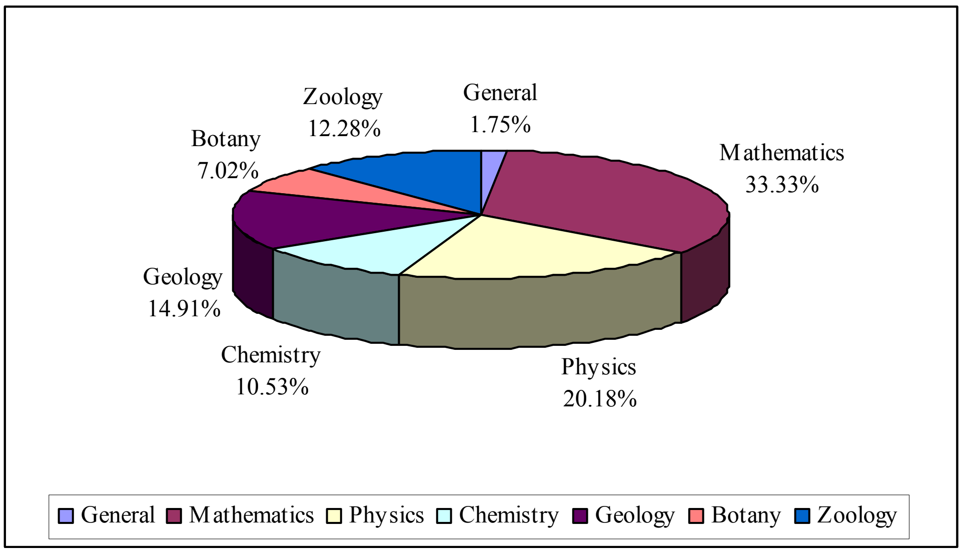
The total books number translated to Arabic language in this field was 114 that represent about 9.05% from total books translated in all sciences. Mathematics translated books come in the first rank with 38 books this make 33.33% from pure sciences translated books and 3.02% from the total number of translated books. Physics books come in the second rank with 23 books making 20.18% from pure sciences translated books and 1.83% from the total number of translated books. The third rank occupied by translated books is in geology with 17 books representing

14.91% from pure sciences translated books and 1.35% from the total number of translated books.

Table 8: Number and distribution of pure sciences translated books

Pure science branches	Number of translated books	% from pure science	% from total translated books
General	2	1.75	0.16
Mathematics	38	33.33	3.02
Physics	23	20.18	1.83
Chemistry	12	10.53	0.95
Geology	17	14.91	1.35
Botany	8	7.02	0.63
Zoology	14	12.28	1.11
Total	114	100	9.05

Figure 7: Distribution of Pure Sciences Translated Books



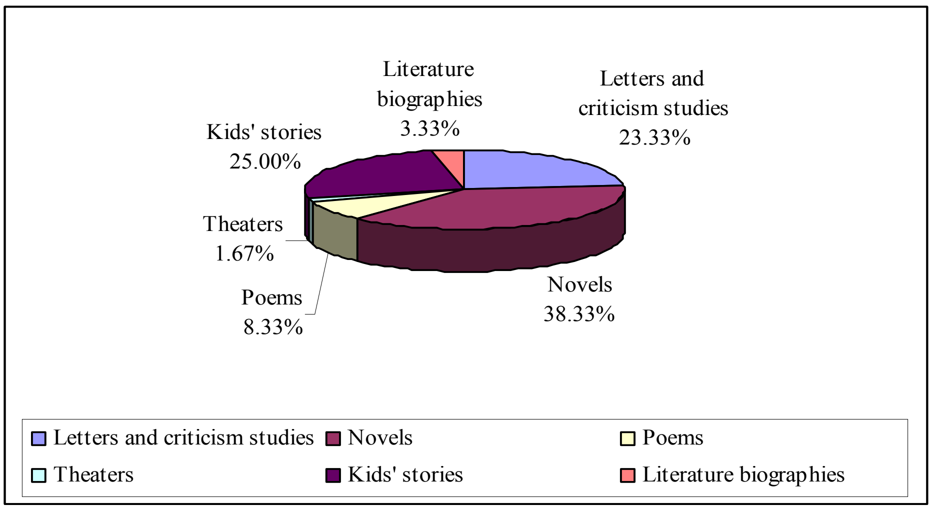
3.2.6 Literature books

The total number of books translated in Literature equals to 60 books this represent 4.76% from the total number of translated books in Saudi Arabia. 23 books from the 60 translated were in novels, this represent 38.33 % from Literature books translated to Arabic language and 1.83% from the total number of translated books. Kids' stories come in the second rank with 15 books these represent 25% from Literature translated books and 1.2% from the total number of translated books. Number of books translated in letters and criticism studies were 14 books representing 23.33% from translated Literature books and 1.11% from the total number of translated books to Arabic.

Table 9: Number and distribution of literature translated books

Literature branches	Number of translated books	% from letters translated books	% from total translated books
Letters and criticism studies	14	23.33	1.11
Novels	23	38.33	1.83
Poems	5	8.34	0.4
Theaters	1	1.67	0.08
Kids' stories	15	25	1.19
Literature biographies	2	3.33	0.15
Total	60	100	4.76

Figure 8: Distribution of Literature Translated Books



3.3 Original translation languages

No reliable information about translated books' original languages are available (for all books and products estimated) due to the absence of clear and particular databases. However, we are almost sure that more than 95% from translated books are translated from English to Arabic language. While the rest 5% is distributed between French, Germane, Russian, Urdus and other languages.

4 Description of Arabic translation Industry

To analyze the structure of the Arabic translation activities, statistical information related to the number of translated books and their distribution according to publishers can be used. This distribution gives a clear description to the supply side of the market of translated books. First, the period 1955-2004 is analyzed to describe the structure and the concentration of the industry. Second, the data related to the period 1992-2004 is used to examine the evolution of the translation activities of some publishers over the recent years. A special attention will be given to inspect the translation activities location by focusing on the city of publication of the translated product.

4.1 Main supplier actors of the Arabic translation industry

It is useful to describe the distribution of Arabic translated books according to their publishers to give an appropriate idea about the structure of the Arabic translation industry in Saudi Arabia. This distribution of the Arabic translated books during the period 1955-2004 is summarized in table 10:

Table 10: Translated books according to publishers in Saudi Arabia

Publishers	City of Publication	Number of translated books
55 publishers each published 1 translated book	Different	55
22 publishers each published 2 translated books	Different	44
9 publishers each published 3 translated books	Different	27
9 publishers each published 4 translated books	Different	36
4 publishers each published 5 translated books	Different	20
4 publishers each published 6 translated book	Different	24
3 publishers each published 7 translated book	Different	21
King Fahad National library	Riyadh	8
King Abdul Aziz public library	Riyadh	9
General organization for technical education and vocational training	Riyadh	10
Immam Muhammad bin Saud Islamic University	Riyadh	10
Dar Al-Olom for printing, Pub. &Dist.	Riyadh	10
Dar Khalid Bashamag for Pub.&Dist	Jeddah	12
Okaz Est. for press & Pub.	Jeddah	16
Saudi House for Pub. &Dist	Jeddah	17
Ministry of communications Dep. of public relations	Riyadh	17
King Adul Aziz University –scientific publishing center	Jeddah	25
Tihama Publishing & bookstore	Jeddah	25
Individuals	Riyadh	34
Al-ma'arifa House for educational consults	Riyadh	39
Arab Bureau of Education for Gulf States	Riyadh	40
Institute of Public Administration	Riyadh	52

Jarir bookstore	Riyadh	99
King Saud University –printing press	Riyadh	141
Mars Publishing House	Riyadh	194
Obeikan Bookshop	Riyadh	275
Total		1260

From table 10, the following remarks can be extracted:

- Obeikan Bookshop is the first publisher in the translation industry in Saudi Arabia. It published about 275 translated books that represent 21.83% from the total number of translated books. 274 books from the 275 were translated after 1996. Translation activity does not make a significant figure in the whole of Obeikan Bookshop activities. In addition, this publisher is interested in cultural, politics and novels books translation oriented to a wide range of readers.
- Mars Publishing House published 194 translated books that represent 15.4% from the total. It is important to mention that the majority of books translated by Mars publishing House have educational and academic patterns that are oriented generally to the high education students. This Publishing House is specialized in the translated products prepared for academic universities staff and high education students.
- King Saud University comes in the third rank with 141 translated books representing 11.19% from the total. King Saud University translation center was established in 1973 (1393 H). The total number of books translated until the end of 2004 were 141 books, this number increased at the mid of current year to 160 books. About 200 additional books still under translation process. The translation center allows a translation period of less than 18 months for each book. Moreover, there are some exceptions if the translated product size is too big like encyclopedias.

  King Saud University translation center considered as non-profit center aims to enhance the educational staff translation activity for the newly published books (not more than 5 years). The reward paid by the center is estimated according to three factors: the number of translated book pages, the scientific quality of the translated subject and the translation quality estimated by the jury. The rewards is ranged between 16,000 -50,000 S.R (4,250 -13,300 $). For example: the center pays about 16,000 S.R (4260 $) for a book of 200 translated pages, if the translation quality is evaluated as good.

  The center pays also fees for WIPR to the foreign publishers, this amount range is between 1,000 and 3,000$. In some cases the fees for the writer's rights may reach 10,000$ according to the translation product size (encyclopedia for example).

  King Saud University education staff is motivated to translate books for academic promotion. Each translated book is given one point counted to the translator, who has to get certain numbers of points to be promoted .The points given for the translation are the same as for Arabic authorship book and refried research. Two or more translators can participate in the same translation work, as well as in research or authorship, but the point in this case will be divided between the two translators.

  The translated books distributed through King Saud University translation center are sold in the cost price only (ink, papers, finishing cost), without adding any translators' awards or fees for foreign publishers. For this reason, the translated books prepared through this center have lower prices compared with books translated by the private publishers.

- Jarir bookstores published 99 books representing about 7.86% from the total number of translated books. The books translated by this private firm have general cultural patterns and usually oriented to a wide range non-specialized readers. Those books are not considered generally under the scientific or academic books but they are a mixture of political books and novels.

