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Publishing Market Profile

Pakistan 2006

By David Johns



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Contents

The Author	v
Methodology	vi
1 Executive Summary	1
2 General Background	3
2.1 The Territory	3
2.2 Historic, Political and Economic Background	4
2.3 Further Information	6
3 The Overall Book Market	7
3.1 Piracy	7
3.2 Pakistan–India Trade	9
3.3 UK/US Exports and Market Size	9
3.4 Local Publishing	10
3.5 Publishing or Printing?	11
3.6 Distribution and Trading Terms	12
3.7 Online Bookselling	12
3.8 Aid Funding	12
4 The School Market	14
4.1 The Education System	14
4.1.1 The Public Sector	14
4.1.2 Approval Systems for Books and Manuscripts	16
4.1.3 Opportunities for UK Publishers	17
4.2 The Private Sector	17
4.2.1 The 'International' English-medium Private-school Market	18
4.2.2 The Beaconhouse School System	18
4.2.3 The City Schools	19
4.2.4 Cambridge International Examinations (CIE)	19
4.2.5 Marketing and Publicity	19
4.2.6 Key Distributors	19
4.2.7 Opportunities for UK Publishers	20
4.3 English-language Teaching	21
5 Academic and Professional	22
5.1 Educational Structure	22
5.2 Market Size and Characteristics	23
5.3 The Library Market	24
5.4 Journals and Electronic Markets	24
5.5 Distance Learning	25
5.6 Vocational Education	25
5.7 Distribution and Terms of Trade	26
5.8 Other Information	27
5.9 Opportunities for UK Publishers	27
6 The Trade Market	29
6.1 Market Characteristics	29
6.2 Market Size	29
6.3 Opportunities for Rights Sales	29
6.4 Other Opportunities for UK Publishers	30

7	Appendices	31
	Appendix 1: Library Rates Committee Conversion Schedule, January–March 2006	31
	Appendix 2: Education Sector Reforms (Policy Decisions)	34
	Appendix 3: Donors' Assistance for Pakistan's Education Sector (Summary US\$m)	36
	Appendix 4: Government and Official Bodies	37
	Appendix 5: Local Publishers	40
	Appendix 6: Importers, Distributors and Retailers	42
	Appendix 7: Publishers' Agents	45
	Appendix 8: Accredited Higher Education Institutions*	47
	Appendix 9: Institutions Officially Recognised by the HEC	49
	Appendix 10: Databases Currently Available on PERN via the HEC	53
	Appendix 11: Language Institutes	54
	Appendix 12: Private English-medium Schools	55
	Appendix 13: The Lahore Book Fair 2005	57
	Appendix 14: Pakistan English-language Press	59
	Appendix 15: Other Useful Addresses/Resources and Websites	60
	Appendix 16: Education Structure in Pakistan	61

Figure

2.1	A Map of Pakistan	3
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Tables

2.1	Exchange Rates Pakistan Rupee, 1970–2006	5
3.1	Value of UK and US Book Exports to Pakistan, 1999–2005	10
3.2	Estimated Size of English-language Books Market (publisher's net revenue), 2006	10
3.3	2006 DfID Aid Projects	13
4.1	Structure of Education in Pakistan	14
4.2	Number of Public-sector Schools and School Enrolments in Pakistan, 2004–2005 and 2000–2001	15
4.3	Number of Private-Sector Schools and Enrolments in Pakistan, 2004–2005 and 2000–2001	17
5.1	Higher Education Institutions and Enrolments in Pakistan, 2003	22
5.2	High Education Institutions – Growth in Numbers 1990, 2000, 2004, and 2006	22
5.3	Number of Vocational Institutions in Pakistan, 2003	25

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Methodology

This report was prepared during December 2005 and January 2006, initially from a wide range of desk research and telephone conversations with UK publishers, the Pakistan book trade, government and institutions in Pakistan. It also draws upon the British Council's *Publishing Market Survey* prepared by Damien Tunnacliffe in 1999, and published on the Global Publishing Information Website in 2000 and a 2001 unpublished report by Jonathan Smith of the British Council, Pakistan.

