



**The
Polish
Book
Market
2018**

General Information

The Polish book market accounts for almost 3 per cent of the European publishing market, while Poland's population accounts for 7.5 per cent of the total population of the European Union.

At the end of 2017, in the ISBN database maintained by the National Library, there were almost 42,000 publishers registered in Poland, though not more than 2,000-2,500 of them are active (publishing several books in the course of the year).

There are many factors to imply that the extremely demanding creative sector represented by the Polish book market has significant potential for growth, including a relatively low level of readership, the strong role of prices as a basic tool for competition among the individual segments of the market, consistent growth in activity by institutional programmes, and financial contributions from the state budget for the development of readership and in support of the publishing sector.

At the same time, many internal market factors are limiting this growth potential. The most critical of these include: over-exploitation of the sale price of books to the end user as a basic tool for promotion and marketing, unequal commercial margins and sales wars between individual distribution channels, and also the low profitability of entities in the retail sector resulting from the aforementioned policy.

However, the market is still highly concentrated. A group of almost 300 entities holds almost 97 per cent of it. Approximately 600-700 firms publish more than ten books per annum. According to estimates produced by Biblioteka Analiz, approximately 250 firms achieved a turnover of or above 1 mln zlotys (€ 234,700), and approximately 120-130 achieved a turnover exceeding 2 mln zlotys (€ 469,500) in 2017. Most of the other registered publishers have only issued a very limited number of books and do not take part in the publishing market.

Market share in 2017 (by size of publishing firm)

	Number in group	Sales income within group in zloty mln	€ mln	Market share in %
Large publishers annual income > € 4 million	40	1635	309.7	72.7
Medium-sized publishers annual income from € 200,000 to € 4 million	~240	542	102.6	24.1
Small publishers annual income < € 200,000, publishing at least two titles pa	Over 1,500	52	9.8	2.3
Irregular publishers producing occasional publications	Over 4,000	11	2.1	0.5

Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

Income from book sales

	2013	2014	2015	2016	2017
Income from book sales at publishers' market prices (in zloty mln)	2,680	2,480	2,410	2,370	2,250
Percentage growth	0.4%	-7.5 %	-2.8%	-1%	-5%
Income in € mln	640	582	566	559	528

Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

In 2017 the value of the Polish book market totalled 2.25 bn zlotys in wholesale prices (at which publishers sell books to their distributors). Compared with 2016, when it totalled 2.37 bn zlotys, the market value fell by 5 per cent.

The fall in sales in the publishing sector, recording a slightly higher rate in 2017 than in recent years, was caused by a combination of factors of various kinds, which are leading to gradual changes in the retail sales sector, where a persistent decline in bookstore sales has been occurring, while at the same time Internet sales have been rapidly growing in significance.

At the same time, despite increasing financial expenditure for the promotion of readership and declarations of support for small firms that offer an ambitious publishing programme, from the business point of view their situation is not only not improving, but from year to year it is getting worse. Access to a wider market and to the most effective channels of distribution is being gained, to an overwhelming extent, by the commercial titles with the biggest sales potential. Not much more than 10 per cent of the items on offer from retail chains or independent bookshops consist of more ambitious publications of every kind.

On the other hand, the past few years have seen relative stabilisation for the commercial book sector, including belles-lettres, and also rises of a few percentage points in the value of sales of general non-fiction and a dynamic rise in the quantity and value of sales of books for children and young adults.

Yet the current situation on the retail market continues to have the greatest effect on its condition, because of factors including the purchase-and-sales policy being implemented by both publishers and leading physical and Internet retailers. Currently,

the ever-increasing number of new titles available, which the market is supposedly anticipating (rather than high warehouse inventories) is forcing publishers and retailers into rapid price reductions for their new products. As a result of market realities, the publishers are playing an increasing part in this procedure, because any publishing firm that wants to optimize the value of its commercial turnover with the distribution sector has to run frequent, regular promotional campaigns, providing the end customer with discounts at a level of 25-30 per cent of the retail price. Paradoxically, this practice prolongs the rotation of a title on the retail market and leads to a fall in the margins of the individual segments within the distribution chain, and also in the income achieved from sales.

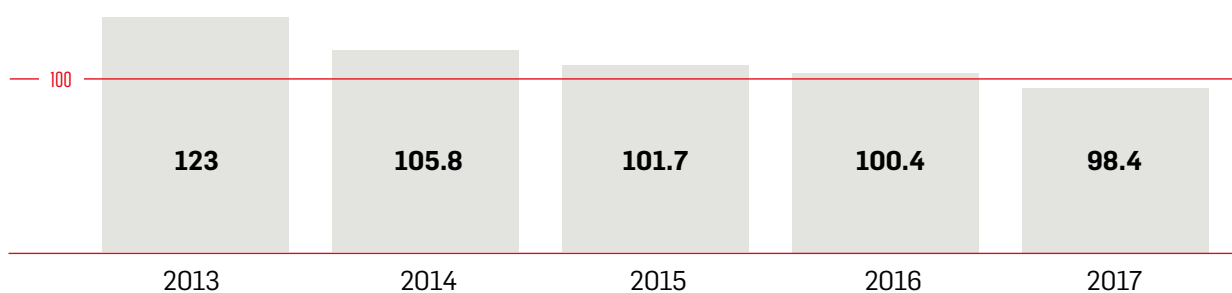
In the period from 2016 to 2018 the collapse of the Matras bookstore chain has had a strong impact on the state of the publishing market, including a direct effect on book sales. For many years Matras acted as the natural deputy leader of the printed books retail sales segment, in terms of both income and volume (number of copies) of sales achieved. As a result of Matras's bankruptcy, the Polish publishing sector has suffered a considerable financial loss, estimated at between 105 and 12 mln zlotys (447-511 mln euros). Therefore the year 2017 was to a significant extent a period in which publishers tried to repair the damage to the distribution system for their own publications caused by the disappearance of Matras, and as far as possible to regain some of their lost income.

Income from book sales by category (%)

	2013	2014	2015	2016	2017
Mainstream literature	13.2	12.3	11.6	12.1	12.8
Children's books	6.0	7.3	7.7	8.4	11.1
School set books	2.0	0.6	0.5	0.4	1.5
School textbooks	31.5	30.4	29.0	28.0	26.6
Academic and professional books	36.5	37.9	39.2	39.8	37.2
Illustrated books	3.9	4.6	5.0	5.3	5.4
Religious books	4.1	3.8	3.9	3.6	3.4
Other (including musical scores and maps)	2.8	3.2	3.1	2.4	2.0

Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

Number of copies sold (millions)



Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

Book production

	2013	2014	2015	2016	2017
Published titles	29,710	32,480	34,920	36,140	38,620
First editions	15,580	18,870	21,130	23,250	26,450
Print-runs (in millions of copies)	112.4	105.1	97.7	94.2	92.3
Average print-run (no of copies)	3,783	3,236	2,798	2,435	2,234

Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

In 2017 there was a further fall in the average print-run, this time by 8 per cent, from 2,435 to 2,234 copies. The overall number of copies of printed publications was also significantly lower, at 92.3 mln, down from 94.2 mln.

Belles-lettres (number of titles)

	2013		2014		2015		2016		2017	
	Adult	Children's	Adult	Children's	Adult	Children's	Adult	Children's	Adult	Children's
Published titles	5,036	2,178	5,712	2,630	6,785	2,144	6,814	2,717	7,201	3,073
First editions	4,658	2,092	5,245	2,533	6,253	2,060	6,338	2,605	6,670	2,893
Re-editions	378	86	467	97	542	84	476	112	531	180

Polish Publishing in Figures 2017, National Library

Original books and translations (total)

	2013		2014		2015		2016		2017	
	Original	Translated	Original	Translated	Original	Translated	Original	Translated	Original	Translated
Published titles	23,299	6,270	22,590	6,710	23,111	7,208	23,279	7,068	24,294	7,534
Belles-lettres for adults	2,859	2,078	3,167	2,418	3,574	3,045	3,758	3,056	3,841	2,973

Polish Publishing in Figures 2017, National Library

In 2017 there was a further reduction in employment in the publishing sector, by 0.25 per cent, down to 4,750-4,630 employees.

Average book price

	2013	2014	2015	2016	2017
PLN	38.3	41.5	41.8	42.6	43.5
EUR	9.14	9.74	9.01	10.00	10.12

The last few years have been a period of rising retail prices, the result not just of objective increases in production costs (printing, paper, logistics etc.) but also stems from a strong tendency to offer high discounts in retail sales, including the sale of new publications being issued for the first time too.

Over the past few years book prices have only risen minimally, and even dropped slightly in 2013, and in

the years 2015-2017 rose relatively by 0.7, 0.9 and 2.1 per cent, yet many readers think of books as expensive. This impression is mainly based on the cover prices, which are artificially inflated because of the almost inevitable reductions that are very soon made at the retail sales points. At the same time, the supply of so-called cheap books is immense (copies sold at a reduced price by the publishers or wholesalers).