- Institute of Public Administration comes in the fifth rank according to translated books number. 52 books were translated into Arabic language representing 4.13% from the total. The Institute of Public Administration is a non-profit governmental organization that provides training courses for the governmental employees to improve their performance. The relationship between the education staff in Institute of Public Administration and their promotion are the same as in King Saud University.
- Arab Bureau of Education for Gulf States takes the sixth rank in the publishers list in Saudi Arabia with 40 books translated to Arabic (3.7% from the total).
- The number of commissions and publishing centers that translated two books was 22 commission and center.
- The number of commissions and publishing centers that translated one book only was 55 commission and center.
- Large amount of private publishing centers stopped their translation activities especially after the nineteenth of the last century and restricted their works in publishing and distributing Arabic books like Tihama Publishing & bookstore in Jeddah, that published around 25 translated books before the year 1990.

4.2 Geographic Location of Arabic translation industry

Translation activities to Arabic language are not distributed geographically in similar way in Saudi Arabia. This was a result of unequal distribution of the governmental and educational commissions, universities and publishers in different Saudi regions, which reflects the geographical distribution of the translated books.

Table 11 shows that Riyadh city, which is the economic and politic capital of Saudi Arabia, comes in the first rank in publishing translated books, leading all the other cities. The number of books published in Riyadh equals to 1084 books from 1260 books, this represents 86.03% from the total number of translated books. While 123 books were translated in Jeddah (9.76%) and 10 books only translated in Dhahran (1.11%).

Table 11: Geographical distribution of translated books

City	Books number	% from total translated books
Joof	1	0.08
Khobar	1	0.08
Madennah	3	0.24
Abha	3	0.24
Dammam	6	0.48
Makkah	7	0.56
Taif	8	0.63
Dhahran	10	0.79
Other regions	14	1.11

Jeddah	123	9.76
Riyadh	1084	86.03
Total	1260	100

4.3 Trend and structure of Arabic translation industry production

In the previous sections, Arabic translation industry was described basing on data related to the whole studied period 1955-2004. During the last recent years, the structure of this industry was submitted notable changes. So, our analysis must take into consideration the recent patterns of the Arabic translation industry in Saudi Arabia.

To analysis the recent market structure of the Arabic translation industry, published books data for the period 1992-2004 are presented in table 12 and the information from the type (1) questionnaire, will be considered.

Table 12: Distribution of published translated books by publishers 1992-2005

Years	Obeikan	KSU	Jarir	Mars	Knowledge for Humanities Development	Institute of Public Administration	Basha mag	King Abdulaziz Library
1992		1				1		
1993	1	2				2		
1994		5				2		
1995		3				1		
1996		10	1	1				1
1997	5	20	3			2		
1998	10	11	7	3		6		
1999		31	19	1	8		3	8
2000	11		57	6	10	3	10	
2001	25	13		3				
2002	92		12	17	21			
2003	48			8				
2004	82			27				
Total	274	96	99	66	39	18	13	9

- The Saudi Publisher Directory of King Fahad National Library reveals that the total number of all publishers having an (ISBN) in Saudi Arabia equals to 417 publishers.

Some publishers working in translation industry (like the Knowledge for Humanities Development house) is not mentioned in this Directory.

- The number of publishers published more than 10 books in the last 13 years, equals to 7 publishers: Obeikan, King Saud University, Jarir, Mars, Knowledge for Humanities Development, Public Administration Institute and Dar Bashamag. It can be concluded that the Arabic translation Industry in Saudi Arabia is highly concentrated in six publishers, four from the private sector (Obeikan, Jarir, Mars, Knowledge for Humanities Development) and two from the public sector (King Saud University, Public Administration Institute).
- Although Obeikan and Jarir are the most important Arabic translated books publishers in Saudi Arabia, their activity as Arabic translation publishers is small comparing to their others activities (Arabic books publishers, stationary, electronic administration equipments, etc.). Unfortunately, our research does not have precise comparative figures between Arabic books and translated Arabic books edited by these two publishers, As indictor, the total number of published books in Obeikan until the end of 2003 equals to 592 books, between them only 192 are translated Arabic books. Therefore, the percentage of translated Arabic books is about the third of the total published books.
- Mars publishing house is the main publisher specialized in academic and scientific Arabic translated books. This publisher began its activities 27 years ago. But the economic size of Obeikan and Jarir is more important than Mars house. As mentioned before, Obeikan and Jarir are more than publishers and bookstores.
- The Arabic translation is not a stable activity, from year to year the number of Arabic translated books is highly varied. As example, the number of translated books published by Obeikan was 25 in 2001, 92 in 2002, 48 in 2003, and 82 in 2004. Therefore, there is no clear trend in the number of the Arabic translated books edited specially by the private sector. This remark can be easily generalized for the other private and public Arabic books publishers, as mentioned in table 12.
- The private sector publishers, assumes the principal role in the Arabic translation industry in Saudi Arabia. From 757 Arabic translated books during the period 1992-2004, the private sector translates 600 books and the public sector translated 157 books. So, the percentage of the Arabic translated books by the private sector is about 79% while the percentage of the public sector is 21%.

4.4 Arabic translation industry description throughout questionnaires

Two types of questionnaire were used, the first is addressed to experts, translators and academicians, the second is addressed to the publishers.

4.4.1 Description of Arabic Translation Industry based on experts questionnaires

The number of questionnaires filled by direct interview is 32. During the interview, many problems were discussed with the respondents. Most of them are at the same time translators and teaching staff at the Universities or at the Institute of Public Administration. Their opinions were very useful to evaluate and describe the Arabic translation activities in Saudi Arabia.

After the collect of the questionnaires, SPSS was used to summarize and analyze the filled questionnaires. The introduction of the detailed results in this research makes the presentation very long and heavy. For this reason, this research tried to focus on the most important conclusions describing Arabic translation industry, that will be presented as fellow:

- The respondents agreed that high prices of translated books, smallness of market size, subject of translated books, weakness of translation style, high publisher's profits, absence of supporting sectors, absence of categories interested in reading, are obstacles in publishing the translated books in The Kingdom of Saudi Arabia. Moreover, they were strongly agreed that the low translator's income is the most important obstacle to develop this industry.
- Researchers and general readers are the main interested categories in buying translated books.
- Translator's motivations for translation activities are: science, knowledge and culture diffusion, academic promotions, income profit and celebrity.
- Publisher's motivations for translation activities are: income profits, increasing market share and diversification of published products.
- The respondents agreed that low income return for translators and publishers, low number of Arabic readers, formalities in publishing procedures, absence of qualified translators, high IPR translation fees, copyrights for the translated books, publication piracy of translated books, absence of governmental support and difficulties to find the appropriate scientific terms are the most important factors restricting the translation to Arabic language.
- The translated books topics that interest the readers can be ranked as the following: Textbooks, politic and media, novels, general culture and pure sciences, kids and schoolbooks.
- Factors enhance translation activities are: governmental support, increase internal and external market, reduce of control procedures and simplify the administrative publishing procedure.
- The translated books (from the respondents point of view) are 25 -50 % higher in prices than authoresses Arabic books.

4.4.2 Description of Arabic Translation Industry based on publishers questionnaires

To complete understanding of Arabic translation industry, another questionnaire was designed. This second questionnaire was addressed to the publishers of Arabic translated books. Most of them refused to fill the questionnaire because it contains confidential information related to their activities. Small number of publishers was a little cooperative and give the questionnaire special attention.

The number of questionnaires filled by direct interview is 3. During the interview, many problems were discussed with the respondents. Their suggestions were very useful to understand the supply problems of the Arabic translation activities, and to formulate some recommendations.

After collecting the small number of questionnaires, SPSS was used to summarize and analyze the filled questionnaires. This research focus on the most important conclusions describing Arabic translation industry, that will be presented as fellow (see appendix C)

- The questioned firms exert many activities at the same time: publishing, distributing, selling books and electronic equipments.
- All firms were satisfied about their economic performance.

- The labor force in Arabic translated industry is distributed according to the qualification level as: 10% low skill labor, 50% medium level labor, 40% high level labor.
- Labor skill types have strong effect on the firm's economic performance.
- All firms have good financing resources. This means that the firms don't complain from financial problem.
- Firms' debt to equity ratio decreased to less than 25%.
- Own capital is the basic firms financing resource.
- The firms' financial state affects strongly the economic performance.
- Cost factors have bad effects on the firm economic performance.
- The local demand is enough to absorb the total production.
- Firms are oriented to satisfy all groups of consumers, but it paid more attention to medium income group.
- Firms are aware of external market demand when they have translating projects of new books.
- Firms that publish translated book pay special attention for exportation and external markets.
- Exports from translated books are estimated to less than 50% from the total sales.
- Maximizing profits and minimizing costs are the main goals of the Arabic translated books exportation strategy.
- The strong competition in the external markets is a main obstacle for translated books exportations.
- The main determinant demand factors of translated books are: cost, cultural quality and topics of translated books.
- Demand factors affect strongly firm's economic performance.
- There are less than nine firms working in translation production industry and only three of them are dominant.
- There is a high degree of competition in Arabic translation book production.
- Entry to the books' translation market is described as normal.
- There are some obstacles and restrictions on the entrance of new firms to Arabic translation industry.
- The main obstacles faced by the new firms entry to the translation production market are technical and legal obstacles
- There are some significant obstacles for the foreign firms to enter the local translation production market.
- Firms have clear strategies for translating books to Arabic language.
- The market share of foreign firms in local markets is medium.
- Firm's strategies for Arabic translation books are prepared by special work team.
- The firm's manager paid more attention for marketing strategy in the last two years.
- Nowadays, the firms pay more attention for external competition.

- All firms update systematically their production techniques, the mixture of production factors and the administrative organization.
- Firms have a complete IPR strategy.
- Firms suffer from IPR problems.
- IPR has strong effect on the firm economic performance.
- The government supports translation production through: Human resources development, scientific and technological improvements, maintenance and infrastructure improvement, enhancing the product industry demand, promoting investments, helping to open external markets and promoting exports. While it neglects IPR protection, competition promoting, reviewing legislations concerning translation industry and controlling price levels.
- In the next two years, firms expect the decrease of their market share, the profit level and the Arabic market growth.
- In the next two years, firms expect the stability of production factors combination, the employees' number, the sales size and the growth of external markets.
- The future expectations of the firms are good.

5 Performance of the Arabic translation Industry

Saudi Arabia is the biggest country in the Arabic peninsula. It is also the most important member of the Gulf Cooperation Council (GCC). It has the biggest production and reserves oil in the World. So, the economy of Saudi Arabia is based mainly on the oil revenues. The economic growth and the development plans depend also on the oil revenues injected throughout of the public expenditures.

