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The Publishers Association and the British Council jointly initiated the Global Publishing Information (GPI) website in 2000 to provide market intelligence for UK publishers. GPI is an online database of detailed market research reports on the opportunities open to UK publishers in individual countries overseas.

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Foreword

This 2008 market profile is an update of a 2002 GPI report on the Greek book market, prepared by Mike Esplen. Work on the 2008 edition was undertaken between December 2007 and March 2008: it involved desk-based internet research, and contact with several publishers, distributors, booksellers, and other organisations and individuals involved in Greek publishing and bookselling. Contact was via telephone and email, as well as over twenty face-to-face meetings and interviews in Greece in February 2008.

The Publishers Association (PA) and the author are particularly grateful to the National Book Centre of Greece, who administers the Biblionet database, which is the main source of reliable data about the publishing market in Greece. Contact details for the National Book Centre are given in the appendices of this report.

The author is particularly grateful to Socrates Kabouropoulos, senior information officer at the National Book Centre, who provided invaluable support, introducing publishing contacts, helping to set up publishing meetings, and providing information and insight into the workings of the Greek book market.

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Others contributed too and apologies to those who have been omitted from the list.

Mike Esplen
April 2008
The Author

Mike Esplen has over thirty years experience of educational publishing. He started the English Language Teaching (ELT) list at Heinemann and went on to become its managing director. When the Heinemann ELT list was sold to Macmillan in 1998, he became joint managing director of Macmillan Education, one of the leading players in curriculum publishing for international markets.

He was chairman of Heinemann Iberia for many years, as well as a director of several overseas Heinemann and Macmillan companies.

Mike left Macmillan in 2002 to become an independent publishing consultant. For the last five years he has been actively involved in publishing-related consultancy work for multi-national and national publishing companies and organisations. This work has included GPI publishing market surveys on Italy, Mexico, Poland as well as Greece.
1 Executive Summary

Background to Greece and its Publishing Market

Geographically and culturally, Greece is a country on the edge of Europe, but very much within Europe. It is about half the size of the UK — covering an area of 131,000 sq. km. — but with only a fifth of the population. Unusually for a European Union (EU) country, it has no EU neighbours. Because of its location, Greece has become a bridge between the EU and the less developed but populous countries of south-east Europe and the Black Sea rim.

Greece has a quite small, but open economy. In recent years it has enjoyed a period of sustained economic growth, which has brought relatively low inflation, greater investment, better living standards, and currency stability, having replaced the drachma by the euro in early 2002. State control of industry remains high by EU standards, but is reducing. It wasn’t until the 1950s that revenues from manufacturing overtook agriculture, and agriculture now accounts for only 5 per cent of GDP. The services sector, including the buoyant tourist industry, is relatively large and growing, representing 74 per cent of GDP.

The modern book-publishing industry is relatively young. Many of the leading companies were established after the military dictatorship ended in 1974, or have grown unrecognisably since then. Nearly all are family companies — family-owned, family-run, and called by the family name: Patakis, Livonis, Kastaniotis, Savalas, Sakkoulas, and so on. One of the oldest, Hestia, was founded 120 years ago and remained in the same family for generations. Exceptions are Ellinika Grammata and Modern Times, both publishing companies being part of national media groups.

Greeks think nothing of starting their own business and publishing is no exception. There are around 730 active publishers, nearly double the number in 1990, heavily concentrated in and around Athens (82 per cent) and Thessaloniki (11 per cent), and producing over 9,000 new titles a year. There are no dominant groups, but a handful of leading players and some 20-30 publishers represent a substantial share of book production and book sales followed by a very long thin tail.

There are only a few examples of foreign investment in Greek publishing, apart from in ELT, and only limited merger and acquisition activity. In many respects a 1999 profile by the National Book Centre of Greece of Greek publishing still holds true: a traditional, family-based organizational structure, often under-capitalised and under-funded, facing distribution problems and lacking economies of scale. However, in recent years, the situation has been changing; several of the larger companies have been modernizing, investing in systems development, adopting modern marketing techniques, and increasing market share at the expense of the many smaller publishers.

There has been a healthy increase in book sales over the last decade, 60 per cent between 1999 and 2006. The market is estimated to be worth around £450m at retail value, and £250m-£300m at net publisher receipts, but it is difficult to estimate the value of this market accurately. Only about 40 Greek publishers have to publish balance sheets and there are no figures based on publishers' or distributors' turnovers, so official estimates of market size are based on government research into
family budgets and household spending on books and government public expenditure on book purchases.

For UK publishers, Greece continues to be an important market for book sales as well as rights and co-edition sales. Translations account for over 40 per cent of Greek book production and 53 per cent originate from English. The UK is also the largest source of Greek book imports (27 per cent); for UK publishers, Greece was the fifteenth largest export market in 2006, with an export value of £26m, with the largest part being imported ELT, followed by Higher Education, and Trade book sales.

The School Educational Market

The School Educational market (unusually for an EU country) is small, estimated in a good year to be worth around £30-£40m at publisher receipts, and is of little value or interest outside ELT to UK and international educational publishers.

For Greek publishers, it is mainly limited to supplementary texts, because with few exceptions the state publishes all school classroom textbooks. Over the years, local publishers have capitalised on the importance attached to education (and in particular to passing the school-leaving exam) by producing auxiliary school books and ‘study companions’ in all subjects, which closely mirror and support the state-published primary and secondary school subject textbooks, and this has become a lucrative supplementary market, particularly in years of curriculum change.

In addition, some Greek publishers compete to win government tenders to supply educational software and to author and produce layouts for the government-published subject textbooks, although textbook tenders are not regarded as profitable business.

The ELT market

The ELT market is large, estimated at £35-40m at publisher receipts, and represents 15-20 per cent of the total book market – a larger proportion than in other European countries. It is an important market for British and international ELT publishers (including Burlington, the market leader), all of whom have local companies or offices and compete with Greek-owned companies, some of whom (like Express) should be seen as international and not local players.

Although there is a Ministry market for ELT textbooks at secondary level, about 80 per cent of ELT sales are to the private sector where the student enrolments have been reducing but the market in for children’s and teenage courses and exam-related publishing in particular remains large. However the overall ELT market is at best flat, very congested with ten sizeable players, and saturated in terms of competing product.

The Trade and Children’s Book Market

The trade market is surprisingly active given the population is small (10.7m) and Greeks lack a tradition of reading for pleasure compared to many other European nationalities. Sales of Greek trade fiction and non-fiction continue to grow and the children’s book market is thriving, although typical print quantities remain small: 2,000-3,000 for a new children’s book, and 2,000 or less for an adult literary title. A successful trade book sells over 5,000 copies a year, and a best seller sells more
than 10,000 copies a year and can sell upwards of 30,000 – 40,000 copies, with a
top best-seller approaching 90,000 copies.

Altogether this trade market is estimated to be worth around £120m at net publisher
receipts. There is a reasonable and well-published market for literary fiction, as well
as mass-market paperbacks – heavily reliant on foreign translations – and a growing
interest in all kinds of non-fiction.

The market for imported English trade titles is estimated to be worth around £5m,
much of it mass-market, boosted by the summer reading of 14 million tourists each
year – a quarter of whom are British – and this is well served through established
trade customers. For UK publishers, there is also a strong market for rights sales and
co-edition deals on all sorts of trade fiction, non-fiction, general reference, and
children’s books.

The Higher Education & Professional Market (HEP)

The HEP market is estimated to be worth some £60m at publisher receipts. The
market is restricted by the price constraints imposed by the government, which pays
for books for the state universities, which is a market for Greek publishers and Greek
texts. The supply system tends to be tender-based and funding (and payment) can
be erratic. University texts are also subject to heavy photocopying.

The market is currently in a state of flux, the key issue being resistance by
universities to government attempts to introduce assessment of lecturers along
Bologna agreement standards for EU tertiary education. In certain areas – law,
medicine, business – sales of Greek books to the professional market are more
interesting than sales to universities.

For UK publishers, the growth in places at state universities and technical colleges in
the last five years has meant a reduction in enrolments at private colleges that use
English texts and represent the main market for imported titles. For imported college
and academic books in English (estimated to be worth around £3m annually),
general business, marketing, accounting and finance titles sell best. The major UK
and international academic and professional publishers are represented locally and
sell through established channels and trade customers, and the general consensus is
that rights sales are steady and growing, particularly for economics and business
titles, and also for medicine.
2 General Background: Greece and its Book Market

2.1 The Territory

Greece is the smallest of the mainland European Union countries bordering the Mediterranean. It has benefited from membership of the EU, which it joined in 1981, and enjoys much greater prosperity than its northern neighbours - Albania, Bulgaria, and the Former Republic of Macedonia - although it still has relatively low standards of living compared to EU-member states in Western Europe.

Over the last few years Greece has enjoyed a sustained period of economic growth and political stability. As home country to the Olympic movement, Greece was proud to host the 2004 Games, which resulted in Athens having a smart new airport, an improved subway system, and a boost to the economy in terms of investment.

Despite an active publishing industry, which has seen a steady increase in book production and sales, and a strong literary tradition, the Greeks still prefer outdoor leisure activities to reading, and this is reflected in comparative country surveys within Europe on reading habits.

2.1.1 Geography

As 14 million annual foreign holidaymakers will testify, the Greek mainland and its islands form a beautiful, mountainous, coastal country, located on the Mediterranean at the southernmost tip of Europe, occupying the southernmost part of the Balkan Peninsula. Greece is about half the size of the UK – covering an area of 131,957 sq. km. – but with only a fifth of its population. Unusually for an EU country, it has no EU neighbours, sharing land borders with Albania, Macedonia and Bulgaria to the north, and Turkey to the north-east. Because of its location, Greece has become a bridge between the EU and the less developed but populous countries of south-east Europe and the Black Sea rim.

2.1.2 Population

The population of Greece is estimated to be 10.7m. A declining birth-rate since the Second World War, from 20.3 births/1,000 inhabitants in 1951 to 9.6/1,000 in 2007, has resulted in a very low rate of population increase.

In the 1950s and 1960s, more than 10 per cent of the population emigrated, many of them to live as guest workers in Western Europe, West Germany in particular. A significant number subsequently returned and the current rate of immigration is very low. In the 1990s, the population was inflated by an influx of immigrants from Albania, Romania and Former Soviet Union (FSU) countries, of which there are estimated to be c750,000.

Since the 1950s, there has also been significant migration from rural areas and villages to towns and cities. In 2005, 61 per cent of the population lived in urban areas. The largest concentration is in the Athens metropolitan area in the south, with more than one third of the population, and Thessaloniki, a major port city, in the north. Other major cities include Piraeus, a major port and industrial centre located near Athens; Patra, the largest Peleponnese port; Heraklion, the capital of Crete; and Volos and Larissa, commercial cities in Thessaly.
Living standards may still be lower than is many other EU countries, but life expectancy is higher, and has been growing steadily from 65 in 1950 to 77 (for males) and 82 (for females) in 2007.

2.1.3 Culture, Education, and Language

Although in many ways the source of Western culture, in recent times Greece emerged from Turkish occupation only in 1821. Over the years, immigration has created a mix of cultural ties and influences, so that Greece today is a country on the edge of Europe, but very much within Europe.

It is in fact the most ethnically homogeneous country in the Balkans, with ethnic Greeks making up about 98 per cent of the population (discounting illegal immigrants). The first language of the overwhelming majority of this population is Modern Greek. In terms of religion about 97 per cent is at least nominally Greek Orthodox.

In spite of, or perhaps because of, the deficiencies of its educational system, the Greeks attach great importance to education which is perceived as the passport to upward social mobility and a good job. Literacy levels are high – 96 per cent of adults and 99 per cent of younger people are literate. A high 8.5 per cent of government spending goes into state education which is free and compulsory for all children between the ages of 6 and 14. Greeks also spend a lot of money on private education, which is the main sector for international ELT and Higher Education publishers in Greece.

Since the end of military dictatorship in 1973, there have been strong cultural developments and nowhere more so than in book publishing, with the emergence of the main Greek publishing houses that exist today.

2.2 Politics and the Economy


2.2.1 Political Structure

Greece formally became an independent state in 1830. Greece voted for a republic following the end of military rule in 1974. This brought the end of the monarchy and a new republican constitution was established in 1975 with strengthened powers for the executive over the legislature.

Table 2.1 summarises the main elements of the political structure of Greece.
Table 2.1: Political Structure of Greece

<table>
<thead>
<tr>
<th>Official name</th>
<th>Hellenic Republic.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal system</td>
<td>Based on the 1975 constitution.</td>
</tr>
<tr>
<td>National Legislature</td>
<td>Parliament of 300 members, elected by a form of proportional representation for a four-year term, though early dissolution possible.</td>
</tr>
<tr>
<td>Electoral system</td>
<td>Universal suffrage over 18 years of age.</td>
</tr>
<tr>
<td>National elections</td>
<td>September 2001 (legislative); February 2005 (presidential). Next legislative election due by September 2011 and next presidential election by February 2009.</td>
</tr>
<tr>
<td>Head of State</td>
<td>President, without executive powers, elected by parliament for five-year term (and a maximum of two five year terms).</td>
</tr>
<tr>
<td>National Government</td>
<td>Council of Ministers responsible to the Legislature, headed by a prime minister appointed by the president, who is obliged to select the candidate proposed by the party with largest number of seats in parliament. A New Democracy government was elected in September 2007, with Costas Karamanlis as prime minister.</td>
</tr>
<tr>
<td>Main political parties</td>
<td>New Democracy (ND); Panhellenic Socialist Movement (PASOK); Communist party of Greece (KKE); Coalition of Radical Left (SyRiZa); Popular Orthodox Rally.</td>
</tr>
</tbody>
</table>

Source: Based on Economist Intelligence Unit, Country Brief on Greece, February 2008.

2.2.2 Main Political Parties

New Democracy (ND) was started by Constantine Karamanlis, the first prime minister after the military rule from 1968-1974, as a right-of-centre grouping. Under his nephew, Costas Karamanlis, New Democracy became a more coherent right-of-centre party, elected to government in 2004 and subsequently re-elected with a smaller majority in September 2007.

Pasok, which enjoyed many years as the ruling party, was created out of an underground movement that opposed the 1967–74 military dictatorship. During the 1980s and 1990s, Pasok grew from a radical, class-based socialist movement into a mainstream European social democratic party. Under its leader, George Papandreou, it lost the September 2007 election but remains the main alternative to New Democracy.

The Communist Party of Greece (KKE), led by Aleka Papariga, has endured some internal struggles over the years. It maintains significant influence in both the trade unions and in rural areas. Its membership is declining and ageing, but the KKE still managed to increase its popular vote to 8 per cent in the 2007 election (from 6 per cent in 2004), making it the third largest party.
2.2.3 Political Outlook

According to the Economist’s political forecast (January 2008), the New Democracy (ND) government which began 2008 with a majority of four seats in parliament is likely to stay in office into 2009, although it may well be weakened by internal dissent. The government will remain pro-EU and it will support the accession of countries in the west Balkans and conditionally support Turkey’s bid to join the EU.

2.2.4 Key Economic Data

In recent years Greece has enjoyed a sustained period of economic growth, which has brought relatively low inflation, greater investment, improved living standards, and currency stability.

Table 2.2 shows the main economic data for the period 2002–2006.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>GDP (US$ bn) [b]</td>
<td>171.0 (£113.9bn)</td>
<td>223.3 (£136.7bn)</td>
<td>264.5 (£144.4bn)</td>
<td>284.0 (£156.3bn)</td>
<td>308.7 (£167.4bn)</td>
</tr>
<tr>
<td>Real GDP growth (%) [b]</td>
<td>3.9%</td>
<td>4.9%</td>
<td>4.7%</td>
<td>3.7%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Consumer price inflation (av. %)</td>
<td>3.6%</td>
<td>3.6%</td>
<td>2.9%</td>
<td>3.5%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Exports of goods fob (US$ bn)</td>
<td>9.9 (£6.6bn)</td>
<td>12.6 (£7.7bn)</td>
<td>15.7 (£8.6bn)</td>
<td>17.7 (£9.7bn)</td>
<td>20.3 (£11bn)</td>
</tr>
<tr>
<td>Imports of goods (US$ bn)</td>
<td>-31.3 (-£20.8bn)</td>
<td>-38.2 (-£23.4bn)</td>
<td>-47.4 (-£25.9bn)</td>
<td>-52.0 (-£28.6bn)</td>
<td>-64.6 (-£35.1bn)</td>
</tr>
<tr>
<td>Current account balance (US$ bn)</td>
<td>-9.7 (-£6.5bn)</td>
<td>-12.5 (-£7.6bn)</td>
<td>-13.0 (-£7.1bn)</td>
<td>-17.9 (-£9.8bn)</td>
<td>-29.7 (-£16.1bn)</td>
</tr>
<tr>
<td>Foreign exchange reserves excl. gold (US$ bn)</td>
<td>8.1 (£5.4bn)</td>
<td>4.4 (£2.7bn)</td>
<td>1.2 (£0.7bn)</td>
<td>0.5 (£0.27bn)</td>
<td>0.6 (£0.34bn)</td>
</tr>
<tr>
<td>Total external debt (US$ bn)</td>
<td>63.2[</td>
<td>65.8[</td>
<td>69.4[</td>
<td>75.2[</td>
<td>81.0[</td>
</tr>
<tr>
<td>Debt-service ratio, paid (%)</td>
<td>22.9[</td>
<td>19.0[</td>
<td>14.9[</td>
<td>15.3[</td>
<td>15.2[</td>
</tr>
</tbody>
</table>


Source: Economist Intelligence Unit, Country Data on Greece (February, 2008).

2.2.5 Economic Sectors

Until the 1950s, agriculture dominated the Greek economy and the bulk of Greece’s income came from the export of certain agricultural products, its shipping industry, and money from Greeks living abroad. It wasn’t until 1970 that revenues from manufacturing overtook agriculture. The other key economic development of these post-war years was the development of tourism.
In 2005, Services, including tourism, contributed 74 per cent of the GDP, and industry – principally manufacturing and construction – accounted for 21 per cent of GDP. Agriculture (including forestry and fishing) contributed just 5 per cent of the GDP.

Industry is mostly in and around Athens and Thessaloniki. Attempts to decentralise it have been frustrated by poor communications, particularly in the north and on the islands, but with improved transport links the situation is changing.

2.2.6 State Control and Market Forces

While levels of privatization have increased since the period leading up to Greece joining the European Union, the Government continues to be a major employer, both directly through a large public sector – including state-owned banks, public utilities, schools and transport – and indirectly through businesses controlled by state-owned banks. In publishing, state control is a key limiting factor to free market opportunities in the educational sector.

Outside state control, much of the economic activity in Greece is done by small, family-owned businesses and the self-employed, and this is as true for publishing as other businesses. Industry is mostly in and around Athens and Thessaloniki. Attempts to decentralise it have been frustrated by poor communications, particularly in the north and on the islands, although transport links are improving.

2.2.7 Foreign Trade

Greece has a trade deficit, spending more on imports than it sells in exports. This deficit is mainly offset by income from tourism, shipping, EU payments, and (to a declining degree) by repatriation of money from Greeks living abroad. Since Greece joined the EU, its proportion of trade with European countries has risen.

Its major export partners are Germany, Italy, the UK, and the US, and its main exports include fruit and vegetables, olive oil, textiles and clothing.

The countries supplying the most imports are Germany, Italy, France, Netherlands, and the UK. The main imports include cars and other vehicles, machinery, food, chemical products, petroleum and petroleum-derived products.

2.2.8 Currency and Banking

Greece replaced its national currency, the drachma, with the euro in January 2001. and since then has followed economic policies established by the European Central bank (ECB) which includes setting interest rates and regulating money supply. Under the influence of EU membership, the Greek banking system has been liberalized with the relaxation or elimination of several government restrictions, and several foreign banks have opened branches in Greece.

2.2.9 Economic Outlook

According to the Economist Intelligence Unit country briefing (January 2008), the Greek government is likely to miss its targets for reducing the government deficit, although this is expected to stay within 3 per cent of GDP. Consumer demand and house building are likely to slow as debt-service costs rise and there is a likely slowdown in credit growth. The Economist has increased its annual average inflation
forecast for Greece to 3.3 per cent for 2008 and 2.8 per cent for 2009, but these forecasts need to be subject to review.

2.3 Greek Book Market Overview

2.3.1 Publishers

The modern book publishing industry in Greece is still relatively young, having largely come into being since 1974, when the military dictatorship ended. Most of the leading publishing companies came into the business in the 1970s, and have grown unrecognisably since then.

Nearly all are family companies – family-owned, family-run, and normally called by the family name: Patakis, Livanis, Kastaniotis, Savalas, Sakkoulas, and so on. One of the oldest and most well-established is Hestia, founded 120 years ago, which has remained in the same family for generations. Exceptions are Ellinika Grammata and Modern Times which are both part of large media groups operating at a national level.

Greeks think nothing of starting their own business to serve a market, and publishing is no exception. In 2006 there were 730 active publishers registered on the database of the National Book Centre of Greece (Table 2.3), nearly double the number in 1990, so this is a very fragmented industry. Geographically, publishing is highly concentrated, with 82 per cent of publishing houses in Athens, 11 per cent in Thessaloniki, and 7 per cent in the rest of Greece.

Table 2.3: Number of Greek Publishers

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>374</td>
<td>619</td>
<td>698</td>
<td>729</td>
<td>730</td>
</tr>
</tbody>
</table>

Source: Biblionet / National Book Centre, 2007

There are also 400 public sector legal entities and non-profit organizations engaged in publishing, over 100 of them active on a yearly basis.

Table 2.4 groups the publishers into three categories in terms of title production. There are no dominant publishing groups, but a handful of leading players and some 20–30 publishers represent a substantial share of book production and book sales, followed by a very long, thin tail.

Table 2.4: Size of Greek Publishers

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Large (80+ titles p.a.)</td>
<td>14</td>
<td>16</td>
<td>20</td>
<td>18</td>
<td>20</td>
<td>19</td>
<td>39%</td>
</tr>
<tr>
<td>Medium (10-80 titles p.a.)</td>
<td>148</td>
<td>150</td>
<td>138</td>
<td>148</td>
<td>158</td>
<td>155</td>
<td>43%</td>
</tr>
<tr>
<td>Small (1-10 titles p.a.)</td>
<td>476</td>
<td>532</td>
<td>460</td>
<td>563</td>
<td>572</td>
<td>556</td>
<td>17%</td>
</tr>
<tr>
<td>Total</td>
<td>638</td>
<td>698</td>
<td>618</td>
<td>729</td>
<td>750</td>
<td>730</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Biblionet / National Book Centre, 2007
The 10 largest publishers in 2006 in terms of book production are shown in Table 2.15. These are mainly well known companies (Savalas, Patakis, Livani, Kastaniotis, Ellinika Grammata, Modern Times, Metaichmio) which started out as adult trade, children’s, or school book publishers and then successfully expanded and diversified into other areas of book publishing. The order may be somewhat different if categorized by sales value rather than titles published, but this list probably does also represent almost all the main players in terms of sales with the important exception of Express Publications, the leading Greek ELT publisher.