// The Polish Book Market 2017

In 2014 publishers' and booksellers' organisations alike were involved in taking action to introduce rules for the uniform pricing of books. A draft Book Act was prepared, foreseeing the introduction of fixed prices for books, modelled on regulations that exist in France and Germany. In 2015 the draft was debated in the Sejm (the Polish parliament), but did not gain approval. The topic returned in the second half of 2016, underwent wide public consultation conducted by the Ministry of Culture and National Heritage, and in the first half of 2017 was submitted to parliament again.

Poland's biggest book publishers

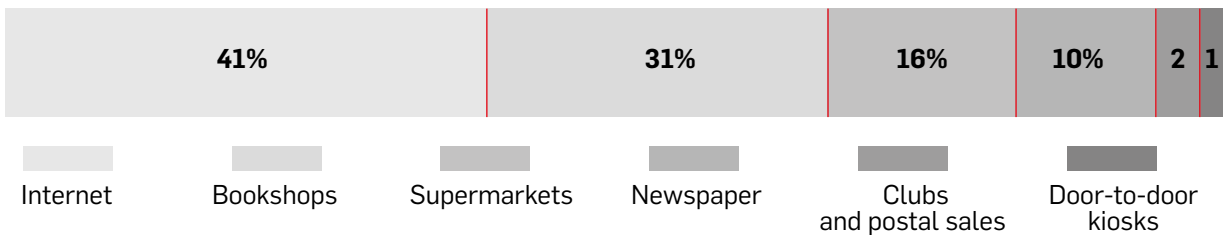
Publisher	Income from book sales in 2017 (in zloty mln)	Income from book sales in 2016 (in zloty mln)
Nowa Era www.nowaera.pl	369.6	264.99
Wydawnictwa Szkolne i Pedagogiczne wsip.com.pl	Data unavailable	230.0
Wolters Kluwer Polska wolterskluwer.pl	218.5	212.17
Wydawnictwo Olesiejuk olesiejuk.pl	115.5	96.0
Pearson Central Europe pearson.pl	102.47	111.3
Grupa Edukacyjna mac.pl	87.43	92.26
Ameet ameet.pl	76.62	84.36
SIW Znak wydawnictwoznak.pl	72.81	87.45
C. H. Beck beck.pl	65.0	61.06
Macmillan Polska macmillan.pl	48.19	41.3

Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

Distribution

Wholesalers have a large, approx. 46 per cent share of the market. The total number of wholesalers is falling, and approximately 150 firms are still active on the market, of which the biggest firms with national scope are: Azymut, FK Olesiejuk, Ateneum, Super Siódemka, Platon.

Distribution market share



There is dynamic growth in Internet sales, the value of which is rising above all at the cost of sales at physical outlets, especially independent bookstores, which since 2014 have been deprived of the opportunity to distribute a major part of their stock of school textbooks.

However, Internet sales are mainly driving competition on the basis of price, offering discounts on new publications equal to as much as 35-40 per cent of the retail price.

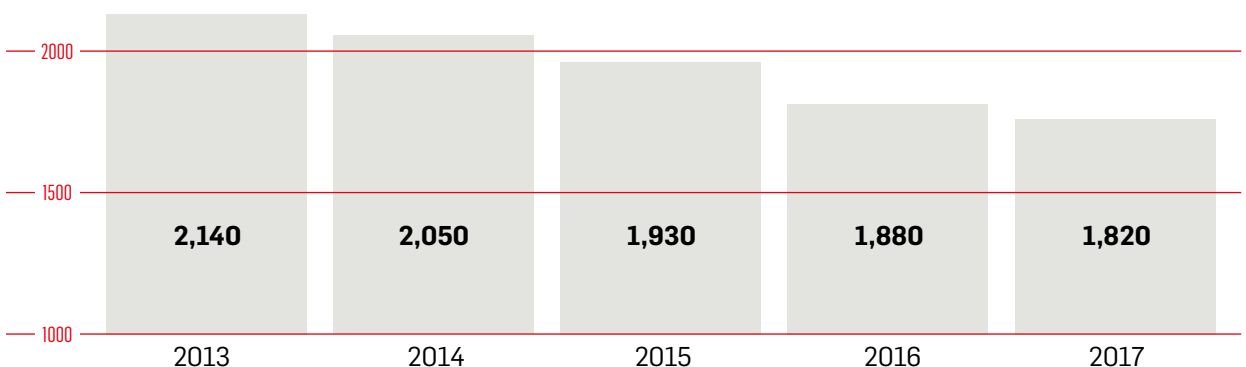
Stable sales are also being generated by newspaper kiosks and shops, which offer above all new books and bestsellers. Sales in the supermarket sector are rising, above all thanks to the commercial activity of discount chains, and are driven by

a combination of an attractive range of topics: popular fiction, non-fiction, manuals, educational books, children's books) at lower prices than the mainstream, on average 25-35 per cent lower. It seems that in subsequent years it is the sale of books at supermarkets that, alongside Internet sales, may record the highest growth rate. The largest contribution to this trend is being shown by the Portuguese firm Jeronimo Martens' Biedronka chain, whose permanent product range now includes cyclical promotional campaigns devoted to individual types of publication available on the market. The chain has recorded its best results in sales of publications for children, self-help books, best-selling fiction (popular, crime-and-thriller, and romantic fiction) and non-fiction (mainly biographies and history books).

Bookshops

The number of bookshops is steadily decreasing as a result of various factors. As well as a general decline of interest in books, economic factors such as high rents for premises, strong competition from large retail firms (not just bookstore chains but also supermarkets) are having a notable effect, as are the price wars initiated by the largest market players.

Number of bookshops



Rynek książki w Polsce 2018 by Biblioteka Analiz Sp. z o.o.

// The Polish Book Market 2017

Towards the end of 2015 the Polish Book Chamber began a long-term project to develop a National Bookshop Database, financed by the Book Institute. At the end of 2017, 1,827 bookshops were registered on the database. As a result of the increasing problems affecting traditional physical bookshops, in the course of 2017 233 bookshops disappeared from the database. This negative trend has continued in 2018.

The years 2016-2017 were a period of intense change in the chain bookshop sector. Alongside the collapse of the Matras chain, there was dynamic growth for entities such as Świat Książki Bookshops, MoleMole (which in terms of capital is connected with Empik, the market leader among physical bookshops), and BookBook.

However, as these entities are tied to others in terms of capital and organisation, there is progressive narrowing of sales in favour of the products offered by selected publishing firms and a gradual limitation of a product range fully representative of Polish book production.

Wholesale discounts average approximately 42-55 per cent. Bookstore chains work at discounts ranging from 42-50 per cent, yet in some instances direct cooperation is burdened by extra costs. Independent bookshops work at a discount of 27-35 per cent in the case of so-called colour books, and 15-20 per cent for textbooks. Booksellers supplied directly

by the publishers buy at a discount of up to 35-47 per cent (apart from large bookselling chains such as Empik), on top of which the publisher may offer a higher discount in exchange for an increase in the sales of their books and greater commitment to promoting their titles. In addition, where there is direct cooperation between the publishers and the leading chains, the discount on the cover price for the retail bookseller can be as high as 60 per cent.

A new initiative in the bookselling sector is the establishment of Poland's first annual post-graduate bookselling course of study at a university level. The courses are organised by the Book Institute, the Polish Book Chamber and Warsaw University's Institute for Academic Information and Bibliology, as the "Polish Academy of Bookselling" (PAK), which originated from a study trip to the Frankfurt Book Fair in 2015. By the end of 2017, 70 people had completed the course.

In 2017 the Ministry of Culture and National Heritage launched a grant programme called "Partnership for a book", focusing inter alia on support for bookshops and libraries through the development of professional skills via training, and also activities aimed at promoting bookshops and developing readership at public libraries. In 2017 almost 267 projects were implemented within the scope of the programme. Under the programme for 2018, 255 applications received funding, for total financing of 4.36 mln zlotys.

Main bookselling chains

Empik / empik.com

Poland's biggest bookselling chain, which in spring 2018 had 250 shops. The company's complete range of goods includes more than 1.5 mln products (including books, CDs, DVDs, computer games, stationery, electronics such as e-readers and MP3 players, and household goods). The average number of books on offer is 75,000 titles, but Empik's gross receipts from book sales totalled from 500-520 mln zlotys.

Since 2016 Empik has been implementing a rebranding strategy based on the concept of the so-called Future Store, which involves designing the stores from a more customer-centred viewpoint, and a strong connection with the Internet platform, Empik.com. Currently all the new stores are fitted and furnished according to this concept.

