

Arab Publishing

The publishing scene in the Arab world often feels like an unremitting desert. In the Middle East, a book that sells 3000 to 5000 copies – a modest print run for mainstream publishers in the West – is considered a runaway success, and the distribution of the few books that are published is at best haphazard. Moreover, aside from undeniably fragile production and bookshop networks, once books are printed and distributed, many people can't actually read them.

The region remains plagued by one of the highest illiteracy rates in the world; in Morocco and Egypt, for example, less than half of the population can read, according to UN statistics. Another survey, which was undertaken in 2007 by a leading non-governmental organization, Next Page Foundation, found that only two-thirds of the populations across the Arab region considered themselves readers, and that even fewer read novels, at some 14 per cent. The real numbers of books published annually are hard to come by in any Arab country. But typically, literary works represent a very poor 5 per cent of total sales, with the vast majority comprising academic textbooks or religious books.

Another key barrier to publishing across the Arab region is erratic and often arbitrary censorship. Under the repressive, largely socialist regimes that took control of several of the largest Arab countries during the 1950s and 1960s, book publishing and especially distribution was either a state monopoly or somehow supervised. And in many Arab countries, including those in the Gulf region, private publishing remains an entirely new and limited endeavour. More inexcusably, scores of books are still banned, burned or confiscated if they are found to violate a catalogue of political, moral and religious sensitivities.

It is therefore perhaps hardly surprising that, faced with this spate of hurdles, the Arab world has succeeded in producing only one Nobel laureate in literature, the Egyptian writer Naguib Mahfouz, who won the prize in 1988.

However, one must be wary of making sweeping statements about business and culture in a region of 300 million people. Analysts from the West often resort to analogies and generalities when discussing Arab publishing, and perceive the regional market as a huge homogeneous entity caught in endemic quicksand. But the Arab world is a true patchwork; what applies in Yemen – one of the least developed countries in the world according to the UN – does not apply in Iraq, which before the first Gulf war boasted a solid base of fiction readers.

Indeed, there are some bright lights in the Arabic publishing landscape and a growing international recognition of the strength of Arab literature. Within that context, the largest and most comprehensive international literary prize, the IMPAC Dublin Literary Award, with prize money worth 100,000 euros, has no fewer than three novels by Arab authors on its 2008 shortlist of eight. And the Egyptian novelist Alaa al-Aswany, who enjoyed rare success in the Arab world and beyond with his novel, *The Yacoubian Building*, was the “author of the day” on the second day of this year's London Book Fair, 14-16 April 2008, which chose the Arab world for its annual theme.

Within the region, the publishing scene is striving to prove it can be rich and varied. For example, Dar al-Jadeed in Lebanon publishes books on critical theory and, in Egypt, the American University in Cairo Press has gone from publishing three titles a year in 1984 to 40 titles a year since 1996. In addition to its thriving niche – Arabic literature in translation and books about the

Middle East – the Press established the Naguib Mahfouz Medal for Literature in 1996, one of the few literary prizes in the Arab world. Winners get \$1,000, but the real reward is the publication of their work in English, thereby winning them international audiences. This was the case of the highly successful *I saw Ramallah* by Mourid Barghouti, a memoir by the Palestinian poet who returned to his home in the West Bank after 30 years in exile.

Other contemporary writers include the young Saudi, Raja Alsanea – one of the new wave of young Saudi bloggers-turned-novelists – whose first novel *Girls of Riyadh* was a runaway success in Arabic. The paperback English edition was published in June 2008 by Penguin.

To be sure, the greatest cultural impetus these days is coming from the Gulf. Abu Dhabi in particular has been pursuing several literary projects. The Emirates Foundation is funding the International Prize for Arabic Fiction, the so-called “Arab Booker”, with a jackpot worth a total of \$60,000 – \$10,000 to each of the six shortlisted authors and an additional \$50,000 to the winner. And in 2007, the Abu Dhabi Authority for Culture and Heritage (ADACH) launched a nonprofit organization called Kalima, Arabic for “word”, aimed at expanding Arabic-language publishing in the United Arab Emirates by translating into Arabic various past and present writers (see box). Not to be outdone, neighbouring Dubai initiated the Tarjem programme of the Mohammad Bin Rashid al-Maktoum Foundation in February 2008 to translate 1000 bestsellers into Arabic over three years.