So far, there has only been limited merger or acquisition activity in Greek book publishing apart from the examples of Ellinika Grammata and Modern Times referred to above. And outside ELT there is so far little evidence of significant foreign investment in publishing for Greece.

In many respects a 1999 profile by the National Book Centre of the Greek publishing industry still holds true: a traditional, family-based organisational structure, often under-capitalised and under-funded, facing distribution problems and lacking economies of scale to easily make the transition to new technologies.

However, the situation is changing. In recent years, a number of larger companies have been modernizing, investing in systems development, adopting modern marketing techniques, and increasing market share at the expense of the many small publishers. According to observers, it seems likely that concentration will continue quietly in the Greek way, and that in the next few years several smaller publishers will be out of the market.

2.3.2 Reading Habits and Interest in Books

Interest in books is growing steadily, as are book sales, but studies show that while there are few literacy problems, Greece still lags behind many of its EU partners in reading books.

According to national research on reading behaviour by the National Book Centre, 43.8 per cent of Greeks are “non-readers”, over two-thirds of whom are aged 65 or over. Of the rest, 19 per cent read only “practical” books (leisure, hobby and DIY titles); 1 per cent read only “professional” (job related) books; 2.4 per cent read only practical and professional books; 25.4 per cent read “few” books annually (1-9 titles); and only 8.6 per cent read more than 9 books a year.

This picture is reinforced by EU cultural surveys of member states which provide an interesting snapshot of the diversity of cultural habits of Europeans aged 15 years and over in relation to reading, music, television, internet use, art and other leisure activities.

Table 2.5 shows that northern Europeans read much more than southern Europeans, where Greece is well above Portugal, but just behind Spain. Greeks put this down to levels of education, lack of any tradition of book-buying at school (in contrast to Spain), and a Greek climate which favours outdoor activities and an old “oral” tradition.

<table>
<thead>
<tr>
<th>Country</th>
<th>Sweden</th>
<th>Finland</th>
<th>UK</th>
<th>Spain</th>
<th>Greece</th>
<th>Portugal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Readers</td>
<td>80%</td>
<td>75%</td>
<td>74%</td>
<td>47%</td>
<td>45%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: EU Eurobarometer Study on Cultural Activities, 2002.
2.3.3 Trade in Books: Book Imports & Exports

The figures from the Department for Business, Enterprise and Regulatory Reform (BERR), formerly the Department of Trade and Industry (DTI), show that Greece continues to be in the top 20 countries for UK book exports. In 2006 Greece was the fifteenth largest export market for UK publishers, with an export value of £26m. Italy (£42m in 2006) is around one and half times this figure and Spain (£48m in 2006) is nearly twice the size, but pro rata to its size of population, Greece is easily the largest southern Europe export market for British publishers.

Table 2.6 shows the value of UK book exports to Greece from 2003 to 2006.

Table 2.6: UK Book Exports to Greece, 2003–2006 (£'m)

<table>
<thead>
<tr>
<th>Year</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>27.6</td>
<td>23.1</td>
<td>26.3</td>
<td>26.0</td>
</tr>
</tbody>
</table>

*Source: BERR (formerly the Department of Trade & Industry), 2007*

Figures for book imports to Greece show a steady increase in the last few years. Table 2.7 shows the ranking order of countries. About 50 per cent of the books are in English and come from the UK and Israel (the latter reflecting large ELT imports from an Israeli company – Burlington - that is the ELT market leader in Greece), as well as from USA and China (7.6 per cent in 2005). The UK remains the top supplier, a substantial proportion being ELT and other mainly educational books, although as the Table shows the UK share of Greek book imports has reduced over time.

Table 2.7: Greek Book Imports by Country of Origin, 2000 & 2005

<table>
<thead>
<tr>
<th>Country</th>
<th>2000</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>41.2 %</td>
<td>26.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>8.3%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>7.6%</td>
<td>7.9%</td>
</tr>
<tr>
<td>France</td>
<td>6.3%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Italy</td>
<td>3.4%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Spain</td>
<td>1.9%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>2.3%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Israel</td>
<td>16.0%</td>
<td>10.9%</td>
</tr>
<tr>
<td>USA</td>
<td>3.6%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Cyprus</td>
<td>2.2%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Other</td>
<td>7.3%</td>
<td>12.8%</td>
</tr>
<tr>
<td>Total %</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Total Value (€)</td>
<td>54.3m (£33.1m)</td>
<td>69.8m (£47.7m)</td>
</tr>
</tbody>
</table>

*Source: National Statistical Service of Greece. Data processed by the National Book Centre of Greece. Total values are at importers’ prices.*

Greek book exports (Table 2.8) are significantly lower than its book imports, but the figure is growing. The main export destination for Greek-language publications is Cyprus – the only other Greek-speaking country - and other countries overseas with a sizeable Greek population, but these do not represent a large export market because most Cypriots are bilingual and a large part of the market buys English language books, while levels of Greeks living outside Greece tend to assimilate the language of their country of residence quite rapidly.
In fact nowadays a larger proportion of Greek book export sales derive not from Greeks living outside Greece but from international sales of ELT publications by Greek ELT publishers to teach English to people in the non-English speaking world in countries such as Poland, Russia, Turkey, Hungary, Romania and Mexico, and these ELT exports have seen a lot of growth between 2000 and 2005.

Table 2.8: Greek Book Exports, 2000 & 2005

<table>
<thead>
<tr>
<th>Country</th>
<th>2000 value</th>
<th>2000 %</th>
<th>2005 value</th>
<th>2005 %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€ '000</td>
<td>£'000</td>
<td>€ '000</td>
<td>£'000</td>
</tr>
<tr>
<td>Cyprus</td>
<td>8,660</td>
<td>5,275</td>
<td>12,296</td>
<td>8,406</td>
</tr>
<tr>
<td>Poland</td>
<td>2,273</td>
<td>1,385</td>
<td>4,213</td>
<td>2,880</td>
</tr>
<tr>
<td>UK</td>
<td>1,474</td>
<td>898</td>
<td>1,101</td>
<td>753</td>
</tr>
<tr>
<td>Rest of EU</td>
<td>2,511</td>
<td>1,530</td>
<td>12,513</td>
<td>8,555</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,574</td>
<td>959</td>
<td>11,311</td>
<td>7,733</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>16,492</strong></td>
<td><strong>10,047</strong></td>
<td><strong>41,434</strong></td>
<td><strong>28,327</strong></td>
</tr>
</tbody>
</table>

Source: National Statistical Service of Greece. Data processed by the National Book Centre of Greece.

2.3.4 Book Sales and Value of Book Market

The Greek book market operates under a number of constraints. The limited proportion of Greeks who buy and read books (referred to above) is one. Furthermore, market segments that represent sizeable book sales in other countries do not present similar opportunities in Greece. Most municipal libraries, for example, are rudimentary and poorly funded and present very limited opportunities for Greek publishers. Similarly, the primary and secondary school textbook market is published for by the state and does not therefore present opportunities to educational publishers in the way it does in many other parts of Europe.

Despite these constraints, there is no doubt that there has been a healthy increase in book sales in Greece over the last decade, particularly in the areas of children’s books, adult fiction and non-fiction, and professional publications. However, it is difficult to estimate the value of this publishing market accurately.

Neither publishers nor booksellers can provide figures on the size and value of the book market in Greece. Therefore, this study relies upon figures based on Government research into family budgets and Greek household spending on books, published by the National Statistical Service of Greece and processed by the Book Monitoring Unit of the National Book Centre (Table 2.9).

According to these statistics, consumer spending on books at current values increased from €400m (£243m) in 1999 to €570m (£387m) in 2004, and to €633m (£431m) in 2006. This means that spending by households on books increased over the period by nearly 60 per cent, and the retail value of the book market in 2005 and 2006 showed annual growth of over 5 per cent.

In terms of net publisher receipts this market is thought to represent £250m-£300m per annum.
Table 2.9: Consumer Spending on Books, 1999–2006 (€m, current values)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>€m</td>
<td>399.4</td>
<td>569.7</td>
<td>601.4</td>
<td>633.1</td>
<td>42.6%</td>
<td>5.6%</td>
<td>5.3%</td>
</tr>
<tr>
<td>£m</td>
<td>243.3</td>
<td>386.7</td>
<td>411</td>
<td>431.6</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: National Statistical Service of Greece, Family Budget Surveys. Data processed by the Book Monitoring Unit, National Book Centre of Greece.

To these estimates you need to add public expenditure on book purchases by the Government, which is shown in Table 2.10 for 2004 and 2006.

Table 2.10: Public Expenditure on Books in Greece, 2004 and 2006

<table>
<thead>
<tr>
<th></th>
<th>Books for Public libraries</th>
<th>University textbooks</th>
<th>Other purchases (book tokens)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€m</td>
<td>£m</td>
<td>€m</td>
<td>£m</td>
</tr>
<tr>
<td>2004</td>
<td>12.2</td>
<td>8.3</td>
<td>41.9</td>
<td>28.4</td>
</tr>
<tr>
<td>2006</td>
<td>13.1</td>
<td>8.9</td>
<td>42.7</td>
<td>29.1</td>
</tr>
</tbody>
</table>

Source: National Book Centre of Greece

In 2006, Government book purchases amounted to €58.4m (£39.8m), up from €50.3m (£30.5m) back in 1999. This government spending was divided between public libraries, “outsourcing” by government of university textbook provision to commercial publishers, and distribution of book-tokens to certain groups of employees.

If you then combine the figures for consumer spending on books with the figures for government spending, you arrive at a total estimated value of the book market in Greece, which grew from €450m in 1999 to €691m in 2006, as shown in Table 2.11.

Table 2.11: Total Expenditure on Books in Greece, 1999-2006

<table>
<thead>
<tr>
<th>Total Expenditure on Books</th>
<th>1999</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€m</td>
<td>£m</td>
</tr>
<tr>
<td>Consumer spending on books</td>
<td>399.4</td>
<td>243.3</td>
</tr>
<tr>
<td>Government expenditure on books</td>
<td>50.3</td>
<td>30.5</td>
</tr>
<tr>
<td>Total expenditure on books</td>
<td>449.7</td>
<td>293.6</td>
</tr>
<tr>
<td></td>
<td>633.1</td>
<td>431.6</td>
</tr>
<tr>
<td></td>
<td>58.4</td>
<td>39.8</td>
</tr>
</tbody>
</table>


How reliable are these estimates for the book market, based as they are on a survey of family-budget consumer spending and not on publishers’ sales? Only the larger book companies in Greece have to show their sales in their published accounts and few of them seem to have a clear idea of market size and share. Thirty-nine book publishers published balance sheets in 2006 and these show a total turnover of €296m (£202m), although this figure does include some substantial non-book sales in the case of the two companies owned by media groups (Modern Times and Ellinika Grammata).
It is unlikely the market value will be greater than the estimated figures given in the above tables, and some industry sources believe that basing market size on the Government’s surveys of household expenditure may inflate the value of the actual market to some extent.

2.3.5 Prices of Books

The average retail price of Greek paperbacks has changed (Table 2.12). The figures show an increase since Greece joined the euro zone in January 2002. However this increase was no greater than for most other consumer products during this period and prices remain relatively competitive.

Table 2.12: Books Prices, 2001-2006

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>€13.70</td>
<td>€15.60</td>
<td>€14.70</td>
<td>€16.20</td>
<td>€16.00</td>
<td>€16.15</td>
</tr>
<tr>
<td></td>
<td>(£8.51)</td>
<td>(£9.80)</td>
<td>(£10.17)</td>
<td>(£10.99)</td>
<td>(£10.93)</td>
<td>(£11.00)</td>
</tr>
</tbody>
</table>

Source: Biblionet/National Book Centre

2.3.6 Retail Price Maintenance

By a law of 1998, publishers of new titles and new editions of books published in Greece and in the Greek language must set a retail price on which retailers may offer a limited discount (up to 10 per cent) or an increase (up to 5 per cent) for a period of two years from date of publication. This law does not apply to imported books or books sold to the public sector.

The law has been effective in limiting increases in book prices, and in helping smaller bookstores survive the competition from larger chains. Professional bodies have asked for a reform which would apply retail price maintenance more widely (for example, to include books purchased by libraries).

2.3.7 Import Duties/VAT on Books

There are no import duties on book imports from the UK or other EU countries. However, VAT is payable at 4.5 per cent on books, and at 19 per cent on cassettes, CD-ROMs, and other non-book items. If a publisher invoices a book/CD-ROM package on one line as ‘book including CD-ROM’, the VAT should be 4.5 per cent, but if two codes are shown on the invoice, they will be treated as separate items for purposes of VAT, and charged at 4.5 per cent and 19 per cent respectively. Distributors normally sell the item as packaged by the publisher. So, wherever possible, it makes sense to treat the book and CD-ROM as one item.

2.3.8 Book Production Data

Following the boom of the 1990s, when the number of titles published more than doubled, Greek book production has now stabilized, and the market now produces between 8,500 and 9,500 new titles a year, excluding new editions and reprints (Table 2.13).

Table 2.13: Books Produced, 2001-2006

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7,450</td>
<td>7,837</td>
<td>7,878</td>
<td>8,427</td>
<td>8,442</td>
<td>9,209</td>
</tr>
</tbody>
</table>

Source: Biblionet /National Book Centre, 2007
Table 2.14 gives the full breakdown by subject category of new titles published in 2002–2006, including new editions. While the humanities and social sciences category account for the most new titles, adult literature (fiction) has lost a little ground to some other categories such as children’s books and practical non-fiction titles (self-help, cookery, travel guides) and university textbooks and professional titles.

Table 2.14: Book-Title Production by Subject Category, 2002–2006

<table>
<thead>
<tr>
<th>Subject Category</th>
<th>2002</th>
<th>%</th>
<th>2004</th>
<th>%</th>
<th>2006</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>School &amp; ELT</td>
<td>897</td>
<td>11.4%</td>
<td>596</td>
<td>7.1%</td>
<td>791</td>
<td>8.6%</td>
</tr>
<tr>
<td>Humanities &amp; social sciences</td>
<td>2,038</td>
<td>26%</td>
<td>2,194</td>
<td>26%</td>
<td>2,288</td>
<td>24.8%</td>
</tr>
<tr>
<td>Pure &amp; applied sciences</td>
<td>584</td>
<td>7.5%</td>
<td>622</td>
<td>7.4%</td>
<td>584</td>
<td>6.3%</td>
</tr>
<tr>
<td>Literature</td>
<td>1,715</td>
<td>21.9%</td>
<td>1,756</td>
<td>20.8%</td>
<td>1,907</td>
<td>20.7%</td>
</tr>
<tr>
<td>Children’s</td>
<td>1,478</td>
<td>18.9%</td>
<td>1,729</td>
<td>20.5%</td>
<td>2,064</td>
<td>22.4%</td>
</tr>
<tr>
<td>General, practical &amp; self-help</td>
<td>715</td>
<td>9.1%</td>
<td>985</td>
<td>11.7%</td>
<td>932</td>
<td>10.1%</td>
</tr>
<tr>
<td>Art</td>
<td>410</td>
<td>5.2%</td>
<td>544</td>
<td>6.5%</td>
<td>636</td>
<td>6.9%</td>
</tr>
<tr>
<td>Total</td>
<td>7,837</td>
<td>100%</td>
<td>8,427</td>
<td>100%</td>
<td>9,209</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: Biblionet / National Book Centre

Despite some significant print runs of bestselling titles in recent years, it needs to be remembered that the print runs of most of these productions is very low (in most cases 1,000 copies or less), with initial distribution to bookshops of about 300 copies per title.

2.3.9 Book Production – Top Ten Publishers

Table 2.15 lists the publishers producing the most titles (2006), and they will feature in later sections of this report. In terms of new-title production, the top five publishing companies stand out.

Table 2.15: Top Ten Publishers (new title production), 2006

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Titles</th>
<th>Areas of publishing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Savalas</td>
<td>421</td>
<td>Educational; recently expanded list includes children’s books, foreign literature, social sciences</td>
</tr>
<tr>
<td>Ellinika Grammata</td>
<td>419</td>
<td>Greek and foreign literature, children’s books, humanities, social sciences</td>
</tr>
<tr>
<td>Patakis</td>
<td>370</td>
<td>Started with Auxiliary school books and study companions; list now covers Greek &amp; foreign literature, children’s books, personal care, health, sports, humanities, social sciences</td>
</tr>
<tr>
<td>Modern Times</td>
<td>272</td>
<td>Children’s books, popular fiction, personal care, health, comics, audio-visual books</td>
</tr>
<tr>
<td>Kedros</td>
<td>265</td>
<td>Greek &amp; foreign literature, humanities, social sciences, art, children’s books</td>
</tr>
<tr>
<td>Metaichmi o</td>
<td>183</td>
<td>Educational, and – more recently – Greek and foreign literature, humanities, social sciences, biography</td>
</tr>
<tr>
<td>Livanis</td>
<td>177</td>
<td>Greek and foreign fiction, humanities, social sciences, children’s books, art, CD-ROMs</td>
</tr>
<tr>
<td>A.N Sakkoulas</td>
<td>171</td>
<td>Law</td>
</tr>
<tr>
<td>Kastaniotis</td>
<td>158</td>
<td>Literature, humanities, social sciences, fine arts, illustrated books, children’s books, CD-ROMs</td>
</tr>
<tr>
<td>Agyra</td>
<td>155</td>
<td>Children’s books, literature, biography, large format illustrated, music, cookery</td>
</tr>
</tbody>
</table>

Out of more than 700 publishers in Greece, the top 10 companies accounted for 25 per cent of new titles produced in 2006. And 25 per cent of the publishing houses publish 83 per cent of the total number of titles produced.

### 2.3.10 Translations

Translations are very important in the Greek book market and foreign writers in translation represent over 40 per cent of book production in Greece (Table 2.16). This has increased every year between 2002 and 2006 as demand for foreign writers in translation has continued to grow.

**Table 2.16: Number of translated titles, 2001-2006**

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>2,877</td>
<td>2,880</td>
<td>3,151</td>
<td>3,447</td>
<td>3,565</td>
<td>4,049</td>
</tr>
<tr>
<td>%</td>
<td>38.6%</td>
<td>36.7%</td>
<td>40.0%</td>
<td>40.9%</td>
<td>42.2%</td>
<td>44.0%</td>
</tr>
</tbody>
</table>

*Source: Biblionet /National Book Centre, 2007*

Five languages account for nearly 80 per cent of translations and of these about 53 per cent are translations from English (Table 2.17).

**Table 2.17: Translations & Language of Origin, 2006**

<table>
<thead>
<tr>
<th>Language</th>
<th>Titles translated</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>2,156</td>
<td>53.2%</td>
</tr>
<tr>
<td>French</td>
<td>497</td>
<td>12.3%</td>
</tr>
<tr>
<td>German</td>
<td>214</td>
<td>5.3%</td>
</tr>
<tr>
<td>Italian</td>
<td>202</td>
<td>5.0%</td>
</tr>
<tr>
<td>Spanish</td>
<td>176</td>
<td>4.3%</td>
</tr>
<tr>
<td>Other languages</td>
<td>804</td>
<td>19.9%</td>
</tr>
<tr>
<td>Total</td>
<td>4,049</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Source: Biblionet /National Book Centre, 2007*

### 2.3.11 Sales Channels

Bookshops remain the main source for book-buyers, representing an estimated 55 per cent of book sales in Greece, and these are described in 2.3.12. Other channels for book sales are covered in 2.3.13. These include direct sales by the publisher, as well as book sales through supermarkets and shopping malls, and via the kiosks.

### 2.3.12 Bookshops and Distributors

Current sources typically estimate that there are more than 2,000 bookshops in Greece of varying shapes and sizes, and more than 3,500 point-of-sale outlets for books, including press agencies and supermarkets. In fact, recent research by the National Book Centre suggests that many (mainly smaller) outlets closed down in the period between 1998 and 2007, and the total number of bookshops has reduced to about 1,600. Of these bookshops, 90 per cent are small, mixed stationery and books stores. Only 280 sell books more or less exclusively, and 120 of these are of considerable size and mostly located in Athens (about 50 per cent) and the larger cities (Thessaloniki, Patras, Larissa and Iraklio).

Smaller bookshops, while vulnerable to the larger chains, are helped by the laws on retail price maintenance, while larger bookstores can improve profits by reducing
wholesale prices, since they cannot offer discounts on retail prices, and smaller publishers inevitably suffer the most.

In book retail, the last decade has seen the emergence of the some sizeable bookstores and book chains, of which Papasotiriou and Eleftheroudakis are the largest. More recent developments since 2005 include the opening of FNAC (with its first store in 2005) and other modern bookstores in Athens and Thessaloniki, including the well-financed Public chain of stores. The Eleftheroudakis chain has meanwhile expanded nationally. Overseas suppliers have been putting pressure on the larger retailers to modernize by digitizing their catalogues and adapting to electronic ordering systems.

Details about the major bookstore chains and the largest bookshops for both Greek and foreign books are given in Section 5.

Wholesale distribution in Greece is still not sufficiently developed, so many of the publishers retain independent distribution networks. Details of the main book wholesalers are given in Section 5.

2.3.13 Other Sales Channels

There has been growth in sales of books through channels other than the bookshops. One dimension of this is the increase in direct sales by some publishers such as Savalas and Modern Times via television “info-mercials”. Another is the emergence of newspaper groups purchasing rights to books which they print and sell with or without their newspapers at low prices through the kiosks and newsstands. There has also been growth in book sales through the supermarkets and shopping malls.

2.3.14 Libraries

The public library network is still, to a large extent, rudimentary and has not adapted to provide modern library services. There are about 2,000 libraries of which 962 are public and municipal, 233 in universities and colleges, 550 in schools and 315 are in research institutes and other organisations.

According to the National Book Centre, there are four exceptions to this general rule:

- 45 state public libraries, funded directly by the Ministry of Education
- 22 libraries for children and adolescents, co-ordinated by a dedicated organization (OPEV)
- 233 academic libraries at universities and technical colleges
- 550 school libraries (for 5,000 secondary schools), created with funding from the EU’s Community Support Framework.

There are also some private libraries such as the Gennadius, which belongs to the American Archaeological School in Athens which holds some 90,000 titles in various languages. There are also libraries at the foreign colleges and institutes which will order English books.
2.3.15 Rights Protection

As a member of the EU, Greece respects copyright, and national copyright laws are in place. Protection of intellectual property rights is the job of the Greek Copyright Organisation (OPI) within the Ministry of Culture. The basic law that holds is Law 2121/93, which covers both moral and financial rights of authors.

Publishers and authors have created a society to collect income from authorized copying, which is supervised by the OPI, and which is similar to the UK's Copyright Licensing Agency. It is called OSDEL and it is quite active.

Piracy is a big problem with audio and multi-media products. For book publishers, photocopying remains a problem, particularly with academic titles, school-books and ELT. Greek publishers, and in some cases foreign publishers, are active in taking legal action against offending photocopy shops but with limited effect.

2.3.16 National Book Centre of Greece (EKEBI)

The National Book Centre of Greece (EKEBI) was set up by the Ministry of Culture in 1994. It operates as an independent organisation, which provides support to the main players in the book chain in Greece, and promotes Greek books abroad. Its main aim is the creation and implementation of a national policy on books and reading.