Saudi Arabia has realized during the last decades a very important economic development. Development of education, health, transport, communication and infrastructure was paid a special attention from the government All of the economic sectors (agriculture, industry and services) realized a sensible growth. The big size of the oil sector led to the other economic sectors a weak importance. In spite of the public support to industrial sector, its contribution in the GDP can note exceed 10%. Being a sub-sector of the industry, the Arabic translation industry has a minimum importance in the structure of the Saudi economy.

The economy of Saudi Arabia is an open economy. The import restrictions are very limited and the degree of competition is very high. The Saudi industry in general, and the Arabic translation industry in particular, are dominated by the foreign labor force. By opposite, the capital, as a second production factor, can note be considered as very scare. The finance capacity in the economy is high, and the firms in general do not complain from financing problems. The Saudi industry is technically well equipped. The industrial firms produce by applying high technology. The industrial products have a good quality and satisfy generally the international standards.

The industrial sector has benefit during the economic development plans from a considerable public supports and subsides. Financial loans, industrial cities, infrastructure are offered by the government to develop and promote the industry that has two objectives: imports substitution and exports promotion.

Description of the industry position in the whole of the Saudi economy permits to understand the characteristics of the Arabic translation industry as an integral part of this sector. These characteristics can be summarized as fellow:

5.1 Size and performance industry

Because of the importance of Saudi economy in the regional, national and international levels, the huge size of the oil sector, the size of the Arabic translation industry reveals very small compared to other sectors and sub-sectors of the economy. Regarding the number of Arabic translated books (1260 books during 50 years), the overall performance of this industry can be considered as poor.

5.2 Production factors

By examining the structure of the Saudi economy, the performance of the industry in general and the performance of the Arabic translation industry in particular, the role of labor as determinant of the supply in the last industry can be evaluated as poor The most important part of the industrial labor force is guest worker. The saudialization policy adopted by the government to replace the foreign labor force by a national labor force does not realize a notable success in the industry.

The role of the capital can be evaluated as good (the capital is available in the Saudi market especially after September 11 and the return of the Saudi capital flow to the local market). The publisher firms do not complain generally of the scarcity of financing.

5.3 Economic contributions

Basing on a rough estimation for the year 2000, we estimate the percentage of the added value of Arabic translation industry of the GDP at 0.0.3%, the percentage of the exported Arabic translated books of exportations at 0.0.3%, the percentage of the labor force working in the Arabic translation activities of the total labor force at 0.02%. The information related to the importations of Arabic translation books are not available.

5.4 Local demand

Local demand for Arabic translated books is good. The few number of publishers working in this industry do not complain from insufficiency of their local consumers. The external demand is evaluated as poor. The increase of the production costs and the high degree of competition are the most important reasons for the weakness of the Arabic translated book exportations.

5.5 Related industries

The relationship of the Arabic translation industry with the upstream industry is poor The industries based on the products of Arabic translation activities as production inputs are almost neglected. The relationship with the downstream industry is good (paper, carton, plastic, packing, ink, ..), and with other firms is poor. The paper and ink industries in Saudi Arabia are highly developed. These national industries provide to the printing industry in general, and to the translation industry in particular, an important part of its production inputs.

5.6 Competition

The competition of the Arabic translation Industry in Saudi Market is good. The industry is highly concentrated. Three principal publishers are working in the Arabic private translation industry. The public institutions producing the Arabic translated books (universities, institutes, etc,,) are non-profit institutions. The foreign competition is very high. The books translated in Lebanon, Egypt and Syria are cheaper than those translated in Saudi Arabia.

5.7 Government sector role

The government of Saudi Arabia has established many training programs to replace the guest workers by the national workers. The saudialization programs met relative success in some disciplines, but the structure of the labor force in the industry in general does not varied sensibly. The role of public policy related to human resources and technology in the Arabic translation industry can be qualified as poor, because there is no clear national strategy to promote the translation activities. By opposite, the government has realized a great success in the infrastructure construction (electricity, water, roads, communication, transport, etc.). The efforts of the public sector were a vital element in the industrial development. So, the public policy of the infrastructure and investment can be evaluated as good.

5.8 Public stimulation demand

The demand volume in Saudi Arabia depends on the level of the GDP that depends in it turn by the oil incomes. These incomes are injected into economy via the public expenditures. If the oil prices are low, the GDP and the demand decrease and vise versa when the oil prices increase. Nowadays, the demand is stimulated automatically by the increasing of oil revenues. So there is no clear public strategy to stimulate the demand in general and the demand of Arabic translated books in particular. The evaluation of the public policy role can be evaluated as very poor.

5.9 Enforcement of IPR

The ministry of culture and information controls efficiently the publishing and editing activities in Saudi Arabia. There is a joint collaboration between this ministry and King Fahad National Library for the issue of the temporal and final permission allowed to publishers. This ministry observes and controls the diffusion of publications in the country and prohibits any piracy acting. The nearly expected adhesion of the Saudi Arabia to the WTO implies the respect and the application of the Intellectual Property Rights treatments. We can conclude that, the enforcement of IPR's is good in Saudi Arabia.

5.10 Firms expectations

The Saudi economy realizes nowadays an oil boom similar to the previous oil boom of the seventeenth. The Barrel of oil attaint 70 dollar. The public budget realizes an important surplus. The real economic growth rate is estimated at 8% for 2005. The economists expect the continuing of the economic growth with the increase of the oil prices. The firm’s expectations in the Arabic translation industry, as in the other economic sectors, can be qualified as good. [20]

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[20] Global results related to the economic performance are presented in Appendix A.

6 Arabic Translation industry obstacles

Arabic translation production obstacles in Saudi Arabia can be classified into three groups:

- Education and administrative obstacles.
- Technical obstacles.
- Economic obstacles.

6.1 Education and administrative obstacles:

Educational and administrative obstacles of the Arabic translation activities in Saudi Arabia can be presented as fellow:

- Disturbance of cultural and intellectual development in all citizens and high rate of illiteracy especially between females.
- Closed nature of the social and culture activities, accompanied with the absence of local readers' awareness about other cultures. While religion, literature and heritage books make the majority of sales in the book's exhibitions, the scientific and specialized books demand still low.
- Education system in Saudi Arabia is based on dictation and not on improving abilities and learning curiosity to reach and research for the information. Also there is no motive to learn about other societies' knowledge and cultures.
- The foreign languages education in Saudi Arabia is restricted in English language only at the low and high education levels. Although the English is the easiest language, the education system is ineffective to produce a generation manipulates perfectly this language.
- Most of the universities depend on Arabic textbooks, decided by the professor who is usually the author .This makes the University similar to a large secondary school. Swapping the decided Arabic book with the translated references that has English language origins specially and covers the basic sciences in excellent qualities.
- The university and high education in Saudi Arabia depend on one educational language. Some departments use the Arabic as educational language for studying like literature, religions, administrative sciences and pure sciences. The others restrict the use of English language like medicine, dentistry, engineering, pharmacology and applied medicine sciences. The unitary of educational language in Saudi Arabia makes a basic barrier in translation and distribution improvement. Students learning in English language only do not use translated books to help them in studying and reading from books written in foreign languages. While, students learning in Arabic language use the decided Arabic books that contain the required sufficient scientific topics for passing the exams without any further need to go back to other Arabic or English references.
- Translated books in Saudi Arabia are submitted to political, information and administrative control. This let many translators away from translating some books that may not get the necessary permissions from information and controlling sectors.

6.2 Technical obstacles

The most important technical obstacles to promote Arabic translation activities are:

- Random personal patterns in the selection of translated books and the absence of collaboration in the translation efforts cause that some books might be translated more than one time by different translators without knowing and some times after many years.
- The absence of national center specialized in translation, providing the required level of improvement and translation efforts arrangement in the Kingdom. It would be recommended that the expected center will be affiliated to the ministry of high education or the ministry of culture and information.
- The translation efforts, in the Arabic World generally and in Saudi Arabia specially, faced a major problem in finding the appropriate terms to translate engineering, medicine, applied sciences and computer sciences. The absence of coordination, at the Arabic countries level and even at the local level, produce disturbance and imperfection in the translation activities added to the presence of multiple terminologies for the same translated word. This creates confusion and misunderstanding for the readers (especially for specialized fields). So, the readers prefer to read in the foreign language used to continue their high education in.
- The lack or deficiency in the number of expert translators qualified, at the same time, in foreign and Arabic language. These translators must have the ability to translate the ideas in a precise manner, easy style and comprehensive sentences. The translators have to avoid the word by word or textual translation .Also there is a lack in the number of Saudi translators capable to translate from languages other than English.
- Most of the translators exercise translation as an additional job to their education profession in the universities and institutions. Thus, the translation activities constitute additional load for them. Some Saudis education staff takes a sabbatical vacation to complete their researches for academic promotion purposes. As a way to improve translation activity, some Universities systems allow the Saudis education staff a period of one or two terms for translation activities. In addition, These systems have to promote the researchers (nationals and foreigners) to work as a team work, especially if the translated product has a big size (like encyclopedia) that cannot completed by a single person.
- The absence of translators IPR protecting comities may lead some translation products to be stolen. Many translated books copied totally or partially in illegal way. Sometimes other publishers may publish the translated book without translator’s or origin publisher’s permission.
- Foreign publisher’s contacts need a long period to get the translation permission. The fees to get the property rights for translation are sometimes very expensive.
- Long period is required for translation and revision the translated product. Some translators and jury do not finish their work at the end of the allowed time by some institutions.
- Translated products printing period is usually long; due to printing difficulties and technical obstacles.

6.3 Economic and social obstacles

- The increase in translating, printing and publishing costs of translated books in Saudi Arabia compared with the neighboring countries (Egypt, Syria, and Lebanon) which have higher contributions in translation (due to presence of qualified translators and low costs). Many authors and translators look for publishers outside the Kingdom to publish and distribute their translated books due to low cost.
- The translators feel that their income from the translation process is low. The income given to translators is very low compared with publisher or distributor profits. For this reason, many translators prefer to spend their efforts into other fields that guarantee more profits to them like authorship and research projects.
- The authorized book hlolds the author's name, while the translated book holds the author's name and the translator's name. For this reason, the translation activity is less attractive than the authorship from the scientific celebrity side. Moreover, translation requires sometimes more efforts and time than authorship activities.