Moreover, ADACH formed a partnership with the Frankfurt Book Fair last year to promote publishing and reading in the Emirate and the Arab world in general. The joint venture was called Kitab, Arabic for “book”, and the partnership’s first challenge was to transform the annual Abu Dhabi Book Fair from a book bazaar for shoppers into a trade show for publishing professionals.

In the West, the book market is clearly shaped by the blockbuster factor: like Hollywood producers, publishers focus on projects that can duplicate a proven formula for success, with projected sales in the millions. By contrast, the aspirations of Arab publishers are distinctly more modest. Only by capturing the pan-Arab imagination – in the way of Mahfouz, say – can they hope to reach the stratosphere of 50,000 copies. The Arab region is a place of turmoil that is still scrabbling to find its way, culturally and otherwise. The picture of Arab publishing is changing gradually; it may be a desert, but that does not mean it is devoid of all life.

Western Publishers in the Gulf

The early twenty-first century is likely to go down in history for the West as the time that media companies were forced to change radically or die. In the Gulf region, this same period may well be better known as the golden age of the media zone.

Recognising that the Gulf region could become an increasingly important source of funds in the age of tight credit markets, several prominent foreign publishers are hoping to tap into the Arab world for new stars in order to bridge the language gap and make money from selling books in the region and of the region. This comes as the publishing industry in the West – like many businesses across the retail sector – continues to reel from the raft of doom and gloom of the past few months.

In October, both Bertelsmann's Random House and Harper Collins, the books division of the News Corporation, confirmed plans to set up in Abu Dhabi's new media zone, TwoFour54 (see box). These expansion strategies in the Gulf come amid severe consolidations in home markets. Specifically, Doubleday in the US, which operates under Random House, laid off 10 per cent of its staff, while HarperCollins reported that operating income in the first quarter of 2008 had dipped to \$3 million from \$36 million a year earlier. Equally in October, Bloomsbury – the UK publisher of the Harry Potter series – announced plans to launch its regional office in Qatar. In coordination with the Qatar Foundation, which provided an undisclosed monetary sweetener, the Bloomsbury list is expected to focus on fiction and non-fiction for adults and children, educational books and classics of Arabic literature as well as reference books.

With further declines projected in the Western market as recession gathers pace, more heavyweight publishers could be tempted to establish or relocate regional headquarters in the Gulf. From the UAE to Qatar and beyond the Gulf to Egypt and Jordan, zones have been dedicated to attracting clusters of media and publishing companies; and with every blockbuster announcement comes more pressure on each to carve a niche, or else risk losing the title of regional hub to a neighbour.

There is no doubt that the current wave of Arab-Western literary ventures represents a testament to the power of money to see bold visions realized. From the standpoint of Western publishers, the success of Alaa al-Aswany's novel, *The Yacoubian Building*, revealed how lucrative the market could be for Arabic books in the West. The book, which was translated into English, was made into a film of the same name in 2006 and has so far sold more than 100,000 copies in 20 languages. Not bad for a work of fiction from the Middle East where a book that sells 3000 to 5000 copies is considered a runaway success.

Publishers are betting that the Arabic literary world, with some 300 million native speakers, is on the cusp of a boom; and it's a gamble that could well pay off handsomely in an age of uncertain worldwide book sales. A recent analysis on the state of the Arab printing and publishing sector by a leading regional think tank, Shuaa Capital Research, projects that the total book and print media market will still manage some brisk growth despite the global downturn, at just under \$2 trillion in 2009 for the entire Middle East and North Africa, increasing from an expected \$1.7 trillion by end 2008.

Attracting Western, particularly American and British, publishers also makes sense from the perspective of Gulf investors. Many in the region feel that globalization and the domination of English have negatively affected their native tongue. But Gulf oil and gas wealth – and the competitive urge to create and buy signature international brands – has opened up possibilities. The hope is that the investment will succeed in transforming the face of the region and the entire make-up of the global media and publishing environment.