EKEBI mediates with the publishing industry and the Government to develop book policies, and to regulate the book market. It was active in negotiating the retail price maintenance law and the system of fixed prices for books sold to the public that was implemented in 1997. It is also active in representing the publishers’ and booksellers’ associations in their dialogue with Government to try to secure tax-relief measures for their book businesses.

The remit of EKEBI also includes the protection of intellectual property rights.

The Book Monitoring Unit of EKEBI does valuable work collecting and interpreting statistics and data on the book market. Most of the data in this section of the present report was sourced through EKEBI and comes from Biblionet, a Greek books-in-print database.

Biblionet was founded in 1998 by EKEBI, the main publishers’ associations, and a number of individual publishers and now run by EKEBI. The database contains information on over 120,000 Greek titles, authors, translators, illustrators, publishers and distributors. Biblionet can be accessed free of charge at www.biblionet.gr and in English on www.gbip.gr.

For further information on the EKEBI, visit their web site at www.ekebi.gr.

2.3.17 Greek Publishers and Booksellers Associations

There are many regional associations throughout Greece, to which publishers and booksellers belong, and which are themselves members of the Greek Federation of Publishers and Booksellers. The Federation represents its members in various ways. They publish in English a useful directory of Greek publishing companies, distributors and e-bookshops in Greece. The President of the Federation is Dimitris Pandeleskos, and they can be contacted by email at poev@otenet.gr.
2.3.18 The Internet and Books

Internet use is still limited in Greece but growing quite rapidly. According to a September 2006 survey by the National Statistical Service of Greece (www.statistics.gr) on the use of new technologies, use of computers continued to grow rapidly between 2002 and 2006, so that by 2006 38 per cent of households used a computer, and 29 per cent had internet access, with internet access rising to 33 per cent in 2007.

According to the same survey, in 2005, 6.6 per cent of the population appears to have used the internet in Greece for purchasing goods online, and the items purchased were mainly books, magazines, and e-learning materials (32 per cent), computer hardware (24 per cent), and clothes and sports goods (16 per cent).

Within the educational system, secondary schools and almost all primary schools have computers.

For book sales, the number of online bookstores has grown rapidly. In early 2008, Biblionet had 25 online bookstores on its database. However, despite the place accorded to books in the emerging e-commerce market in Greece, the evidence of publishers and book retailers with e-commerce sites is that online book sales are increasing but the proportion of sales through the internet compared to traditional channels still remains small.

A significant part of internet Greek book sales come from Greek communities living abroad. Within Greece itself, the market does not yet seem quite ready for e-books and electronic publishing, and paid for on line delivery of publishing content is still very much confined to certain specialist areas of professional publishing like accountancy and law.

2.3.19 General Information about Greece and the Book Market

For the general reader there is a large choice of books in English about Greece. The Economist Intelligence Unit country briefings are a valuable source of statistical and general information – see www.economist.com/countries/Greece. The Embassy of Greece also has a useful website at www.greekembassy.org. Some of the main sources of information and website addresses about Greece as a publishing and book market have been given above, and others are given later in the survey. The appendices include a list of useful contact names and addresses.
3 The School Educational Market

The most remarkable thing about the school market in Greece is that the state publishes all the subject textbooks (apart from foreign languages at some levels), so the classroom textbook market is in effect ‘closed’ to educational publishers. Publishers are able to tender to author and supply page layouts for new school subject textbooks required by, and published by, the Government, but this Ministry tender market is unprofitable and very limited for publishers. While the supply of free books by the state is respected, there is much concern among educational publishers in Greece that the market is not open in the way that it is in most other EU countries.

Because of this situation, a supplementary private publishing market has emerged called the ‘auxiliary book’ or ‘study companion’ market. The job of the companion is to reinforce and supplement the state textbooks in all the different subjects, and several publishers have done well from this supplementary market.

However, unlike general books, it seems that this schoolbook market – which took off in the late 1980s – saw little growth in the few years up to 2005. Then the Government introduced curriculum changes to the schools, which resulted in new state-published subject textbooks and new commercially-published school companions in 2006-2008. So the school market has received a boost.

However, in years when there are no curriculum changes, the educational publishing market in Greece is not so interesting for publishers. In part, this is a reflection of the static school-age population, and the amount of photocopying and second-hand book sales, and partly the result of improvements in the state-published school textbooks, which are now in colour. Over time, a dwindling supplementary market may be compensated for by the opening up to publishers of a mainstream school classroom market but this is unlikely to happen soon.

3.1 The Educational System

A number of sources provide a reasonably detailed description of the Greek school system, although published government statistics on numbers of teachers and pupil enrolments tend to be two or three years behind. Apart from the Ministry of National Education’s own website (www.ypepth.gr), one of the best sources of information is the Eurydice database on educational systems in Europe from which information can be found on www.eurydice.org.

3.1.1 School Education: Organisation and Curriculum

Under the Constitution, all Greeks have the right to free education. Preschool education (kindergarten) is provided by the state, followed by nine years of compulsory schooling which covers six years at primary (dimotiko) and three years at lower secondary (gymnasio).

The primary curriculum (grades 1-6) includes modern Greek, mathematics, environmental studies (including religious education in the first and second grades), music and arts, and physical education from Grade 1; religious education, history, and English as a first foreign language from grade 4; geography, physics, and social studies & civics from grade 5.

In lower secondary, the subjects covered are modern and ancient Greek, history, geography, English, French or German, religious education, mathematics, physics,
chemistry, computer science, technology, home economics, music and arts. There are daytime and evening gymnasia, both with three-year programmes. Young working people can go to evening gymnasia, providing they are at least 14 years old.

After nine years of compulsory education, anyone who wants to continue their studies can go to a unified upper secondary school (*eniaio lykeio*, or EL), to study sciences, applied sciences (technology and computing), and/or humanities and social sciences; or they can go to a technical vocational school (TEE). There are daytime and evening *lykeia* to enable working pupils to attend school. Attendance at daytime *lykeia* is for three years; at evening *lykeia* it is for four years.

The school year at all levels of education begins on 1st September and ends on 31st August the following year.

### 3.1.2 Educational Administration

Educational administration appears bureaucratic, with several tiers, involving many committees.

Primary and secondary education are organised hierarchically from the central Ministry, through the regions, into the provinces, and down to the school, involving the following:

(a) The Ministry of National Education and Religious Affairs (YPEPTh), which has overall responsibility.
(b) Directorates of Education, appointed by YPEPTh, which are responsible for administering primary and secondary education in the different ‘prefectures’ or regions.
(c) The education offices in the various provinces within each prefecture.
(d) The school, under the direction of the principal, the assistant and the teachers’ association.

Private primary and secondary schools also come under the Ministry of Education, which supervises and inspects them through the same regional bodies as inspect state schools.

Among the various educational advisory bodies are the National Education Council (ESYP) and The Pedagogical Institute (PI), which operates as an independent public service, with responsibility for primary and secondary education.

There are also a number of agencies overseen by the Ministry of Education, which perform specific functions, of which the most relevant for publishing is the School-book Publishing Organisation (OEDB), which is responsible for publishing and distributing textbooks to the schools. The OEDB works to the Directorates of the Primary and Secondary Education Curriculum.

### 3.1.3 Education Laws

There have been many educational reforms and changes over the last few years in Greece. Some of the most important were in 1997 and 1998, which helped to shape the current structure of schooling. The unified upper secondary school (*eniaio lykeio*) was introduced in 1997, and this has gradually been replacing all the previous kinds
of secondary school (lykeio). Changes were also made to secondary vocational education, with the introduction of the new technical vocational schools (TEEs). Second-chance schools were also set up for young people who are over 18 years old and have not completed their compulsory education.

### 3.1.4 Numbers of Schools and Pupils

According to Government figures, at pre-school level there are over 5,800 kindergartens, 141,000 pupils, and 15,000 teachers. 97 per cent of these schools and children are in the public sector.

In compulsory education, there are over 7,800 primary and secondary schools in Greece, and nearly 1m pupils. Tables 3.1–3.4 show Government figures for numbers of schools and students at primary, lower secondary and upper secondary levels for 2004-05 (the most recent available at the time of compiling this report).

**Table 3.1: Number of Schools and Pupils in Primary Education in Greece, 2004–2005**

<table>
<thead>
<tr>
<th>2004–2005</th>
<th>State schools</th>
<th>Private schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>5,609</td>
<td>375</td>
</tr>
<tr>
<td>Pupils</td>
<td>603,108</td>
<td>47,134</td>
</tr>
<tr>
<td>Teachers</td>
<td>55,237</td>
<td>3,540</td>
</tr>
</tbody>
</table>

*Source: Operational Research and Statistics Department of YPEPTh.*

Within Primary, the ratios between public and private education has changed little in the last few years. The number of state schools has declined (from 5,949 in 1999/00) and the number of teachers has increased (from 44,424 in 1999/00), while student enrolments in the last few years have not changed significantly.

**Table 3.2: Number of Schools and Pupils in Lower Secondary Education (gymnasia) in Greece, 2004–2005**

<table>
<thead>
<tr>
<th>2004–2005</th>
<th>State schools</th>
<th>Private schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>1,867</td>
<td>117</td>
</tr>
<tr>
<td>Pupils</td>
<td>316,826</td>
<td>17,857</td>
</tr>
<tr>
<td>Teachers</td>
<td>39,238</td>
<td>2,291</td>
</tr>
</tbody>
</table>

*Source: Operational Research and Statistics Department of YPEPTh.*

Within lower secondary education, the number of students in the public sector has declined in the last few years (from 348,150 in 1999/00), while the number of teachers has increased (from 34,856 in 1999/00). The number of students and teachers in the private sector over the same period has changed little.

**Table 3.3: Number of Schools and Pupils in General Upper Secondary Education (Eniaio Lykeio) in Greece, 2004-05**

<table>
<thead>
<tr>
<th>2004-05</th>
<th>State schools</th>
<th>Private schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>1,265</td>
<td>110</td>
</tr>
<tr>
<td>Pupils</td>
<td>226,056</td>
<td>17,428</td>
</tr>
</tbody>
</table>

*Source: Operational Research and Statistics Department of YPEPTh.*
Table 3.4: Number of Schools and Pupils in Technical Vocational Schools (TEE) in Greece, 2004-2005

<table>
<thead>
<tr>
<th></th>
<th>State schools</th>
<th>Private schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>473</td>
<td>67</td>
</tr>
<tr>
<td>Pupils</td>
<td>109,428</td>
<td>4,287</td>
</tr>
</tbody>
</table>

Source: Operational Research and Statistics Department of YPEPTh

Within upper secondary education, student enrolments in general upper secondary schools have not changed significantly in the last five years, but there has been some reduction in student enrolments in the technical schools since 2002.

3.1.5 Budget for Textbooks

Education is funded by the state budget as well as by non-state sources, particularly EC funding. According to Government sources, in recent years the money from the state budget for the production and provision of free school textbooks has averaged around €25m (£17m) per annum, spread between primary and secondary education, as shown in Table 3.5.

Table 3.5: Budget for Textbooks, 2002-2005 (£)

<table>
<thead>
<tr>
<th>Year</th>
<th>Primary schools</th>
<th>Secondary schools</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>£m</td>
<td>£m</td>
<td>£m</td>
</tr>
<tr>
<td>2002</td>
<td>8.2</td>
<td>5.2</td>
<td>20.2</td>
</tr>
<tr>
<td>2003</td>
<td>8.0</td>
<td>5.53</td>
<td>15.55</td>
</tr>
<tr>
<td>2004</td>
<td>8.15</td>
<td>5.53</td>
<td>15.28</td>
</tr>
<tr>
<td>2005</td>
<td>8.5</td>
<td>5.8</td>
<td>16.68</td>
</tr>
</tbody>
</table>

Source: Financial Affairs Directorate, YPEPTh.

3.2 The School Educational Market for Publishers

Despite the constraints of state textbook publishing, there are a number of ways publishers in Greece get involved in publishing for the school market, and these are described below.

3.2.1 Classroom Textbooks: State Schools

Classroom textbooks for all primary-school subjects and all secondary-school subjects, except for foreign languages at secondary level, are produced, published and supplied by the state free to schools.

Following a period of school curriculum change, 2006-2008 has been a busy time for replacing these subject textbooks in the schools.

The organisation, or department, with the responsibility for state publishing and distribution to schools is the OEDB. First, the Pedagogic Institute helps to draw up specific guidelines for the syllabus and content for each subject by year, which the textbooks must adhere to. The Government then sets up a ‘competition’, or tender, inviting interested parties – who may be teachers, schools, but are now more often publishers – to author manuscripts to the guidelines for the different subjects. The Primary and Secondary Education Directorates then give their opinion on the
submissions; authors are chosen, and the publisher delivers the final manuscripts to the OEDB, which produces and publishes the work.

A similar tendering process can also take place for the preparation and submission of the page layouts for the subject textbooks. In effect, the publisher (or organization) which wins the tender is acting as an author/packager for the Government which acts as the publisher.

For publishers, this Ministry tendering activity is not profitable but a number of publishers still participate.

3.2.2 Classroom Textbooks: Private Schools

Private primary and secondary schools are obliged by law to follow the same curriculum and use the same books as state schools. The school supplies the list of textbooks to students, who buy the books from bookshops, supplied by the OEDB. The Government fixes a retail price limit, which covers the unit cost of production and leaves the bookseller with a small margin.

In practice, there are a number of large and prestigious private schools where parents are prepared to pay more for alternative textbooks. These are sometimes called the ‘yellow bus’ schools – after the distinctive buses they use for ferrying pupils to and from school.

3.2.3 School Educational Software

In 2007 and 2008 there have been some significant educational software tenders by the Government. The school software tenders follow a similar tender process to the textbooks, but according to some publishers more generous government budgets have made this a more profitable area than tendering for state textbooks.

The Government has also financed the translation of foreign educational software where the Greek publisher buys rights from the foreign publisher and handles the translation. In some cases the software provider will also handle the production of the software and its distribution direct to schools, while in other cases the OEDB will produce the software and supply the schools.

3.2.4 Auxiliary Texts and Study Companions

The Greeks value having free textbooks for schools, but there is much concern about the limitations of quality imposed by a system where the state is the publisher in a society that attaches great importance to educational achievement.

Commercial publishers have been quick to exploit the situation, and a niche publishing industry has grown up to supplement the state textbooks. In terms of revenues from school publishing, sales of auxiliary texts and study companions represent the main school market for publishers.

Auxiliary texts and study companions abound, which mirror the state subject textbooks lesson for lesson and page for page, providing additional notes, explanations, extension texts and practice exercises on every aspect of the syllabus. This market expands in those years following curriculum changes when the Government introduces new subject textbooks into the schools and students have to replace their study companions to match the new curriculum and the new textbooks.
Study companions are often recommended by the school, and are bought by parents who seem prepared to pay. In addition, many children go to private tutoring classes in the afternoon. These are called frontistiria and are to be found in every small village in Greece. Some frontistiria concentrate on teaching foreign languages – notably English (see Section 4); many offer classes on the whole range of subjects taught in the school curriculum.

There are frontistiria classes for children at primary and lower secondary school, but the greatest demand is at upper secondary, to help students to prepare for the compulsory subjects in the school-leaving exams. As a result, the frontistiria have become a sizeable market for auxiliary school texts and study companions.

One publisher in this survey observed that the money spent by the state on education may be lower than in other European countries, but the figure is nearly doubled if one takes into account the money Greek families are prepared to spend in supplementing state education.

3.2.5 School Libraries

Many schools have no library facilities, and where these exist they often appear to be inadequate and poorly funded. Sometimes school parent associations or local councils donate books to the school library, but the main source of funding is central. One problem is that there is no consistent pattern to availability of funding for purchases of library books.

3.3 Schoolbook Publishers, Market Size and Share

3.3.1 The Main Schoolbook Publishers

The publishing of auxiliary schoolbooks is a moving market, because any frontistiria owner can produce their own books, so newcomers can spring up at any time and there are many small players. The largest publishers involved in this segment include Patakis, Savalas, Metaichmio and Livani.

The most active publisher in the school software market is Kastaniotis, whose main competition has been from technology and software companies.

The publishers who have been most successful at winning the most recent government school textbook tenders are Ellinika Grammata, Patakis and Metaichmio.

Patakis

Patakis was founded in 1974 by Stefanos Patakis, a leading figure in Greek publishing. An ex-high school teacher and tutor, Patakis began as a schoolbook publisher and made his money from auxiliary schoolbooks before moving into general publishing. The company is one of the market leaders in the schoolbook market, actively publishing auxiliary/companion schoolbooks and educational reference titles (dictionaries, atlases), as well as successfully participating in Ministry textbook tenders. Patakis also used to publish educational software but stopped in 2001 to focus on its other areas.
Savalas
Savalas is a serious educational publisher, one of the largest and most established of those specialising in school-books. The owner, like Patakis and Metaichmio, was a school teacher, and sixty per cent of the company’s annual turnover of €10m (£6.8m) comes from schoolbooks. Historically, its key subject strengths were in mathematics and science subjects, but Savalas now publishes across the curriculum, focusing on the auxiliary book market rather than competing for Ministry textbook tenders.

Metaichmio
Five years ago, Metaichmio was an interesting up-and-coming publisher. Now the company has arrived. It was started by another teacher in 1993 to publish study companions for the gymnasio, and later the lykeio. Historically its list was strongest in literature, modern and ancient Greek, Latin and history. Since the year 2000, the company has expanded its subject range with titles in mathematics and science, and now covers the main curriculum subjects in primary and secondary schools. On the back of their initial success in school-books, Metaichmio moved into trade books but seventy per cent of its €8m (£5.6m) sales still comes from educational titles.

Livani
Livani is another general publisher active in the schoolbook market. It started publishing auxiliary schoolbooks in 2005 and by 2008 had built a list of 120 titles. The company used to be active in the field of electronic publishing, through its affiliate company Multi-media Electronic, which included a multimedia project for secondary schools, but this no longer exists.

Ellinika Grammata
This publisher – part of a large media group - was the main winner in the last round of educational tenders in 2006 and 2007 to prepare school textbooks for publication by the state, ahead of Patakis and Metaichmio. The company also publishes auxiliary books and companions, but not yet on the scale of Patakis and Savalas.

Kastaniotis
Kastaniotis expanded into the educational market from being a general publisher. As an educational publisher, however, its focus is on the market for educational software rather than the market for auxiliary books and companions.

More information about these companies is given in Section 5, in relation to their role as trade book publishers.

3.3.2 Size of the School Market

It is very difficult to calculate the value of the school market to publishers, because there has been no analysis, which would involve both large and small publishers and/or distributors declaring their sales. Only about forty publishers publish balance sheets and these do not break down their sales by category. So we know that 9 per cent of book production is schoolbooks, but we don’t know what percentage of book values this represents.

The survey conducted for the present report suggests the total market value to publishers is around €50m (£34.2m) with the leading six or seven publishers having about sixty to seventy per cent of the market. The annual value can be higher or lower, depending upon the timing of curriculum and textbook changes.
3.4 Marketing Schoolbooks

The targets for the promotion of auxiliary school-books are the school teachers, frontistiria owners and private tutors.

Few publishers employ school reps – these would not be cost effective – so the key is developing an active database for direct mailing purposes and samples. The main publishers organise at least two mailings each year – one in September for the beginning of the school year, and another in February, between the semesters.

There are no book fairs for school-books as such. In Athens there are two general book fairs – the September one is the more important for school-book sales.

Apart from these methods of promotion, publishers rely on press releases and reviews, and advertising in one or two special educational journals.

3.5 Prices and Photocopying of School-Books

Study companions are still not cheap, priced between €12-18 (£8.20-£12.30) depending upon the level and extent, but greater competition between publishers has certainly helped to limit the price increases in the last five years.

Typically a publisher like Livani publishes all its companions on a common format in paperback with a distinctive series styling and bright cover designs. At Primary level, they range from 250–400 pages in extent, printed in four colours, and priced at €12-14 (£8.20-9.60). At lower secondary, they are typically 300-500 pages in extent, mostly printed in two colours, priced at €14-17 (£12.60-11.60). At high school level, price and extent are similar, but can run to 600 pages and a maximum price of €18 (£12.30).

Some publishers publish two companions for the same subject text, by different authors and priced differently, with a lower price option.

Photocopy shops are very common in Greece, and affect sales of study companions. Publishers in the past have joined forces to take action against photocopy shops, but not so much recently. It may be because books are now cheaper so the incentive to photocopy has reduced.

3.6 Distribution and Trading Terms

The distribution channels and trading terms for auxiliary school-books are very similar to those for general books. They are described in more detail in Section 5 of this report.

Most publishers of study companions do direct sales to the public through their own bookshops and book fairs, as well as supplying distributors, the book chains and bookshops. Frontistiria are not permitted to purchase direct from a publisher or distributor, but some reportedly do so.

Most of the main general book wholesalers and retailers are involved in school-books. They include Christakis, Apollon, Georgiou, Efstathiades, Eleftheroudakis and Protoporia. They are described in Sections 4 and 5 of this report.
The main publishers like Patakis, Savalas, Metaichmio and Livani have their own bookshops (often selling only their own books) and all operate a large number of accounts. Their discounts on school-books average 35–40 per cent, with 40–45 per cent to the leading bookstore chains; 40 per cent to wholesalers, and 35 per cent or less to smaller bookshops.

Credit terms vary, but are normally 3–6 months, depending on the customer’s payment record. A publisher may typically offer 5–10 per cent rights of return under an annual arrangement, while others, such as Savalas and Metaichmio, operate a full returns policy.

3.7 Opportunities for UK Educational Publishers

It will be clear from the above that (apart from ELT and foreign languages) there are few if any real opportunities for international educational publishers within the mainstream public and private sector school market. The centralized Greek system for government-produced textbooks rules Greece out as a market for inward investment in terms of school textbook publishing.

The chances of UK school publishers successfully licensing content are remote, although there could be opportunities for licensing educational software. The one area which is of interest to British and American publishers is sales of school textbooks into those international schools in Greece which follow a British-based curriculum.

3.7.1 Sales to International Schools

According to the Ministry of Education’s website, there are eleven private foreign or international schools in Greece with a non-Greek curriculum, and eight of these follow an English-medium curriculum along UK or US lines, for children from the age of three or five years through to 18 years. These schools are a market for British and American school curriculum publishers.

These schools are recognised by the Ministry of Education. Seven of them are in Athens (Byron, St Catherine’s, Campion, St Lawrence’s, Green Hill, Tasis Hellenic, and American Community School), and the other (Pinewood) is in Thessaloniki. Contact details for these schools are given in Appendix 4.
4 The ELT Market

Section 3 described the school market and how most school-books in Greece are published by the state. There are therefore no mainstream school textbook publishers as there are in other Western European countries, producing core curriculum classroom textbooks for English and other subjects.

Instead, a phenomenon has emerged in ELT that is peculiar to Greece – a Greek specialist ELT publishing industry catering for a mainly private-sector ELT market with an insatiable appetite for learning English. Over several years, the Greek-owned ELT publishers have been competing successfully with the foreign-owned ELT publishers that once dominated the Greek market and one or two of these Greek-owned ELT publishers have become successful international ELT publishers, exporting their international ELT products to many other countries around the world.