7 Recommendations to promote Arabic Translation Industry

According to the theoretical descriptive and quantitative analysis, this research suggests four types of recommendations to motive Arabic translation in Saudi Arabia. The first is general, the second can be applied by national Saudi sectors, the third is to apply on Arabic level and the fourth can be supported through the World Bank contributions and participations.

7.1 General recommendations

- Creating scientific, technical, medical and engineering terms dictionaries is an important and necessary work. Also, the unification, the updating and the revision of these terms should be periodically.
- Increasing morale and economic translators' motives through increasing economic translator's rewards and opening the opportunities for private sectors (companies, banks and firms.) to support translation activities by rewards and donations either directly to the translators or indirectly to the governmental translation centers in universities and institutions. In addition to author, translator and publisher names, the supporting sector name should be mentioned when the translated book is printed.
- Preparing appropriate book lists to be translated and classify them according to their importance and finding a mechanism to unifying and updating the scientific terms. These lists should cover university and general culture books.
- Increasing the general cultural of people and the reading interests. Emphasizing on the media role in showing the importance of translated books by offering special sites for translated books in the internet. Organizing translated book's exhibitions in universities and academic institutions, in addition to specify independents sections in private publishers and libraries for Arabic translated books.
- Preparing qualified human resources able to translate in efficient way, devoting translators' efforts in the translation, and preparing a timetable to promote the team work translation activities instead of the individual translation efforts.
- Using cheap and modern materials to save and diffuse the translated products. In other words, the use of computer CDs must be considered as an economic form to save the translated books. Translated books should also exist in printed matter for readers want to possess them. The CDs cost is less than printed books. Moreover one CD may contain tens or more of translated books.

7.2 Recommendations on the Saudi economy level

- The establishment of multi foreign languages and cultures educational system. The Saudi educational system is based on English language (as principal or second language) and the majority of postgraduate students referred to English speech countries to continue their studies.
- This isolation makes Saudi society away from other different cultures and knowledge written in languages other than English and makes the translation from those languages (French, Germany and Spanish) to Arabic in Saudi Arabia something cannot be reach.

- Establishing a national independent center concerned in translation activities that should have the following tasks: setting up objectives and strategies, providing financing sources, selecting and attracting qualified human and technical experts, arranging public and private official efforts and simplifying technical and administrative translation procedures.
- Increasing the universities' and institutions' work efficiency in a good manner, providing economic, administrative and technical facilities to the researchers and education staff and motivating them to translate scientific books. Further more, the possibility to give them vacations to achieve books' translation in their specialization fields.
- Giving special interest and care for people who continued their high education level in foreign countries and having experience in other languages, perfecting their knowledge to Arabic language and motivating them to translate. This create generations able to deal with Arabic and foreign languages in an efficient way. Also, supporting the concept that Arabic language is sufficient and apt to translate science and knowledge from other languages and cultures.
- The establishment of Saudi scientific translation center to support translation activities and research centers. These centers collect national qualified persons in translation activity from different languages, study the problems faced during translation process at the local level, seek for translation financing resources to support translators' efforts, suggest policies that make administrative procedures easier and decrease translation product control.
- Simplify publishing procedures: reduce control over translated items, accelerate the first and final permissions giving for printed products generally and translated books especially, accelerate providing the ISBN to the translated books from King Fahad Library, allowing the permission to the translated books to cross the borders without any control or custom obstacles and increase the concern to publish through internet.
- Giving more credits to the teaching universities staff to get their academic promotions by working in translation books, compared with credits allowed to authorship or published researches, as a policy to motivate the academicians to pay more attention to the translation activities. This policy will increase the number of translated books and vary their topics.
- Authorship process is usually more simple and easier than academic books translation. This is due to the ability of the author to adapt himself with the selected contents of the authorized book. The author collects, control and choice the ideas, elements and references without the restriction of the translated book. In addition, there is more flexibility for the academic author in the topics book selection according to scholar or university programs. Moreover, the authorship process is more attractive than translation process for education staff. So, the non economic obstacles should also be treated by allowing more advantages to the translation activities.
- In academic promotions process, the number of points given to the educational staff for a translated book, authorized book and judged research are equals. While the translation efforts are greater than those required to complete a research. Also, the spent period to complete a research is less than the required time to translate a book. For this, the researchers prefer working in judged researches for promotions more than in book authorship or translation. This means that translation motivations for academic promotions come in the last position of education staff concerns. This fact explained by comparing the number of translated or authorized books with the number of researches produced for promotional purpose For example in King Saud University, the teaching

staff in economic department produced about 100 researches and 10 authorized books in Arabic language (related to scholar programs in the department) for promotional purposes. While the number of translated books was only two, one of them published in the translation center and the other published by a private publisher. For this, the promotional system in Saudi Universities should be changed to give translated books additional credits appropriate with the required efforts.

7.3 Recommendations on the Arabic level

- Increasing economic support of translation activities by Arabic, regional and international institutions, because the translation activity advantages spread from local level to regional and Arabic level. The translation activity must be supported by regional organizations like Gulf Heritage and Culture, the GCC council and the universities of Arabic countries. It is very wise that supporting translation activities be under the control of an appropriate strategic plan, for example: establishing Gulf translation center and Arabic translation center.
- Coordinating the translation activities in all the Arabic countries. Considering the weakness in Arabic translation activity as a national problem at the Arabic world level and not only at the local level, Arabic translation strategic plan should be decided and connected with education translation efforts.

7.4 Recommendations for Pan-Arab NGOs

- The common governmental sector ideology is to refuse any support or award. This behavior is justified by the belief that the government is not poor to accept any external support. This idea began to be changed and some academic departments in the university started accepting economic helps, awards and supports to establish libraries or upgrading computers (provided by some private banks). This open-minded thinking can play an important role in the translation production motivations and preparing the road to the acceptance of award from international institutions. The World Bank has to clarify its objectives in the field of Arabic translation activities promotion to facilitate acceptance of its project by the public and private sectors in the Arab World.
- The governmental institutions working in translation activities (like King Saud University translation centers or Public Administration Institute) have limited economic resources. The important obstacles in translation production are related to the weakness of translators' income. For this reason, the public sector is suffering from certain budget restrictions making this sector unable to increase the rewards for education staff translators. The translation economic obstacles can be face by getting an external material support from international institutions like the World Bank.
- Translations of some foreign books require some special technical facilities for printing and finishing. For example, chemical formula, mathematical equations and engineering graphs need special techniques and appropriate tools for printing and finishing. In authorized books case, it is possible to adapt with the available facilities. While in translated books, the translator should work within the original book content without excluding or deleting any part. This makes the printing and finishing process more

difficult due to the importance of comparing translated book with the original one. Technical support for printing and finishing for translated books should be provided through advanced printers and copying machines in addition to appropriate software to edit and print special scientific books (like books in chemistry, mathematics and engineering fields). The World Bank can motivate the translation activities by offering the technical supports like printer, software and computers.

- The Arabic translated books are spread throw Arab World. Many Arab countries have considerable translation activities. To avoid duplication of translation, and to inform students, readers, academicians and researcher, data base of the Arabic translated books must be designed to count, classify and update the Arabic translated list books. Also, the World Bank can offer the technique, scientific and material supports to establish this data base and open a web site in the internet to permit the use of this data base.
- Improving the use of the auto-translation (translation based and done by computers), supporting the researches and projects that facilitate the use of these techniques in books translation. As we know, the auto-translation is used now between many languages (English, French, Spanish, Germany…etc.).It is important to the Arabic countries to participate in financing researches that provide immediate translation like the auto-translation between other languages. These types of project may be financed by international institutions like the World Bank in coordination with other software companies (like Microsoft).

ECONOMIC PERFORMANCE OF THE ARABIC TRANSLATION INDUSTRY IN SYRIA

By Roger Melki

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1 Executive Summary

Syria suffers from a declining annual per capita income and from stagnation across all economic sectors. Centralized and rigid political controls, inefficient markets, inadequate pricing mechanisms, non-competitive public sector, inexistence of independent professional associations, overwhelming bureaucracy and an archaic banking and financial systems, are factors that have held back Syrian economic growth.

Printing and publishing in Syria remain underdeveloped despite efforts to develop the book market. Private publishing companies were founded after that for many years the Syrian Ministry of Culture and the Syrian authors' association had been the only publishers.

The translation industry is strongly marked by state involvement. The market, mainly domestic, is characterized by comparatively low production standards. In recent years significant private publishing industries have developed and have expanded the translation sector.

The translation output in Syria is hard to estimate in the absence of reliable data. Translations with copyright acquisition are estimated at 100 books per year, representing less than 15 per cent of total translated volume.

There are no translation firms in Syria except legal translation bureaus. Customers have established their own networks of translators. The supply of translation is provided mainly by academics from different horizons. Most people involved in translation are proficient in Arabic while aptitudes in foreign languages are reported to be extremely variable. As a result, Arabic translations are of uneven quality.

Financially, translation does not guarantee enough revenues to make a living. Many skilled translators have shifted to other activities because of low revenues.

Books from the western world are attractive as they offer to Arab readers different appealing ways of life. Many publishers pointed out that translation establishes a cultural dialogue between the Arab World and other continents. The demand for best sellers is high but publishers are careful before taking a chance on a book that would be immediately pirated and offered to the market in weak translations and cheap editions. Public and external translation funds have a crucial role in publishing foreign literature.

Public and supporting institutions that act as supporters of culture and inter-cultural exchange are supply-oriented. They aim at spreading knowledge to readers who do not have access to foreign books either because they do not master a foreign language or because they cannot afford them. The mass of readers are not viewed as sophisticated enough to have an objective judgment on quality of translations, the reason why so many low quality works are produced. On the other hand, no information is available on whether Syrian consumers are aware that book piracy is illegal, or that illegal reproduction harms the publishing industry.

Given the lack of structure of the translation industry and in the absence of supporting institutions, access to foreign demand is difficult. Foreign demand is hindered by weak distribution mechanisms all over the Arab World. However, the demand from the Gulf countries especially from Saudi Arabia has risen in the last two years. Book fairs are main occasions where publishers have access to foreign demand.

Competition among translators is high, especially between those who charge low tariffs. Good translators are marginally affected by price competition as they are able to impose higher tariffs than average.