The majority of the information, however, derives from a ten-day visit to Pakistan in January 2006, visiting publishers, the retail book trade, associations, the British Council, and government institutions in Karachi, Lahore and Islamabad. In total I had approximately 30 meetings during my visit.

I am indebted to them all for their knowledge and experience of the Pakistan market, and for their time and help.

David Johns
June 2006

1 Executive Summary

Much has changed in the Pakistan market since the first British Council *Pakistan Market Survey* was published in 1999. But readers familiar with the region will agree that many things are the same. The turn of the century heralded a difficult period with a significant worsening of the exchange rate against the world's major currencies, and a consequent serious fall in imported business. The years since have seen a climb back toward and beyond previous levels, despite the very difficult political situation. Education remains the driving force in the market, but the trade and children's sectors have also seen significant advances.

Pakistan is now in a strong phase of economic growth (+8.4 per cent in 2004–05), and government funding into education has increased substantially, stimulating the higher education sector in particular (now three times larger than in 2003). The growing middle class in the country, mirroring similar growth in India, has expanded the trade market; demand and use of internet bookselling, and, in particular, private education, further consolidating the dominance of the education sector in the overall English-language market.

Market size is notoriously difficult to confirm in the South Asian markets, where no reliable official figures exist, and where the supply system is increasingly diverse. It is clear that the market is substantially larger than the ex-UK DTI figures suggest (indeed these have been flat for some years, while the volume of sales has grown substantially). A major feature of the market in recent years has been the growth of supply from India, either direct from the Export Processing Zone (EPZ), or via the Indian distribution operations of major, especially scientific, technical and medical (STM) publishers. This welcome initiative has made titles available at much more affordable prices than hitherto, benefiting the education sector in particular, and going some way to combating the ever-present incidence of piracy.

Difficult economic and political conditions since about the year 2000 have not helped the piracy situation, which is as much a problem for local, legitimate publishers as it is for their international colleagues. Pakistan has long been in the top flight of countries subject to rampant piracy, with any successful title becoming available almost immediately in unauthorised editions at rock bottom prices. In many circles ('off the record' government often included) this availability is considered a public service, making otherwise unaffordable educational material realistically priced for the widest public.

However, Pakistan's co-operation in international events has also brought more government understanding, recognition and action regarding copyright material. Although US pressure has led to optical disc and software piracy receiving the greatest attention, books are closely related in the action. The Publishers Association (PA) initiatives in 2005 and 2006 are starting to have an effect, not only in combating the pirates, but also increasing the confidence of the local legitimate trade once again.

Current estimates, including sales lost to piracy, and imports of material from India and elsewhere, suggest a market size of around £130m per annum, making Pakistan perhaps a quarter of the size of the Indian English-language market (ex-UK sales to Pakistan in 2004 were £2.4m).

The school-level education market has always been entirely closed to the private sector, with all texts and materials developed and made available through the powerful Provincial Textbook Boards. With Pakistan's public education system still designated as one of the poorest performers in the world, this is one area identified

as contributing to that situation. A new, recently constituted committee (comprising both government officials and the private sector), has discussed changing the monopoly of the Boards and allowing the private sector to be involved, and including a choice of text rather than the current single title or series per subject. An imminent change is not expected, but it is at least encouraging that discussions are taking place.

Private education, always strong in Pakistan, has been booming in recent years as the perception of the quality of the public sector continues to be extremely low. It is estimated that around 30 per cent of the school-going population is in private institutions, with international examination success – Cambridge International Examinations (CIE) being the preferred choice – a prerequisite for all aspirational parents and students.

The retail and distribution trade is strong, professional and, within the practicalities of the market, innovative. The 'Urdu Bazaar', however, is a destabilising influence at best, and calls out for more control and attention. The recent PA moves have revealed that willingness to change is there, and positive discussions have taken place. It is hoped that this will start a long-term process, and will contribute to Pakistan's development as a modern publishing market.

As the political situation improves and consistent action against piracy continues, Pakistan is worthy of greater and more direct attention than in recent years. The legitimate local trade is ready and willing to work ever more closely with its international colleagues toward a sustainable market that respects intellectual property (IP). All agree that this can only be achieved by combined and consistent action, not only through the legal system, but also through widening the range of affordable titles in the market.