4.1 ELT Market Segments & Sectors

4.1.1 Private Language Schools

The frontistiria are private tutoring/teaching organisations that cater for school subjects and foreign-language teaching (see Section 3). It is the foreign-languages frontistiria (now officially called foreign language centres) that are relevant for ELT and it is this private language school (PLS) segment that is the most interesting for ELT publishers. Sales into the private sector in Greece are estimated at 75 per cent or more of total ELT sales.

As Table 4.1 shows, there are thousands of private language schools, many teaching English to hundreds of thousands of mainly school-age students every year. The number of private language schools and their enrolments has reduced in recent years with a trend towards consolidation into chains and franchise operations.

<table>
<thead>
<tr>
<th>Table 4.1: Private Language Schools and Student Numbers, 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of foreign language centres</td>
</tr>
<tr>
<td>Number of students in foreign language centres</td>
</tr>
</tbody>
</table>

Source: Industry sources/Publisher estimates

ELT publishers in Greece typically have 6,000–7,000 (and anywhere between 5,000 and 10,000) entries on their databases. These are potential textbook adopters, and range from central buyers of major private language school chains with many branches and up to 20,000 students, to registered owners of large, medium and small schools with as few as 40 students, to very small, unregistered groups and individual private teachers.

The chain schools are particularly important, and publishers spend much time and money trying to secure and service adoptions there. The largest ones are ISON (ex-Strategakis), based in Thessaloniki; Evrognosi, with over 150 franchise branches and growing; Axon, with 100 franchises; Omiros, which has about 80 schools; So Easy with about 80 branches.
Table 4.2 shows the range of classes and average ages of students in the Greek private language centres.

**Table 4.2: Range of classes and average ages of students in Greek Private Language Centres**

<table>
<thead>
<tr>
<th>Level</th>
<th>Ave. Start age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Junior</td>
<td>5/6</td>
</tr>
<tr>
<td>Juniors</td>
<td>6/7/8</td>
</tr>
<tr>
<td>Senior A–C</td>
<td>9/10</td>
</tr>
<tr>
<td>Senior D</td>
<td>12</td>
</tr>
<tr>
<td>Pre First Certificate English (Pre FCE) – E Class</td>
<td>13</td>
</tr>
<tr>
<td>Cambridge First Certificate (FCE) / Michigan ECCE</td>
<td>14</td>
</tr>
<tr>
<td>Cambridge CAE/Proficiency/ Michigan Proficiency</td>
<td>15/16</td>
</tr>
</tbody>
</table>

*Source: ELT Publisher questionnaires, 2008*

The trend in recent years has been for children to start ELT younger. Parents are trying to save money by getting their children to FCE or the Michigan exam level as soon as they can, usually cutting out one of the Junior years as well as the Pre-FCE year.

This trend is likely to continue, because Greek students in upper secondary schools preparing for the school leaving exam have little time for extra English classes, and so the pressure is on parents to get their children to start English classes even earlier, and get them over before the school leaving exam.

### 4.1.2 Private Lessons Market

Although a difficult market for publishers to reach and to quantify, the private lessons market is large and growing. One leading ELT publisher estimates there are 17,000 teachers who are giving private English lessons. The attraction lies in lower costs to parents and convenient, tailor-made timetables compared to attending classes at a private language centre. Industry sources estimate this segment could represent 25 per cent or more of the total private sector market for learning English, but for publishers it represents a smaller portion of revenues as this segment does not buy so many books.

The Government cannot be happy about the situation, as this is untaxed income for private teachers, who are often teaching in state schools and private language centres as well as giving private lessons “illegally”, if they are state school teachers, for example.

### 4.1.3 Private Primary/Secondary Schools

As well as the private language centres and private lesson market, a useful additional private-sector market for publishers lies in the *Ekpaedeftiria* – special private primary and secondary full curriculum schools, particularly in and around Athens. There are not many of these, but they can be very large.

Examples include Athens College (around 3,000 students), Kostea Geitona, and Arsakeio (with a total of 9,000 students in three Greek campuses plus a new one in Albania). Other important private full-curriculum schools are Ziridis, Moraitis, Platon and Doukas.
4.1.4 State Schools

At Primary level, there are about 650,000 pupils in state schools in Greece. A foreign language is not normally taught in the first three years, but English starts in the 4th grade (age 9). In the past this was a market for commercially-published approved ELT textbooks, but the Government now publishes and prescribes its own English textbook series so this is a very restricted market for ELT publishers and one where the textbooks used may be changed – see 4.2.1 below.

At Lower Secondary level (gymnasia), there are about 317,000 pupils. The lower secondary schools opened as an ELT market to commercial publishers in 1999. Initial orders were large, but the value of the market subsequently reduced as schools recycled the books. The government sets limits on book prices for use in the schools which also limits the value of this sector. However there are changes pending which are likely to affect this segment as a market for ELT publishers, possibly from 2008 – see 4.2.2 below.

At Upper Secondary (lykeia) level, there are about 336,000 pupils studying in general and technical state secondary schools. This segment has been accessible to ELT publishers for some time although its value for ELT publishers is restricted by the high levels of photocopying, low book prices, second-hand recycling, and the emphasis put on other subjects in the school-leaving examination.

For a publisher to sell ELT textbooks into secondary schools, their course must first be approved. The Ministry sends out a letter to publishers early in the year, inviting them to submit multiple sets of all components with prices. The submission must include the complete series, and it must not contain Greek, though exceptions are sometimes made in the end. The list is published in the summer, or sometimes in September. Historically, the experience of most publishers in the past has been that titles submitted are rarely rejected if they comply with the basic requirements. Once on the approved list, they can remain there for seven years.

The decision to choose a title from the approved list is made by the school teacher and headmaster. The Ministry has 11 ELT advisors who visit schools and hold seminars, and they have a strong influence on the selection process.

4.1.5 Adult Learners

Partly because of the unique scale of the private sector language learning market for children and younger teenagers, the adult ELT market in Greece is a small one by southern European standards. It is mainly in the private sector, where English is taught to state employees and business people. There is also a low value market for general English and some ESP published materials at tertiary level, but this is restricted by the lack of a tradition of student textbook purchase, and a lot of photocopying. A recent influx of immigrants from Central Europe and the Middle East and Africa may increase the demand for adult ELT, but this is a segment of customer with very low purchasing power, and often discriminated against in society.

4.2 ELT Products

Greece has always been mainly a market for British rather than American English, although some publishers report limited interest in some American English titles
particularly in the adult sector and with the growth of Michigan’s ELT American English examinations (see 4.7 below).

4.2.1 Products for Primary/Junior Classes

In state primary schools, as mentioned above, children are obliged to use the government-published English course. The Government has tendered for new ELT primary textbooks (3 titles for Grades 4-6) and may introduce these new textbooks in September 2008, although this has still to be confirmed.

Some schools do buy other materials with parent funding but this is not common. Ministry-appointed school advisors do sometimes recommend use of supplementary materials such as a children’s grammar series, but in general the open market for publishers in the Primary schools is very limited.

The big children’s market for ELT publishers is in the private sector – in the “Pre-Junior” and “Junior” children’s classes in the private language centres, where international courses are used but need to be adapted to fit the local system. Best-selling courses in recent years have included include Welcome, Sail Away and Fairyland (Express); Tom Cat, Showtime and Freddie and Friends (Burlington); Brilliant and Big Heart (Macmillan); Rainbow (OUP). Pearson’s Wonderland (the Greek edition of English Adventure launched in 2005) has also been a strong seller.

There are also several strong selling children’s Grammar series, which have always been popular in Greece. Express has been the market leader in this area, with popular Grammar series like Grammarway for the A-C classes.

It used to be possible to sell 30,000 copies of Level 1 of a children’s grammar series or a children’s course in Greece but volumes have declined as the market has become saturated with product choices from the publishers. Nowadays, Level 1 of a best-selling children’s course which fits the system in the language centres will seldom sell more than 15,000 copies annually. Such volumes of course do not match textbook sales in Poland, Spain or Italy with their greater populations and access to large national state primary school markets.

4.2.2 Products for Secondary / Senior Classes (General courses)

In the gymnasía lower secondary schools, several Ministry-approved titles from publishers like Express, Hillside, Grivas, and Longman et al have been good sellers over several years, but this “open” market may close in the future as commercially-published textbooks are replaced by Government-published titles in the gymnasía schools.

As at Primary, the Government has tendered for new ELT textbooks for lower secondary but it is unclear when it will introduce these new textbooks. A number of publishers have won these tenders as well as a few groups of individuals. The new books will consist of 6 titles for the 3 years, offering two streams of 3 books each for weaker and more able students.

For ELT publishers, by far the more interesting market for this age group is in the A-C Senior classes in the private language centres, where unit sales are similar to those for the Junior classes for children. Best selling courses in recent years at this level have included Fantastic Five, Cool English, and Here We Go (Burlington); Enterprise and Click On (Express); Team Up and Heroes (OUP), and Treasure Hunt (Pearson).

For the “D” Class, popular titles include Choices and Update Intermediate (Burlington), Laser (Macmillan) and Upstream Intermediate (Express).
4.2.3 Products for Secondary / Senior Classes (Exam-preparation)

The driving force within the private ELT market is passing ELT examinations. So, apart from general English courses, there is a very large market in Greece for international exam preparation textbooks and practice materials for the most popular international ELT examinations in the private language centres and the private lessons market. These examinations are described in 4.7.

The market is full of competing product, but a best-selling international exam textbook for the First Certificate in English (FCE) examination can still sell between 15,000 to 20,000 copies annually in Greece. In the practice tests market, CUP publishes the past papers for the Cambridge ESOL exams which sell widely.

Students in Greece who take the FCE examination are generally younger than in other countries and some publishers have developed FCE materials with this younger age range in mind, with different content and design.

A new trend in Greece is parallel exam enrolments, whereby students may be enrolled simultaneously for Cambridge and Michigan examinations and perhaps a third exam (Edexcel, Trinity) as well. Thus private teachers and language centres are tending to offer more generic courses at the Common European Framework B2 level, with intensive options for exam prep for the various exams to be taken simultaneously. The Common European Framework classification is thus being adopted widely as a short-hand for course levels.

4.2.4 Products for Adult Learners

The adult courses used in Greece tend to be the same international titles as those used in other European countries – New Headway (OUP), Cutting Edge (Pearson), etc. - but the volumes are small, reflecting the small scale of the market. There is also English for Adults (Grivas) which may be the market leader. Macmillan’s Campaign is a specialist course designed for military/peacekeeping personnel and it will be interesting to see if English for Special Purposes products of this kind find a market. If the adult market is going to grow, it is likely to be company-driven.

4.3 Value of ELT Market

ELT sales probably represent around 15-20 per cent of total book sales in Greece – a larger proportion than in most other countries.

The general consensus is that the value of the ELT market has been at best flat and at worst shown a gentle decline in the last few years. The declining birth-rate from the mid-1980s affected enrolments, although this situation has now stabilized, and ELT enrolments have had some benefit from the influx of immigrants to Greece from Albania, Romania, Bulgaria and the FSU countries, who seem to make attentive students, and whose parents are reputed to be reliable payers. Nevertheless the PLS market continues to shrink slightly year-on-year. And some ELT publishers commented that they felt there was a noticeable reduction in the size of the book-buying market in 2007.

Current estimates of the value of the Greek ELT market vary. Based on estimates from publishers and distributors, the market is thought to be worth annually around €90m (£61.6m) at retail value, €60m (£41.1m) at wholesaler/distributor value, and €50m (£34.2m) at local publisher net receipts. The figures take into account that
some publishers’ business is direct supply to schools.

This puts Greece on a level with Poland as the third largest accessible European ELT market for international ELT publishers after Spain and Italy; with the highest per capita spend on ELT of any European country.

These estimates do not include the export sales by Greek ELT publishers to other countries, which have grown a lot in the last few years and could be worth another €15m -20m (£10.3m-13.7m) at local publisher values.

4.4 ELT Publishers and Market Shares

The Greek ELT market is clearly large, and that is why it has attracted so many publishers. But it has also become very congested – with ten sizeable players – and saturated in terms of competing product. As more publishers join in, more and more money is being invested in publishing and marketing more and more books, for a market which is not growing, and which has seen an overall gradual year-on-year reduction in class sizes and enrolments.

Certainly, outside the exams level, sales of supplementary and skills titles have fallen, and the number of copies a publisher can now sell of a best-selling course-book series has decreased. Where 20,000 copies was once possible, today a publisher is doing very well to sell over 12,000 copies of the first level of a best-selling course-book in Greece.

As normally happens when the going gets tough, the tough get going. There has been some downsizing in an effort by some publishers to reduce costs and improve margins, and – although it is not in the Greek way of doing things - it would be surprising if over the next five years we did not see some shake out in the number of ELT players, with one or two publishers exiting the Greek market, and one or two acquisitions or mergers reducing the number of competitors. This process has already started with Thomson Learning’s acquisition of New Editions and perhaps some further market concentration is inevitable.

Table 4.3 gives an estimate of the market shares of the main ELT publishers. This is based on taking a view on the basis of feedback from several industry sources.

<table>
<thead>
<tr>
<th>ELT Publisher</th>
<th>Estimated Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burlington</td>
<td>24%</td>
</tr>
<tr>
<td>Express</td>
<td>13%</td>
</tr>
<tr>
<td>Longman</td>
<td>12%</td>
</tr>
<tr>
<td>OUP</td>
<td>10%</td>
</tr>
<tr>
<td>Hillside</td>
<td>8%</td>
</tr>
<tr>
<td>Macmillan</td>
<td>7%</td>
</tr>
<tr>
<td>Grivas</td>
<td>7%</td>
</tr>
<tr>
<td>Thomson / New Editions</td>
<td>4%</td>
</tr>
<tr>
<td>CUP &amp; other foreign-owned Publishers</td>
<td>4%</td>
</tr>
<tr>
<td>MM and Other Greek-owned Publishers</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: Industry sources

Five or six years ago, Greek-owned ELT publishers were taking market share in Greece from the foreign-owned ELT publishers who once dominated the market. However the growth of Burlington and a fight back by some of the UK publishers has
probably adjusted the balance. According to estimates from some distributors and publishers, Greek-owned ELT publishers are currently estimated to have about 40 per cent share of the Greek market and foreign-owned ELT publishers have 60 per cent.

**Burlington Books**

Burlington Books is the largest ELT publisher in Greece, and the clear overall market leader. The Greek operation of this Israeli-based publisher was started by Eric Cohen, the founder of Burlington, 16 years ago, and made a strong impact in the mid-1990s with a course called ‘Jackpot’. Burlington has four regional offices (Athens, Thessaloniki, Patra, Crete) and the largest ELT sales team in Greece with around 45 sales and marketing staff (including a team of around 10 telereps), as well as a big editorial department, and publishes best-selling titles at every level for the Greek market. Exclusive distribution is through Efsthathiades. The company has also built a successful ELT business in Spain.

**Express Publishing**

Express Publishing is a leading international ELT publisher and probably the No 2 publisher in the Greek market. It is the brain-child of Virginia Evans, a language teacher, language school owner, author, and publisher. In the last few years, Express has moved into a large number of other countries in Europe, the Middle East, Latin America, and Asia.

The company draws on in-house as well as local authors, designers and editors to create its very large range of ELT materials, which are popular with teachers and learners alike because of the clear page design and logical step-by-step approach, offering lots of practice material. The company gives away large quantities of free books and this policy has helped it to penetrate markets in Greece and elsewhere.

**Longman**

Pearson Education - through its Longman ELT brand – is well-established in the Greek ELT market. It has a strong catalogue which it is expanding for the local market and has recently grown its range of children’s publishing for the private market. *Treasure Hunt* (2003) was the company’s first step back to re-establishing a local publishing team and developing locally-commissioned titles. It now has a strong local publishing plan and has a Greek-specific offering at all levels from Primary to B2. There is an established local editorial team of three staff to supplement the main ELT publishing centre in the UK and a promotion team of about 10 local reps under two regional managers. For many years, distribution has been exclusively through Apollon.

**Oxford University Press (OUP)**

OUP, with Longman, is the most long-established of the foreign-owned ELT publishers in Greece. The company has an office in Athens and showrooms in Athens and Thessaloniki, having closed its Thessaloniki office in 2007. It employs a local sales and marketing team of about 11 staff and sells through an exclusive distributor, Efsthathiades. OUP has a large catalogue of titles for the Greek market although the publishing approach remains more centralised and driven by the UK publishing centre, than seems to be the case with competitors such as Longman Pearson and Macmillan who operate more regional publishing models.
Macmillan
Macmillan has been working in Greece since the 1980s. A few years ago, Macmillan became the only international ELT publisher to move its editorial office to Greece, in a bid to reduce publishing costs and build a stronger local identity and list. The move initially had mixed results. Nevertheless Macmillan continued to hold faith with its regional publishing approach, commissioning locally-based authors (some of whom have achieved international status) for its local publishing which sells not just in Greece but into other countries in the region. It employs a network of 13 regionally based local sales representatives. For distribution, it operates a selective open-market policy, with Apollon as its largest customer.

Hillside Press
This is another established, family-owned Greek ELT publisher, started by Andy Kostakou. It began with supplementary skills books before moving into course books. A large part of its turnover comes from sales of Ministry-approved courses into the state secondary schools where it has been very successful.

Grivas Publications
Grivas Publications was started by Kostas Grivas, who published his first title in 1970. This is another story of a language teacher turned author, and now family-owner and inspiration of a successful and well-established ELT publishing business. The company also collaborates with Klett, Cle, Diffusion and Bonacci to distribute German-, French-, Spanish- and Italian-language teaching courses in addition to English courses, of which ‘Exploring English’ is the most successful. The company’s focus seems to remain on the Greek, rather than the international, ELT market.

Cengage Learning/New Editions
Thomson Learning, who acquired New Editions, a Greek-based ELT company, in 2007, is now part of Cengage Learning. New Editions’ focus was on producing materials for the private language centres which could also be sold into international markets. The group now seems to be actively developing its ELT publishing for Greece and other European markets out of its publishing centres in Greece and the UK.

Cambridge University Press (CUP)
CUP has a smaller presence as an ELT publisher than the other major British ELT publishers, with a more limited range of local publishing and two full-time ELT sales consultants. Their product strengths continue to be their Cambridge exam practice materials and their Murphy’s In Use titles series. Their local manager, Craig Walker, is the longest serving of the British-based managers, and is responsible for Academic and International Schools as well as ELT into Greece, Cyprus, Malta and Albania. For distribution in Greece, the company operates a selective open-market policy.

MM Publications
MM is owned and managed by Giannis Malkogiannis and his wife, who runs the editorial department. Apart from its standard range of products, the company has also developed multi-media language learning software through its sister company, Binary Logic, which claims to supply software to 1,500 schools. The company’s strategy like Express and New Editions has been to develop an international list and apart from Greece it has had some success with its British and American titles in other markets.

Other ELT Publishers
Other smaller international ELT publishers starting to make a move are Marshall Cavendish, represented by Andrew Betsis, with ELT courses and supplementary
materials for the private sector: Richmond Publishing (part of the Santillana publishing group); and Summertown Publishing (acquired by Marshall Cavendish in early 2008) whose niche business English list is distributed by Express in Greece. Of the other Greek ELT publishers, Boukouvalas is the best known. It focuses on the private market, although its presence seems to have declined following the death of its owner. There are several other smaller, niche local Greek ELT publishers, mostly catering for the ELT exams market. These include Andrew Betsis and Sylvia Kar.

4.5 Prices and Photocopying

The price of ELT books in the private sector in Greece is high, although annual price increases by publishers have slowed in the last five years and now more or less match inflation. Table 4.4 shows that a student spends nearly €70 (£48) on purchasing a typical main-course package for use in a private language centre, or more if a grammar book is bought as well.

Table 4.4: ELT Main-Course Package Prices

<table>
<thead>
<tr>
<th>Component</th>
<th>Price (€)</th>
<th>Price (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student book</td>
<td>25–30</td>
<td>17-21</td>
</tr>
<tr>
<td>Workbook</td>
<td>15</td>
<td>10.30</td>
</tr>
<tr>
<td>Companion</td>
<td>15</td>
<td>10.30</td>
</tr>
<tr>
<td>Test book</td>
<td>9</td>
<td>6.15</td>
</tr>
<tr>
<td>Total</td>
<td>64–69</td>
<td>43.80-47.75</td>
</tr>
</tbody>
</table>

Source: Apollon, 2008

Of course, not everyone buys at this level every year. According to publishers surveyed for this study, a typical conversion to sales ratio for an ELT textbook series was 100 per cent purchase of a new adoption in Year 1; 80 per cent in year 2; 70 per cent in year 3, with a lower sales conversion rate for exams courses. In addition, the average estimate for annual student purchase of supplementary materials not included in the main course package is €20–35 (£13.70-£24) a year. Prices are much lower for ELT courses sold into the state sector at secondary level. Here the publisher normally fixes special net prices that may be anything between 30 per cent and 60 per cent of the normal retail price.

Photocopying is a problem in ELT, but not as great as for academic publishers in the higher education sector. ELT publishers estimate that it could represent 20-30 per cent or more of lost sales. Some attempts have been made by publishers and booksellers to get together and take joint action, as has happened in general and higher education publishing, but so far this initiative has not got much further than discussion.

4.6 Marketing ELT Books

Table 4.5 attempts to rate different promotional activities employed by publishers in the Greek market.
**Table 4.5: Rating of Promotional Activities used by ELT Publishers in Greece,**

<table>
<thead>
<tr>
<th>Promotional activity</th>
<th>Rating in order of importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>School visits/reps</td>
<td>1</td>
</tr>
<tr>
<td>Samples</td>
<td>2</td>
</tr>
<tr>
<td>Telesales</td>
<td>3</td>
</tr>
<tr>
<td>Publisher-driven events / author talks</td>
<td>4</td>
</tr>
<tr>
<td>Direct mail</td>
<td>5</td>
</tr>
<tr>
<td>Advertising</td>
<td>6</td>
</tr>
<tr>
<td>Catalogue</td>
<td>7</td>
</tr>
<tr>
<td>Press coverage</td>
<td>8/9</td>
</tr>
<tr>
<td>Exhibitions (e.g. Floras)</td>
<td>9/10</td>
</tr>
<tr>
<td>Other (e.g. e-mail and web marketing)</td>
<td>9/10</td>
</tr>
</tbody>
</table>

*Source: Publisher responses to Author’s survey.*

The rating is based on feedback from several ELT publishers. All publishers involved put rep visits and samples at the top; telesales is strongly associated with Burlington; views on the value of catalogues vary widely (Longman, for example, no longer has a print catalogue for Greece).

### 4.7 ELT Examinations

There is a huge ELT exams market in Greece, and every publisher’s catalogue lists an array of exam preparation materials.

One development has been wider government recognition of international ELT exam boards. There are now six or seven recognized boards for ELT rather than two (Cambridge ESOL and Michigan) as was the case three years ago. These include Trinity College London (TCL), Edexcel (Pearson Assessment’s London Tests), the Greek state ELT examinations (KPG), and most recently City & Guilds now joining the most popular and well-established Cambridge ESOL and Michigan examinations.