Within that context, many of the projects of the past years have aimed at moving from basic literacy to literature in order to create a culture. For instance, the Emirates Foundation is funding the International Prize for Arabic Fiction – the so-called “Arab Booker”, worth \$50,000 to the winner – to help boost the international profile of literary fiction in Arabic. Similarly, the non-profit organization, Kalima, under the purview of the Abu Dhabi Authority for Culture and Heritage (ADACH), has set the ambitious goal of translating and publishing 500 titles a year by 2010 – although the track record so far has come significantly short at nine published volumes since the launch in November 2007.

Moreover, while the spanking media zones are able to lure the publishing giants – usually with some combination of tax-free status, government facilitation and brand-name cache –there are still several basic barriers to selling books in the Arab region. These include comparatively high illiteracy rates, fragile production and bookshop networks, and often arbitrary censorship. This is particularly anathema to the publishing traditions of the West and could still throw a hammer in the works if governments seek to exert control of content.

Ultimately, like many other grandiose development projects in the Gulf, the lofty ideas for the publishing industry are currently just that: ideas. While HarperCollins and Random House are establishing a presence in Abu Dhabi to capitalize on the sale of English-language books in the Middle East, it is still too premature to gauge whether the market potential will translate into actual profit. But 20 years ago, the Gulf's cultural cachet was something of an oxymoron or, even less charitably, a punch line in a bad joke. Today, backed with the recent oil windfall, the region has created if not an actual epicentre then at least an enabling environment for the arts.

Magazines

With global credit tightening and growing competition from the internet, more traditional magazines are having trouble retaining readers and advertisers. According to the Publishers Information Bureau, the worldwide magazine industry is struggling amid lower ad revenues, which were down an estimated 3 per cent in the first three quarters of 2008 against the previous year. The slump was steepest in the US, where advertising revenue over that period closed at \$18.5 billion, representing a decline of 5 per cent on the first three quarters of 2007.

Already, even some large and highly visible publications are consolidating or searching for badly needed money, and advertising has begun a decline that media analysts expect to persist through much of next year.

Print publishers in the US are cutting madly, driven largely by the negative earnings in the wake of the financial crisis. For example, Time Inc. – America's largest magazine publisher and home of Time magazine, Fortune, People and Sports Illustrated – announced that it was cutting 600 jobs and reorganizing its staff. And in the starkest sign yet of the rough times in the news business, media giant Tribune Co., which owns the Los Angeles Times, filed for bankruptcy protection from creditors in December.

Total advertising pages of magazines with a general readership dropped an average of 9.5 per cent in the first three quarters of the year, at a total of some 164,000 ad pages, compared to the same period in 2007. This steep decline stems from lower projected sales in the three sectors that are traditionally the big spenders on print ads, namely, the car industry, retail business and financial services – all three of which have been in the immediate firing line of the financial fallout.

But for now, the penny pinching in the magazine industry in the US has not crossed over into the Gulf region. According to the Global Entertainment and Media Outlook Report 2008-2012, which was released by PricewaterhouseCoopers, the media market in the Middle East is expected to expand at double-digit annual rates over the next five years, with the total number of newspapers and magazines across 18 countries in the Arab region expected to exceed 4,000 during that period. This is corroborated by Pira International, global consultants on printing and

publishing, which also expects the region to buck the global trend, with annual growth rates in the printing industry running at 7.7 per cent until 2012.

While it may be tough times in other regions, it is still boom time for those catering to Arab readers, particularly the well-heeled in the Gulf. This could be attributed to a natural lag in the economic chain: the storm that began in the sub-prime mortgage market in the US will take time to wend its way to the magazine industry in the Gulf.

Certainly in terms of ad revenues, the contrast could not be starker. Compared to the downturn in the US, advertising in the Middle East grew by some 17 per cent in 2007 to reach \$1.5 billion, with the car, banking, telecommunications and real estate sectors grabbing the lion's share of that growth, at some 82 per cent of all advertising. In terms of ad pages in magazines, pan-Arab advertising spending in 2007 reached some \$150 million, thereby representing an increase of 19 per cent over 2006, and is projected to grow to \$275 million by 2011 (see table).

But perhaps a better explanation lies in the level of maturity of the domestic magazine industry. It may appear paradoxical that Arab publishers – in Arabic and English – are currently faring better than magazines in the US and Europe, given that many are still struggling to establish consumer niches unlike many of their Western counterparts that do not have an audience problem.