The market has inevitably had few visitors over the past few years, but travel to the main publishing and bookselling centres is now largely straightforward once more. Good growth, especially in the education sector, awaits those prepared to engage once again with the market, or looking to take their initial steps.

Note: Unless otherwise indicated exchange rates of £1 = PR102 and £1 = US\$1.84 have been used in this report. (PR = Pakistan rupee)

2 General Background

2.1 The Territory



Figure 2.1 A Map of Pakistan (<http://www.fas.org/>)

Pakistan, with a land area of 796,000 sq km (excluding the disputed Pakistan-administered portions of Jammu and Kashmir), is over four times the size of the UK. (In addition there are the Federally Administered Tribal Areas – FATA; the Federally Administered Northern Areas – FANA – Azad Jammu and Kashmir.) It has a population of 152.8m (December 2004), which is growing at an average annual rate of 1.9 per cent. Some 40 per cent of the population is aged 14 years or below, and 56 per cent is aged between 15 and 64 years.

Including Islamabad Capital Territory, the country consists of five provinces: Balochistan, the North-West Frontier Province (NWFP), Punjab and Sindh.² There are seven cities with a population of 1 m or more: Karachi (9.3m), Lahore (5.1m), Faisalabad (2 m), Rawalpindi (1.4 m), Multan (1.2 m), Hyderabad (1.2 m), and Gujranwala (1.1m).

Punjabis form the largest linguistic group, at 44.2 per cent; Pashtuns (15.4 per cent) are dominant in the north-west, and Sindhis (14.1 per cent) in the south-east province of Sindh. Other groups include the Balochis and the Siraikis, who live mostly

in Punjab; Urdu-speaking Muhajirs – refugees from India and their descendants who migrated to Pakistan during the 1947 partition and are concentrated in Sindh; and Brahuīs – a Dravidian-language group in Sindh and Balochistan. Over 78 per cent of the population are concentrated in the eastern provinces of Punjab and Sindh, with 68 per cent in rural areas.

Urdu and English are the national and official languages respectively. In 2003, 52 per cent of the population aged ten years and above were classed as literate, with a higher rate (54.8 per cent) for males than females (32 per cent). The National Literacy Campaign was established to raise this figure to 60 per cent by 2005, but progress has yet to be assessed. School enrolment rates were on average 36 per cent, with urban areas achieving the higher levels.

(Sources: Government of Pakistan; FCO Country Profile; Library of Congress Country Profile.)

2.2 Historic, Political and Economic Background

With the British withdrawal from India in 1947, partition established Pakistan as a separate state for the Muslims of British India. With the early deaths of Pakistan's founding father, M.A. Jinnah, in 1948, and the first Prime Minister, Liaquat Ali Khan, in 1951, devising a constitutional structure for independence and integrating the principles of Islam proved difficult. Following a war with India in 1947, it took a further eight years to agree a final constitution, which established Pakistan as a republic within the Commonwealth in 1956.

The first military coup in 1958, and a second war with India in 1965, finally led to the first democratic election in 1970. This, however, resulted in a two-party stand-off, with the Awami League in the east and the Pakistan's People's Party in the west. A new constitutional crisis ensued, which led to civil war in March 1971, and the emergence of East Pakistan as the independent state of Bangladesh.

From 1973, civilian and military governments under President and Prime Minister Z.A. Bhutto, President General Zia, and Prime Minister Benazir Bhutto then alternated before another military coup in 1999 established President General Musharraf in power. Civilian administration took over in November 2002, with General Musharraf remaining President. In August 2004, Shaukat Aziz was elected as Prime Minister.

Throughout the 1990s, Pakistan's economy suffered for a number of reasons, but from 2002 to 2004 the economy has recovered as a result of changes in government policies and the resumption of international lending. Economic statistics do not reflect the reality of the economy, because official economic data omit the informal economy, which is estimated to equal about 30 per cent of the formal economy. Agriculture employs the greatest proportion of the working population, but accounts for less than 25 per cent of gross domestic product (GDP). This discrepancy is the result of rapid growth in services and industry since the 1980s, although major industries, such as textiles and sugar, are heavily reliant on agriculture.