University of Central Lancashire exams were recognized in 2006 and then subsequently de-recognised by the Greek government after changes to the rules in August 2007 which required British exams to be accredited by the QCA in the UK. However it appears that Central Lancashire now fits the criteria and is being re-recognised!

For ELT publishers this development may have resulted in some fragmentation of the market for exam titles at the Common European Framework B2 level, making exam-specific publishing at this level less lucrative, although successful titles for the main Cambridge and Michigan exams continue to be good earners. Publishers’ sales of exam titles have also been helped by the trend reported above of students taking two or three exams at B2 level simultaneously.

Table 4.6 shows the result of a 2007 survey conducted by ELT News, a popular ELT professional journal in Greece, on the exam market in Greece, published in November 2007. The survey was based on interviews and questionnaires with owners of private language centres and was restricted to the four main exam boards mentioned.
Table 4.6: Exam Market Shares in Greece (the Top 4 exam boards only)

<table>
<thead>
<tr>
<th>Exam Board</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cambridge</td>
<td>41.8%</td>
</tr>
<tr>
<td>Michigan</td>
<td>41.1%</td>
</tr>
<tr>
<td>State Certificate</td>
<td>12.4%</td>
</tr>
<tr>
<td>Edexcel</td>
<td>4.7%</td>
</tr>
</tbody>
</table>

Source: ELT News Survey, November 2007

4.7.1 Cambridge ESOL Exams

As every ELT publisher knows, Greece is the most important market for the University of Cambridge suite of ELT exams. Although they have been under great competition in recent years, particularly from Michigan, the Cambridge exams remain popular. The main Cambridge exams are the First Certificate in English (FCE); the Certificate in Advanced English (CAE), and the Cambridge Proficiency in English (CPE).

Other Cambridge exams that were introduced about eight years ago in Greece are the Preliminary English Test (PET); the Key English Test (KET), and Young Learners. PET and KET are small players in the market; Young Learners are expanding, but it is not that great in numbers.

4.7.2 Michigan ELT Exams

Michigan (run by the Hellenic American Union) has been very successful in growing its share of the ELT exam market in recent years. If UCLES exams are perceived to have pedigree and prestige, Michigan exams are liked for being accessible, and are perceived as being easier than their Cambridge ESOL equivalents – something that its competitors challenge. The two main exams are the Michigan ECCE (equivalent to the Cambridge FCE) and the Michigan ECPE Proficiency (which at this top level is much more popular than the Cambridge Proficiency).

4.7.3 PALSO exams

PALSO (www.palso.gr) is the Greek foreign-language school-owner’s association. The majority of schools are members. The organisation runs its own exams, which compete for young learners with the Oxford exams and the Cambridge exams. In 2007, PALSO split into two “factions”: PALSO Federation (outside Athens), sponsoring the Edexcel exams, and PALSO Attiki (Athens and environs), sponsoring the University of Central Lancashire exams.

4.8 ELT Distribution

4.8.1 Distributors and Retailers of ELT

Some publishers reportedly find ways to direct supply the chains of language centres and the Ministry state schools, although it is illegal to do so. But the majority of ELT sales are through bookshops.

Some local ELT publishers have direct accounts with several bookshops. These include the two main chains, Papasotiriou and Eleftheroudakis, and other retailers.
that sell English language titles, such as Kosmos-Floras, Pantelides, Compendium, Efsthathiou in Larissa, and Lexis in Patra. Kosmos Floras also organises ELT Book exhibitions in Greece and publishes a newspaper for EFL teachers called Lingua Franca.

However, the normal channel for supplying imported and locally published ELT books to the many bookshops throughout Greece is through a limited number of importing wholesalers – Apollon, Efsthathiades, Georgiou, Eurobook, Papadopulos, Tsigaridas - who specialise in distributing ELT and other foreign-language teaching titles. The sizeable market controlled by the two largest, Apollon and Efsthadiades, has been the subject of a recent competition law court injunction, and this has unsettled the market in a typically Greek fashion.

A large ELT distributor in Greece may have up to 3,000 customers, of which 2,000 can be significant accounts; but less than 500 of these will account for 80 per cent of its business. Its customers are mainly bookshops, ranging from the very best bookstores to the books-and-stationery corner shops, some Government public service organisations who are book purchasers, and state schools, where the publisher gets the order and the distributor supplies it direct to the school.

**Apollon**
Apollon is the largest of the ELT distributors. It has 170 employees operating through its six regional outlets, and probably has about 30 per cent of the overall ELT book market. It is part of an equity capital group. About two-thirds of its sales come from foreign books (ELT accounting for about 80 per cent of this). The company is the exclusive ELT distributor for Longman/Pearson.

**Efsthathiades**
Efsthathiades is a successful family business. The company’s two main activities are distribution of foreign-language teaching books and distribution of Greek-language books for schools. They have several warehouses in Athens, Thessaloniki and Crete. They have the important long-standing exclusive with Burlington Books, as well as the ELT exclusive with OUP. It is estimated that Efsthathiades and Apollon have 60 per cent of the ELT market between them.

**Georgiou**
Georgiou is another family company. It was set up in 1964 to distribute Greek literature and schoolbooks, and moved into ELT distribution in 1974. It has warehouses in Athens and Thessaloniki, and distributes quite a wide range of ELT, trade, school-books and stationery. The company owns a chain of bookstores, which sell the range of products that it distributes.

### 4.8.2 Trading Terms

Discounts from ELT publishers average between 40 and 50 per cent, depending on the customer. Discounts to the larger wholesalers are typically 45–50 per cent, with wholesalers selling on to bookshops at around 30 per cent discount.

Some publishers operate a consignment arrangement with the distributor; others supply on firm account, with 120–180 days credit on stock orders.

There are no credit terms on the supply of ELT books to state schools, where Greek publishers normally supply direct to schools. Payment is not less than six months and can be at least one year.
Bookshop returns are normally limited to a maximum of 10–15 per cent of their annual turnover. Publishers normally accept returns only of out-of-print titles, and operate a new-for-old policy on new editions. However, sometimes they are forced to accept crediting distributor’s overstocks that have to be pulped and written off.

4.9 ELT Organisations

PALSO is mentioned above. There is also a Greek Foreign Languages Publishers Association, to which most of the local ELT publishers belong.

The British Council’s main involvement in ELT in Greece is in administering and helping to promote the Cambridge ESOL exams (although no longer on an exclusive basis), and in the direct teaching of English. It also has an ongoing role in teacher development, although it no longer provides grant-aided teacher training into the state school system as it used to. There is since 2007 a new Director (Richard Walker) and Assistant Director (Exams, Mark Walker).

The Hellenic American Union is the US equivalent to the British Council, and a competitor. It administers and actively promotes the Michigan exams in Greece. It now has a significant publishing programme of exam practice books.

ELT News (owner/editor Anastasia Spyropoulou) is a well-established and popular monthly newspaper for the ELT profession. See www.eltnews.gr for more details.

4.10 Opportunities for ELT Publishers

Greece offers international ELT publishers a large accessible market but one that is (at best) static in terms of volume sales, highly congested in terms of competitors, and saturated in terms of products. ELT publishers have been forced to increase investment in publishing and promotion to maintain sales and this in turn has decreased margins.

In these circumstances, it is clear why companies like Express and MM Publications have looked beyond Greece to international markets, but it is less clear why a recent or new entrant into European ELT would want to make a significant investment in Greece, other than to acquire a market leading position which would only be possible through an acquisition of Burlington or Express.

The strategy used by the established foreign-owned ELT publishers of investing in their own local sales operation in Greece would make little sense for a smaller company wanting to develop its Greek sales. Partnering with a local Greek educational publisher on a co-edition or promotion/distribution basis may be a better option. However, the right choice of partner is vital as there are very few Greek publishing companies with the appropriate know-how and market coverage who are likely to be interested.
5  The Trade Market

This section looks at the trade market in Greece for adult fiction, non-fiction, children’s books, and general reference titles.

5.1  Trade Books

5.1.1  Greek Trade Books

Trade publishers in Greece have to contend not just with a small population, but one that does not have a longstanding tradition of reading for pleasure.

Despite this, there is a reasonable and well-published market for literary as well as mass market fiction and a thriving and growing children’s book market. In Greece, literature means paperback, as hardbacks do not exist beyond some children’s titles and imports. Trade publishers are heavily reliant on translations, which account for nearly 60 per cent of literature titles and bring in big names. Nevertheless, with few exceptions, the best-selling fiction by Greek writers outsells the best-selling fiction by foreign authors in translation.

Local publishers report that a typical print quantity is 2,000–3,000 copies for a new children’s book, and 2,000 or less for an adult literary title. A successful trade title sells over 5,000 copies a year, and a bestseller sells more than 10,000 copies a year, and can sell 30,000 to 40,000 copies and upwards. For example, the 2007 Greek fiction bestseller published by Psichogios sold 89,000 copies in that year.

Table 5.1 lists the Top 10 selling fiction titles in March 2008 according to the Kathimerini newspaper. This shows the mix between Greek authors and foreign writers in translation. Foreign writers regularly feature in the best-seller lists.

<table>
<thead>
<tr>
<th>Position</th>
<th>Author/Translator</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vassilis Alexakis</td>
<td>m.Ch. (A. D.)</td>
</tr>
<tr>
<td>2</td>
<td>Ian McEwan</td>
<td>Atonement</td>
</tr>
<tr>
<td>3</td>
<td>Kiki Dimoula</td>
<td>Metaferthikame paraplevros (We Moved Next Door)</td>
</tr>
<tr>
<td>4</td>
<td>Andreas Mitsou</td>
<td>O kyrios Episkopakis (Mr Episkopakis)</td>
</tr>
<tr>
<td>5</td>
<td>Yannis Xanthoulis</td>
<td>Tou fidiou to gala (Snake’s Milk)</td>
</tr>
<tr>
<td>6</td>
<td>Louis-Ferdinand Celine</td>
<td>Journey to the End of the Night (a new authorised translation)</td>
</tr>
<tr>
<td>7</td>
<td>Lena Manda</td>
<td>To spiti dipla sto potami (The House by the River)</td>
</tr>
<tr>
<td>8</td>
<td>Milan Kundera</td>
<td>Laughable Loves</td>
</tr>
<tr>
<td>9</td>
<td>Dimitris G. Stefanakis</td>
<td>Meres Alexandrias (Alexandrian Days)</td>
</tr>
<tr>
<td>10</td>
<td>Cormac McCarthy</td>
<td>No Country for Old Men</td>
</tr>
</tbody>
</table>

Source: Kathimerini newspaper, 2nd March 2008

Non-fiction also sells well in some areas, including DIY, practical, self-help titles. There is also a growing interest in lifestyle books. Table 5.2 lists the Top Ten non-fiction best-sellers in April 2007, from the same source, which included history (4 titles), the occult (1), politics (1), architecture (1), philosophy (1), Greek classics (1), and literary studies (1).
Table 5.2 Non-Fiction Best-sellers, March 2008

<table>
<thead>
<tr>
<th></th>
<th>Author</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rhonda Byrne</td>
<td>The Secret</td>
</tr>
<tr>
<td>2</td>
<td>Ernst Gombrich</td>
<td>A Little History of the World (Weltgeschichte fur junge Leser)</td>
</tr>
<tr>
<td>3</td>
<td>Eric Hobsbawm</td>
<td>Globalisation, Democracy and Terrorism</td>
</tr>
<tr>
<td>4</td>
<td>Alain De Botton</td>
<td>The Architecture of Happiness</td>
</tr>
<tr>
<td>5</td>
<td>Vassilis Tzanakaris</td>
<td>Asia Minor in Tears</td>
</tr>
<tr>
<td>6</td>
<td>Nelly Andrikopoulou</td>
<td>Mataroa’s Course</td>
</tr>
<tr>
<td>7</td>
<td>Francois Dagognet</td>
<td>The Great Philosophers and their Philosophy (Les grands philosophes et leur philosophie)</td>
</tr>
<tr>
<td>9</td>
<td>Tassos Kostopoulos</td>
<td>War and Ethnic Cleansing: 1912-1922</td>
</tr>
<tr>
<td>10</td>
<td>(Collective)</td>
<td>Encyclopaedia of Modern Greek Literature (Patakis)</td>
</tr>
</tbody>
</table>

Source: Kathimerini newspaper, 2nd March 2008

5.1.2 English-Language Trade Books

For international English-language trade publishers, Greece is a smaller market than Spain and Italy, but well ahead of Portugal and Turkey. Pro rata to its population, Greece is in first position in southern European countries. It is also a growing market, particularly in the retail sector with the opening of Public Stores, the expanding Papisotiriou chain, and the arrival of Fnac.

The market for imported trade titles is boosted by the summer reading of 14m tourists each year, 25 per cent of whom are British. British publishers report sales are mass market driven via tourism but that Greece is also becoming a better literary market supported by the chains, especially Eleftheroudakis, and it is also a good market for illustrated/art and lifestyle books.

Paperback fiction remains the strongest, led by mass-market, but well-supported by literary fiction and non-fiction, followed by reference. The main sales are of mass-market paperbacks, particularly thrillers and “chick lit”, with the usual best-selling English-language big name authors like Dan Brown, John Grisham, Tom Clancy, Stephen King, Jackie Collins and Wilbur Smith able to sell 4,000–5,000 copies in the first year. Hardback is mainly for non-fiction best-sellers, with hardback fiction confined to a few lead titles, in small numbers.

Non-fiction imports which sell well include popular science, history, popular culture and politics. Greek-interest titles are the other sellers, ranging from travel guides, to Captain Corelli’s Mandolin, The Cretan Runner, Victoria Hislop’s The Island, and Salonica: City of Ghosts (Non Fiction) by Mark Mazower.

For literary paperback imports, 1,000 copies would be considered a good seller by UK and US trade publishers, and 400 copies for literary hardback titles. For children’s book imports, 200 copies would be considered a good seller; for illustrated books, 150-200 copies.
5.2 Market Size

There is no reliable data on which to base an estimate of the value of trade book sales in Greece. Trade book sales at retail value including children's books could be worth as much as €300m (£205m) which would represent more than half of the official retail figure for the total family spending on books in Greece (€633m (£433m) in 2006).

An estimate by one leading distributor of the annual retail value of imported foreign trade titles is €6m (£4.1m) at retail value.

It is difficult to validate these estimates on the basis of publisher turnovers, because only the larger companies have to publish accounts, and these companies will not normally separate out their trade sales from educational sales, or their own sales from sales of other publishers’ titles through their own bookshops, where this is relevant.

5.3 The Main Trade Publishers

The characteristics of the Greek publishing industry as described in Section 2 apply in particular to trade book publishers and publishing.

5.3.1 General Publishing: Adult Fiction & Non Fiction

General publishing remains a family-owned and family-run concern. So far, there are only a few examples of Greek media groups buying into book publishing; very limited foreign investment unlike in the larger markets of southern Europe, and little consolidation in terms of mergers and acquisitions of lists.

However, there has been a growing concentration of both production and sales of trade books. Some ten publishers together now have the main share of the children’s and adult trade book market. Several of these are also active in school-books and academic publishing (see Sections 3 and 6). It is getting harder for the large number of small and medium-sized publishers to get their books into the distribution network and compete.

Tables 5.3 lists the leading publishers of fiction and Table 5.4 lists the leading publishers of Greek fiction, in terms of the numbers of titles published, in 2006.

Table 5.3: The Leading Fiction (Novels) Publishers, 2006

<table>
<thead>
<tr>
<th></th>
<th>Publisher</th>
<th>Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Kedros</td>
<td>58</td>
</tr>
<tr>
<td>2</td>
<td>Bell Harlenic</td>
<td>55</td>
</tr>
<tr>
<td>3</td>
<td>Livanis</td>
<td>53</td>
</tr>
<tr>
<td>4</td>
<td>Kastaniotis</td>
<td>41</td>
</tr>
<tr>
<td>5</td>
<td>Psychogios</td>
<td>35</td>
</tr>
<tr>
<td>6</td>
<td>Modern Times</td>
<td>31</td>
</tr>
<tr>
<td>7</td>
<td>De Agostini Hellas</td>
<td>29</td>
</tr>
<tr>
<td>8</td>
<td>Ellinika Grammata</td>
<td>29</td>
</tr>
<tr>
<td>9</td>
<td>Metaichmio</td>
<td>28</td>
</tr>
<tr>
<td>10</td>
<td>Empiria Ekdotiki</td>
<td>28</td>
</tr>
<tr>
<td>11</td>
<td>Patakis</td>
<td>25</td>
</tr>
</tbody>
</table>

Source: Biblionet/EKEBI, 2007
Table 5.4: The Leading Publishers of Greek Fiction, 2006

<table>
<thead>
<tr>
<th>Rank</th>
<th>Publisher</th>
<th>Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Kedros</td>
<td>26</td>
</tr>
<tr>
<td>2</td>
<td>Livanis</td>
<td>25</td>
</tr>
<tr>
<td>3</td>
<td>Empiria Ekdotiki</td>
<td>20</td>
</tr>
<tr>
<td>4</td>
<td>Kastaniotis</td>
<td>18</td>
</tr>
<tr>
<td>5</td>
<td>Ellinika Grammata</td>
<td>18</td>
</tr>
<tr>
<td>6</td>
<td>Modern Times</td>
<td>14</td>
</tr>
<tr>
<td>7</td>
<td>Patakis</td>
<td>9</td>
</tr>
<tr>
<td>8</td>
<td>Agyra</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>Psichogios</td>
<td>8</td>
</tr>
<tr>
<td>10</td>
<td>Gavrilidis</td>
<td>8</td>
</tr>
</tbody>
</table>

Source: Biblionet/EKEBI, 2007

Summary notes on some of the best-known Greek trade book publishers are given below.

**Kedros**
Kedros is a well-established company, with a large catalogue. It has an annual turnover of about €6m (£4.1m) and publishes around 170-250 titles a year. Its trade bestsellers have included Tolkien’s *The Lord of the Rings* and *The Hobbit*, as well as some of Stephen King’s titles. Its Greek fiction bestselling authors in 2007 included Nikos Themelis and Yovanna.

**Livanis**
Livanis was established as a publisher in 1972. Although a family business, it is now listed on the Greek stock market. In 2006, the company had annual turnover of €13m (£8.9m). It employs about 100 staff, and publishes some 150 new fiction and non-fiction titles a year. About 60 per cent of its catalogue is made up of foreign translations, with many well-known fiction and non-fiction authors over the years including Gabriel Garcia Marquez, Paolo Coelho, Anita Desai, A.S. Byatt, Dan Brown, Arthur Golden, Michael Cunningham and Jeremy Rifkind. It has published much political and economic non-fiction by Greek and foreign authors, including celebrated names like George Soros, Henry Kissinger and John Kenneth Galbraith. Unlike most publishers, Livanis also owns its own printing house.

**Ellinika Grammata**
Ellinika Grammata was established in 1957. It has been growing fast since a media company took a stake in 2000, and full ownership in 2007. Apart from bookshop sales, the company is seeking opportunities to develop book titles for newspaper promotion and for business-to-business sales. In 2006, it had an annual turnover of over €15m (£10.3m). It employs about 150 people, and publishes about 250 new titles annually. It has an important fiction list, including Umberto Eco novels like *The Name of the Rose* and *Baudoliono*, Peter Carey’s Booker winner, *True History of the Kelly Gang*, and William Trevor’s *The Story of Lucy Gault*.

**Kastaniotis**
Kastaniotis is another serious family-owned general publisher. In 2006, it published over 150 titles and had an annual turnover of €8m (£5.2m). It has one of the strongest lists of contemporary Greek literature, and also has a good range of foreign writing in translation, which includes many classics (Conrad, Dickens, Wilde, Wolfe, Camus, Hemingway), and contemporary authors such as P.D. James, Michael Palin,
Doris Lessing, Kasuo Ishiguro and Anne Enright. It was also the first Greek company with International Organization for Standardization (ISO) accreditation.

Harlenic Hellas-Bell
Harlenic Hellas-Bell started via kiosks with small format, mass-market paperbacks, with authors like Jack Higgins, Le Carré and Wilbur Smith. Their book design has improved in recent years, and the company now sells into both bookstores and kiosks. It publishes three separate series of books in translation: bestsellers (Grisham et al); literary fiction (David Lodge et al); and romantic novels.

Psichogios
Psichogios’ main reputation is as a publisher of Greek commercial fiction and foreign literary fiction, and also as a publisher of children’s and juvenile titles (see Section 5.3.2). Its list of authors in translation includes Salman Rushdie, Zadie Smith, Khalid Hosseini, Jan Martell, and the successful translation of Louis de Bernière’s *Captain Corelli’s Mandolin*. The company has an annual turnover of €9m (£6.2m) and publishes about 150 new books a year.

Patakis
Patakis is one of the leading general publishers. The company started with school-books in 1974, before moving into children’s publishing in the 1980s, and adult trade publishing in the 1990s. It has a strong trade list, with many well-known foreign European and Latin American authors in translation in its modern classics series, including Ian McEwan and Nick Hornby. The company publishes about 350 per annum and had a turnover in 2007 of €17m (£11.6m).

Hestia
Hestia is an older established company, which does not feature so much on the best-seller lists but it has been publishing for 120 years, and used to have the leading list of contemporary Greek authors. It continues to have Greek authors and a few translations. It also publishes all the books of Milan Kundera, one of the most successful foreign writers in Greece.

Oceanida
Oceanida was established in 1987. It has many successful novels, which are particularly popular with a female readership, including *The House of the Spirits* by Isabelle Allende; *The Horse Whisperer*, by Nickolas Evans; *Hotel du Lac*, by Anita Brookner, and *Bridget Jones’ Diary*, by Helen Fielding. It publishes the books by Rosamund Pilcher. Oceanida has also published novels by Orhan Pamuk, the Nobel prize winning Turkish author.

Ikaros
A leader in poetry, Ikaros is another long-established company, which has been publishing for 60 years, and counts two Greek noble prize winners, George Seferis and Odysseas Elytis, among its authors.

Specialist companies
There are also several companies producing a range of information, non-fiction and reference titles. For example, Road publishes travel guides and maps; Thymari publishes books on sociology, health and psychology; Melissa specialises in books on art, architecture, archaeology and history. Kapon publishes art books. A company called Esoptron publishes titles on religion, philosophy and ancient Greece. Archetypon publishes books on religion, philosophy and the occult. Kaktos has a large list of ancient Greek authors. Papyros publishes ‘Britannica’ encyclopaedias
and is also moving into foreign fiction. Diogoras publishes bilingual Greek dictionaries.

### 5.3.2 Children’s Publishing

The children’s book market in Greece seems to be thriving. 60,000 visitors attended the children’s book fair in Athens in February 2008. There has been a large increase in recent years in the range of titles and publishers of children’s and juvenile fiction and non-fiction. About two-thirds of titles for children are translated into Greek from other languages. At the same time, the number of Greek authors is also growing, and more publishers are getting involved in children’s book publishing.

Table 5.5 lists the leading children’s book publishers, in terms of the numbers of titles published, in 2006.