However, Arab publishers are able to benefit from a demographic boon, which, according to the Media Outlook, constitutes a leading variable almost on par with the economy that helps to drive growth. Specifically, the increasing number of publications in the Arab region has been spurred by economic prosperity, strong foreign investment inflows and changing lifestyles, particularly a gradual rise in literacy rates. Within that context, for example, despite its weaker economy compared to the Gulf States, Lebanon enjoys among the highest audiences in the Arab region in terms of print media on account of high literacy rates in Arabic, English and French.

According to the World Bank, 36 per cent of the Arab population is aged under 15, and many are already more literate than their parents. This means that local as well as international media outlets will increasingly look to tap into the emerging demographics of the region.

Furthermore, there is a paradigm shift in the print and publishing sector in the region, as exemplified by the different and competing models of Saudi Arabia and Dubai – both of which have used oil wealth to insulate themselves from volatile ad revenues.

By investing hundreds of millions of dollars since the 1980s to acquire news organizations in the Middle East and Europe, Saudi Arabia has focused primarily on news rather than high-end magazines. In a bid to exert a dominant influence over the news and political opinions presented to millions of Arabs, the Saudi-owned Middle East Broadcasting Centre bought United Press International for \$3.95 million in 1992; and at least two dozen Saudi-owned Arab publications are based in London, including the two most influential Arab dailies, al-Hayat and Asharq al Awsat.

By contrast, Dubai opted for a more holistic approach to media with the creation of the Dubai Media City in 2001. This has proved successful in drawing both international and regional companies under one roof – it currently houses more than 1000 companies, including such global names as CNN, Reuters and CNBC. Indeed Dubai Media City has proved so popular that it has been unable to meet demand, and many companies on the waiting list have turned to other newly-established or soon to be established media free zones, including TwoFour54 in Abu Dhabi and

the Media City in Qatar – the country largely credited with kicking off the Arab media boom with its launch of al-Jazeera in 1996.

In terms of major regional publications, Dubai-based ITP just put out two of its largest issues ever among its fashion titles, L'Officiel, L'Officiel Homme and VIVA; while competitor Motivate Publishing established a new magazine in June aimed at MICE and corporate events and announced healthy circulation figures for its magazines – including Emirates Woman, What's On and Dubai Voyager – in order to placate nervous backers.

Indeed, some see the events in the publishing industry in the US as an early warning signal. Critics also worry about the degree of unbiased reporting in a traditionally autocratic part of the world, particularly in current affairs and news magazines. For instance, Saudi Arabia ranked 148 out of 169 countries on the Press Freedom Index 2008, and censorship is common in all Arab countries – even al-Jazeera shies away from reporting on the Qatari royal family. Press freedom hiccoughs aside, the public commitment is set to buoy the Arab media sector and compensate for any temporary declines in ad revenues given that the market is sufficiently young and ambitious – and, especially rich – to survive a short-term global recession.

Graphic Novels

Not much has changed in the world of comics. The caped superhero is still around fighting evil, even if the characters and plots have been jazzed up and adapted to suit the modern world. For instance, in previous generations, both Superman and Captain America had the opportunity to knock Hitler senseless; the spotlight is now on Osama bin Laden, among other contemporary archvillains. In a forthcoming graphic novel called Holy Terror, Batman!, the Dark Knight is pitted against an al-Qaeda cell that attacks Gotham City.

The characters are driving billions of dollars in sales for publishing, film and retail companies. Aside from the direct sales of comics – estimated at \$700 million globally in 2007, up 9.4 per cent from 2006 – consumers are spending faster than a speeding wallet on Hollywood tie-ins and on a range of licensed merchandise from toys and games to clothing. Last year films adapted from comics hauled in a record \$925 million in ticket sales, which accounted for 10 per cent of the total box office for 2007.

Naturally, the true driving force is an insatiable consumer appetite for the genre. In the West, such graphic-novel forms – from Batman to the Pulitzer prize-winning Maus – constitute cultural reference points; and in francophone countries, comic strips have long been revered as the neuvième art – or the ninth art – while Japanese manga has become a dominant cultural force.