Since independence, economic growth rates have been impressive, but have fluctuated widely, largely because successive governments have emphasized different sectors through changes in subsidies, regulations, and state ownership of industry. Furthermore, shifts in international aid and foreign capital flows have influenced economic growth through changes in government spending and budget deficits. Still, from 2002 to 2004 there were surpluses in the current account, inflation was low, and export growth was the highest in almost a decade.

According to World Bank data, in 2003 Pakistan's GDP was US\$68.6 bn. (£37.3bn); gross national income (GNI) per capita was US\$430 (£234), and purchasing power parity per capita was US\$2,060 (£1,120). GDP grew an average of 5.4 per cent annually from 1961 to 2003, but average annual GDP growth from 1993 to 2003 was lower, at 3.4 per cent. Similarly, per capita GDP grew at an annual average of 2.6 per cent from 1961 to 2003, and 0.9 per cent from 1993 to 2003. From 1974 to 2004, agriculture's proportion of GDP declined from 35 to 23 per cent, whereas the proportion created by services increased from 43 to 52 per cent, and industry and manufacturing increased slightly from 22 to 25 per cent.

The world situation combined with a number of local factors has pushed up inflation in 2005 to a level just over 7 per cent (January 2006).

Pakistan's 2004–05 (to end June) GDP growth rate was 8.4 per cent, moving the country towards the top of emerging market rates, but with the lowest foreign exchange reserves at \$9.6 bn. In 2003, UNESCO reported that 7.8 per cent of total government expenditure went to education, although this was only 1.8 per cent of GDP, compared with India at 12.7 per cent and 4.1 per cent respectively. In Pakistan, over 90 per cent of expenditure is committed to salaries.

For decades, Pakistan's official currency, the rupee (PR), has declined in value against the US dollar and the British pound, with a major fall in 2001–02 – although 2006 has seen a slight improvement. The official exchange rate was Rs4.76 to US\$1 in 1970; Rs9.85 to US\$1 in 1980; Rs21.61 to US\$1 in 1990; Rs53.65 to US\$1 in 2000, and approximately Rs59.34 to US\$1 in late February 2006.

Table 2.1 shows exchange rates for the Pakistan rupee from 1970 to 2006.

Table 2.1 Exchange Rates Pakistan Rupee, 1970–2006

Year	US\$	GBP
1970	4.76	
1980	9.85	
1990	21.61	
2000	53.65	83.91
2001	61.93	86.47
2005	61.22	117.46
2006	59.85	104.14

Sources: Government of Pakistan; FCO Country Profile; Library of Congress Country Profile; World Bank; *The Economist*; UNESCO.

In 2003–04, some 3.5m people – some 8 per cent of the working-age population – were unemployed in Pakistan. According to the 2004 *Labour Force Survey*, over 50 per cent of that number were classed as educated. With substantial additional funding into education in recent years, especially at higher levels, there is now a glut of graduates who find it increasingly hard to secure suitable local jobs. This is exacerbated by an imbalance in course intake, with much higher numbers registering for professional degree courses than vocational qualifications. Thus Pakistan

educates over double the number of doctors than nurses and many more architects than plumbers.

2.3 Further Information

Since '9/11', the security situation in Pakistan has been difficult. The Foreign and Commonwealth Office (FCO) initially advised against all travel, but subsequently revised this advice to a more general threat warning and advice not to travel to certain areas.

International organisations have all substantially increased their security protection, with the British High Commission (BHC) consolidating activities. One of the unfortunate effects of this necessity has been the curtailment of the activities of the British Council. Formerly very active in the country, with well-resourced libraries in all main cities, the Council is now only able to operate remotely. Public access is no longer allowed; all the libraries have closed, and the materials have been donated to various causes. The British Council office in Karachi – a landmark colonial building – has been sold, and the staff relocated to the main BHC compound in Clifton. While the Council still undertakes as much as possible via means such as its website, the situation has had a major influence on the promotion of the UK and UK business.