Government projects to promote literacy and culture have positive effects on the translation industry. The State has a role in translation and culture development through the Ministries of National Education and Culture.

Population growth and increasing literacy are major reasons for the emergence of a growing publishing and translation sectors in Syria, despite the decline of readership. Publishers complain about the future, but they should expand their business and perform better if work conditions and regulations improve. The modernization of the profession, the fighting of piracy, and the removal of market and trade constraints will encourage private initiatives and position Syria on the Pan Arab scene.

2 Introduction

Syria has a significant potential to develop the cultural industry. The introduction of foreign languages in the primary and intermediate levels, the progressive opening of the economy, the increasing role of private sector, and intentions to develop IT industries and the Internet are positive steps towards the growth of cultural economies.

This project aims at conducting an evaluation of the translation into Arabic industry in Syria, identifying main industry actors and analyzing activity and performance. The diagnosis includes defining strengths and weaknesses of the sector, providing a basis for recommendations to improve the sector's performance and to enhance its competitiveness in local and regional markets. However, the sector is so informal that quantitative evaluations are difficult to make.

The study moderately relies on available data and on few available published materials. The study relies on empirical findings and on specialist estimates. A preliminary list of representatives of main actors included translators, interpreters, publishers, scholars, students, lawyers and authors. In-depth interview were conducted with 26 key people. Major findings focus on performance of firms, supply and demand conditions, market structure, firm strategies, price policies, advertising and future expectations.

Table 1: Summary of interviews

Publishers	5
Translators	6
Scholars	4
Students	3
Government representatives	4
International institutions (UN, embassies, cultural centers)	4
Total	**26**

Translation activities remain mainly under the informal sector. Figures and issues raised during interviews could not be validated by official published figures. Targeting the right profile possibly offsets the uncertainty in data gathering.

3 Description of the Arabic Translations Industry

3.1 General trends and business environment

Syria suffers from a declining annual per capita income and from stagnation across all economic sectors. Centralized and rigid political controls, inefficient markets, inadequate pricing mechanisms, non-competitive public sector, inexistence of independent professional associations, overwhelming bureaucracy and an archaic banking and financial systems, are factors that have held back Syrian economic growth.

Syria has a fast growing and very young population – 17.4 millions growing at a rate of 2.4 per cent with a GNI per capita of about $1,160 (World Bank 2003 estimates). According to the 2003 7-year plan, close to 66% of civil servants earn less than $150 a month, and a Syrian family's monthly spending averages more than $200.

Internal problems and regional and international events had a negative effect on investments and development prospects. President Bashar Al-Assad's succession of his father in June 2000 raised expectations about reforms, both in the political and economic domains -among which privatization and eliminating corruption-, but the move towards these objectives remains uncertain.

Until the 1990s, private sector involvement was limited by a number of regulations. In the past decade, the relaxation of some restrictions allowed the private sector to import equipment and other industrial inputs. Currently, private sector involvement is significant in the textile, food, leather, paper, and chemicals sectors, while the heavy industry remains state-dominated. The Syrian government, however, has started to open up state-dominated industries to private-sector investment as the public sector cannot meet rising demand.

Recently, the way was cleared for the first foreign banks to open, and a decree was passed to abolish laws banning foreign currency dealings. These changes have received international attention and sent a positive signal to investors.

After a long period of severe restrictions, the Internet is now available in Syria. There are currently two Internet service providers that offer connections to individuals and companies.

On the international scene, the country is now isolated, contrary to the early 1990s, when Syria's cooperation with the allied forces in the first Gulf war was rewarded by closer integration in the world economy. The US is threatening sanctions and Syria is hoping the conclusion of the preliminary cooperation agreement with the European Union. In November 1995 Syria and several other Middle Eastern and North African countries signed an agreement with the European Union to create a Mediterranean free trade zone by 2010. Officially, the Syrian government is trying to gain accession to the WTO.

3.2 Publishing Trends

Printing and publishing in Syria remain underdeveloped despite efforts to develop the book market. Among the main factors negatively affecting the publishing sector are a general lack of literary appreciation, the low purchasing power of most Syrian readers, the negative sales expectations of publishers that limit output, the poor quality of books, and the lack of motivation of authors who are not able to make a living from writing. Censorship is another obstacle faced by publishers since all publications are submitted to long and fastidious procedures before authorization. Another problem lies in marketing and distribution. Standard ways to market a book -book readings, press releases, and book reviews- are virtually non-existent in Syria.

Despite these problems, which are common in most Middle Eastern book markets, Syrian publications are well positioned and are becoming a major contributor of library materials in literature and Middle Eastern and Islamic studies.

3.3 The economic weight of translation industry

Around 85 per cent of the Syrian population speaks Arabic, which is the official language in public schools and universities. The weak level of existing educational systems, the lack of major investments in human resource development, and a failure to remain connected to the latest development in the various fields of science and the humanities have reduced the Syrian readership to a limited public.

Private publishing companies were founded after that for many years the Syrian cultural ministry and the Syrian authors' association had been the only publishers.

Among the 2500 publications registered yearly in Syria (compared to about 12,000 in Egypt), only about 100 (4 per cent) are Arabic translations. The translation industry is strongly marked by state involvement. The market is mainly domestic and production standards comparatively low. Recent years have seen the development of significant private publishing industries that have expanded the translation sector, particularly in editorial policies.

The economic weight of the translation industry remains trivial as Syrian publishing is not significantly involved in translation and not integrated into the international exchange of translation rights. The results are a limited number of translations into Arabic of important works from the West. Most Syrian publishers cannot afford to translate subjects of interest to local and Arab readers because market is small and financial risks are high. Many publishers complain that several books published in translation are pirated locally or regionally.

Together with translations enjoying good selling perspectives are works with academic or political interest. Such works are published by official public and private institutes regardless of their ability to sell.

3.4 Legal and regulatory frameworks

3.4.1 General Translation

No legal restrictions for the translation activity prevail in Syria. Anyone can offer translation services whether officially registered or not. According to our sources, a significant portion of translation activities are settled in cash without being declared to tax authorities.

3.4.2 Certified public translation

Certified public translators are bound by law to the Ministry of Justice and are liable for faults or law infringements. The official appointment is given by the Ministry of Justice subject to passing a competitive entrance examination organized at irregular intervals. No new recruitments have been made in Syria in the last five years.

Presently, there is no official syndicate or body representing the translation industry at the national level. The translation sector in Syria remains informal and no statistics are available to assess its output.

3.4.3 IP laws

The Copyright Law No. 12/ 2001approved by the People's Assembly on 19/2/2001 only protects: works produced and distributed by citizens of the Arab Republic of Syria in the Syrian territory and abroad; works of authors domiciled in the country, and works protected through the provisions of cultural agreements and other agreements to which Syria is committed.

Syria's legal system does not recognize IP for non Syrian authors and facilitates the transfer of property rights, including intellectual property rights. Following the signature of the Berne Convention (Literary and Artistic Works), in June 2004 the International Property Rights (IPR) Department at the Ministry of Supply and Trade has recently amended the legislation but it is still pending approval. For the time being, infringements of copyright are not prosecuted and illegal Arabic translations of foreign books are widely available.

4 Economic Performance of the Industry

4.1 Main actors and products

Legal public translators are the only companies that are registered as translation firms in Syria. The general translation activity is tied to the publishing industry, to the cultural and educational public institutions, and to some international private institutions.

4.1.4 Translators

Most translators work in other fields and practice translation informally as extra job for additional earnings. Many hold a university degree in a foreign language, usually English or French. Others work in public institutions, in private companies, or in journalism. The number of translators is impossible to assess. Translators' ability to generate business depends on their acquaintance in the publishing business and in public and private organizations that subcontract translation services.

4.1.5 The Ministry of Culture

The Ministry is an important actor in the translation industry. Book publishing is placed under the responsibility of the Book Directorate. Every year, 50 to 70 books are translated from several source languages (English, French, German, Russian, Spanish) which represent about 50 per cent of the Ministry's publishing activity.

The Book Commission makes a selection of titles out of the catalogues of foreign publishers the Ministry receives. The Commission gets also proposals from outsiders who wish to translate a particular book. The final decision belongs to an appraisal committee that does not seem to follow a specific strategy in the choice of titles. Subjects must however be compatible with political orientations of the Central Government.

The Ministry publishes works on cultural heritage, contemporary Arabic literature, studies in humanities and social sciences, and sometimes science books.

4.1.6 The Ministry of Higher Education

The Ministry produces its own university textbooks in Arabic. Books are a compilation of various extracts of foreign references translated in-house, and completed by contributions of academics teaching from various fields. The students rely heavily on notes and on photocopied materials distributed by lecturers.

4.1.7 The Arab Center for Arabization, Translation, Authorship and Publication

ACATAP was established in 1989 according to an agreement between the Syrian government and the Arab League Educational, Cultural and Scientific Organization (ALECSO) to be one of the specialized institutions in the ALECSO.

ACATAP aims at: arabizing and translating references for higher education in all areas of academic and technical specializations; enriching the Arab culture with foreign intellectual productions; sharing efforts in translating highly refined Arabic intellectual works in the fields of science, art and literature, into widely used foreign languages.

ACATAP has translated 104 books since 1991; however the average number of titles published in the last two years has dramatically fallen to 4 or 5 per year.

4.1.8 Private Publishers

Some private publishers are well known to have an interest in translating works, autobiographies, letters, notes, and essays of various well known artists, intellectuals, political and religious figures. They cover not only classics, but also works that open ways to new disciplines unknown in the Arab World. They aim towards creating a better understanding and appreciation of foreign values and way of life, away from political considerations. A small publishing house is specialized in translating the milestone philosophic works of the intellectual history of the West, especially Europe. These renowned publishers acquire translation rights of all books and are concerned about the protection of intellectual property. The total number of titles translated and published by this sub sector is estimated at around 100 per year.

Apart from these known publishing houses, there is an active parallel market where all sorts of works by authors of different origins are translated and sold at low prices. Motivations of illegal publishers vary from giving Arab readers access to international authors, to merely picking up a popular topic and commercializing it at a large scale with the simple objective of making profits. Illegal translations are estimated to represent more than 80 per cent of total translations, and are of weak quality with respect to text and to format.