Since mid-2017 the firm has been developing a loyalty programme, Mój Empik ("My Empik"), which has now amassed almost 2.5 mln users. Towards the end of 2017 the firm also launched an app called EmpikGO, which allows for easy selection and use of e-books and audiobooks.

Empik organizes its own "Apostrophe" International Literary Festival and runs a promotional programme for children's books called "Przecinek i Kropka" ("Comma and Full Stop"), which includes a combined children's book festival and book fair. At this event a nationwide prize for the best children's book is awarded.

Świat Książki / swiatksiazki.pl

One of the most rapidly developing bookstore chains. The owner of the chain is a company called Dressler, which in 2013 acquired 36 bookshops from Weltbild. In 2015-2016 it opened almost 25 new shops. Over the next year the chain expanded by another 48 bookshops, and by mid-2018 it was running almost 120 outlets. The new bookshops are situated in shopping centres and malls as well as on the main commercial streets in their localities.

The company also runs its own Internet bookstore, Swiatksiazki.pl. Its customers can collect their orders free of charge from the chain's bookshops. The chain's marketing policy involves two rotating promotional campaigns, one offering "A second book at half price" and the other "3 for the price of 2". The range of books on offer within each of these promotions changes once a month.

BookBook / Bookbook.pl

BookBook bookstores are part of the nationwide chain established by an enterprise called Dom Książki, which includes 97 shops. It is a joint venture between two individuals, six publishing houses (Czarna Owca, Helion, Prószyński Media, Publicat, Rebis and Zysk i S-ka) and the book wholesaler Super Siódemka. This is the first occasion on which

a group of Polish publishers have joined ranks and taken over a chain of bookstores. In 2016-2018 most of the bookshops in this chain were rebranded and now operate as BookBook stores. Most of the chain's bookshops are situated in small localities, and their characteristics are determined by the purchasing power and preferences of the local consumer.

Książnica Polska / ksiaznica.pl

This firm operates mainly in north-eastern Poland where it runs retail operations and owns more than 35 bookshops in 30 cities including Olsztyn, Gdańsk, Warsaw, Lublin, Szczecin, Poznań, as well as an Internet bookshop called Czytay.pl. The company performs 1.15 mln transactions annually and is visited by 3.5 mln customers. For several years

the company has been developing a partnership programme aimed at independent bookshops, which in exchange for a percentage of income offers to modernise the shops, supplement their product range, guarantee their orders and support their marketing and promotion efforts. Gross receipts in 2017 were just over 30 mln zloty.

MoleMole/ molemole.com

This chain appeared on the Polish book market in the first half of 2017. It was designed by the Empik Group as a way to establish physical sales points at smaller outlets (100-350m²) with carefully selected stock,

focusing on a particular range of books. Most of the new bookshops are located within shopping centres and malls. In the first year of its existence, the chain opened 33 bookshops in 22 localities.

Bookszpan / bookszpan.eu

Bookszpan is a new bookstore chain established jointly by three experienced booksellers, distributors and one publisher (Sonia Draga). The chain has not taken over any existing bookshops but has been setting up its own – in the first year of its existence it

had nine, at the end of 2017 there were more than 15 of them. These bookshops are located in the biggest cities (Warsaw, Gdańsk, Wrocław, Poznań) and also in some smaller places (Bytom, Racibórz, Czechowice, Dziedzice, Tarnowskie Góry).

Internet book sales

Internet book sales are one of a small number of distribution channels for printed books which have noted a steady rise in value in recent years. Internet bookshops offer not only new titles, but also a large selection of books from publishers' back lists, which are harder to find, and often not available in physical bookshops. At the same time, e-commerce in books is the arena for the fiercest price competition, which has an extremely strong effect on the entire book retail sector and the general state of the publishing industry in Poland.

One of the major trends typifying retail book sales in Poland is the rapid and progressive migration of

customers from the physical sales sector (traditional bookshops) to Internet bookstores. At the same time, customers whose purchasing decisions continue to be guided above all by price do not show loyalty to any particular e-bookshop but migrate between the various firms, choosing the best offers as and when they arise, based on the cost and conditions of delivery as well as the price of the book.

Income from Internet sales of printed books in 2017 totalled just under 1 bln zlotys. Currently there are several dozen firms active on the Polish market whose annual sales income exceeds 10 mln zlotys.

Allegro.pl

This is Poland's leading auction website and internet platform for the book trade. Many market analysts now regard the Allegro.pl service as the country's biggest internet bookseller too. However, its sales involve the primary market (new books) as well as the secondary one (used books). In recent years income totalling an annual 185-190

mln zlotys has been achieved from book sales via the Allegro platform. The share of sales of new books on Allegro totalled 69 per cent in this period. Customers show the biggest interest in publications from the following categories: belles-lettres, popular literature, non-fiction, academic and popular science books.

Bonito.pl

This is Poland's biggest internet bookstore, which has been in operation since 2006. It offers a range of 75,000 titles and processes 200,000 orders per month. It has the fastest growth in gross income, from 2 mln zloty in 2009 to 200 mln in 2017.

The company owes its growth to its aggressive pricing policy and the large range of services that it provides. Its customers can receive their orders via

the Polish postal service, via courier firms, at several thousand press outlets, Orlen petrol stations and 30 company delivery points, located in 12 cities, including Warsaw, Krakow, Bielsko-Biała, Katowice, Poznań, Lublin, Łódź and Rzeszów.

Apart from its basic sales outlet, the owner of Bonito.pl also runs the discount Internet store, Aros.pl, which accounts for about 30 per cent of the firm's income.

Merlin.pl

Merlin.pl is one of the oldest Polish brands associated with Internet sales. For some years Merlin.pl was the leading internet retail bookseller, with about 40-45 per cent of its profit resulting from internet sales. In 2017 the e-store became part of Merlin Group S.A., within which three brands operate: the Merlin.pl and Cdp.pl internet stores, and a newly established

publishing house called Merlin Publishing. In mid-2018 the Merlin Group announced the takeover of Profit M, a company that sells books, stationery and toys through the Internet stores Nieprzeczytane.pl, Profit24.pl, Mestro.pl and Smarkacz.pl and two physical bookshops located in Warsaw.

According to a survey entitled "E-commerce in Poland 2018. Gemius for E-Commerce Poland", which describes the Internet sales market, the most recognisable brand involved in Internet book sales is Empik (39 per cent), and the other top places are taken by the Allegro platform (13 per cent) and one

of the pioneers of e-sales, Merlin.pl (5 per cent). The remaining brands are recognised by no more than 4 per cent of those canvassed: Matras and Świat Książki (4 per cent), Bonito, Olx and Tania książka (3 per cent), Amazon and Aros (2 per cent), Gandalf, Mediamarkt and Znak (1 per cent).

Bookstores that package and deliver books abroad

// Allegro.pl

// Merlin.pl

// Empik.com

// Taniaksiążka.pl

// Bonito.pl

// Gandalf.com.pl

// Helion.pl

// InBook.pl

E-books

The share of digital publication sales fluctuates at around 3-4 per cent of the total value of the market expressed as income in publishers' sales prices. The market is expecting changes likely to be brought by this year's decision by the European Parliament allowing for the standardisation of rates of VAT on books, regardless of their form. One of the main obstacles for the dynamic growth of the market in recent years has been the disproportion existing in this sphere – printed books are subject to VAT of 5 per cent, while digital publications are subject to the basic rate of 23 per cent. The sector is currently waiting for a change in the national regulations regarding tax rates.

The estimated value of e-book sales in 2017 totalled 85 mln zlotys, representing growth of 13.3 per cent compared with 2016. Thus the sector maintained its two-figure growth trend. Publishing houses recording the highest value for digital product sales noted a rise in income of almost 15-18 per cent. Meanwhile, the rate of sales growth expressed as the number of files sold is estimated at 16.5 per cent. The relationship between the number of files sold and the value of sales may indicate a minimal fall in the price of e-books.

The biggest e-material sellers are: Platforma Dystrybucyjna Wydawnictw, Empik.com, Virtualo

(which belongs to Empik), Woblink (which is part of the Znak group), Legimi, Publio.pl.

The burden of market development lies on the one hand with the publishers, who are responsible for growth in the number of titles available in digital form in the Polish language, and on the other on retail vendors, whose marketing activities create demand and generate higher sales.

The central focus of contention within the industry is not on the pricing of e-books. Far more important, especially from the customer's point of view, are the breadth and attractiveness of the range on offer, its availability, and the customer service offered by the store, including the payment systems available.

A sales model for digital books through subscriptions has been gaining ground in Poland since 2012. This form of distribution is an alternative to transaction sales, through which the reader becomes the owner of the digital book. By contrast, the subscription model provides temporary access to the relevant title in exchange for a fixed payment (e.g. for 30 days).