For Pakistani citizens, visas to visit the UK (and elsewhere) are now much more restricted and difficult to obtain. Members of the publishing and bookselling trade all reported struggles to obtain visas for the Delhi World Book Fair in January 2006.

With the close post-9/11 political connections between Pakistan and the USA, American influence is starting to be evident in many areas, including education. The United States Agency for International Development (USAID) is providing US\$71.5m (£38.9m) funding toward another five-year President's Education Reform Programme, starting in 2006.

The Bush Administration, Congress and the 9/11 Commission identified Pakistan's education system as 'relevant to US interests in South Asia' (Congressional Research Service, *Education Reform in Pakistan*, December 2004). Legislation passed by the 108th Congress called for US support to 'improve and expand access to education for all (Pakistani) citizens', and required the Secretary of State to report on Pakistan's education reform strategy and the US strategy to provide relevant assistance.

3 The Overall Book Market

Verifiable figures are notoriously unavailable for the Pakistan market. Thus there are only educated guesses and estimates available for the English-language market size. These range from £75m to well over £110m per annum (publishers net revenue) – mostly in educational resources from school to university and research level. At least 50–60 per cent of the market is lost to piracy, with loss in some sectors perhaps closer to 90 per cent.

The international political situation and travel restrictions have left the market largely unvisited since 2001, and local piracy has ably filled the gap both in availability and IP monitoring.

The trade is split between a small number of importing booksellers who sub-distribute to retailers around the country, and what is known as the 'Urdu Bazaar'. The Bazaar, a specific area in the main cities of Karachi (350 businesses), Islamabad and Lahore (700+ businesses), where local booksellers and publishers are based, is regarded as the funder of piracy. Small bookshops and stands proliferate all over the country to supply demand, with these businesses usually buying on a cash basis from the Bazaar.

A major feature of the current market is the substantial and increasing volume of Indian reprints of key student texts and trade titles. Major publishers with offices in India use the EPZ system to access local print costs and supply the South Asian region. The recent opening up of inter-country trade now makes this a cost-effective option for publishers (see Section 3.2.2).

However, there is some suggestion of a price differential between India-supplied orders and those to neighbouring countries, with Indian published prices lower than those available to customers in Pakistan. This gives the Pakistan trade some suspicion that they are being disadvantaged by this otherwise very positive arrangement. Trade terms are reported on average as 25–30 per cent discount on the India published price.

The advantage of this initiative is shown by the fact that sales of a key student text at the original (UK imported) price may struggle towards 1,500–2,000 copies, but when specially priced either locally or via India, sales reach 10,000+ copies almost immediately, raising net revenue substantially and going some way to combating piracy.

3.1 Piracy

Pakistan's deserved reputation as one of the world's greatest contributors to product and brand piracy affects the prospects and prosperity of the book industry greatly.

Local authors and publishers are just as much at risk as those from overseas from the pirates who are well organised and have full access to modern technology to make the whole job even easier than hitherto. Both photocopying – especially of academic texts – and commercial print piracy are endemic in the whole system, and it has become increasingly difficult to assess the integrity of any company in the supply chain. Indeed many operate both a legitimate and a pirate operation side-by-side.

With little deterrence in the market, and almost non-existent legal action or prosecution, piracy levels are between 40 and 80 per cent of some market sectors, and perhaps even higher for trade bestsellers or key academic texts.

In many circles (government included to an extent), the low, 'affordable' pricing in which pirates specialise is seen as a public service facilitating access to education and learning for the greatest proportion of the population. This is made official by a clause inserted into the Pakistan Copyright Ordinance of 2000 that provides for the government to grant the National Book Foundation (NBF), or other bodies, reprint rights *without authorisation of the right holder, and without royalty*.

The NBF is widely regarded as a significant threat to copyright in Pakistan (the extent of their operations can be seen at <http://www.nbf.org.pk>). With what they consider an official mandate and an active organization, officials visit international book fairs to source new material. A number of publishers, including Hodder and Nelson Thornes have suffered at their hands, and despite successful legal action the NBF continues to produce unauthorised reprints.