**Table 5.5: The Leading Children’s Book Publishers, 2006**

<table>
<thead>
<tr>
<th>Publisher</th>
<th>Number of Titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Savalas</td>
<td>335</td>
</tr>
<tr>
<td>2 Modern Times</td>
<td>208</td>
</tr>
<tr>
<td>3 Patakis</td>
<td>176</td>
</tr>
<tr>
<td>4 Agyra</td>
<td>112</td>
</tr>
<tr>
<td>5 Papadopoulos</td>
<td>111</td>
</tr>
<tr>
<td>6 Minoas</td>
<td>97</td>
</tr>
<tr>
<td>7 Kedros</td>
<td>97</td>
</tr>
<tr>
<td>8 Psichogios</td>
<td>88</td>
</tr>
<tr>
<td>9 Susaeta</td>
<td>83</td>
</tr>
<tr>
<td>10 Ellinika Grammata</td>
<td>64</td>
</tr>
</tbody>
</table>

**Source:** Biblionet/EKEBI, 2007

The most important children’s book publishers include Psichogios, Patakis, Modern Times, Savalas, and Ellinika Grammata.

**Psichogios**

Psichogios is one of the leading specialist children’s publishers. The company was set up by Athanassios Psichogios in 1979 to publish children’s fiction. It then moved into adult fiction, but over 50 per cent of its turnover is still from its list for children and younger readers. The list is a mix of Greek authors and translations, which include Roald Dahl, Philip Pullman, Jacqueline Wilson, and the prized *Harry Potter*, the Greek edition of which sells around 85,000 copies per title.

**Patakis**

Patakis is recognized as a quality children’s book publisher and one of the market leaders. Its children’s list includes foreign and Greek titles, with about half fiction and half non-fiction (including gift products). Translations represent about half the list, so are important to Patakis and the company has strong links with a number of UK children’s book publishers including Usborne and Scholastic. It also publishes some prestigious and award-winning Greek children’s book authors.

**Savalas**

Savalas has become a major children’s book publisher. The company started publishing children’s books with a few titles in 2000; in 2006, it published more
children’s titles than any other publisher. Its list is based on translations, and covers
the full range including a lot of titles for very young children.

**Modern Times**
Modern Times is a relative newcomer to book publishing, but very active. Like
Ellinika Grammata, it is owned by a media group. The company publishes mainly
mass-market comics and illustrated children’s books, ranging from *Pokemon*,
*Jurassic Park*, *Barbie*, and ‘Batman’ illustrated books, to Agatha Christie and James
Bond comics.

**Ellinika Grammata**
Ellinika Grammata publishes a strong mass market strand (Disney and Warner
books) as well as children’s and teen books (Greek authors) for the more traditional
distribution channel. The company also publishes Dorling Kindersley titles for the
children’s market.

**Other children’s publishers**
There may be as many as fifty to sixty children’s book publishers in Greece. Apart
from those mentioned above, larger general trade publishers with good children’s
lists include Kedros, Kastaniotis, Livantis, Metaichmio and Hestia. Other children’s
publishers are Agyra and Minoas, and the Spanish-owned publisher, Susaeta. There
are also a number of smaller children’s book publishers, among which are Evernites,
which publishes non-fiction titles, and Papadopoulos.

5.3.3 English Language Trade & Children’s Publishers

For sales of English language trade books, principally to the large tourist sector, the
usual UK and US trade publishers are well represented – Penguin, Random House,
Macmillan, etc. Lifestyle book publishers such as Phaidon and Thames and Hudson
also sell well due to the growth in sales of coffee table books.

The major US trade houses have long been active in Greece. While there has been a
traditional preference for UK sourcing with the benefits of faster delivery, US
publishers still have a significant impact and they are being helped by the weak
dollar, especially in the tourist distribution sector.

One or two of the major international trade players have been surprised recently by
quite how many UK publishing reps visit Greece and also by how many foreign
accounts the main customers have as more stores open and retailers presumably
feel they need an edge to keep their customers. Information about the way English
language books are promoted and distributed, and trading terms for imported titles, is
given below.

5.4 Distribution and Retail

The distribution network is very fragmented. Greek books are distributed through
about 1,700 bookshops, and a total of 3,500 point-of-sale outlets in all, including
press agencies and supermarkets. There is also a lot of direct selling by publishers to
the general public, not yet through e-commerce to any significant extent, but through
direct mail marketing campaigns (in some cases using television info-mercials”), and
through public book fairs.

The bookshops vary greatly. There are about 200 bookstores dealing exclusively with
books, and another 500 well-appointed books-and-stationery stores with organised
book display and sales areas. The rest are bookshops by name only, and are very restricted areas stocking some books with an assortment of non-book items in often small and cramped areas. The kind of books that are most widely available in these bookshops are school texts; foreign-language texts; children’s books, and some adult literature (mainly bestsellers), whereas the books-and-stationery stores stock a much wider range, including quality literature, social science titles, and subjects of general interest.

The larger general Greek publishers normally work with a number of book wholesalers and retail customers, and may have anything between 1,000 and 3,000 accounts, with a core list of 200–500. Many have their own bookshops. In 2002, four of the leading publishers – Patakis, Kedros, Psihogios and Minoas – joined forces to open a chain of bookshops, called Bibliotopia, which created some upset in the book trade and, although three of the four bookstores remain, the expansion was halted.

A medium-size or smaller Greek publisher operates far fewer accounts – typically up to 200–300 – or relies on one wholesaler and perhaps 30–50 bookstore customers. Retail outlets do not have the capacity to cope with 9,000 new titles each year, and smaller publishers have the real dilemma of whether to go with the larger wholesalers who are working with many titles, or go to smaller distributors to get more of their attention.

For imported English-language trade titles, the larger UK and US trade book publishers typically work through about 20 active accounts, and in some cases 30-40 accounts. Their Top 5 in turnover would normally include Hellenic Distribution, Eleftheroudakis, Papasotiriou, Public Stores, FNAC and Politea. More information about these customers is given below.

### 5.4.1 Key Wholesalers

For trade books, the role of book wholesalers is important for network coverage. They work mainly with the smaller bookstores. However, for the larger publishers, turnover via wholesalers is declining year on year, as much of their retail book sales through bookshops are supplied direct from the publisher to the book chains and bookshops.

The Greek wholesalers and main booksellers are listed in the Appendices. The main wholesalers include Christakis, Apollon, and Georgiou, with Hermes doing distribution, and Hellenic as the leading distributor for foreign trade books.

**Christakis**

Christakis is a large, national, general book distributor, working with many of the Greek publishers, and also a retailer. The company represents many, mainly smaller, general and academic publishers.

**Apollon**

Apollon is the largest book wholesaler. Its major line of business is ELT and foreign languages, but 35 per cent of their turnover comes from Greek books. They have a number of exclusives with smaller Greek publishers.
Georgiou
Georgiou is also associated with ELT and schoolbooks, although the company has distributed Greek trade books since 1964, and uses its retail chain of bookstores in to sell the full range it distributes.

Hermes
Hermes is not a wholesaler, but a logistics distribution company, the first of its kind in Greece. The publisher continues to be responsible for getting and processing orders, which it passes to Hermes who handles invoicing, supply and payment. It started as a joint-venture between the publisher Kastaniotis and the retailer Eleftheroudakis. It handles the distribution for Eleftheroudakis, Kastaniotis, and a number of publishers.

Hellenic Distribution Agency
Hellenic Distribution Agency (HDA) is the key importing wholesaler/retailer for foreign trade publishers. Hellenic imports and distributes 3,500 magazine titles, 250 newspaper titles, and 5,500 new book titles which are mainly mass market. The distribution network consists of some 4,000 retailers (kiosks, shops, hotels, supermarkets, souvenir shops etc.) including HDA’s own chain of press/book outlets, under the NEWSSTAND brand name.

5.4.2 Key Bookstore Chains

There are now several major bookstore chains, but by far the largest and most influential both for Greek and imported foreign books are Papasotiriou and Eleftheroudakis:

- **Papasotiriou** is a very large and forward-looking nationwide chain of some 25 shops with a good range of both Greek and foreign books across 27 branches in 11 cities, with both general and technical bookstores that sell fiction, art books, software and e-devices. They are venturing into more commercial outlets and have airport kiosks in Athens and Thessaloniki.

- **Eleftheroudakis** is a third-generation family-owned bookseller, and the second biggest chain in Greece, and (with Hellenic) the main importer of non-ELT books. It has 26 branches, stocking both general and foreign language non-ELT books in Athens, Thessaloniki, Mykonos and Alexandroupoulis. The 7-storey branch on Panepistimiou Street in central Athens compares well with Europe’s best.

- **Ianos** has 5 branches in Thessaloniki, a brand new one in Athens (a 1,600 sq.m store with an important venue for activities) and a successful on-line store.

- **Protoporia** started in the 1970s as a discount store, and it is now the fourth largest bookshop chain, with 4 general bookstores in Athens, Thessaloniki and Patras, and one very popular on line bookshop.

- **Kosmos-Floras** has 13 bookshops in greater Athens, and a new one in Thessaloniki, although specializing mainly in ELT books but has now also moved into trade books.
• **Leader Books** has 9 general bookshops in greater Athens selling Greek and foreign-language books.

• **Hellenic Distribution Agency** has over 40 foreign press agencies which sell books, as well as newspapers and magazines, throughout Greece, including the main tourist resorts.

• **Fnac** opened its first store in Athens in November 2005 and others are likely to follow in Athens (Glyfada suburb) and Thessaloniki.

• **Public (Germanos)** is a successful micro-electronics company which has launched mixed book-CD-DVD stores in Thessaloniki and in Volos, Nicosia in Cyprus, and a third flagship store which opened in central Athens in December 2007. They envisage expanding through the Balkans region by 2010 and opening up more stores in Greece and Cyprus.

### 5.4.3 Key Bookshops

The 10 largest bookshops are:

• **Eleftheroudakis**: 2,500 sq. m. (of which 2,350 sq. m. for books), 17 Panepistimiou St. Athens.

• **Malliaris**: 2,200 sq.m. (of which 2,000 sq. m. for books), 39D Gounari St. Thessaloniki; a mixed books and stationery store.

• **Patakis**: 1,500 sq.m. (of which 1,400 sq. m. for books), 65 Akadiamis St. Athens.

• **Protoporia**: 1,350 sq.m. (main branch), 3-5 Gravias St. Athens.

• **Ianos**: 1,600 sq.m. (of which 1,100 sq.m. for books), 24 Stadiou St. Athens.

• **Papasotiriou**: 1,000 sq.m., 37 Panemistimiou St. Athens.

• **Evripidis sti Stoa**: 810 sq. m., 11V.Konstantinou St. Halandri (Athens suburb).

• **Politeia**: Started as a discount store, now one of the reference points in the book trade, with 750 sq.m., 1-3 Asklipiou St. Athens.

• **Hestia**: 600 sq. m., 60 Solonos St. Athens.

• **Fnac**: 2,200 sq. m. (of which 600 sq. m. for books), The Mall Athens, Maroussi (Athens suburb).

• **Public (Germanos)**: 2,000 sq.m. (of which 500 sq. m. for books), Mediterranean Cosmos, Pilea (Thessaloniki airport). Plus December 2007 opening in Syntagma Square, Athens: 5,000 sq. m. (of which 1,500 sq. m. for books).

Also relevant for foreign books are a few bookstores mainly in Athens stocking English titles, including Euripides – a three-storey bookshop with a floor dedicated to
English books, and an English-language bookstore called Compendium, which is reputed to be struggling and has a very poor stock level now. There is also a key store in Thessaloniki called Konstantinidis.

5.4.4 Trading Terms on Greek Books

As ever, publishers’ discounts vary. The average seems to be about 40 per cent, with 30–35 per cent to bookshops and 40–50 per cent to the major book chains and wholesalers.

Credit terms normally offered by Greek publishers are from four to eight months. Late payment is a serious problem. More than one publisher commented that bookshops sometimes arbitrarily take eight months. For many of these publishers, cash-flow is a problem. Many, mainly smaller bookshops do not pay, so publishers work with a system of post-dated cheques.

Publishers try to avoid ‘on consignment’, but use it with larger bookstores like Eleftheroudakis. The policy on returns varies by publisher. Kastaniotis, for example, says it operates a 5-10 per cent returns policy, whereas Savalas claims to accept full rights of return.

5.4.5 Trading Terms on Imported Books

For UK trade publishers, the average discount for imported titles is 45–55 per cent. There are no exclusives, apart from ELT.

Credit terms vary – between 60 and 120 days to retailers, and from 120 to 180 days to wholesalers.

Mark-up ranges between 15 and 50 per cent, with the major bookstores in Athens like Eleftheroudakis at the lower end, and 40–50 per cent being the regular mark-up applied by wholesalers.

Returns on imported trade titles are higher than with other southern European markets, because of the amount of damaged stock from tourist/kiosk distribution. Publishers told me they expect returns of around 25 per cent.

Although there has been a credit card boom in Greece in recent years, cash transactions are still more common than in many other European countries, and many book purchases in bookshops are still paid for in cash. This is for no other reason than that a number of book outlets do not have credit transaction facilities.

5.4.6 Supermarkets

For the large stores like Carrefour, Jumbo (the children’s toy store/chain), and Hondos, there do not seem to be specialist distributors, and most sales are direct from the publishers. In Greece there is no equivalent of the big book departments to be found in Corte Ingles in Spain, for example. Stock and space for books is limited, as is the range of titles – Greek dictionaries, self-study, some children’s books and some popular mass-market titles.

Some of the leading trade publishers in this survey commented that they supplied supermarkets at a minimum of 40 per cent discount, with an open returns policy, and
three or four months credit, and that they are generally good payers.

5.4.7 Kiosks

Kiosks are traditionally the channel for magazines and newspapers, rather than books. There are two big distribution networks for daily and weekly newspapers and magazines – Argos and Europa – and there are about 11,000 selling points nationwide.

Part-works used to be sold by newspaper publishers to complement sales of newspapers like *To Vilma* and *Ta Nea*, but part-works are not popular any more in Greece. Instead Greek newspaper groups are now actively engaged in buying rights from publishers to books which they print and sell in large quantities with their newspapers and separately through the kiosks and newsstands.

Rather than simply using books to increase newspaper sales, the newspaper publishers have been switching their approach in recent years and using their advertising power and knowledge of their distribution channel to sell series of books separately from newspapers through the kiosks, thereby creating a complementary sales market. Their focus is not so much on trade fiction as collectible items (series of titles on history, art, music, for example) which would not hit the bestseller lists in conventional bookstores.

For English language publishers, the main distributor for imported English language mass-market books, newspapers and magazines is Hellenic. Full rights of return apply, and returns can be high.

5.4.8 Door to Door

Door-to-door was big business in Greece a few years ago, but seems to be less popular now, although it is still important for some types of product such as encyclopaedias and dictionaries.

5.4.9 E-Commerce

The leading book retailers now have e-commerce sites. The best known include www.bestseller.gr (the Bibliokiniski bookshop chain) and the e-commerce sights belonging to Papasotirou, Protoporia and Eleftheroudakis. However, while the proportion of trade book sales through e-commerce continues to grow, its proportion of total book sales is still relatively modest. Many of the customers who use internet bookshops are Greeks living abroad. Greece is a follower rather than a leader when it comes to internet use.

Bookstores report that international e-commerce sites like Amazon are often used by book-buyers for reference, but not much for online purchase of trade titles. However, the situation is changing for higher priced academic books, with Amazon having an effect on local book prices (see Section 6).
5.5 Book Promotions

5.5.1 Bookstores

The top of the range bookstores are very well laid out and appointed; provide very
good display at points of sale, and are considered by many to have raised standards
of display in other bookstores as well. Some of the leading stores in Athens like
Fnac, Ianos and Eleftherodakis have in store coffee shops and facilities for music
and literary events which include book-related launches and promotions. Trade book
publishers report that these retailers are becoming more demanding in the support
which publishers are expected to provide for in store book events.

5.5.2 Book Events

World Children’s Book Day, World Book Day and World Poetry day are celebrated in
a quiet way among booksellers and other organisations. In recent years, tribute
events have been held for some of the most important Greek authors (such as
Yorgos Seferis, the 1962 Nobel Prize winner), initiated by the Ministry of Culture and
the National Book Centre. There are also book events linked to the main book fairs
open to the public. At the 2007 children’s book fair in Athens, for example, the
National Book Centre launched a bookshop front display competition in which about
twenty-five bookshops participated.

5.5.3 Journals & Literary Prizes

There are a number of journals for general readers on books and book publishing.
The main one is called Diavazo, a monthly literary magazine with a best-seller list,
produced in collaboration with bookstores, which also organises literary prizes.
Another magazine called Dekata awards prizes for Greek and translated fiction with
money raised from sponsorship. The state organises a book prize, which takes place
before Christmas. In 2005, the National Book Centre of Greece also launched a
favourite book of the year prize nominated by readers. There is also a children’s book
prize organized by the Greek section of IBBY (International Board of Books for
Young People).

5.5.4 Promotion of English Language Trade Books

The main UK trade publishers do not have resident representatives, but rely on
twice-yearly visits to key customers, and meetings at the Frankfurt and London Book
Fairs. They participate in and initiate promotions with Hellenic and Eleftheroudakis.
Hellenic takes a very focussed, small selection of titles, bestselling A format
paperbacks, and puts them in almost every kiosk/outlet for the whole summer
season. Eleftheroudakis produces catalogues to which publishers contribute, and
Hellenic run various promotions – author book of the month, etc – in some of their
outlets.

Papasotiriou and Public also now have bi-annual catalogues; Fnac has started
producing a Christmas catalogue and independent bookshops Konstantinidis and
Evrpidies produce Christmas catalogues which tend to be distributed within
broadsheet newspapers in the lead up to the festive season.

The British Council in Greece also has a programme of events to promote
contemporary UK writing. This involves high profile literary events by well-known and
upcoming contemporary UK writers. The 2008 programme included James Meek, Panos Karnezis, Marina Lewycka, Victoria Hislop, Paul Johnston and Kate Mosse. The Council’s Converging Lines is a two-way poetic exchange between young UK and Greek poets with readings, workshops and translations. In 2007, there was also a literary translation competition organized by the British Council in collaboration with EKEMEL, focusing on British literature published in Greek translation.

5.6 Opportunities for UK Trade & Children’s Publishers

5.6.1 Selling Books

UK and US publishers report a steady market for imported English trade and children’s books, which support an expatriate community and more importantly a large tourist industry. This market for imported books has been described above, along with an estimate of market size, with details about key customers and trading terms.

There are very few examples of inward publishing investment by foreign trade publishers in local language publishing in Greece. One exception is Susaeta (a children’s publisher and part of a Spanish group). Given the thriving children’s book market in Greece, and the importance of translations in this market, it would be surprising if one or two UK publishers did not follow their example.

5.6.2 Rights & Co-edition Sales

Greece may not be a top-league market for literary agents, who mostly handle foreign rights, but it is an interesting market for UK trade and children’s book publishers for rights sales and co-edition deals because of Greek trade publishers’ reliance on translations of commercial fiction and non-fiction adult and children’s book titles that do well in Greece. The larger Greek trade publishers use scouts in the UK to inform them about forthcoming titles of interest to their market.

Patakis and some other Greek publishers interviewed for this survey commented that they like working with UK publishers when it comes to co-editions because they are generally better organized than co-edition partners from France and other European markets.

International trade publishers and their agents report commercial fiction, especially historical fiction, normally sells the best, although in 2007 Greek authors have been very popular and one or two publishers report that less fiction has been translated. Some UK trade publishers also report that advances are increasing and that rights business is somehow becoming more established as UK and US publishers develop successful relationships with Greek trade publishers, based on visiting the market a couple of times a year and at the book fairs.

Even though the Greek market is quite small, Greek publishers seem interested in everything from literary to commercial fiction and will publish everything that falls between these two categories as well as a wide range of non-fiction. The fact is there are lots of publishers, perhaps too many given the limited readership, but they are all very committed to literature and each has its own interests, so there are plenty of opportunities.
It can however be quite an unpredictable market. Some Greek publishers themselves admit they don’t understand what makes one book work and another fail. A best seller in 2007 was Victoria Hislop’s *The Island*, a book about leprosy!

While the main rights and co-edition deals for children’s titles and adult fiction and non-fiction are for bookshop retail sales, there are also opportunities to develop titles for newspaper promotion and for business-to-business sales with a Greek publisher like Ellinika Grammata, which is part of a large newspaper and magazine group, and is always looking for brand extensions and to use books as a way to drive consumers to buy newspapers. A 2007 deal between this publisher and Dorling Kindersley involved bundling six sticker books for a Greek fast food chain (Goody’s) to be given away with their happy meals, and illustrates the possibilities for business-to-business sales. The same Greek publisher has also done deals with UK publishers for a number of reference books, children’s sticker books, books for well-being, everyday life and healthy eating.

For UK publishers to access such possibilities relationships are important and so is an appreciation that the Greek way of thinking is different to western Europeans. In Greece things always work at the last minute, and the ability to react quickly and turn around products quickly will help to build trust and ensure success.
6 The Higher Education & Professional Market

There are about 600,000 students in Greek-medium state higher education in Greece. However, the constraints imposed on pricing of university books, which are described below, make this quite a restricted sector in terms of values of book sales for Greek publishers.

Despite this, several of the general Greek publishers are active in the higher education and professional book market, as well as a few specialist professional publishers, and several smaller local academic publishers. In many areas – particularly law, medicine and business – sales to the professional market are more interesting than sales to universities.

Higher education in Greece is also quite an interesting market for the adoption of texts in English, because of the number of private colleges teaching in English. However, these are not referred to in official reports or enrolments for higher education, because the state does not recognise private-sector higher education institutions in Greece. It is quite a curious situation and one that may change.

6.1 Higher Education in Greece

State higher education, which comes under the Ministry of Education and Religious Affairs (YPEPTh), comprises the technical colleges and universities, as follows (figures refer to 2003/04):

- Fifteen technical colleges or technological education institutes (TEIs) offer a total of 95 specialisations to about 120,000 students in fields like administration and economics, health and welfare, graphic arts, food and nutrition technology.

- Twenty-two universities offer undergraduate and postgraduate courses to over 380,000 students. There is also the Hellenic Open University which provides distance learning.

For many years the biggest issue was the large demand for higher education, and the lack of courses and places to meet that demand in the TEIs and state universities. However, this situation has now been resolved, following the 1997 educational reforms which paved the way for more university places. As a result, undergraduate places in state higher education institutions increased from 254,000 in 1997/98 to 353,000 in 2003/04. Students wanting a place in higher education can now get one, although not necessarily in their chosen department or course.

At postgraduate level, the number of students has more than doubled between 2002 and 2007, so that in 2007/08 there are 25,000 post-graduate students compared to 12,000 in 2002/03, and the number of courses has also increased from 233 to 435. Although the enrolment and placement issues have been addressed, quality issues remain. The market has been in a state of flux, particularly in the 2006/07 academic year, when disagreements between the universities and the Government resulted in long strikes by the teaching establishment, with the universities being closed for much of the academic year. A key issue has been resistance to internal and external assessment of lecturers along Bologna agreement standards for EU tertiary education. Eventually the universities reached an agreement with the Government and teaching resumed, but there are doubts about whether the agreement will be acceptable to the EU.
Another important feature of the higher education scene in Greece (at least for British publishers and providers of UK education and training services) has been the role provided by the private sector, fuelled by the lack of enough places in the TEIs and state universities. However, over the past five years, as public universities have opened more positions and the TEI’s have become more organized and able to offer a better quality of studies, the number of students in the private universities has been declining. Because education is free in the public sector and because tuition is so expensive in the private colleges, a lot of students prefer to attend the full four years in the public universities and TEI’s.