The leader in this sector is a platform called Legimi, which since 2015 has also sold e-books in a package together with an e-reader for one zloty,

within a subscription model that provides access to a database of more than ten thousand titles. Since 2016 Legimi has also been developing a subscription sales service with an e-reader priced at one zloty. The service is also available from Poland's biggest mobile phone operators (Plus, T-Mobile and Play), and within selected subscription packages called "książki w chmurze®" (meaning "books in the cloud") audiobooks are also included.

In Poland the distribution of e-books via subscription models (e.g. Ibuk, Legimi) to institutional customers, above all public libraries, is also gradually but consistently growing.

According to the above-mentioned survey of Polish e-commerce, when it comes to instant familiarity among the various Internet services selling multimedia products in e-form (apps, e-books etc), the most recognisable brand is Empik (23 per cent), ahead of Allegro (6 per cent) and Google Play (4 per cent). The recognisability of the remaining brands does not exceed 3 per cent: Spotify (3 per cent), Amazon, iTunes, Merlin and Play (2 per cent), Apple Store, Audioteka, Matras, Mediamarkt, Publio and Virtualo (1 per cent).

Audiobooks

According to estimates, in 2017 audiobook sales maintained their two-figure growth trend in terms of income achieved. The value of audiobook sales in retail prices grew by 10.4 per cent to a level of 45.6 mln zlotys.

The rapid growth of this sector of the book market in recent years is the result of dynamic competition between two companies in the audiobook online segment (Audioteka and Storytel) in their efforts to co-finance recordings and add new titles to their range. It is also worth mentioning a project launched in 2017 by Storytel Polska, called Storytel Original, which aims to produce original projects in the form of 10-part audio serials. In turn, the biggest promotional

project for audiobooks on the Polish market was the media campaign for the Storytel subscription service run in 2017-2018, which covered not just the Internet but also national and specialised TV stations.

The range of audiobooks on offer rose again in 2017, this time by 13 per cent, from 4,250 to more than 4,800 titles (not counting publications for learning foreign languages and foreign-language editions).

The average price of an audiobook slightly exceeded 35-37 zloty, regardless of the carrier (CD/digital file).

In 2017 the proportion between income from sales of CDs and downloaded files was 50:50.

Audiobook market

	2013	2014	2015	2016	2017
Number of audiobook publishers	113	115	140	150	170
Value of sales (in zloty mln)	26.9	29.2	36.5	41.3	45.6
Number of titles on offer	2,730	3,250	3,720	4,250	4,800
Percentage growth (in number of titles)	16%	19%	14%	14%	13%

Top literary publishers

Albatros / wydawnictwoalbatros.com

(222 published titles)

Founded in 2000, this company is known as a “bestseller factory”. It mainly publishes foreign bestseller authors such as Harlan Coben, Nicolas

Sparks, Stephen King, Graham Masterton, Ken Follett, Mario Puzo, Frederick Forsyth, Ian McEwan, Marc Levy and many others.

Amber / wydawnictwoamber.pl

(232 published titles)

This publishing house was established in 1989 as one of Poland's first privately owned firms. It specialises in fiction (both popular and crime), especially in translation from the US and UK markets. It responds quickly to reading trends, and in recent years has become one of the main publishers firstly of vampire and dystopia books

for young adults, and secondly of erotic books. Its authors include: Sebastian Fitzek, Sharon Bolton, Clive Cussler, Walter Lucius, Danielle Steel, Jayne Ann Krentz, Isabelle Broom, Kristen Proby, Jodi Ellen Malpas, Julia Quinn, Eloisa James, Veronica Roth, Erich von Däniken, Andrew Collins, William Breuer, Erik Durschmied.

Czarne / czarne.com.pl

(121 published titles)

Founded in 1996, Czarne publishes European prose and non-fiction and is a leading reportage and travel writing publisher. Already well-known for publishing the work of new Eastern and Central European authors, a wide range of non-fiction, essays and memoirs as well as first-rate fiction, Czarne is now adding history and social science to its range. Its

authors include: Andrzej Stasiuk, Krzysztof Varga, Yurii Andrukhovych, Herta Müller, Paul Theroux, Jean Hatzfeld, Jacek Hugo-Bader, Wojciech Tochman, Paweł Smoleński, Mariusz Szczygieł, Svetlana Alexievich, Lidia Ostałowska, Liao Yiwu, Colin Thubron, Karl-Markus Gauß, Martin Pollack, Thomas Bernhard.

Grupa Wydawnicza Foksal / gwfoksal.pl

(275 published titles)

This group was formed in 2012 from the merger of three publishing houses: W.A.B., Buchmann and Wilga. The next year the group expanded its product range to include new brands – Uroboros (fantasy books) and FoxGames (a publisher of board games for children and young adults), aimed at teenage

literature fans. Although its list includes many well-known foreign authors, it also publishes Polish authors (including Jacek Dehnel and Zygmunt Miłoszewski). W.A.B. has promoted most of the newer names in Polish literature.

Muza / muza.com.pl

(145 published titles)

Founded in 1989, this firm publishes fiction and essays, and is a major buyer of foreign rights. It publishes a large number of leading foreign authors including Roberto Bolaño, Haruki Murakami, Carlos

Ruiz Zafón, Daniel Silva, Vladimir Nabokov and Arturo Pérez Reverte. Muza also publishes the work of best-selling crime writer Katarzyna Bonda.

Prószyński Media / proszynski.pl

(199 published titles)

This firm has been active since 1990 and has successfully launched a large number of new authors of popular Polish literature. It also publishes some of the best-known science fiction, crime fiction and non-fiction, as well as popular science books. Its authors include: Virginia C. Andrews, Orson Scott

Card, Diana Chamberlain, Jeffery Deaver, Ursula K. Le Guin, John Irving, Henry James, Dennis Lehane, Stephen King, Jodi Picoult, Terry Pratchett, Nora Roberts, John Steinbeck, Amy Tan, Anais Nin. The company's publication list includes crime novels by Katarzyna Puzyńska.

Rebis / rebis.com.pl

(290 published titles)

This publishing firm has achieved success by continuously broadening its range. Fiction accounts for about 45 per cent of its output, but in recent years it has published an increasing amount of non-fiction, self-help books, and popular science. For almost a decade Rebis has been consistently building its

position as one of the leading players in the history book sector. Like the other publishers of fiction, it produces most of its books in extensive series. Its authors include: Jay Asher, Carla Montero, Bernard Minier, Terry Hayes and Mons Kallentoft.

Sonia Draga / soniadraga.pl

(135 published titles)

This company has been on the publishing market since 2000. Its list mainly consists of a broad range of literary novels (novels of manners, historical fiction, historical romance, crime and thrillers), and it also publishes non-fiction. It also runs a graphic novel imprint called Non Stop Comics and a non-fiction imprint called Post Factum, as well as an imprint called Debit, publishing books for children

and young adults. It has built its market position on the long-term success of the biggest best sellers of the past decade, including the novels of Dan Brown and E.L. James' erotic series. Its authors include: Charlotte Link, Chris Carter, Lisa Gardner, Javier Marías, James Ellroy, Mohsin Hamid, Elena Ferrante and Jonathan Franzen.

Świat Książki / swiatksiazki.pl

(91 published titles)

Founded in 2004 by the Bertelsmann media corporation, it was later incorporated into the German group Weltbild, and in February 2013 it was taken over by Wrocław-based publisher Bukowy Las. It publishes books by some of the most popular Polish authors (Hanna Krall, Manuela Gretkowska,

Janusz Głowacki), but its entire list has a much wider range. This firm's most popular book in recent years has been the novel *The Girl on the Train* by Paula Hawkins, and excellent sales figures were also achieved by the novel *Me Before You* by Jojo Moyes.

Wydawnictwo Literackie / wydawnictwoliterackie.pl

(177 published titles)

Founded in 1953, this company is connected with the international publishing firm Libella. It publishes many leading Polish authors and promotes new titles by foreign and Polish writers – Stanisław Lem, Witold Gombrowicz, Jacek Dukaj, Ignacy Karpowicz. As well as serious literature it also publishes thrillers, crime novels and women's romantic fiction. Wydawnictwo

Literackie's authors include winners of all Poland's top literary prizes including the Nike Literary Award, the Kościelski Foundation Prize, the Janusz Zajdel Polish Fandom Prize, the "Polityka" Passport, the Gdynia Literary Prize and many others. It also publishes the work of Olga Tokarczuk, who won the 2018 Man Booker International Award.

Znak / wydawnictwoznak.pl

(290 published titles)

Founded in 1959, this company publishes literary fiction and non-fiction as well as children's literature. It publishes some of Poland's most famous authors, including Czesław Miłosz, Wisława Szymborska, Wiesław Myśliwski, Paweł Huelle, Magdalena Tulli

and Małgorzata Szejnert. It has several different imprints, including Znak Literanova (fiction), Znak Emotikon (children's books), Znak Horyzont (history books). It has established a separate publishing house called Wydawnictwo Otwarte.