The Copyright Ordinance clause violates TRIPS (and even clauses in the Constitution of Pakistan), and petitions are being made by trade bodies to have it deleted. However, awareness of the IP issues in Pakistan is now such that the NBF (the only body so far to have invoked the apparent licence) is now much more circumspect in its activity.

The legitimate book trade is caught between relationships with their supplying overseas suppliers and having to compete in an increasingly hostile local market. However, there is willingness to act, and they welcome recent moves by the PA. The year 2005 saw a series of raids in Karachi that netted around 3,000 infringing titles and three arrests. Subsequent discussions with the Bazaar resulted in an agreement to stop selling or producing pirated copies while a *modus operadi* was developed to allow Bazaar booksellers access to legitimate low-price editions. In March 2006, it was alleged that the agreement had not been adhered to by the Bazaar, with illegal stock (McGraw titles) again seized, casting doubt upon whether this process can ever be successful. Discussions and investigations are again in progress.

The US-based International Intellectual Property Alliance (IIPA) has been much involved in the piracy issue in Pakistan, with the problem being addressed at the highest level. Grouping books together with optical discs, copyright music and software resulted, during 2005, in the referral of Pakistan to the US Government Department of Commerce for possible removal of the Generalised System of Preferences (GSP) clearance whereby Pakistani goods have duty-free access to the US market.

Pakistan/US government action was swift, with high-profile raids and closure of a number of disc-manufacturing facilities. While this did disrupt the flow of pirate materials for a while it has still a long way to go, but at least the issue is now much more on the agenda. January 2006 saw the threat of GSP removal withdrawn, with the USA recognising the efforts being made.

These efforts have included a new National Textbook Policy Committee formed by General Qazi, the Federal Minister of Education. For the first time, the Committee includes members of the publishing industry and the book trade. This Committee has only met twice to date, but reports suggest that entrenched issues such as piracy, the one book per subject system of the Textbook Boards, and exclusion of the private sector from government book provision are at last being reviewed at the highest level (see Section 3.2).

The Higher Education Commission (HEC, see below) has begun to take a strong line in regulating colleges and universities operating without authorisation, or whose standards fail to meet official requirements. This regulation also includes the requirement to use only legitimate resources, and to enforce this as far as possible.

The process is greatly helped by the current Director of the HEC, Dr Atta-ur-Rahman, being an international published author himself.

3.2 Pakistan–India Trade

With the recent (2004) South Asia Free Trade Agreement (SAFTA) between India and Pakistan to remove all barriers to trade, it has been estimated in the press that unofficial cross-border trading has been reduced by 50 per cent to US\$1 bn. (£543m). Significant changes to custom tariffs have reduced costs and brought much more business back into legitimate trading. (For further details on SAFTA see the website of the South Asian Association of Regional Co-operation at <http://www.sarc-sec.org/main.php>).

The balance of trade is inevitably much in India's favour, with exports estimated in 2004–05 at US\$507m (£275.5m) and imports at US\$96m (£52.2m). The two governments are now projecting bilateral trade to rise to over US\$10bn (£5,434m) by 2010. Pakistan has declined to grant Most Favoured Nation (MFN) status on India (although India did this for Pakistan over 20 years ago), whereby Indian goods would have the lowest import tariffs, and prefers to continue a bilateral trade strategy for the present.

A rather ironic consequence of the much increased trade of books from India into Pakistan is that it is now a major feature of the market, making Pakistan not only a pirating centre itself, but also subject to the importation of books pirated in India.

The existence of pirated imports, 'India-only' imports, and fully legal imports (i.e., where the importer has the right to all of South Asia including Pakistan) complicate the enforcement environment. However, it is clear that unauthorised, illegal, and counterfeit copies pose a continuing threat to UK and US imports. Pakistani Customs will therefore need to be much better equipped in terms of resources and information to deal with such shipments, and to seize pirated, counterfeit, or unauthorised copies at the borders. With a new overland cross-border trade route from Jodhpur in India via Hyderabad to Karachi expected to be opened in the medium term, in addition to the existing Amritsar-Lahore crossing, this issue becomes ever more urgent.