There is a much fuller description of state higher education in Greece on the EU Eurydice website, at www.eurydice.org. Another source for coverage of recent developments and issues in the higher education sector is the British Council in Greece.

6.2 The Market for Higher Education Books

6.2.1 Academic Textbooks for State Universities/Colleges

The textbook market in state universities and technical colleges is open to publishers, but it is constrained. In effect the Government ‘out-sources’ the publishing of adoption texts to Greek publishers, and provides funds for universities to purchase at a fixed price. So although there is a market, it is heavily constrained in terms of pricing and value. And for higher education publishers, Greece remains a predominantly book-based rather than electronic market.

The faculty professor is both author and decision-maker in respect of which academic text to adopt, so effectively ‘the professor is the market’! The publisher’s task is to commission the right professors to write the books – limited promotion is required, but royalties can be as high as 30 per cent of publisher’s receipts. The professor decides the adoption text; the university tells the Ministry how many copies it needs; the Ministry then asks the publisher to tender, and a price is agreed. The Ministry gives the funds to the university finance department, which pays the publisher.

Apart from foreign languages, all degree subjects at Greek universities are taught in Greek, so adoption texts are the preserve of Greek publishers, although at undergraduate level some recommended reading lists include English books. At the end of 2007, a new law was passed (presumably as a result of EU pressure) requiring that students on undergraduate courses should have a recommended book list. There are issues surrounding how a recommended list will actually work in a market used to prescribed texts often written by their professors. In practice, probably little will change.

At graduate level, a number of state universities recommend and adopt English textbooks for their masters programmes. This is not followed religiously but there is a big trend in adopting English textbooks. Examples include the graduate programme at Athens University of Business and Economics. The maximum number of students does not exceed 30, so volume textbook sales are small, and (unlike at the undergraduate level) they are not subsidized, so students have to buy the books, or photocopy them.
6.2.2 Library Purchase

The libraries are a good market when they have the budget, but this is a problem. The anticipated funding from the EU allocated for tertiary book purchase is a key factor. EU money comes and goes, and payment is not reliable. 2002 was the last really good year for print orders from the universities. After 2002, money from EU funding has gone into on line purchases and technical equipment. In 2008 (for the first time since 2002) universities are spending money on print and reference titles, as well as e-learning content.

A lot of booksellers have problems participating in the tenders as they often have to wait up to a year or two for payment. That is why we see only the really big bookshops tendering, and co-operation between the two largest retailers - Eleftheroudakis and Papasoteriou - to win tenders.

6.2.3 Private Sector

Because the Greek constitution requires higher education to be provided exclusively by the state, private universities are not recognized. However, it is permissible for private companies to provide post-secondary education using the name Laboratories of Liberal Studies (LLS), although they cannot be recognised (or regulated centrally) as educational institutions, and their courses are not officially recognised by the state in terms of public-sector employment – something that has been challenged by the EU.

Despite these hoops, private-sector laboratories of all shapes and sizes have sprung up over the years to cater for those school-leaving students who have been unable to get university places, or who think a course linked to a UK (or US) university will help them in the job market. Many of these laboratories operate as franchises of UK or US universities, and students may attend for a foundation year before going to the UK or US to study, or stay in Greece and do a degree course. So the private sector is the key market for UK academic publishers as well as for UK education providers.

According to most UK and US publishers, Greece remains a stronger college and academic market for English texts than other southern European countries, because of the number of private colleges and institutions teaching in English. Nevertheless, the private colleges have now become a mature market and adoption numbers where English textbooks are used are reducing rapidly as a result of declining private sector enrolments, the photocopying of the books, and – in some cases – the sale of second hand books amongst the students. So while the private colleges remain the key sector for sales of higher education titles in English, it is also the sector where numbers have been declining. Publishers report that whereas in the past there may have been 800-1,000 students in a September enrolment, the number is down to 800, with an inevitable knock-on effect on sales.

In terms of subject areas, the potential for sales is very diverse but the biggest demand for titles in English is for general business, marketing, accounting and finance texts. Adoption sizes vary depending on the college – from 15 to 20 copies at undergraduate level at the smaller colleges; up to 200 copies at the larger ones. You may have an adoption for an enrolment of, for example, 250 students but this is likely to translate into sales of 50 books.
There are several large and important private colleges that teach in English, with an emphasis on business and social sciences, although most have seen a reduction in student numbers in recent years. The largest is the American College of Greece (Deree College), with two campuses in Athens. Another is the American College of Thessaloniki. Laverne, the largest private college after Deree, closed down in 2005. There are also a number of campuses affiliated to US universities, such as the University of Indianapolis, and New York College. For these, the book choices are made in the USA, and the books are sometimes supplied through the US university.

6.3 Value of Higher Education & Professional Market

Table 6.1 shows the money spent by the Government on the purchase and supply of textbooks to state higher education institutes for 2002-2005.

<table>
<thead>
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<th>Year</th>
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<th>TEIs</th>
<th>Total</th>
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<td>23.72</td>
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</tr>
</tbody>
</table>

Source: YPEPTh, Financial Affairs Directorate 2005

Public expenditure on textbooks varies from one year to the next. Nevertheless, if we take the 2005 figure of €36m (£24.6m) and add this to the value of sales to the private college sector and to the professional market in law, medicine, and business, the size of the higher education and professional book market at annual publisher net receipts may be in the region of €80–100m (£54.7m-£68.4m). This figure would include the value of imported academic and professional books, which is estimated to be around €4m (£2.7m) annually.

More recently, the university strikes and closures made 2006/07 a difficult year for academic book sales in Greece. Sales were probably lower and academic publishers experienced delayed payments from retailers.

The other factor which influences academic sales is photocopying. Of all publishing sectors, the academic market is the one most affected by high levels of photocopying. It is common for complete academic textbooks to be photocopied in copy shops, often situated off campus. Greek publishers have been taking action to curb the levels of photocopying but with very limited success. Foreign publishers have also been collaborating on an anti-copying campaign; Pearson report there are currently three criminal cases pending in early 2008 but these may never get to court.

6.4 Higher Education & Professional Publishing

6.4.1 Greek Academic and Professional Publishers

Several of the leading Greek general book publishers described in Section 5 also publish academic and professional books. Examples are Ellinika Grammata (social sciences, education, history, philosophy, psychology); Livani (literature, social sciences); Kastaniotis (social and political sciences, psychology, education), and Patakis (social sciences, philosophy, business, psychology, education).
There are also several specialist academic publishers catering for the state universities and the professional market. They have their own association – the Hellenic Association of Scientific and Academic publishers. They include the Ion Publishing Group, which has a good engineering and technical list, and the university presses, such as Panepistimiakies Ekdoseis Kritis (University of Crete), which is a respected publisher in pure sciences.

Economics and business publishing is a good area for both academic courses and professionals. The leading academic publisher in this area is Papazissis, owned and run by Victor Papazissis – a well-known figure in Greek academic publishing. Dardanos has a similar profile, with economics, management and sociology titles. Tables 6.2 and 6.3 list the leading academic and professional publishers in 2006 for social sciences/humanities and for STM. Although the tables are based on the number of titles produced, they do include the main players by turnover.

**Table 6.2: The 10 Leading Publishers of Social Sciences and Humanities, 2006**

<table>
<thead>
<tr>
<th>Publisher</th>
<th>No. Titles</th>
<th>Main List Focus</th>
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<tbody>
<tr>
<td>A.N. Sakkoulas</td>
<td>171</td>
<td>Law</td>
</tr>
<tr>
<td>Ellinika Grammata</td>
<td>129</td>
<td>Psychology, Education</td>
</tr>
<tr>
<td>Sakkoulas S.A.</td>
<td>92</td>
<td>Law</td>
</tr>
<tr>
<td>Nomiki Vivliothiki</td>
<td>62</td>
<td>Law</td>
</tr>
<tr>
<td>Papazisis</td>
<td>54</td>
<td>Economics, Business, Social Sciences</td>
</tr>
<tr>
<td>Patakis</td>
<td>53</td>
<td>Education, Literature studies</td>
</tr>
<tr>
<td>Dardanos</td>
<td>51</td>
<td>Economics, Management, Sociology</td>
</tr>
<tr>
<td>Epikentro</td>
<td>49</td>
<td>History, Social Anthropology</td>
</tr>
<tr>
<td>Kastaniotis</td>
<td>39</td>
<td>Psychology, Management</td>
</tr>
<tr>
<td>Metaichmio</td>
<td>38</td>
<td>Education, Sociology, Linguistics</td>
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</tbody>
</table>

*Source: Bibliomet/EKEBI, 2007*

**Table 6.3: The 10 Leading STM Publishers, 2006**

<table>
<thead>
<tr>
<th>Publisher</th>
<th>No. Titles</th>
<th>Main List Focus</th>
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</thead>
<tbody>
<tr>
<td>Giourdas Vassilis</td>
<td>63</td>
<td>Computer Software</td>
</tr>
<tr>
<td>Paschalidis P.C.</td>
<td>41</td>
<td>Medical</td>
</tr>
<tr>
<td>Klidarithmos</td>
<td>35</td>
<td>Computer Software</td>
</tr>
<tr>
<td>University Studio Press</td>
<td>24</td>
<td>Medical, Agriculture</td>
</tr>
<tr>
<td>Ellinika Grammata</td>
<td>22</td>
<td>Sciences</td>
</tr>
<tr>
<td>Parisianou</td>
<td>21</td>
<td>Medical</td>
</tr>
<tr>
<td>Giourdas, Moschos</td>
<td>19</td>
<td>Computer Software</td>
</tr>
<tr>
<td>Ion Publishing Group</td>
<td>18</td>
<td>Engineering, Technical</td>
</tr>
<tr>
<td>Ziti</td>
<td>17</td>
<td>Medical, Pure sciences</td>
</tr>
<tr>
<td>Travlos</td>
<td>11</td>
<td>Popular Science</td>
</tr>
</tbody>
</table>

*Source: Bibliomet/EKEBI, 2007*

The more active local publishers promote academic titles in the usual ways. Some employ sales reps to visit the universities, as well as doing direct mail, organising exhibitions and attending conferences. An increasing number of them have websites. Prices for academic and professional Greek books generally seem to be in the 20–35 euro range (2008), although prices to the universities are fixed and are cheaper, varying according to size and specification.
6.4.2 Law Publishing

Law is a very lucrative area. A leading law publisher estimated the market in 2007 to be worth over €16m (£10.9m), with 25 per cent academic and 75 per cent professional. Greece apparently has 32,000 lawyers, 3,000 judges and 4,500 notaries, so there is a good professional market to target! Much of this is direct sale to large companies with legal departments, and through the bookshops in the major cities.

There are three law schools, as well as other schools of political science, with economics faculties that teach law or political science.

The leading law publishing family is Sakkoulas, which has three separate law companies run by three brothers. The largest are Sakkoulas Antonis and Sakkoulas Publications S.A., which has smart premises with a bookshop for law students in central Athens. After Sakkoulas, the next law publisher is Nomiki Vivliothiki. For Sakkoulas, electronic products account for less than 5 per cent of revenues, mainly CD-ROMs. This is because the Athens Bar Association (www.dsa.gr) has an electronic database supplying data very cheaply, so a publisher like Sakkoulas cannot compete, especially in a small market like Greece. According to Sakkoulas, the only other electronic database for law is provided by a company called Intracom (www.intracom.gr), a provider of telecommunications and information systems in Greece.

There is not much of a market for English law titles in translation, as Greek law has no basis in UK law. Nor is there much demand for imports, as the teaching of law is in the state universities and Greek law schools, and instruction is in Greek.

6.4.3 Medical Publishing

International developments in medical science are important, and so unlike law, translations figure quite highly for medicine.

There is no dominant brand for medical publishing in Greece, but there are a number of family-owned medical publishers. Paschalidis publishes textbooks for the medical schools and professional market, and they also publish three to five titles per year in English to sell overseas through Elsevier. Other medical publishers are Parisianou, Litsas, Bita, Zita based in Athens, University Studio Press and Siokis in Thessaloniki, Kreta University Press in Crete, and some other smaller publishers with a handful of titles each.

As with law, the teaching of medicine is in state universities, so the academic market for English texts is very small. However, there is a good professional market for doctors and private hospitals, and through the big pharmaceutical companies who buy expensive English textbooks for the doctors as gifts. For example, a new edition of Harrison’s will sell over 5,000 copies to pharmaceutical companies when it is published. The market for medical titles in English seems to be mainly serviced by Lippincott, Harcourt/Elsevier Health Sciences, and McGraw Hill Medical.

6.4.4 English-Language Publishers

The usual international publishing groups are active in Higher Education and Professional book sales. Pearson—with its breath of list - is by far the largest within
this sector, with perhaps 40-50 per cent of the imported book market, followed by McGraw Hill. Most of the international higher education and professional publishers including Wiley, Thomson, Palgrave Macmillan, Sage, Hodder and CUP have local academic representation in Greece which also covers other markets in the region as well.

For college and academic books in English, general business, marketing, accounting and finance titles sell best, with annual sales ranging from 200 to 800 copies. Professional titles that sell best are computing, general business, technical and engineering, with quantities varying between 50 and 200 copies a year. According to Pearson, self-help and general business books in English used to sell well but less now that so many titles are available in Greek.

The English departments at state universities in Athens and Thessaloniki use English literature and linguistic texts. Adoptions in the English departments at the state universities are normally between 40 and 200 copies and can go up to 350 copies. Actions by foreign publishers to promote academic titles in Greece include academic visits to private colleges, supported by e-mail and e-marketing campaigns, gratis and direct mail.

Publishers’ agents covering this market include Zitsa Seraphimidi, based in Athens; Philip Tyers (Tyers Book Sales Ltd.), representing Wiley-Blackwell, Houghton Mifflin and others, with offices in Athens and the UK; J&L Watt, based in Oxford; and International Publishers’ Representatives (IPR), based in Cyprus. See Appendix 5 for their contact details.

6.5 Distribution

6.5.1 Key Distributors and Retailers

For state university titles, where the prices are fixed by the Ministry, the books are supplied either through a bookshop or directly by the publisher, who is paid using Government funds allocated for university book purchases. Publishers reported that payment can take nine months.

The purchasing system at state universities is tender-based, with much of the business dependent on which bookseller gets awarded the tender to supply an institution. This means that a bookseller can do very well one year and not the next. Apart from the state universities, the supply chain for academic and professional books is very similar to the main supply chain for general books. This is described in Section 5.

The main suppliers of college texts are general booksellers, because many of the colleges do not have campus bookstores. Some of the smaller colleges invite their preferred supplier to the college to sell to students. Others advise students that their textbooks are available in a specific bookstore.

A Greek academic publisher may outsource distribution exclusively to one wholesaler, or may typically have 500 accounts including wholesalers, bookstores and the smaller bookshops. The main retail chains are Eleftheroudakis and Papasotiriou, which has many branches in university towns.
6.5.2 Trading Terms on Greek Books

The average discount from Greek publishers is 30–40 per cent for bookshops, and 40–50 per cent for a large chain. Credit terms seem to vary widely, 90 days being low and four to eight months being common. Slow payment is a problem, and publishers often supply on a consignment basis, or using the system of post-dated cheques.

6.5.3 Distribution of English Language Books

The main importers of college and professional titles are again Eleftheroudakis and Papasotiriou. Other established accounts include Glorybook and Mihalopoulos. New bookshops include Public and Best Book Hunters.

There are very few examples of exclusivity, as publishers prefer to operate an open-market trading policy.

It is normal for a UK academic publisher to have 15–25 accounts, at discounts averaging about 35 per cent for college books and 40 per cent or more for professional titles.

There is no mark-up in the prices of books any more. Most booksellers pass on part of their discount to their customers.

Pricing is an issue, because of the photocopying problems. The average price in 2008 of an introductory textbook for the private college market is €55-60 (£37.60-£41.10), with €65 (£44.50) seen as a price barrier. Publishers apply special prices for Greece, and certainly two of the major players continues to do so, amounting to a 12 per cent reduction on the standard euro price.

Credit terms are normally 90–120 days, but these have to be very flexible because many of the Greek customers are late payers. One or two UK academic publishers commented that all Greek accounts pay late, with the exception of Papasotiriou and Eleftheroudakis.

The main English language higher education publishers have to be very flexible on returns. One operates a 12 months returns policy on active titles and three months on out-of-print titles.

6.5.4 E-Commerce

The main distributors and bookshop chains supplying academic and professional books have websites. Papasotiriou (www.papasotiriou.gr) is rated as one of the best, but it is Greek language only. Glorybook (www.glorybook.gr) is in English, but the best English site is reckoned to be Eleftheroudakis (www.books.gr).

The Zevelekakis website (www.zevelekakis.gr) is a specialist medical website offering 120,000 medical titles, and is the only one aimed at overseas purchasers as well as the local market, with prices available in a number of currencies. International e-commerce sites like Amazon are being used more by academics, and not just as a source of information. Papasotiriou, the leading technical bookstore, has seen an impact, mainly in higher priced professional and computing books.
6.6 Opportunities for UK Publishers

It will be clear that although the higher education market in Greece is in a state of flux, it does provide some good opportunities for UK publishers both to sell books and rights.

This section has described where the market lies for sales of imported higher education and professional titles in English, and it mentions the main trade customers for imported titles, as well as a number of publishers’ agents who have specialist knowledge of the higher education market.

As for rights sales on academic and professional books, the consensus is that these are steady and growing, particularly for economics and business titles, and also for medicine. McGraw Hill has done rights deals on economics, medical and other texts; Pearson is active in academic rights sales across its list; Lippincott and Elsevier have sold medical rights to publishers like Paschalidis and Litsas.

However, one leading Greek academic publisher, Papazisis, sounded a note of caution, commenting that his company prefers to buy rights from US publishers these days, because UK publishers tend to organize rights auctions on academic titles which makes buying British more expensive.

6.7 Distance Learning and Opportunities for Education UK

The British Council is probably the best source for information about distance learning provision and opportunities for UK higher education providers. Although of only peripheral interest to UK publishers, it is worth a mention here.

The Hellenic Open University (partly modelled on the Open University) opened in 1998, and now has several thousand students. This development looks set to change the attitude of the Greek authorities, who in the past have been unwilling to accept and recognise degrees taught at a distance.

The UK Open University has 600 students in Greece. If, as expected, a change in attitude leads to official recognition of UK distance education courses in Greece, there will be growing opportunities for UK education suppliers.

The UK universities have already been very successful, both in linking up with partner organisations to deliver British degree courses in Greece, and in attracting students to study at British universities. With more undergraduate places now available in Greek universities, the number of Greek undergraduate students coming to the UK to study has been declining steadily and it is clear from current trends in enquiries and applications that there is likely to be a continuing decline in the number of Greeks on first degree and graduate courses in the UK in the coming years. This is due to demographic factors in a small country and to the increase in the provision of undergraduate places within the state higher education sector within Greece.

Despite the trends, interest in UK higher education continues to be strong and this is reflected in the number of educational enquiries (20,000) made each year to the British Council in Greece. Five years ago, there were more Greeks studying in UK universities than nationals from any other country. This may no longer be the case, but it is almost certainly still true that Greece probably has the highest proportion of students in UK higher education per head of the population of any overseas country.
Appendices

Appendix 1: Publishers in Greece

Appendix 1 lists most of the larger publishers in Greece, including foreign companies, and gives where possible key contact names and main publishing areas for each company fewer than five categories: Trade, Children’s, School, ELT and HEP (Higher Education & Professional).