By stark contrast, the Arab world has always taken a comparatively dim view of comic art, not quite getting the visceral thrill of the Hulk levelling a city or the Roman-bashing antics of irreducible Gauls. While there has always been a strong tradition of political cartoons, particularly in the more liberal press in Lebanon, comic books have long been perceived in equal parts puerile and loosely immoral. Even children in traditional Arab households are often discouraged from reading comics owing to the @&%! swearing and – frequently in the superhero genre – to pictures of well-endowed, underdressed women.

Of course, this isn't exclusive to the Arab region. The US – the cradle of the genre – almost banned comic books in the 1950s when parents complained that their children were being exposed to antisocial suggestions – aside from the violence found in certain comics, there were rumours that Batman and his sidekick, Robin, were gay.

But attitudes are starting to change gradually in the Middle East. Fuelled partly by the Internet, there is a nascent enthusiasm for a genre that had been largely sidelined. Graphic novels are gradually coming into their own in an era when people are becoming used to taking in words and images together. However, there is an important distinction between comics and graphic novels. While the fate of the comic book depends mainly on the perennially successful superhero genre, graphic novels are in many ways harder to sell in the Arab region given the weightier and often thornier subject matter.

In that category, for instance, the *Pride of Baghdad* is largely unknown in the region despite its setting and relevance: the graphic novel is inspired by actual events about lions that escape a zoo in Iraq during an American bombing raid. And even the highly-acclaimed film version of *Persepolis*, a first-hand account of Iran's troubled history by Marjane Satrapi, is typically shelved with children's animated films if it is stocked at all (inexplicably, Lebanon chose to ban the film).

It's a different story when it comes to comic books aimed at a younger Arab audience. In Cairo, AK Comics publishes *Middle East Heroes*, which follow the adventures of four, larger-than-life Arab characters who try to bring order after 55 years of war between two superpowers, with political undertones running throughout.

But in terms of home-grown talent, it is Teshkeel Media Group, based in Kuwait, which is promoting itself as the first name in comics for the Middle East – this publicity hype was given some credence in January 2008 when *Forbes* ranked Teshkeel's series of comic books in the top 20 trends sweeping the globe. Unlike AK Comics, Teshkeel is focusing specifically on Muslim virtues in order to attract young Muslim readers. Playing it strictly by the book, Teshkeel has included women in headscarves – as a deliberate departure from the Catwoman model, one of the superheroes even wears a burka.

This is more than a mere detail. The religious dimension often constitutes the biggest risk for a product in the Gulf where religion and entertainment rarely mix. This is after all the age when badly-drawn cartoons can spark riots. Moreover, Naif al-Mutawa, the Kuwaiti founder of Teshkeel had to win the blessing of Muslim clerics who manage an investment bank in Bahrain in order to secure some \$25 million in start-up costs.

In a nod to his religious backers, the series is entitled *The 99*, which refers to the number of divine qualities in Islam; and each superhero embodies one of these 99 virtues – everything from wisdom to generosity – in order to conquer evil. The characters include, among others, Jabbar the enforcer, who is a gawky teenager from Saudi Arabia with the power to grow into a hulking figure; and Noora from the United Arab Emirates, who helps people to see the truth about themselves.

Teshkeel hopes to use *The 99* to build a regional network of theme parks (see box) and to improve distribution for some other publishing ventures. The company has so far attracted \$7 million from investors, based on the promise that it will become the largest publisher of comics in the Middle East. Within that context, Teshkeel has signed on with Marvel Comics to translate and distribute

their comics in the Middle East, and will soon begin publishing Arabic versions of Spider-Man and Incredible Hulk.

Certain superheroes, like the spider guy or the boy from Krypton, need little introduction thanks to decades of TV shows, colouring books and even pyjamas and underwear. But if Teshkeel or other home-grown initiatives are to succeed with their own brand of superheroes, they will need to appeal to a global audience. Only then can they hope to clinch film deals, which is where the serious money lies.

For instance, the Batman feature, The Dark Knight – the latest in a string of summer hits released across the Gulf region that are derived from comic characters – has become the fastest movie ever to amass more than \$300 million in US ticket sales in just 10 days, with global ticket sales nearing \$440 million. Not bad for a chap in a cape who turns 70 next year and who swooped into pop-culture consciousness at about the time Hitler's tanks rolled into Poland.