Zysk i S-ka / zysk.com.pl

(194 published titles)

This company makes about 80 per cent of its income from adult fiction. It also promotes Polish writers, including Małgorzata Kalicińska, Elżbieta Cherezińska and Wojciech Cejrowski. It is also one

of the leading publishers of fantasy on the Polish market. Its foreign authors include: George R.R. Martin, Chimamanda Ngozi Adichie and Peter Ackroyd.

Polish Literature Abroad

The tradition for translation of Polish literature into foreign languages goes back to the sixteenth century. In that era the works of Poland's Renaissance poets were translated. In the seventeenth and eighteenth centuries some classic Polish novels enjoyed popular success abroad.

Translations from classic Polish literature include the works of Henryk Sienkiewicz (4,800 whole books and 117 stories in anthologies), Adam Mickiewicz (619 and 242 respectively), Władysław Reymont (569 and 83 respectively), Józef Ignacy Kraszewski (358 and 43 respectively), Bolesław Prus (335 and 80 respectively), and Stanisław Ignacy Witkiewicz (137 and 46 respectively).

Of the modern authors, the most frequently translated include Stanisław Lem (1,462 translations of whole books and 138 stories in anthologies), Witold Gombrowicz (583 and 73 respectively), Ryszard Kapuściński (566), Andrzej Sapkowski (558), Czesław Miłosz (511 and 218 respectively), Janusz Korczak (425), Sławomir Mrożek (371 and 132 respectively), Wisława Szymborska (324 and 209 respectively), Jarosław Iwaszkiewicz (221 and 253 respectively), Zbigniew Herbert (205 and 160 respectively), Tadeusz Różewicz (200 and 265 respectively), Bruno Schulz

(200 and 59 respectively), Olga Tokarczuk (165 and 34 respectively), Karol Wojtyła (162 books), Andrzej Stasiuk (148 books and 47 stories in anthologies), Tadeusz Konwicki (136) and Hanna Krall (109).

The satirical crime novels of Joanna Chmielewska (580 books) are extremely popular in Russia, where they achieve high sales figures.

The most popular authors by the number of languages into which their works have been translated are Janusz Korczak (49 languages), Czesław Miłosz (48), Wisława Szymborska (48), Tadeusz Różewicz (47), Jarosław Iwaszkiewicz (44), Zbigniew Herbert (42), Stanisław Lem (42), Jerzy Andrzejewski (41), Ryszard Kapuściński (40), Sławomir Mrożek (40), Witold Gombrowicz (39), Bruno Schulz (35), Olga Tokarczuk (35), Adam Zagajewski (33), Andrzej Stasiuk (30), Karol Wojtyła (31), Tadeusz Konwicki (28), Andrzej Szczypiorski (28), Andrzej Sapkowski (28), Paweł Huelle (23), Antoni Libera (22), and Marek Krajewski (21).

In the period from 2008 to 2017 the largest number of translations of Polish literature were into Russian (822), English (377), followed by German (335), Spanish (308), French (288), Ukrainian (284), Czech (258), Italian (236).

Foreign Literature in Poland

Foreign publications account for a large share of the market. In 2017, of a total of 36,260 published titles, translated books accounted for 21 per cent (7,534).

Translations published in 2017

Original language	Titles	Including belles-lettres for adults
English	4,413	1,713
French	631	226
German	525	133
Italian	352	32
Japanese	324	313
Swedish	187	98
Spanish	185	79
Russian	139	66
Norwegian	87	70

Polish Publishing in Figures 2017, National Library

Literary awards

The Kościelski Foundation Prize / koscielscy.org

Awarded annually since 1962. Based in Geneva, the Kościelski Foundation is one of the oldest Polish cultural institutions. The prize is given to writers under the age of 40, for their entire output to date.

2017 // Urszula Zajączkowska

2016 // Maciej Płaza

2015 // Szczepan Twardoch

2014 // Krzysztof Siwczyk

2013 // Krystyna Dąbrowska

Wisława Szymborska Award / nagrodaszymborskiej.pl

An international prize awarded by the Wisława Szymborska Foundation for the best volume of poetry published in the Polish language in the preceding year (including collections written in Polish and translated into it). The award was founded at the bequest of Wisława Szymborska, who won the 1996 Nobel Prize in Literature. Offering prize money of 200,000 zlotys, it is Poland's most valuable literary award. The prize for foreign poetry in translation includes an additional 50,000 zlotys awarded to the translator.

2018 // *Psalmy* (Psalms) by Julia Fiedorczuk

Przejdź do historii (Turn to History) Linn Hansén (translated by Justyna Czechowska)

2017 // *W* by Marcin Sendek

2016 // *Drożdżownia* (The Yeast Factory) by Jakub Kornhauser

Niespieszna żegluga (Leisurely Navigation) by Uroš Zupan

(translated by Katarina Šalamun Biedrzycka i Miłosz Biedrzycki)

2015 // *Świat był mój* (The World Was Mine) by Roman Honet

Przez sen (Through a Dream) by Jacek Podsiadło

2014 // *Zapisać* (Written Down) by Julia Hartwig

The Silesius Wrocław Prize for Poetry / silesius.wroclaw.pl

An award for the best works of Polish poetry and their authors. The prize was founded by the Wrocław city administration, and since 2008 has been awarded annually in three categories, for the entire body of a poet's work, for book of the year, and for debut of the year. The prize consists of a statuette and a cheque for: 100,000 zlotys for the entire body of work, 50,000 zlotys for the book of the year, and 20,000 zlotys for the debut of the year.

2018 // Entire body of work – Bohdan Zadura

Book of the year – *Puste noce* (Empty Nights) by Jerzy Jarniewicz

Debut of the year – *Raport wojenny* (War Report) by Agata Jabłońska

2017 // Entire body of work – Andrzej Sosnowski

Book of the year – *Włos Bregueta* (Breguet's Hairspring) by Jacek Podsiadło

Debut of the year – *Pamięć zewnętrzna* (External Memory) by Radosław Jurczak

2016 // Entire body of work – Julian Kornhauser

Book of the year – *nice* by Barbara Klicka

Debut of the year – *Sierpień* (August) by Aldona Kopkiewicz

The ANGELUS Central European Literary Award / angelus.com.pl

This prize is given to the author of the best Central European work of fiction to be published in Polish each year. It is one of Poland's biggest literary prizes, worth 150,000 zloty. In 2017 the prize was awarded to the Russian author Oleg Pavlov for his trilogy, titled in Polish *Opowieści z ostatnich dni* (*Tales from the Last Days*), and the prize for translation was won by Wiktor Dłuski.

The NIKE Literary Award / nike.org.pl

A prestigious prize for the best Polish book of the year. It involves a three-stage competition, in which at the first stage the jury nominates 20 titles in May, at the second a shortlist of seven finalists is announced in September, and then the winner is chosen from this group. The prize is usually awarded in October. The author of the winning book is given a NIKE statuette sculpted by Gustaw Zemła and a prize of 100,000 zlotys. First awarded 1997, the NIKE prize has mainly been won by novelists. It is only given to living authors.

2017 // *Żeby nie było śladów* (To Leave No Trace) by Cezary Łazarewicz

2016 // *Nakarmić kamień* (To Feed A Stone) by Bronka Nowicka

2015 // *Księgi Jakubowe* (Books of Jacob) by Olga Tokarczuk

2014 // *Zajeżdżymy kobyłę historii. Wyznania poobijanego jeźdźca* (Riding the Mare of History to Ruin) by Karol Modzelewski

2013 // *Ciemno, prawie noc* (Dark, Almost Night) by Joanna Bator

Gdynia Literary Prize / nagrodaliterackagdynia.pl

An annual award initiated in 2006 by the Mayor of the city of Gdynia. Presented in four categories (novel or short story, poetry, essay, translation) to the best literary works published within the last year. The award is worth 50,000 zlotys (in each category).

2018 // Fiction – *Mikrotyki* (Microtics) by Paweł Sołtys

Poetry – *Pawilony* (Pavilions) by Dominik Bielicki

Essay – *Rękopis znaleziony na ścianie* (Manuscript Found on a Wall)

by Krzysztof Mrowcewicz

Translation – Sława Lisiecka for *Chodzenie. Amras*, a Polish translation of *Walking and Amras* by Thomas Bernhard

2017 // Fiction – *Pieczeń dla Amfy* (A Joint for Amfa) by Salcia Hałas

Poetry – *Schrony* (Shelters) by Michał Sobol

Essay – *Koło miejsca/Elementarz* (Near the Spot/A Primer) by Krzysztof Siwczyk

Translation – Ryszard Engelking for *Szkoła uczuć*, a new Polish translation of *Sentimental Education* by Gustave Flaubert

2016 // Fiction – *Skoruń* (Sluggo) by Maciej Płaza

Poetry – *Nice* by Barbara Klicka

Essay – *Droga 816* (Route 816) by Michał Książek

Translation – Anna Wasilewska for *Rękopis znaleziony w Saragossie*, a new Polish translation of *The Manuscript Found in Saragossa* by Jan Potocki

Conrad Award / conradfestival.pl

The Conrad prize is Poland's most important award for first-time authors of fiction. Qualifying books will have been published in the previous year. The award is sponsored by the Mayor of Kraków, and is a joint initiative of the Book Institute, the "Tygodnik Powszechny" Foundation and the Kraków Festival Bureau, which is in charge of Kraków's status as a UNESCO City of Literature. The winner is awarded 30,000 zlotys and a month-long residency in Kraków sponsored by the Book Institute.