The Pakistan Publishers and Booksellers Association (PPBA) is not a very active or effective organisation, although it has been involved in the planning of recent book fairs in Karachi and Lahore. It could and should become involved in greater lobbying of government, training and the raising of awareness of industry issues in the country.

3.3 UK/US Exports and Market Size

Official export statistics to Pakistan have remained very static for some time. The only anomaly highlights 2001, and was caused by the slide of the rupee against sterling and the US dollar.

Table 3.1 shows the value of UK and US book exports to Pakistan in the years 1999–2005.

Table 3.1 Value of UK and US Book Exports to Pakistan, 1999–2005 (£m)

	1999	2000	2001	2002	2003	2004	2005
UK	1.58	2.04	1.30	2.10	2.40	2.40	2.66
US	0.29	0.51	0.38	0.32	0.49	0.52	0.73

Source: DTI Statistics Directorate; US Department of Commerce. (UK figures include maps, globes, charts, etc., but in practice over 95 per cent of such exports to Pakistan are books.)

The official figures capture only direct exports, and thus undervalue the Pakistan market considerably. To achieve a better estimate of the actual market size, one must take account of not only the pirated copies, but resources supplied via third-party countries, including India, Australia and Singapore – for example, McGraw supply Pakistan from their Singapore distribution centre.

A consensus of the trade suggests that the market size for English-language books in Pakistan is £65m per annum as shown in Table 3.2.

Table 3.2 Estimated Size of English-language Books Market (publisher's net revenue), 2006 (£ m)

	Visible	'Hidden'	Total
Educational	9	16	25
STM/Academic	6	12	18
Trade	4	6	10
Electronic	5	7	12
Total	24	41	65

Source: Consensus of UK and Pakistan publishers and book trade, 2006.

Two very successful trade selling events have been held recently: the Lahore Book Fair (2–6 March 2006), and a four-day publishers' fair in Karachi (7–11 December 2005). Both were very well supported by the public, and welcomed thousands of visitors per day. A report of the Lahore Book Fair 2005 is reproduced in Appendix 12.

3.4 Local Publishing

Publishing in English in Pakistan is largely confined to education, biography and Pakistan/South Asia people, culture and issues. Reputable local publishers include:

- **Danesh Publications:** Karachi-based publisher of textbooks, including Pakistan studies titles recommended by Cambridge International Examinations (CIE). Former local representative for Nelson Thornes.
- **Dost Publications:** Pakistan literature, poetry and history publisher based in Karachi.
- **Ferozsons:** Long established, Lahore-based publisher, retailer and distributor, specialising in children's books, dictionaries, reference books, directories, textbooks, maps and atlases, coffee table books and stationery.

- **Oxford University Press (OUP), Pakistan:** The premier publisher in Pakistan publishing right across the range in school textbooks, academic, reference, general, and children's books.
- **Paramount Books:** Probably the second largest publisher in Pakistan, with titles across the range for schools (including titles published for Beaconhouse School System), professional titles, Islamic studies, reference.
- **Royal Book Company:** Academic publisher based in Karachi, specialising in Pakistan Studies and reference, and publisher of the *Pakistan Almanac* (annual editions).
- **Sunrise Publications:** Schools' publishing specialist.
- **Vanguard Books:** Asian and Pakistan Studies-focused publisher in Lahore.

Contact details for these publishers can be found in Appendix 5.

There are also a myriad of Urdu Bazaar publishers.

The education sector has seen the strongest growth, catering not only to those schools unable to contemplate imported product, but also to the more 'local' school sector.

A certain amount of licensing happens (with royalties between 10 and 15 per cent of net receipts), but with the reluctance of UK publishers to grant contracts direct with Pakistan, local publishers have sourced suitable material from elsewhere, including Singapore, Australia and even Korea. Singapore-published educational resources are often appropriate, with their suitability for Cambridge syllabuses (CIE developed the local examination system in partnership with the Ministry of Education, Singapore).

Local publishers of successful books are as much at risk from pirates as international companies. OUP has been the most active in enforcement, appointing a piracy enforcement officer, carrying out raids, and confiscating stock. In addition, OUP has taken much greater control and monitoring of the production process, introducing holograms and watermarked paper, together with storing their own printing plates and paper stock, and having staff present within the printing plants to oversee the process.