AGYRA
271 L. Katsoni &
G. Papandreou St.
135 62, Ag. Anargiri, Athens
Tel: +30 210 2693800-4,
Fax: +30 210 2693805-6
Email: agyra@agyra.gr
Website: www.agyra.gr
Contact: Anna Papadimitriou

Main market: Trade, Children’s

DARDANOS
(Gutenberg, Typothito)
37 Didotou St.
106 80 Athens
Tel: +30 210 3642003
Fax: +30 210 3642030
Email: info@dardanosnet.gr
Website: www.dardanosnet.gr
Contact: George Dardanos

Main market: HEP

BELL/ HARLENIC
57 Ippokratous St.
106 80 Athens
Tel: +30 210 3609438
Fax: +30 210 3614846
Email: info@harlenic.gr
Website: www.bell.gr
Contact: Konstantinos Ordolis

Main market: Trade

DEAGOSTINI HELLAS
44-46 Vouliagmenis Ave.
166 73 Voula
Tel: +30 210 8920300
Fax: +30 210 8993310
Email: info@deagostini.gr
Website: www.deagostini.gr
Contact: Petros Kapnistos

Main market: Trade

BURLINGTON BOOKS
PO Box 76094
171 10 Nea Smyrni
106 81 Athens
Tel: +30 210 9767888
Fax: +30 210 9767889
Email: greece@burlingtonbooks.com

Main market: ELT

ELLINIKA GRAMMATA
59, Em. Beenak St.
106 81 Athens
Tel: +30 210 3981800
Fax: +30 210 3303878
Email: info@ellinikagrammata.gr
Website: www.ellinikagrammata.gr
Contact: Nikos Tsouvalas

Main market: Trade

CAMBRIDGE UNIVERSITY PRESS
Patriarchou Grigoriou E’ 21
153 41 Agia Paraskevi, Athens
Tel: +30 210 6549708
Fax: +30 210 6549740
Email: athens@cambridge.org
Contact: Craig Walker

Main market: ELT, Academic

EMPIRIA EKDOTIKI
74 Mesogion Ave.
115 27 Athens
Tel: +30 210 7777788
Fax: +30 210 7757757
Email: info@empiria.gr
Website: www.empiria.gr
Contact: George Kanellopoulos

Main market: Trade
<table>
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<th>Company</th>
<th>Address</th>
<th>Contact</th>
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<tr>
<td><strong>EPIKENTRO</strong></td>
<td>9 Kamvounion St., 546 21  Thessaloniki</td>
<td>Alexandros Varvounis</td>
<td>HEP</td>
</tr>
<tr>
<td></td>
<td>Tel: +30 2310 256146</td>
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<td><strong>EXPRESS PUBLISHING</strong></td>
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<td>Virginia Evans</td>
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<td>Kostas Grivas</td>
<td>ELT</td>
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<tr>
<td></td>
<td>Tel: + 30 210 5573470</td>
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</tr>
<tr>
<td><strong>GIOURDAS V.</strong></td>
<td>9, Dimitrias St., 104 42 Athens</td>
<td>Vassiliss Giourdas</td>
<td>HEP (Computer software)</td>
</tr>
<tr>
<td></td>
<td>Tel: +30 210 8223220</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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</tr>
<tr>
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<tr>
<td><strong>HESTIA</strong></td>
<td>84 Evripidou St., 105 53 Athens</td>
<td>Eva Karaitidi</td>
<td>Trade, Children's</td>
</tr>
<tr>
<td></td>
<td>Tel: +30 210 3213907, 3213704</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fax: +30 210 3214610</td>
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<tr>
<td></td>
<td>Email: <a href="mailto:info@hestia.gr">info@hestia.gr</a></td>
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<td></td>
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<tr>
<td><strong>HILLSIDE PRESS</strong></td>
<td>13 Doiranis Street, 113 62 Kypseli, Athens</td>
<td></td>
<td>ELT</td>
</tr>
<tr>
<td></td>
<td>Tel: + 30 210 8829401</td>
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<td></td>
<td>Fax: + 30 210 8827677</td>
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<tr>
<td></td>
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<td></td>
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<tr>
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<td>Katerina Karydi</td>
<td>Trade</td>
</tr>
<tr>
<td></td>
<td>Tel: +30 210 3225152</td>
<td></td>
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<tr>
<td><strong>ION PUBLISHING GROUP</strong></td>
<td>7 Simlipigadon St., 121 31 Athens</td>
<td>George Parikos</td>
<td>HEP</td>
</tr>
<tr>
<td></td>
<td>Tel: +30 210 5747729</td>
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<td>Fax: +30 210 5751438</td>
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<tr>
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</tr>
<tr>
<td></td>
<td>Contact: George Parikos</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Main market:** Trade, Children's, ELT, HEP, HEP (Computer software)
KASTANIOTIS
11 Zalogou St.
106 78 Athens
Tel: +30 210 3301208
Fax: +30 210 3822530
Email: info@kastaniotis.com
Website: www.kastaniotis.com
Contact: Athanassios Kastaniotis

Main market: Trade, Children’s, School (software), HEP

KEDROS
3 G. Gennadiou St.
106 78 Athens
Tel: +30 210 3809712, +30 210 3302655
Email: books@kedros.gr
Website: www.kedros.gr
Contact: Katia Lembessi

Main market: Trade, Children’s

KRITIKI
75, Patission St.
104 34 Athens
Tel: + 30 210 8211811
Fax: + 30 210 8211026
Email: biblia@kritiki.gr
Website: www.kritiki.gr
Contact: Themis Minoglou

Main market: HEP

LIVANIS PUBLISHING ORGANISATION
98 Solonos St.
106 80 Athens
Tel: +30 210 3661200
Fax: +30 210 3617791
Email: sophia@livanis.gr
Website: www.livanis.gr
Contact: Ilias & Yota Livani

Main market: Trade, Children’s, School, HEP

LONGMAN HELLAS
229 Sygrou Avenue
171 21 Nea Smyrni, Athens
Tel: +30 210 9373170
Fax: +30 210 9373199
Email: enquiries@longman.gr
Website: www.longman.com
Contact: Mark Short

Main market: ELT

MACMILLAN HELLAS
2 Missaraliotou St.
117 42 Makrygianni, Athens
Tel: +30 211 1074800
Fax: +30 211 7488735
Email: info@macmillan.gr
Website: www.macmillan.gr
Contact: Nick Evans

Main market: ELT

McGRAW HILL EDUCATION (HELLAS)
21 Patriarchou Gregoriou Street
Aghia Paraskevi, 153 41, Athens
Tel: +301 6560990
Fax: +301 6545525
Email: Thanos_Blintzios@mcgraw-hill.com
Contact: Thanos Blintzios

Main market: HEP

METAICHMIO
18 Asklipiou St.
106 80 Athens
Tel: +30 210 3647433
Fax: +30 210 3610750
Email: metaixmio@mediaixmio.gr
Website: www.metaixmio.gr
Contact: Nontas Papageorgiou

Main market: Trade, Children’s, School, HEP

MINOAS
1 Poseidonos St.
141 21 N. Irakleio, Athens
Tel: +30 210 2711222
Fax: +30 210 2711056
Email: info@minoas.gr
Website: www.minoas.gr
Contact: Yannis Konstantaropoulos

Main market: Children’s

MM PUBLICATIONS
58 Deligiorgi
174 56 Alimos, Athens
Tel: + 30 210 9953680
Fax: + 30 210 9938393
Email: sales@mmpi.net
Contact: Giannis Malkogiannis

Main market: ELT
MODERN TIMES
1 G. Papandreou St.
166 73 Voula, Athens
Tel: +30 210 9659904-5
Fax: +30 210 892101
Email: licensing@moderntimes.gr
Website: www.moderntimes.gr
Contact: Kostas Giannikos

Main market: Trade, Children's

NOMIKI VIVLIOTHIKI
23 Mavromichali St.
106 80 Athens
Tel: +30 210 3678800
Fax: +30 210 3678922
Email: info@nb.org
Website: www.nb.org
Contact: Charis Karatzas

Main market: HEP (Law)

OCEANIDA
38 Dervenion St.
106 81 Athens
Tel: +30 210 3806137, 3827341
Fax: +30 210 3805531
Email: oceanida@internet.gr
Website: www.oceanida.gr
Contact: Louisa Zaoussi

Main market: Trade

OXFORD UNIVERSITY PRESS
Salaminos 18
151 24 Marousi, Athens
Tel: +30 210 3607593
Fax: +30 210 3613936
Email: enquiry.athens.gr@oup.com
Website: www.oup.com/elt
Contact: Agapi Tsiakiri

Main market: ELT

PAPADOPOULOS
9 Kapodistriou St.
144 52 Metamorfozi, Athens
Tel: +30 210 2846074
Fax: +30 210 2817127
Email: info@picturebooks.gr
Website: www.picturebooks.gr
Contact: Kyriakos Papadopoulos

Main market: Children's

PAPAZISIS
2 Nikitara St.
106 78 Athens
Tel: +30 210 3822496
Fax: +30 210 3809150
Email: info@papazisi.gr
Website: www.papazisi.gr
Contact: Victor Papazisis

Main market: HEP

PARISIANOU S.A.
47-49 Ch. Trikoupi St.
106 81 Athens
Tel: +30 210 3306880
Fax: +30 210 3821411
Email: medbooks@parisianou.gr
Website: www.parisianou.gr
Contact: Margarita Parisianou

Main market: HEP (Medical)

PASCHALIDIS P.C.
14 Tetrapoleos St.
115 27 Athens
Tel: +30 210 7789125
Fax: +30 210 7759421
Website: www.medical-books.gr
Contact: George Paschalidis

Main market: HEP (Medical)

PATAKIS
14 Valtetsiou St.
106 80 Athens
Tel: +30 210 3650000, 3650051
Fax: +30 210 3650069, 3650059
Email: info@patakis.gr
Website: www.patakis.gr
Contact: Stefanos Patakis

Main market: Trade, Children's, School, HEP

PEARSON EDUCATION HELLAS
229 Sygrou Avenue
171 21 Nea Smyrni, Athens
Tel: +30 (0) 10 9373170
Fax: +30 (0) 10 9373199
Email: enquiries@longman.gr

Main market: HEP (for ELT see Longman)
PSICHOGIOS
1 Mavromichali St.
106 79 Athens
Tel: +30 210 3302234
Fax: +30 210 3302098
Email: info@psichogios.gr
Website: www.psichogios.gr
Contact: Athanassios Psichogios

Main market: Trade, Children’s

SAKKOULAS ANT. N.
69 Solonos St.
106 79 Athens
Tel: +30 210 3615440, 3618198
Fax: +30 210 3610425
Email: info@ant-sakkoulas.gr
Website: www.ant-sakkoulas.gr
Contact: Nickolaos Sakkoulas

Main market: HEP (Law)

SAKKOULAS S.A.
23 Ippokratous Street
106 79 Athens
Tel: +30 210 3387500
Fax: +30 210 3390075
Email: info@sakkoulas.gr
Website: www.sakkoulas.gr
Contact: Panagiotis Sakkoulas

Main market: HEP

SAVALAS EDITIONS
Spyros Savalas
18 Z. Pigis St.
106 81 Athens
Tel: +30 210 3301251,
Fax: +30 210 3306918
Email: info@savalas.gr, press@savalas.gr
Website: www.savalas.gr

Main market: School, Children’s

SUSAETA
44K.Theotokou St.
146 65 Ag. Stefanos, Athens
Tel: +30 210 8145740
Fax: +30 210 8140170
Email: susaeta@otenet.gr
Contact: Bettina Cochran

Main market: Children’s

UNIVERSITY STUDIO PRESS
32, Armenopoulou St.
546 35 Thessaloniki
Tel: +30 2310 209637
Fax: +30 2310 216647
Email: univstud@spark.net.gr
Contact: Andreas Michalis

Main market: HEP

ZITI
27, Armenopoulou St.
546 35 Thessaloniki
Tel: +30 2310 203720
Fax: +30 2310 211305
Email: sales@ziti.gr
Website: www.ziti.gr
Contact: Pelagia Ziti

Main market: HEP (Medical, Pure Sciences)
Appendix 2: Greek Booksellers, Wholesalers & Importers

Appendix 2 lists companies specialising in bookselling and book wholesaling in Greece, including book importers.

APOLLON
7 Stefanou Tsalavouta St.
121 31 Peristeri, Athens
Tel: +30 210 5787677
Fax: +30 210 5781979
Email: apolmaine@otenet.gr; potari@apollonbooks.gr
Contact: Nikos Antoniades

CHRISTAKIS
10-12 Ippokratus Street
106 79, Athens
Tel: +30 210 3639336
Fax: +30 210 3638489

EFSTATHIOU
11, Kanari St.
412 23 Larissa
Fax: +30 2410 284541

ELEFTHEROUDAKIS S.A
17 Panepistimiou St.
105 65 Athens
Tel: +30 210 3258440,
Fax: +30 210 3239891
Email: elebooks@books.gr
Website: www.books.gr
Contact: Sofia Eleftheroudakis

EVIRIPIDIS STI STOA
11 Vas. Konstandinou St.
Chalandri, 152 32 Athens
Tel: +30 210 6800644-6,
Fax: +30 210 6800647
Email: info@evripidis.gr
Website: www.evripidis.gr
Contact: Theodoros Vassilopoulos

FNAC
The Mall Athens
35 A. Papandreou St.
151 22 Maroussi
Tel: +30 210 630555
Fax: +30 210 6305599
Email: fnac.greece@gr.fnac.com
Website: www.fnac.com
Contact: Panagiotis Kakoulidis

EUROBOOK
6 Alikarnassou Street
104 44 Kolonos, Athens
Tel: +30 210 5150300
Fax: +30 210 5138579
Email: eurobook@ibm.net

P. GEORGIOU
3 Chr. Pipsou Street
546 27 Thessaloniki
Tel: +30 2310 522102
Fax: +30 2310 539271
Email: best@otenet.gr

GLORYBOOK
Head Office: Asklipiou, 22 & Skoufa
106 79 Athens
Tel: +30 210 3602695
Fax: +30 210 3640871
Email: pgiokas@glorybook.gr
Website: www.glorybook.gr

HELENIC DISTRIBUTION AGENCY
1 Digeni St.
174 56 Alimos, Athens
Tel: +30 210 9954512, 9919328
Fax: +30 210 9948787
Email: info@hdaath.gr
Contact: Christopher Hatzopoulos, Managing Director

HESTIA
60 Solonos St.
106 72 Athens
Tel: +30 210 3615077
Fax: +30 210 3606759
Website: www.estiabookstore.gr
Contact: Yannis Karaitidis
IANOS
24 Stadiou St.
105 64 Athens
Tel: +30 210 3217917
Fax: +30 210 3217686
Email: ianos@ianos.gr
Website: www.ianos.gr
Contact: Nikolaos Karatzas

KOSMOS FLORAS
59 Panepistimiou St.
105 64 Athens
Tel: +30 210 3215590,
Fax: +30 210 3243368
Email: flatk@otenet.gr
Website: www.floras.gr, www.florasfun.gr
Contact: Giorgos Floras

LEADER BOOKS
60-62 Koniari St.
115 21 Athens
Tel: +30 210 6452825, 6450048, 6450062
Fax: +30 210 6449924
Email: info@leaderbooks.gr
Website: www.leaderbooks.gr
Contact: Theodoros Dres

LEXIS GIANNIOU
352 Korinthiou St.
262 22, Patra
Tel: +30 2610 688800-10
Fax: +30 2310 264856
Email: info@malliaris.gr
Website: www.malliaris.gr
Contact: Antonios Malliaris

G. PAPADOPOULOS
6 Ioustinianou St.
546 31 Thesaloniki
Fax: +30 2310 280129

PANTELIDES
9-11 Amerikis
106 72, Athens
Tel: +30 210 3639560
Fax: +30 210 3636453

PAPASOTIRIOU
35 Stournari St.
106 82 Athens
Tel: +30 210 3809821
Fax: +30 210 3848254
Email: bookstore@papasotiriou.gr
Website: www.papasotiriou.gr
Contact: Giorgos Papasotiriou

POLITEIA
1-3, Asklipiou St.
106 79 Athens
Tel: +30 210 3600235, 3616373
Fax: +30 210 3604462
Email: politeia@otenet.gr
Website: www.politeianet.gr
Contact: Nikolaos Liverios

PROTOPORIA
Vangelis Trikeriotis
3-5, Gravias St.
106 78 Athens
Tel: +30 210 3801591
Fax: +30 210 3810892
Email: info@protoporia.gr
Website: www.protoporia.gr

PUBLIC
1 Karageorgi Servias St.
Syntagma Sq.
105 63 Athens
Tel: +30 210 3246210
Fax: +30 210 3246931
Website: www.public.gr
Contact: Yannis Vavourakis

K & S TSIGARIDAS
10 Ippokratos St.
103 79 Athens
Tel: +30 210 3626028
Fax: +30 210 3645883
Appendix 3: Foreign Booksellers

Appendix 3 supplements Appendix 2 and lists booksellers which specialise in foreign books.

**COMPENDIUM**
5 Nikodimou St.
105 57 Athens
Tel: +30 210 3210226
Fax: +30 210 3222924
Email: compend@ath.forthnet.gr
Contact: Richard Schulein

*English*

**DEUTCH BUCHHANDELUNG**
Chr. Konstantopoulou - Loeb & Co.
10 Stadiou & 4 Omirou St.
105 64 Athens
Tel: +30 210 3225294
Fax: +30 210 3232289
Email: dbathens@hotmail.com
Website: www.dbo.gr

*German books*

**FOLIA TOU VIVLIOU (BOOKNEST)**
25-19 Panepistimiou St.
105 64 Athens
Tel: +30 210 3229560, 3231703
Fax: +30 210 3239246
Email: booknest@otenet.gr
Website: www.booknest.gr
Contact: Thomas Kaoulidis

*English & French books*

**II NARRATORE**
34 Solomou St.
106 82 Athens
Tel: +30 210 3813986
Fax: +30 210 3647592
Email: certosa@hol.gr
Website: www.certosa.gr
Contact: Chryssanthi Reppa

*Italian books*

**KAUFFMANN**
28 Stadiou St.
10564 Athens
Tel: +30 210 3222160, 3255321
Fax: +30 210 3230320
Email: ord@otenet.gr, ckaldi@otenet.gr
Website: www.kauffmann.gr
Contact: Vassílios Kaldi

*French & English books*

**MOLHO PROMETHEUS BOOKSTORE**
10 Tsimiski St.
546 24 Thessaloniki
Tel: +30 2310 275271
Fax: +30 2310 229738
Email: promitheasvivlia@otenet.gr
Website: www.prometheus.com.gr
Contact: Jossef Molho

*English, French & German books*

**ZACHARIADOU**
20 Proxenou Koromila St.
546 22 Thessaloniki
Tel: +30 2310 276344,
Fax: +30 2310 229936
Email: info@lillisbookstore.gr
Website: www.lillisbookstore.gr
Contact: Petros Zachariadis

*German & Italian books*
Appendix 4: English-Medium Schools in Greece

Appendix 4 lists the main schools in Greece which provide an English-medium education, and are therefore a market for English language school curriculum publications.

**AMERICAN COMMUNITY SCHOOLS OF ATHENS**
129, Agias Paraskevis St.
152 34 Chalandri, Athens
Tel: + 30 210 6393200
Fax: + 30 210 6399051
Email: Acs@acs.gr
Website www.acs.gr

**BYRON COLLEGE**
7, Filolaou Street and Aristotelous
135 44 Gerakas Gargitos, Athens
Tel: + 30 210 6047722
Fax: + 30 210 6048542
Email: byroncol@otenet.gr
Website: www.byroncollege.gr

**CAMPION SCHOOL**
P.O Box 67484
153 44 Pallini, Athens
Tel: + 30 210 6071700 – senior school
+ 30 210 6071800 – junior school
Fax: + 30 210 6071750
Email: Dbaker@campion.edu.gr
Website: www.campion.edu.gr

**GREENHILL INTERNATIONAL SCHOOL**
18, Venezouelas
116 74 Ano Glyfada, Athens
Tel: + 30 210 19648866
Fax: + 30 210 19623483

**INTERNATIONAL SCHOOL OF ATHENS (formerly TASIHELLENIC)**
Artemidos and Xenias Street
145 10 Kifissia, Athens
Tel: + 30 210 6233888
Fax: + 30 210 6233160
Email: info@isa.edu.gr
Website: www.tasis.edu.gr

**INTERNATIONAL SCHOOL OF THESSALONIKI INC**
P.O Box 21001
555 10 Pilea, Thessaloniki
Tel: + 30 2310 301221
Fax: + 30 2310 323196
Email: info@pinewood.gr
Website: www.pinewood.gr

**ST CATHERINE’S BRITISH EMBASSY SCHOOL**
PO Box 51019,
14510 Kifissia, Athens
Tel: + 30 210 2829750
Fax: + 30 210 2826415
Email: administrator@stcatherines.gr
Website: www.stcatherines.gr

**ST LAWRENCE COLLEGE**
PO Box 74221, 16 602
Varkiza, Attiki, Athens
Tel: + 30 210 8917000
Fax: + 30 210 8917010
Website: www.st-lawrence.gr
Appendix 5: Cultural Institutes in Greece

BRITISH COUNCIL  
17 Filikis Etaireias Sq., Kolonaki,  
106 73 Athens  
Tel: +30 210 3633211-5, 3606011  
Fax: +30 210 3614658  
Email: customerservices@britishcouncil.gr  
Website: www.britishcouncil.org/gr  
Contact: Richard Walker (Director)

GÖTHE INSTITUT  
14-16 Omirou St.  
106 72 Athens  
Tel: +30 210 3661000  
Fax: +30 210 3643518  
Email: infokurse@athen.goethe.org  
Website: www.goethe.de/om/ath

HELLENIC AMERICAN UNION  
22 Massalias St.  
106 80 Athens  
Tel: +30 210 3680000  
Fax: +30 210 3633174  
Email: hau@hau.gr  
Website: www.hau.gr

INSTITUTO CERVANTES  
31 Skoufa St.  
106 73 Athens  
Tel: +30 210 3634117, 3606263  
Fax: +30 210 3647233  
Email: cenate@cervantes.es  
Website: www.atenas.cervantes.es/

INSTITUT FRANÇAIS D’ATHÈNES  
31 Sina St.  
106 80 Athens  
Tel: +30 210 3698600  
Fax: +30 210 3646873  
Email: ifa@ifa.gr  
Website: www.ifa.gr

ISTITUTO ITALIANO DI CULTURA  
27 Tenedou St.  
113 60 Athens  
Tel: +30 210 8665186  
Fax: +30 210 8665178  
Email: secreteria@iic.gr  
Website: www.iic.gr
Appendix 6: Publisher’s Agents for Greece

INTERNATIONAL PUBLISHERS REPRESENTATIVES (IPR)
P.O Box 25731
1311 Nicosia, Cyprus
Tel: +357 22872356
Fax: +357 22872359
Email: iprschl@spidernet.com.cy
Website: www.ipr-publishers.com/
Contact: David Fatimah

J & L WATT
26 Temple St.
Oxford OX4 1JS
Tel: +44 1865 202829
Fax: +44 1865 202830
Email: info@jlwatt.co.uk
Website: www.jlwatt.co.uk/
Contact: James & Lorin Watt

PHILIP TYERS (Greece Office)
Tyers Book Sales Ltd.
Stisilaou 13
11 363 Ano Kypseli, Athens
Tel/Fax: +30 210 2133436
Email: gellag@hol.gr

ZITSA SERAPHIMIDI
33 Areos St.
175 62 Paleo Faliro
Tel: +30 210 9816816
Fax: +30 210 5245798
Mobile: +30 6944 441184
Email: zitsaser@otenet.gr

PHILIP TYERS (UK Office)
Tyers Book Sales Ltd.
Slade Close
Theydon Road
Epping
Essex, CM 16 4EF
Tel: +44 1992 572416
Appendix 7: Other Useful Contacts & Addresses

**BIBLIONET (Greek Books in Print)**
Administered by National Book Centre - see below
Website: www.biblionet.gr
www.gbip.gr (in English)

**ELT NEWS**
Anastasia Spyropoulou
PO Box 65589
15402 Neo Psychico, Athens
Website: www.eltnews.gr

**GREEK FOREIGN LANGUAGES PUBLISHERS’ ASSOCIATION**
c/o ELT NEWS above

**HELLENIC FEDERATION OF PUBLISHERS & BOOKSELLERS**
73 Themistokleous Street
10683 Athens
Tel: +30 210 3300924
Fax: +30 210 3301617
Email: secretary@poev.gr
Website: www.poev.gr

**HELLENIC ASSOCIATION OF SCIENTIFIC & ACADEMIC PUBLISHERS**
73 Themistokleous Street
10683 Athens
Tel: +30 210 3300924
Fax: +30 210 3301617
President: Viktor Papazisis

**MINISTRY OF CULTURE, DIRECTORATE OF LETTERS**
1 Rethymnou St.
10682 Athens
Tel: +30 210 8201710, 82-11
Fax: +30 210 8201702
Email: protocol@dgr.culture.gr
Website: www.culture.gr

**NATIONAL BOOK CENTRE OF GREECE (EKEBI)**
4 Athanassiu Diakou St.
11742 Athens
Tel: + 30 210 9200300
Fax: + 30 210 9200305
Email: info@ekebi.gr
Website: www.ekebi.gr
Contact: Socrates Kbouroupolou, Senior Books Officer

**NATIONAL STATISTICAL SERVICES OF GREECE**
46 Pireous Str. Eponiton
18510 Piras
Tel: + 30 210 4852315
Website: www.statistics.gr

**SCHOOL BOOK PUBLISHING ORGANISATION (OEDB)**
Mitropoleos 26-28
10563 Athens
Tel: +30 210 3237855
Fax: +30 210 3326224
Email: vpresident@oedb.gr
Website: www.oedb.org

**PEDAGPGICAL INSTITUTE (PI)**
396 Mesogion Av.
15341 Ag. Paraskevi
Tel: +30 210 6083977
Fax: +30 210 6007298
Website: www.pi-schools.gr

**TESOL GREECE (Teachers of English to Speakers of Other Languages)**
17, Kapodistriou St.
106 77, Athens
Tel: + 30 210 7488411
Fax: + 30 210 7488411
Email: tesol.greece@otenet.gr
Website: www.tesolgreece.com