2016 // *Ma być czysto* (Clean It Up) by Anna Cieplak

2015 // *Dom z witrażem* (*The House with the Stained-Glass Window*) by Żanna Stoniowska

2014 // *Alicyjka* (Little Alice) by Liliana Hermetz

The "Polityka" Passport / polityka.pl

A prize established in 1993 by the weekly newspaper "Polityka" for performers in six categories: literature, film, theatre, classical music, popular music and the visual arts. Since 2002 there has also been a special prize for achievements in disseminating Polish culture.

2017 // Marcin Wicha

2016 // Natalia Fiedorczyk-Cieślak

2015 // Łukasz Orbitowski

2014 // Zygmunt Miłoszewski

2013 // Ziemowit Szczerek

Józef Mackiewicz Literary Award / josefmackiewicz.com

This is a major prize awarded to Polish authors for books that promote Polish culture, history and tradition in a significant way. The award was founded to commemorate the life and work of the prominent writer, novelist and political commentator Józef Mackiewicz. A shortlist of about ten nominees is issued during the summer, and the winner's name is announced at an award ceremony held each year on 11 November, Polish National Independence Day. The winner receives a prize of US\$ 10,000. The award has been granted annually since 2002.

2017 // *Sarmacja. Obalenie mitów* (Sarmatia. Debunking the Myths) by Jacek Kowalski

2016 // *Biografie odtajnione. Z archiwów literackich bezpieki* (Declassified Biographies. From the Literary Archives of the Secret Police) by Joanna Siedlecka

2015 // *Dzieje Polski. Skąd nasz ród* (History of Poland. The Land We Come From) by Andrzej Nowak

2014 // *Sokrates* (Socrates) by Ryszard Legutko

2013 // *Opowiem ci o wolności* (Let Me Tell You About Freedom) by Wacław HOLEWIŃSKI

Identitas Literature and History Award / identitas.pl

This award is for works that belong to the broadly defined category of humanities. The jury awards one main prize to a single winner, and also from one to three special prizes, one of which may be for work accomplished in a format other than printed book form. The first edition of the Identitas Award took place in 2014, and it is granted annually between September and December.

Literary Award

2017 // *Palus sarmatica* by Krzysztof Koehler

2016 // *Koniec lata w dziczatym ogrodzie* (The End of Summer in a Wild Garden) by Jarosław Marek Rymkiewicz

2015 // *Krew z mlekiem* (Blood and Milk) by Marta Kwaśnicka

2014 // *Ślady krwi* (Traces of Blood) by Jan Polkowski

Marek Nowakowski Literary Award / bn.org.pl

This award was established in 2017 by the National Library and honours a short story or a collection of short stories “that shows unconventional views, courage and precision of thought, as well as fine writing”. It is named after the Warsaw writer and journalist Marek Nowakowski. The award is granted annually and the winner receives a cash prize of 100,000 zlotys.

2018 // Paweł Sottys for the short-story collection *Mikrotyki* (Microtics)

2017 // Wojciech Chmielewski for his entire oeuvre

The Janusz A. Zajdel Polish Fandom Prize / zajdel.art.pl

An annual award for fantasy literature. The prize is awarded by fans of fantasy to the authors of the best Polish titles, in two categories, novels and short stories.

2017 // Novel – *Różaniec* (Rosary) by Rafał Kosik

Short story – *Szaławiła* (Giddyhead) by Marta Kisiel

2016 // Novel – *Czterdzieści i cztery* (Forty-fourth) by Krzysztof Piskorski

Short story – *Wywiad z Borutą* (An Interview with Boruta) by Łukasz Orbitowski and Michał Cetnarowski

2015 // Novel – *Pamięć wszystkich słów* (The Memory of All Words) by Robert M. Wegner

Short story – *Milczenie owcy* (Silence of the Lamb) by Robert M. Wegner

The IBBY Polish Section “Book of the Year” Competition / ibby.pl

Awarded to the best Polish children’s books, for both their literary and artistic qualities. There are three categories: Best Writer, Best Illustrator and Best Promoter of Children’s Literature.

2017 // Best Writer – Katarzyna Ryrych for *Łopianowe pole* (The Burdock Field), illustrated by Grażyna Rigall; and Marcin Szczygielski for *Serce Neftydy* (The Heart of Nephthys)

Best Illustrator – Urszula Palusińska for *Brzuchem do góry* (Belly Up); and Jacek Ambrożewski, Edgar Bąk, Maciek Błaźniak, Katarzyna Bogucka, Ada Buchholc, Iwona Chmielewska, Robert Czajka, Agata Dudek, Emilia Dziubak, Małgorzata Gurowska, Monika Hanulak, Marta Ignerska, Tymek Jezierski, Paweł Jońca, Agata Królak, Grażka Lange, Patryk Mogilnicki, Piotr Młodożeniec, Anna Niemierko, Ola Niepsuj, Marianna Oklejak, Paweł Pawlak, Dawid Ryski, Marianna Sztyma, Ola Woldańska-Płocińska and Anna Niemierko for *The ABC of Polish Design*, text by Ewa Solarz, Agnieszka Kowalska and Agata Szydłowska

2016 // Best Writer – Marcin Szczygielski for *Klątwa dziewiątych urodzin* (The Curse of the Ninth Birthday) and Joanna Fabicka for *Rutka*.

Best Illustrator – Małgorzata Gurowska, Monika Hanulak, Marta Ignerska, Agnieszka Kucharska-Zajkowska, Anna Niemierko, Gosia Urbańska-Macias and Justyna Wróblewska for *Kern. Wiersze dla dzieci* (Kern: Poems for Children), as well as Agata Dudek and Małgorzata Nowak for *Daję słowo. Wędrówki po języku i literaturze* (I Give You My Word: Journeys Through Language and Literature)

Orpheus – Konstanty Ildefons Gałczyński Poetry Award / orfeusz-nagroda.pl

A literary award established in 2011 for authors of the best volumes of poetry written and published in Polish during the preceding year. The award is granted in two categories: Orpheus - for the best volume of the year, and Masuria Orpheus - for the best collection by an author from north-eastern Poland.

2018 // *37* by Joanna Kulmowa

2017 // *Matecznik* (The Lair) by Małgorzata Lebda

2016 // *Koniec lata w dziczonym ogrodzie* (The End of Summer in a Wild Garden) by Jarosław Marek Rymkiewicz

2015 // *Tym razem wyraźnie* (Clearly This Time) by Janusz Szuber

2014 // *Teoria wiersza polskiego* (Theory of the Polish Poem) by Przemysław Dakowicz

The Wings of Dedalus Literary Award / bn.org.pl

This prize, founded in 2015 by the National Library, is awarded annually for a single book or for an author's entire oeuvre, with special emphasis on fiction, literary and art criticism, history or broadly defined social issues. The winner receives a cash prize sponsored by the National Library.

2017 // Andrzej Nowak (for his entire oeuvre)

2016 // *Jadwiga* by Marta Kwaśnicka

W lodach Prowansji. Bunin na wygnaniu (The Frozen Wastes of Provence: Bunin in Exile) by Renata Lis

2015 // *Afazja polska* (Polish Aphasia) by Przemysław Dakowicz

Readership

Research by the National Library's Book and Readership Institute shows a long-term negative trend in book reading and purchasing. However, last year's research indicated some stabilisation at a level of just under 40 per cent.

	2012	2014	2015	2016	2017
Readers	39	41.7	37	37	38
Buyers	30	27	26	30	34

National Library

A report based on research conducted in 2017 concluded that where readership in Poland is concerned, "we have a stable situation – the basic indicators might move up or down a little, but the general picture does not change. A reading population of 38 per cent in 2017, including 9 per cent who read intensively, is a result that registers very well within the trend to date".

How many books have you read over the last 12 months? (% of population)

	2012	2014	2015	2016	2017
Non-readers	60.8	58	63.0	63.0	62
Readers of 1-6 books	26.5	27	28.0	26.0	29
Readers of 7 or more books	11.1	11	8.0	10.0	9

National Library

However, with the perspective of time it appears that readership in Poland in the twenty-first century has dropped heavily. From National Library data it appears that in the period from 2000 to 2017 there was a marked fall in the number of people reporting that they read at least one book in the course of the year.