4.1.9 Foreign cultural centers

The French Cultural Center in Damascus promotes translation into Arabic within the Publishing Assistance Program (Programme d'Aide à la Publication - PAP) which is extended to Syria and to other Pan Arab countries. The Program financed by the French Ministry of Foreign Affairs aims to reduce the book cost by paying translation and publishing costs. The cultural center pays the rights, finances and supervises the translation; the Syrian publishers are responsible for printing and marketing the books that are sold at an affordable price to the average Syrian buyer. The Center has assisted in the publishing of 6 to 7 books per year in the last two years in the fields of philosophy, literature, psychoanalysis and has a new project to promote books in humanities.

The British council does not provide direct sponsoring of translation. The institute is rather focused towards promoting exchange of information, ideas, distribution and publishing of English writing into Arabic and Arabic into English. The British Council's long-term strategy consists of building channels of communication between the UK and the Near East in the area of fiction and non-fiction publishing, and encouraging links between actors of the same country or region.

The Goethe Institute has its own funding translation program aimed at providing financial support to translations of German writers. The Institute finances the translation of 2 to 3 books per year after approval of an expert jury in Germany. Few demands are received from publishers who often translate books without soliciting the assistance of the Institute. The total number of Arabic translations from German is estimated at 10 per year. The translation activity is promoted by the Goethe Institute worldwide through the online magazine Litrix.de that also extends its goals to organizing workshops and providing direct contacts between German writers and translators.

4.1.10 The Union of Arab Writers (Ittihad al-Kuttab al-Arab)

The Union of Arab Writers is a government publisher, established in 1970. Up to 1987 around 600 titles were published; since 1988, production has fallen to around 20 titles per year. The publications of the Union of Arab Writers are mostly in contemporary Arabic literature.

Table 2: Estimation of yearly translations by selected bodies

Ministry of Culture	50 to70
ACATAP	4 to 5
Private publishers	80 to 100
French Cultural Center	6 to 7
Goethe Institute	2 to 3

4.2 Sales and market share

It is hard to estimate the translation output in Syria in the absence of reliable data. Some broad indications are given with respect to book publishing.

The Ministry of Culture produces 50 to 70 books per year. From 3000 copies in the seventies, the average production of a publication went down to 1000 in the last two years, with highs of 2500 copies for children's books and lows of 600 for specialized books. We can safely assume that the Ministry has cut its production during the last five years, unable to market large amount in Syria or abroad, although production is well valued by the local and regional intellectual community. The weakness of local and regional distribution networks coupled with a passive sales policy has tremendously hindered the promotion of translations, despite extremely competitive prices.

Publishers that acquire copyrights translate an estimated 100 titles per year. Most publishers start printing of 1000 to 1500 copies, which is low compared to the market potential. Only when books are best sellers that can be produced in short delays, 5000 or rarely 10000 print runs are made. Publishers agree that sales have not been increasing during the last two years.

If legal translations represent 10 to 15 per cent of the market, then illegal translations could reach as much as 650 to 1000 titles each year. With a low unit price per book, total sales figures highly depend on the number of copies sold. No indications on the market size and trends of this sub sector are available.

Most of the books are sold locally. However publishers that can afford to participate in regional book fairs realize half of their annual sales during these events.

Table 3: Performance of the Syrian translation industry in the last two years

	Overall performance
Literary works	decreased
Children's books	increased
Reports: economic, technical, financial. TORs bids, offers	increased
Computer software	increased
Legal documents, for private and government use	constant
Interpretation - Conferences	increased

4.3 Financial performance

There is a general consensus among persons interviewed that translation does not guarantee enough revenues to make a living. Many skilled translators have shifted to other activities because of low revenues. Public employees and university lecturers are allowed to take external translation projects.

Facing tight cost constraints, private publishers are not able to adequately pay writers and translators, who face depressing work conditions. Public and external translation funds have a crucial role in publishing foreign literature. Without these funds, a translated novel would have to sell five to eight thousand copies, which is rarely possible.

Institutions that provide financial support to Arabic translations are the Ministries of Culture and Education, the Arab League, some foreign cultural Centers (mainly French an German), and a few private associations.

Apart from translation costs, the cost of acquiring rights is the main additional cost to publishing. Rights are higher for US works (around USD 1000) than European publications (from USD 200 to USD 500). Copyrights vary depending on the country of origin, the publishing house and on the state of cultural cooperation between stakeholders. The action of public and private cultural bodies focus on subsidizing copyright and translation costs to ensure the viability of a translation project.

4.4 Awareness and commitment to quality

Most of the people interviewed represent respectable institutions highly committed to quality. They employ skilled and specialized people, who are capable to return the significance of works.

However our contacts objectively agreed that the market is flooded with weak translations. A lot of consumers and publishers compromise on quality due not only to cost and time constraints, but also because average readers in Syria are not concerned with quality. Topic and price determine readers' choices, regardless of author, translator, and publisher.

The French cultural center started last year a regional project aiming to evaluate the quality of its support program to translation. A census of all French into Arabic translations in the region is under way in order to estimate the work done, to share information between beneficiaries and to avoid financing twice the same work.

4.5 IPR laws

The issue of copyright in Syria has a huge impact on the translation process and on attracting interest in translation from foreign languages. In theory, Syrian authors enjoy copyright protection, which is expected to be extended soon by law to all intellectual works. In practice intellectual rights are constantly violated. Few publishers have IPR departments. As examples, ALECSO which is committed to IPR buys rights at prices ranging between USD 700 and USD 2000. Well known publishing houses are extremely concerned about IP. They try to participate in the promotion of awareness to IPR in the whole publishing sector. By acquiring rights, the French Cultural Center aims at raising publishers' and readers' awareness to the importance of intellectual property.

However the majority of publishers take advantage from the legal gap. Translators often suggest ideas for books without seeking permission from authors or publishers of original works. Piracy is viewed by many as a quick and cheap way to offer books to consumers. By the time a publisher acquires translation rights, the book is already on sale. According to persons interviewed, the share of titles that have been duly acquired for translation is low, not exceeding 15 per cent of the total translation market.

Lawyers, who have little understanding and experience of copyrights are not capable of defending publishers against infringers. Publishers react in different ways: those who represent educational foreign brand books negotiate special prices with distributors to reduce or stop piracy; others drop translation activity to avoid losses. The copyright issue affects negatively publishers who are committed to rights, and has no impact on those who do not care about IP as long as the government does not show a political will to fight piracy.

5 Supply Conditions

5.1 Employment and human resources

Academics from different horizons are the main people involved in the translation activity in Syria. Those involved in literary translation usually have a degree in foreign language, usually English or French. Translators of publications in social sciences, politics, and sciences usually have a university degree or a professional specialization in the related field.

There are no translation firms in Syria except legal translation bureaus. Customers have established their own translators' networks. At the Ministry of Culture part of the translations are made by staff members outside office hours; the rest is given to free lancers known and appreciated over time. A lot of translators contact spontaneously the Ministry proposing books or asking for work. Publishers have teams of free lancers located in all parts of the country. Many reported that good translators are not always available, especially in specialized fields; training needs are therefore very high.

Men are dominant in the Syrian translation market, representing around 60 per cent of total employment; however more women are getting involved by activating their public relations network and seeking new opportunities. Publishers receive from women an increasing number of job applications.

5.2 Academic knowledge

Syria is among the few countries in the region where Arabic was for a long time exclusive in public schools until the seventh grade. Five years ago, English was introduced gradually starting the sixth grade and below, to reach last year the first grade. At present French as a third language starts in the seventh grade with a possible extent to lower levels in the next few years. The general and language skills of future generations are expected to improve, not only thanks to the introduction of foreign languages, but also due to a will from the authorities to improve national curricula and to spread the use of foreign textbooks.

Students of private educational institutions that offer American English or French educational programs (1 to 1.5 per cent of total) are known to have a higher academic level than public system students, and to be more fluent in foreign languages.

People involved in translation are known for their proficiency in Arabic. Foreign language skills were reported to be variable, reflecting on the quality of output.

5.2.11 Universities

Most of students applying for the department of foreign languages at Damascus University have not acquired foreign language proficiency during school years. The level of university graduates is poor in general, only a small portion of them developing good oral and written skills. As long as all applicants are accepted in language departments without restrictions or quota constraints, the rate of repetition will remain high, and only a few graduates will acquire academic qualifications in line with international standards.

The establishment of an English and French translation Institute at Damascus University (the Institut Supérieur de Traduction et d'Interprétation) is under way. After discussions with several foreign institutions in view of a partnership, Damascus University decided to undertake this project on its own. Premises will be ready next year. Bids and tenders for equipment and materials have been launched. The technical and financial sides of the project are being reviewed. Programs are ready but the staff is not yet complete; teachers' rehabilitation and new recruitments are under way.

The school intends in a later stage, to cooperate with foreign institutions on academic and quality control issues, which would improve its reputation. With a potential of 100 to 150 students, the Institute will be open to Syrians and to students of the Near East.

Vocational units do exist within the various departments at Damascus University. The translation unit has not been developed; the commission required by the university (36%) is considered to be high, reducing translators' motivation and financial incentives.

5.2.12 Training and training needs

Few translators deliver outstanding quality jobs. Market specialists and academics insist on the importance of training. Translation skills are not merely obtained through foreign language acquisition. More training and specialized training institutions are needed to improve abilities and to catch on new market trends and needs.

Table 4: Main Universities in Syria

Aleppo University – www.alepuniv.shern.net
Al Baath University Homs – www.baath.shern.net
Damascus University – www.damasuniv.shern.net
Tishreen University Lattakia– www.tishreen.shern.net

Table 5: Universities planning to offer translation studies

Damascus University – www.damasuniv.shern.net
Kalamoon University – www.uok.edu.sy

5.3 Technology

5.3.13 The Internet

The Web is being increasingly used by established publishing companies offering added-value entertainment and information. The state-owned and operated Syrian Telecommunications Establishment (STE) has focused on providing Internet access to governmental and educational institutions. Estimates suggest that the number of households subscribing to STE's services is growing, and that Internet cafés are increasingly available across the country. The Syrian government has attempted to control the Web access by frequently blocking sites and free email accounts. To avoid the government's efforts at censorship, several thousand Syrians have connected to the Internet via Jordanian and Lebanese ISPs.

5.3.14 E-publishing

In the last two years, with the progress in Internet technologies in Syria, major publishing companies have launched bilingual internet sites and internet-based publications. Publishers are also using the internet to launch new publications in market niches where information is either scarce or non-existent.