The percentage of "intensive readers" – those who read 7 or more books in the course of a year – has also noticeably dropped. The fall from a level of about 22-24 per cent in the period from 2000 to 2008 to about 8-12 per cent in the period from 2008 to 2016, and thus by about half, confirms the view that the public reach of books in Poland is falling. Among the reasons for this change one should mention: changes in communication and information technology and the ensuing ways of receiving knowledge and information; the popularisation of digital entertainment; changes in life-style and ways of spending one's spare time; and a small shift in the practice of reading books in adult life for success on the work market.

According to National Library research, the percentage of those who claim never to have read a book, not even when they were at school, is rising (21 per cent, as opposed to 14 per cent in 2012 and 2014, and 18 per cent in 2015 and 2016).

Invariably it is genre fiction that finds the largest readership: crime fiction, popular romance novels

and Polish classics permanently included on school reading lists. The decided majority of those canvassed, apart from a small group of less than 5 per cent, mentioned literature read outside their professional work.

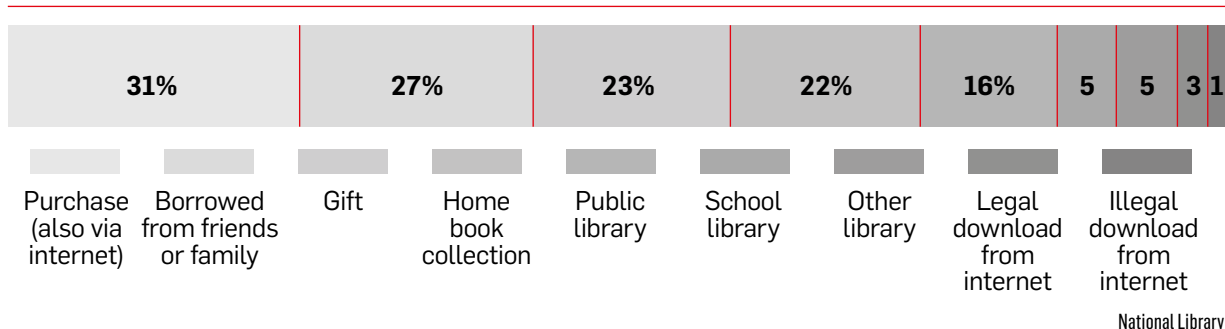
Analysis of the relationship between environment and reading habits showed firmly that people from homes where everyone else reads also read books (up to 82 per cent) as opposed to homes where nobody else reads (13 per cent). This dependency is even more clearly visible in the response to a question about friends and acquaintances: social groups that don't generally read include barely 5 per cent of readers.

Research into preferred sources of news and their connection with reading habits showed that those who declare themselves to be book readers are the most willing to source news about the world through reading too, often online (37 per cent), whereas non-readers choose above all radio and television (55 per cent).

National Library researchers stress a clear link between use of digital formats and extent of book reading. Among people who read 7 and more books per year, 27 per cent were involved in two or more activities in this group, which apart from the most common method of reading longer texts from a screen, meant reading online, downloading books or using e-books and audiobooks.

Sources of books

Percentage of readers who named a book from the given source



Books read in 2017 came mainly from purchase (31 percent), the significance of which has risen since 2014. Important places on the list of sources are also occupied by borrowing from family and friends, and also the home collection, though viewed over several years their significance is growing smaller. Books borrowed from public libraries have for many years occupied roughly the same position. Something particularly notable is the rise in of the role of the book as a gift. This trend was first observed in 2016, and the most recent edition of

National Library research confirms that it is growing. Perhaps, as the researchers claim, this is the effect of the positive feeling that surrounds books, brought about – paradoxically – by factors including alarmist media reports about the low level of readership.

National Library research shows that both the legal and informal download of books from the internet only represents a very minor way of acquiring them (about 1 per cent).

Libraries

The number of libraries in Poland is systematically decreasing. According to data from the Central Office of Statistics, in 2017 there were 7,953 public libraries in operation (about 0.4 per cent fewer than in 2016), which ran 885 departments for children and young adults (about 1.1. per cent fewer than in 2016) and 1,210 branch libraries (about 4 per cent fewer than in 2016).

According to the Polish Librarians' Association there are also 21,000 school libraries, almost 1,480 church libraries and 152 prison libraries active in Poland. Altogether there are about 32,000 outlets providing library services.

Public Libraries

The book collections at the public libraries totalled 128,400,000 volumes (about 0.5 per cent fewer than in 2016), which means an average of 330 volumes for every 100 citizens. 6,020,700 readers were recorded (about 1.2 per cent fewer than in 2016). There were an average of 4,833 citizens for every public library.

	2013	2014	2015	2016	2017
Public libraries	8,112	8,094	8,050	7,984	7,953
Branch libraries	1,271	1,290	1,295	1,260	1,210
Readers	6,434,500	6,302,500	6,232,900	6,096,300	6,020,700
Book loans per million volumes	118.9	115.4	112.4	110.2	105.4

Central Statistical Office

Libraries registered 74 mln visits in 2017 (about 1.3 per cent fewer than in 2016), including 52.5 mln in cities (about 0.6 per cent fewer than in 2016), and 21.4 mln in the countryside (about 3.1 per cent fewer than in 2016). One reader borrowed on average 18 library books in the course of the year.

Purchases for public libraries (number of volumes per 100 citizens)

2012	2013	2014	2015	2016
7.8	7.6	8.2	8.5	8.8

Central Statistical Office

In 2016 3,400,607 library books were bought, i.e. 8.8 books per 100 citizens.

Expenditure on the purchase of books for public libraries in 2016 totalled 75.35 mln zloty (compared with 72.5 mln zloty in 2015, i.e. growth of about 1 per cent). Expenditure on the purchase of books per reader in 2016 amounted to 12.36 zlotys (in 2015 it amounted to 11.63 zloty).

In Poland public libraries are mainly financed out of local council budgets. In addition, within the scope of the Ministry of Culture and National Heritage's programme "Purchase of new publications for public libraries", which is part of the state-funded "Long-term National Programme for the Development of Readership", libraries receive financial support to increase their collections. The Priority Budget for 2017 totalled 26.5 mln zlotys, and a solid rule of the programme is the obligation to use one third of the grant to buy new publications for children and young people.

94.8 per cent of public libraries are equipped with computers, and 89 per cent provide readers with Internet access.

The number of persons employed at public libraries totalled 23,593.

For many years, the Ministry of Culture has run projects aimed at transforming local libraries into modern facilities providing access to knowledge and culture by constructing and modernising library buildings, and also by providing Internet access at

libraries, librarian training and the implementation of a national cataloguing system called MAK+. The budget for the current National Programme for the Development of Readership for 2016-2020 totals 435 mln zlotys (109 mln euros). To date, the Programme has funded the building or renovation of more than 400 libraries. In the period from 2008-2016 a series of programmes provided training for 10,000 librarians from all over Poland. Since 2017 the training courses for librarians have been run as part of the Ministry of Culture and National Heritage's "Partnership for Books" programme. The MAK programme has been installed at 2,260 libraries.

Another important programme supported by the Book Institute is IBUK Libra Light, a free Internet platform designed to provide access to books for the blind and the visually impaired (libralight.pwn.pl). Run in cooperation with PWN Academic Publishers, the Central Library of Labour and Social Security and the Polish Book Chamber, the platform was launched on 1 February 2017.

Since 2007, in cooperation with district public libraries, the Polish Book Institute has been running a Book Discussion Clubs programme. It is aimed at people who like to read and to talk about books, and to discover new authors and literary genres. The number of clubs in operation in Poland has grown successively from 299 in 2007 to 1,613 at the end of 2017, rising to 1,685 by June 2018. Of these, 585 are for children and young adults and 1,100 are for adults. In mid-2018 the Book Discussion Clubs had 16,327 permanent members.

Book Fairs

The Warsaw Book Fair / targi-ksiazki.waw.pl

More than 800 exhibitors from 32 countries took part in the ninth Warsaw Book Fair, organised in May 2018 and held at the National Stadium. It attracted more than 83,500 visitors. This event also includes the "Academia" Academic and Scientific Book Fair. This year an event called "Meet Point" was held for the first time – a YouTuber and computer-game festival, the aim of which was to reach a new

audience, above all for companies in the Internet and computer sector, and to attract as many young people as possible. Despite the fact that the Warsaw Book Fair has only been held annually since 2010, Warsaw has a long tradition of book fairs, having regularly hosted the International Book Fair in Warsaw since 1956.

International Book Fair in Krakow / ksiazka.krakow.pl

The 21th International Book Fair in Krakow, held in October 2017, confirmed the rising status of this event. It is now an essential fixture in the autumn calendar for all the significant Polish publishing houses. 700 exhibitors from 19 countries as well

as 760 authors took part in the 2017 event, which attracted 70,000 visitors. From 2014 the event is being held in a brand new venue Expo Krakow, properly equipped for exhibition requirements.

International Literary Festivals

	Profile	City	Website
Big Book Festival	fiction	Warsaw	bigbookfestival.pl
Bruno Schulz Festival	fiction, essay	Wrocław	brunoschulz.dybook.pl
Children's and YA Literature Festival	Children's and YA literature	Krakow, Warsaw, Gdańsk, Wrocław	fldd.pl
Conrad Festival	fiction, essay	Krakow	conradfestival.pl
Crime Writing Festival	crime, mystery, thriller	Wrocław	festiwal.portalkryminalny.pl
Found in Translation Festival	literary translation	Gdańsk	odnalezionewtlumaczeniu.pl
International Festival of Comics and Games in Łódź	comics	Łódź	komiksfestiwali.com
Literacki Sopot Festival	focus country	Sopot	literackisopot.pl
Miłosz Festival	poetry	Krakow	miloszfestival.pl
Pyrkon	SF/fantasy	Poznań	pyrkon.pl
Polcon	SF/fantasy	Toruń	polcon.pl
Rabka International festival of children's literature	children	Rabka	rabkafestival.pl
Capital of the Polish Language	all genres	Szczeczeszyn	stolicajezykapolskiego.pl

The Polish Book Institute

The Polish Book Institute is a national institution established by the Polish Ministry of Culture. It has been running in Cracow since January 2004. The Institute's basic aims are to influence the reading public and to popularise books and reading within Poland, as well as to promote Polish literature worldwide. These aims are accomplished by:

- // promoting the best Polish books and their authors;
- // organising study visits for translators and foreign publishers;
- // increasing the number of translations from Polish into foreign languages with the help of the ©POLAND Translation Programme and Sample Translations ©POLAND;
- // making information on Polish books and the Polish publishing market accessible to foreign consumers.

The Institute organises literary programmes to promote Polish books at international book fairs, appearances by Polish writers at literary festivals, and within the scope of programmes designed to promote Polish culture worldwide, it publishes an annual catalogue "New Books from Poland".

The Polish Book Institute is also the publisher of cultural journals covering mainly literature and theatre (*Akcent*, *Dialog*, *Literatura na świecie*, *Novaya Polsha*, *Nowe Książki*, *Odra*, *Teatr*, *Teatr Lalek*, and *Twórczość*).

Selected Polish Book Institute programmes:

The ©POLAND Translation Programme aims to promote Polish literature abroad. The Book Institute financially supports Polish and foreign publishers who would like to publish works of Polish literature outside Poland in foreign-language translations.

Since 1999, the ©POLAND Translation Programme has provided over 2,200 grants for translations into 48 different languages published in 58 countries. The average grant was worth 10,000 zlotys (approx. € 2,500)

The Book Institute can help cover the costs of publishing the following types of works:

- // literature – prose, poetry, and dramas
- // works in the humanities, broadly conceived, whether older or contemporary (with particular regard for books devoted to the culture and literature of Poland)
- // non-fiction literature (literary reportage, biographies, memoirs, essays)
- // historical works (essays and popular history, barring specialist and academic works)
- // literature for children and young people
- // comics

The financial contribution of the Book Institute is designed to support the following publication costs:

- // translation
- // copyright license
- // printing.

Sample Translations ©Poland – the purpose of this programme, aimed at translators of Polish literature, is to promote Polish literature abroad by encouraging translators to present Polish books to foreign publishers.

The programme may cover up to 20 pages of the translation. The translator must have published a minimum of one translation in book form before making an application.

Full information on our programmes, including a list of grants awarded to date and a funding application form can be found on the Book Institute's website, www.bookinstitute.pl

For further information please contact: Ewa Wojciechowska, e.wojciechowska@bookinstitute.pl

The Translators' College – Based at a new building on the grounds of the Book Institute in Kraków, this programme provides study visits for translators of Polish literature. During their residency, the translators are provided with suitable conditions for their work and assistance with their translations. The college has been active since 2006. By 2018, over one hundred translators from thirty-four countries had taken part.

The World Congress of Translators of Polish Literature, which has been organized every four years since 2015. Around two hundred and fifty translators from all over the world attend meetings with writers critics and academics. The Congress provides an opportunity to find out more about Polish literature, meet colleagues from other counties and exchange information, ideas and opinions.

The Found in Translation Award is given to the translator(s) of the finest book-length translation of Polish literature into English published in the previous calendar year. The winner receives a prize of 16,000 zloty and a one-month residency in Krakow. The Book Institute has presented this award in partnership with the Polish Cultural Institutes in London and New York on an annual basis since 2008.

Recent winners:

- 2018 //** Jennifer Croft, for *Flights* by Olga Tokarczuk
- 2017 //** Piotr Florczyk, for *Building the Barricade* by Anna Świrszczyńska
- 2016 //** Bill Johnston, for *Twelve Stations* by Tomasz Różycki

The Transatlantyk Prize has been awarded annually by the Book Institute since 2005 to outstanding ambassadors of Polish literature abroad. Its aim is to promote Polish literature on the world market and to provide a focal point for translators of Polish literature and its promoters (publishers, literary critics, academics and organisers of cultural events). The prize is worth €10,000.

Recent winners:

- 2018 //** Antonia Lloyd-Jones
- 2017 //** Lajos Pálfalvi
- 2016 //** Constantin Geambașu
- 2015 //** Laurence Dyèvre
- 2014 //** Bill Johnston

Seminars for Foreign Publishers – Since 2006, the Book Institute has invited groups of publishers from various countries to Krakow to show them what Polish literature has to offer. During the study visit, they attend meetings with writers, publishers and critics to encourage them to publish Polish literature.

Ambassadors of Literature – within this programme, representatives of the Book Institute promote Polish literature among foreign publishers. Their task is to recommend, books, provide information and act as intermediaries between publishers and copyright owners. The programme was launched in 2017 and is currently being developed in the United States, UK, and Germany.



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Deputy Director of the Book Institute **Professor Krzysztof Koehler**

Useful links

Biblioteka Narodowa / bn.org.pl

The National Library

The main state library provides access to many large databases. An electronic national bibliography arranged in five sections is under preparation. More than half of the entire collection is now catalogued on-line, including all library acquisitions since 1994. The ISBN database includes information on all the registered publishing companies in Poland.

Cyfrowa Biblioteka Narodowa Polona / polona.pl

Polona National Digital Library

Polona was created for all libraries and Internet users. Its mission is to provide wide and easy access to the National Library's digital collections, including the most important works of literature and scientific materials, historical documents, journals, graphics, photography, musical scores and maps. The main aim is to present Poland's cultural heritage, its age-old traditions and achievements, and also to show the wide range of the National Library's collections.

Narodowy Uniwersalny Katalog Centralny / nukat.edu.pl

The National Universal Central Catalogue – "NUKAT"

"NUKAT" is the central catalogue for Poland's academic and scientific libraries. It aims to provide information on documents and where they are kept. The "NUKAT" catalogue includes 5,750,000 descriptions of books, periodicals and e-books, as well as sound recordings, musical scores, cartographic and iconographic documents and films collected from 159 cooperating libraries.

Polska Izba Książki / pik.org.pl

The Polish Book Chamber

This organisation covers publishers, bookshops, book wholesalers, printers and all kinds of enterprise involved in the book market. At present it has 138 associated members.

Culture.pl / culture.pl

The Polish culture website, including information on major events in literature, music, film, theatre and other genres.

Elektroniczna Biblioteka / ebib.pl

Electronic Library

The Polish Libraries' Association website – first stop for any librarian.

Lubimy czytać / lubimyczytac.pl

We like to read

Lubimyczytac.pl is Poland's largest book-related website and social network for readers, possibly one of the largest in the world. This influential site provides news from the world of literature, reviews and comments on new books, interviews with authors, special offers, and the opportunity to take part in various literary competitions. By mid-2018 it had over 830,000 subscribers, who had posted more than 410,000 texts about books and over 1.8 mln book reviews on its pages.

Stowarzyszenie Tłumaczy Literatury / stl.org.pl

Literary Translators Association

Founded in 2010, this is an association for literary translators. It promotes literature, reading, publishing and the Polish language. It cooperates with cultural institutes involved with literature, trains translators and runs post-graduate courses

Biblioteka Analiz / biblioteka-analiz.pl, rynek-ksiazki.pl

Biblioteka Analiz concentrates all sorts of data about various sectors of the Polish book market. At present it is the only company in Poland with such a large collection of data on the Polish book market. It is also the largest and best known consulting firm operating in this branch. The site covers archival information about key players on the Polish book market.



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