5.3.15 Translation technologies

Few translators in Syria have the theoretical and practical expertise in language and translation technologies. Experts are not yet familiar with these new trends. Most translations are usually simply done and delivered in Word format while the electronic production is made by computer and website experts.

Translation memories are not widely used especially when translating into Arabic. Translators argue that Arabic data bases are not accurate, that bringing quality to computerized Arabic translations is hard and time consuming, that programs are not user-friendly, and that many do not have the opportunity or the time to receive the adequate training to use them.

6 Demand Conditions

6.1 Nature of demand

Books from the western world are attractive as they offer to many Arab readers different appealing ways of life. Many publishers insist that translation can establish a cultural dialogue between the Arab World and other continents. Authors being at the focus of interest are both modern classics and writers from the younger generation. Factors affecting the attractiveness of a book are name of author, topic, and relevance to current events or socio-economic issues.

The demand for best sellers is high but publishers are careful before taking a chance on a book that would be immediately pirated and offered to the market in weak translations and cheap editions. Publishing companies could also contribute other interesting titles in history, anthropology, and social sciences. However, the ability to sell and cover costs remains the major constraint of publishers. On the other hand, public and external translation funds have a crucial role in publishing foreign literature.

The Ministry of Culture publishes 50 to70 books in the areas of cultural heritage, contemporary Arabic literature, humanities and social sciences, and a small number of scientific publications. The Ministry of Higher Education focuses on satisfying students demand in all fields of higher education. ALECSO sells to university libraries and to professional associations.

The demand for technical and academic books is falling. ALECSO for example has limited number of copies to 1000 in the last two years compared to 2000 to 5000 previously. Half of them are complimentary to public libraries and universities in the Arab World. The Ministry of culture has also reduced the number of copies to 1000 compared to 3000 previously.

Private publishers produce between 1200 and 3000 copies on average, but can go as high as 5000 to 10000 when the title is very commercial.

At the French cultural center the selection of subsidized books is empirical. The institute relies on needs expressed by local publishers and educational institutions, trying at the same time to link the topics to other cultural activities of the center. The demand is oriented towards contemporary social sciences, modern history, politics, which are topics that interest other neighboring countries. 2000 prints of a volume are produced on average. Around two thirds remain in the country while the rest is distributed in the Middle East and North Africa.

Translations from English are the most frequent (around 40%) followed by French (20%) Russian (10%) and German (10%).

6.2 Consumers

Public and supporting institutions who act as supporters of culture and inter-cultural exchange are supply-oriented. They aim at spreading knowledge to those who do not have access to foreign books either because they do not master a foreign language or because they cannot afford expensive books.

According to our sources, Syrian and Arab readers are generally more interested in intellectual currents in the Western world, rather than in individual fictions. ALECSO is more oriented towards satisfying specific needs in the fields of sciences and technology. Publishers are more consumer and business oriented. They follow international trends and select best sellers that they believe the local reader would enjoy. Some publishers also target groups of scholars and intellectuals by translating topics regardless of their profitability. Translations which do no reach the general reader are more or less academic. In the absence of consumers' surveys, it is difficult to assess the degree to which translation publishing strategies correspond to consumers tastes and needs.

The mass of readers are not viewed as sophisticated enough to have an objective judgment on quality of translations, the reason why so many low quality works are produced. On the other hand, there is no information available on whether Syrian consumers are aware that piracy is illegal, or that piracy can harm the publishing industry. Anyhow, most people are probably unable to distinguish pirated from genuine publications, and few feel guilty about buying pirated products.

Some experts do not agree that readership is limited in Syria. According to those, people want to read but they can't get the books because of the lack of efficiency of publishers and distributors.

6.3 Prices

Translation prices per page vary a lot, depending on the ordering customer, the nature of job, and the experience of translators. The Ministry of Culture, the ACATAP, international bodies and foreign companies pay more on average than private local publishers and local companies. Besides, average prices for translation in Syria are low because the general income level is low compared to neighboring countries like Lebanon and the Gulf countries. Translations into Arabic are cheaper than translation from Arabic. Some publishers who get copyright subsidies tend to be generous with translators to support them.

Table 6: Prices per page (250 to 300 words) by customer

	Average Dollar equivalent
Ministry of Culture	6-9
ACATAP	8-10
Local Publishers	1.5-8
Gulf Publishers	8-15
International bodies	7-20

Table 7: Prices per page (250 to 300 words) by nature of job

	Average Dollar equivalent
Novels	1.5-6
Poetry, theater	1.5-9
Scientific/technical	8-15

6.4 Foreign demand

Weak purchasing power in the most populous Arab countries, such as Egypt, Iraq, Morocco, Algeria and Sudan, together with poor distribution and shortage of bookshops, had led to a crisis in Arab publishing, while political tensions in Iraq, Algeria and Sudan had also notably weakened the publishing industry, leading to a fall in the number of translations and of literary works. Some importing countries that never established their own publishing houses, like Iraq and Sudan, can no longer afford to purchase imported books.

Given the lack of structure of the translation industry and in the absence of supporting institutions, access to foreign demand is difficult. Personal contacts, word of mouth, acquaintances with publishers are ways of penetrating foreign markets. Advertising, marketing through the Internet, direct marketing have not in most cases given positive results and have involved useless expenses. Foreign demand is hindered by weak distribution mechanisms all over the Arab World.

However, the demand from the Gulf countries especially from Saudi Arabia has been rising in the last two years. While the high purchasing power of the Gulf customer is boosting demand for translated publications, it is at the same time favoring a rise in translation rates that is often detrimental to the Syrian publishers who cannot follow.

Renowned publishers are active in exporting translated books thanks to their existing regional network. Book fairs are the main occasions where publishers can have access to foreign demand.

ALECSO’s translations are intended to the whole Arab World. Although branches are spread in other Arab States, Damascus remains a specialized center for translation and interpretation.

The demand from Western countries (Canada, the US, Europe) is insignificant.

7 Related Supporting Industries

For years, printing and publishing remained underdeveloped. Difficult political and economic conditions, limited access to import and export markets and shortage of paper, have for a long time handicapped the printing industry. Since the country began to import modern printing presses from Europe, and following the recent trends towards a market economy, new investments which are expected to improve the printing and publishing sectors were made. Most publishers compromise on the quality of paper and printing due to financial constraints.

After a long period of severe restrictions, the Internet is now available in Syria. There are currently two Internet service providers in Syria that offer connections to individuals and companies. A lot has been made but there still are many obstacles to overcome.

8 Firm Strategies

The Syrian publishing and translation markets are marked by a strong heterogeneity and by the existence of a multiplicity of small companies.

8.1 Strategies

Minimizing cost and selling price of books. Professional editorial departments are the focal point in a successful publishing house. The decision-making process whether to place a new book on the market is based on the experience and perception of publisher who rely on intuition, personal appreciation, friends' advice etc. Private sector strategies are focused on minimizing the cost and selling price of books to make it affordable to low income groups and at the same time target a maximum number of readers. Some publishing houses have pricing policies requiring that most books be sold at near cost value. A few publishers have the same translation available in the standard form and in a very cheap version with low quality paper and binding (within their "book for all" project). One publisher offers one free book each month to nine newspapers in the Arab World that print them and distribute them to readers for free.

Filling up needs in sciences. ACATAP strategic objective is to fill up needs in sciences in the higher education system, in Syria and in the whole Arab World. A scientific experts committee makes choices according to propositions received from universities, Arab scientific associations, professional associations according to regional needs. ACATAP aims to make joint projects with private publishers but has not yet reached any positive result.

Filling up intellectual vacuum. Love of literature and the desire to fill up intellectual vacuum by spreading culture, drive a few publishers maintain good standards and tolerate adverse market conditions. Focusing on a specific segment of the market, those publishers service a small clientele, much different than that of most of Syria's publishing houses. They aim to provide the Arab readership with material stimulating interest, satisfying their curiosity, and encouraging them to analyze the various features of the western intellectual culture. The commitment of translators has also a positive role in this respect.

The Ministry of Culture. The Ministry of Culture's strategy is supply oriented. Some academic translations do not reach a wide range of readers. The decision of what to translate is not made according to wishes of the Syrian readership but according to what scholars and readers should get to know from the West. The Ministry sells its books at unbeatable prices.

Marketing and distribution. Since publishing in translation is not reported as lucrative, investments in advertising, publicity and marketing are low. Syrian publishers display books in their own stores and at the book fairs in Arab capitals where they realize more than 50 per cent of sales. Besides, because lists of titles and complete backlists are not always available from publishing houses, the marketing and distribution of books depend on informal networks. For specialized scientific and technical books, publishers rely on direct marketing to universities and concerned institutions.

Pricing. Publishing books is burdened with risks, and Syria lacks proper market information in terms of what sells on the market and on how to find a price that will not turn away buyers. Publishers tend to reduce as much as possible prices of books.

8.2 Competition

Competition among translators is high, especially between those who charge lower tariffs than those commonly applied. Good translators are marginally affected by price competition as they are able to impose higher tariffs than average.

Competition among publishers in translation is not significant. Few publishers have translation activities in a market that is far from being saturated.

Competition between private and public sectors is not significant. The heavily government subsidized translation production and low prices at which they are sold do not seem to disturb private publishers who have their own books. Beyond that, cheap books draw new readers into the market, who might eventually buy more expensive books from independent publishers. From this point of view, subsidizing books would be to the benefit of both the public and the private sectors.

The Syrian market is not concerned with foreign competition as it does not have a large exposure to foreign markets.

8.3 Strengths

Positive effects of economic liberalization. Publishing and translation industries are expected to benefit from the progressive liberalization of the economy. These sectors will possibly attract foreign investments especially from the Gulf.

Important market potential. The Syrian market is large in terms of number of potential readers and demand The Syrian readership is mainly interested in books in Arabic since it has been until now the only official language of the country.

Competence of translators. Many competent translators are available. Technical and specialized translations provide high quality work.

Affordable prices. Prices are competitive and books affordable to a large group of local and regional readers.

8.4 Weaknesses

Lack of structure of the profession. The translation profession is not structured in a way to bring together demand and supply of services. Part of the demand is not channeled to competent professionals although available. The informal character of the industry is a major obstacle to accessing export markets.

Weakness in human resources. Translators do not always have a good knowledge of the language out of which they translate. Translators who have culture and expertise are difficult to locate.

Weakness in financial resources. Free lance translators have a weak financial situation. Incomes are low and work load irregular. Publishers have low profit margins that barely cover the high costs of translating and publishing. Publishers often depend on subsidies to realize a translation project. The financial performance of ACATAP is weak reducing its motivation to expand

Censorship. Censorship and cultural and religious habits in some Arab countries limit subjects of interest and export possibilities.

IPR. The absence of IPR laws often discourages publishers to publish translations that are made available at ridiculous prices by competitors who do not respect quality and copyrights.

8.5 Censorship

Translation publications cannot develop as a result of severe restrictions and controls from censorship authorities. Publications are banned when they are considered to compromise the nation’s political options and ideas of morality. Publishers send a number of projects to other countries like Lebanon or Cyprus where no such restrictions exist.

On the regional market, copies of books are submitted to more than 20 censorship authorities for approval. Censorship takes different forms in different parts of the Arab World where little consistency prevails. Publishers lack motivation to buy rights for a novel that risks to be banned after it is actually authorized and published

9 Government Projects and Policies

Government projects to promote literacy and culture have positive effects on the translation industry.

9.1 Support to higher Education

Damascus University is the largest university in Syria. The university consists of 14 faculties of literature and human sciences, education, economics, law, agriculture, Islamic Sahria'a, pharmacy, medicine, dentistry, civil engineering, fine arts, architecture, mechanical engineering, and the Higher Institute of Administrative Development. Damascus University, along with sister universities in Aleppo, Homs and Lattakia is one of the few places in the world where all scientific materials are taught in Arabic. Damascus University has a central library that includes books, periodicals and the contents of all university courses.

9.2 Support to publishing and translation

Many public institutions provide support to publishing among which the Ministry of Culture. For more than forty years the Government of Syria has had a program to support the production, distribution and promotion of books. However its action is not always adapted to the changing economy. It lacks innovative ways to support publishers so they can take take advantage of opportunities available both at home and abroad. The State has also a role in translation and cultural development through the Ministry of National education and the Ministry of Culture.

The Asad Library opened in 1984 as the national library containing all books and periodicals published in Syria in addition to broad collections in all fields. The law requires that all works published in the country are deposited in 5 copies, which makes the library the main bibliographical reference. The modernization of the institution and the computerization of the card catalogue are under way.

The question remains as whether the Government should continue to intervene directly, through the culture and education ministries to promote and pay for a particular kind of intellectual production; or should publishing be left predominantly to the private sector and market laws.

On the other hand, as already mentioned, the Syrian government is increasing efforts towards the adoption of IP laws and international conventions. The next step involves the effective law application and the penalization of infringers.

Table 8: Membership in international treaties

WIPO Convention	November 2004
Paris Convention (Industrial Property),	September 1924
Berne Convention (Literary and Artistic Works),	June 2004
PCT (Patents)	June 2003
Madrid Protocol (International Registration of Marks)	August 2004
Nice Agreement (International Classification of Goods and Services)	March 2005
WTO	Not a member

Source: WIPO Syria legislative profile

10 Future Expectations

Population growth and increasing literacy are major reasons for the emergence of a growing publishing and translation sectors in Syria, despite the decline of readership. Publishers complain about the future, but they should expand business and perform better if work conditions and regulations improve. The modernization of the profession, the fighting of piracy, and the removal of market and trade constraints will encourage private initiatives and position Syria on the Pan Arab scene.

Non profit organizations expect to continue translation projects as part of programs aimed at fostering inter-cultural dialogue, bridging the knowledge gap between the Arab and Western worlds, and building the necessary intellectual foundation for civil society development.

Public institutions such as the Ministry of culture and the ACATAP expect their activities to remain stable in the next two years.

Future expectations depend greatly on the improvement of the distribution network, on the affordability of books, and on the ability to inform the public and to raise his interest.

11 Conclusions and Recommendations

11.1 Conclusions

Data on publishing in general and translation in particular is poor. It is therefore difficult to draw key conclusions on the translation industry in Syria. Empirical findings lead to the following conclusions:

The weak economic environment, the low purchasing power and the unfavorable political background prevailing in Syria have a negative effect on cultural industries.

Translation industries suffer from Syria's intellectual isolation due to illiteracy and censorship.

Translation remains in the informal sector. No primary sources of information are available on these services to government, industry, and the general public.

Translation is not organized as a specific and autonomous profession. Translators are in a fragile economic and social situation. Only a small proportion of translators earn their living exclusively from translation.

Current demand conditions are poor due to low income levels and literacy rates. However the translation industry's potential is high due to the high level of arabisation in the country.

Supply conditions remain weak due to the lack of specialized labor and weak infrastructure. The lack of specialized translation schools and training programs are major obstacles to the development of the industry.

Prices vary widely depending on the nature of job and on the ordering party. Prices are low compared to some other countries in the neighborhood.

The translation industry is negatively affected by the weak distribution networks of publishers.

The efforts of public and private supporting bodies are of great value, but they remain marginal compared to the huge needs of the industry.

The absence of copyright protection affects negatively publishers who are committed to rights. The Syrian government has not shown until now a strong political will to fight piracy.

11.2 Recommendations

Encouraging translation will have a direct economic benefit on all actors involved in the chain from translators to retailers. It could also open readers in Syria to a broader intellectual and educational literature widening perspectives and preventing isolation from the international cultural scene. The following actions could improve the performance of the sector:

11.2.16 Business environment

Improve and set up a more favorable and supportive business environment by adopting measures that enhance market growth. Encourage the creation of firms by reducing administrative procedures and establishment costs; Help firms to expand by improving access to credit facilities;

Develop reliable partnership networks to establish connections between publishers, authors, translators and editors. Cooperation should be oriented towards regional economic integration.

NGOs and foreign institutions actions should be sustained and extended.

11.2.17 Building learning and training infrastructures

Provide total support to the initiative of establishing a Translation College at Damascus University with the purpose of:

*Developing translation educational curricula compatible with international standards and market needs;
*Making available continuous training within the institution;
*Building links between research, teaching and practice in the field of translation and interpretation.
*Ensuring cooperation among translators and interpreters as well as researchers in order to enhance the professional standing and public appreciation of translation and interpretation

Provide support to other universities, public and private, with a project of establishing translation curricula and degrees.

Provide support to the new curricula in public schools that include foreign languages starting early grades.

11.2.18 Formal organization of the profession

Create within the current legal system an Association of Translators that protects rights of translators and takes action towards:

*Improving economic conditions and social climate in which the translators operate;
*Granting translators better social safety nets and benefits;
*Lobbying for favorable legislation;
*Assisting them in finding work, helping beginners get into the field, and improving pay, benefits and working conditions.

Make translation a specific and autonomous profession by creating a Translation Institute that will play a role in:

*Gathering information of all sources interesting the profession in the form of libraries, files, reviews, bulletins, and organize conferences and meetings;
*Cooperating with authorities and organizations interested in promoting translation: cultural organizations, companies of authors, representatives of literary criticism, universities and institutes of technical and scientific research;
*Cooperating with Arab and International institutions to stimulate foreign demand and to enhance and rationalize the translation activities at a regional level;
*Spreading awareness of the importance of IPR.

Create an Information and Data Base within the Translation Institute.

Build a website to share information and data and to provide a common communication base between stakeholders.

11.2.19 Role of public sector

Sustained and extended government support is essential in the short and medium term until the market economy is effectively implemented in the country. The Government could contribute to:

*Further promote the Ministry of Culture translation scheme by reducing delays in decision-making as well as in translation and publication; and by improving the distribution strategy through a stronger and broader distribution network.
*Adopt a more open policy towards foreign culture and education by loosening censorship and administrative procedures with regard to book publishing.
*Establish intellectual property rights protection through the establishing of new laws and adhering to international conventions and treaties defending IP.
*Enforce the implementation of IP laws and take measures so that sanctions are effective.
*Encourage electronic publications accessible through the internet, which provides a more accessible and affordable alternative to traditional publishing. Lift censorship on the Web.

12 Appendix A: "A Translation Dialogue Between English and Arabic"

A seminar organized by the British Council in Damascus on 22-23 March 2005

Extracts from the report Executive Summary

Arab governments remain committed
Governments in Arabic-speaking countries are committed to making available more translated works from English and other European languages into Arabic. Many policies have been enacted over the past few decades. However, these policies have suffered from a lack of continuity, insufficient financial resources and little attention to marketing and distribution of books.

Data collection needs improvement
Data on book sales in Arabic-speaking countries is often of poor (or inconsistent) quality. In most countries this is partly because the capacity to collect and organize data (in government departments and within publishing houses) is itself in need of attention. One fairly simple way of improving the availability of data is for more Arab publishers to register their material with an International Standard Book Number (ISBN). Participants also urged more publishers to carry out market surveys; reader polling; sales tracking of their books.

Censorship in the Arab world
Censorship is ever-present in Arabic-speaking countries. However, the impact of censorship is made worse by excessive state bureaucracy with ministries in some countries taking up to 12 months to approve a book for publication. Having the right connections can speed up the process, as can a clear elucidation (on the part of governments) of rules and laws that govern publishing.

The lack of literary agents
Literary agents are an important catalyst for the book publishing industry in Western countries.…There is no single literary agency in the entire Arab world. Recommendations included dialogue with London literary agents to make them aware of these issues; and the setting up of a new non-profit literary agency for Arabic-speaking countries.
…

Extracts from the report Recommendations

- The establishment of an agency, which would serve as an intermediary between writers, translators and publishers in the UK and Arab world. This would need initial funding, with the aim of becoming an independent body after 3 years.
- Knowledge transfer between Arab and UK writers, so that they are aware of each other's cultural products.
- Creation of dialogue between literary agents in the UK, and people who already deal with the distribution of magazines and journals in the Arab world. Involve literary agents from across Europe; take a more EU-centered approach, for greater impact.
- In-depth training in the Arab world in different areas of publishing, distribution, rights and digital publishing. This could be done in partnership with British universities.
- More and better market research in the Arab world. This activity could find out which books are popular, and which are being pirated, among other things.
- Research into sources of funding for translation, e.g. from government sources and philanthropic foundations.
- Collaboration with other cultural organizations, such as the Institut Francais, who are also working to promote translations between European languages and Arabic.
- A literary prize for Arabic literature translated into English.

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Courtesy of the British Council - Damascus

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