3.5 Publishing or Printing?

As mentioned above, there is confusion in Pakistan over the relative roles of publishers and printers. The significant (private) companies who hold contracts to produce school-level textbooks are termed publishers, but in practice are simply printing contractors for the provincial Textbook Boards. Any contractor must be registered with the relevant Textbook Board, and with no open tender process this is effectively a closed shop. Regular press coverage (especially around the beginning of the academic year) bemoans the inefficiency of the present system (books are often supplied late or not at all), and suggests suitable liberalisation remedies.

The Ministry of Education has in the past attempted reforming measures – including significant involvement of international agencies – but all have failed to impact on the considerable vested interests in the country. Much is at stake with, for example, the Sindh Board alone printing around 20m copies of over 300 titles annually.

A new attempt at reform is in progress (in 2006), which this time has support at the highest political level. General Qazi, the Federal Minister of Education, has convened a National Textbook Policy Committee to provide a framework, and while this is still a

long way from implementation, the signs are positive. (Further details can be found in Section 4.1.2.)

3.6 Distribution and Trading Terms

The supply system operates similarly for all sectors of the market. A small number of importing booksellers (listed in Appendix 4), each of whom tend to specialise in either trade, academic or schools material, have direct accounts with the major international publishers. These include those publishers who distribute certain titles via their India or South-East Asian offices.

International terms start at 50 per cent and 90 days, and range up to 80 per cent and 180 days, but net pricing by title and low-cost editions are key characteristics of successful operations in the Pakistan market (see below). Ex-UK freight is usually the responsibility of the importing customer.

A recent communication from the International Trade Committee of the PPBA reports that the Pakistan customer authorities now require full packing lists by carton to be supplied with each consignment. Failure to include this information will mean shipments being at least delayed, and may lead to rejection and a PR5,000 (£50) fine.

Importing booksellers sub-distribute either through their own network, or, more widely, through selected third-party retailers all over the country. Local terms average at 30 per cent discount and 30–60 days credit, with some distributors delivering to the trade; many others collect from the distributors' warehouses. When books are sub-distributed discounts can be 25–27 per cent, and are usually cash with order.

There is no duty or sales tax on book imports (paper and paperboard imports are highly taxed, making local printing unattractive), but 3.5 per cent advance income tax is payable at the time of entry. This also applies to imports from India. Import regulations determine that only titles deemed 'technical' or 'professional' are officially allowed to be imported from India (although in practice this is widely ignored), but occasionally and periodically shipments are delayed or refused.

3.7 Online Bookselling

Existing websites are usually extensions of retail operations, and cater to the library market, the expatriate community, and the growing middle class. High-quality local websites are achieving popularity and increasing usage.

Pak Book Corp. (<http://www.pakbook.com>) has a very sophisticated site especially designed for academic librarians. **Sang-e-Meel** (<http://www.sang-e-meel.com>) is a Lahore-based publisher specialising in Pakistan/Islamic studies and children's books in both English and Urdu, which runs a quite good-looking site. **Progressive International Agencies** (<http://www.progressivebooks.net>) markets books and magazine/journal subscriptions, as does **Liberty Books** via its extensive site (<http://www.libertybooks.com>), and **Ferozsons** (<http://www.ferozsons.com.pk>).

3.8 Aid Funding

There are many agencies operating in Pakistan, covering particularly the social and education sectors. The World Bank, The Asian Development Bank (ADB), UNESCO, USAID and the British Department for International Development (DfID) lead the field in terms of project assistance, but it is quite rare for funds to be directly allocated to instructional materials.

Project management is a particular challenge in Pakistan, with regular press reports chronicling budget scandals and delays. The latest (April 2006) concerns the

US\$75m (£40.8m) ADB-funded 'Decentralising of Elementary Education' (DEEP) Project based in Sindh, and launched in 2003. Planned to improve access to public education particularly for girls in rural areas, the Sindh Education Department has so far failed to open even a single elementary school in the province, out of 1,200 schools planned during the first three years of the six-year project. The Project specification projected that 6,947 people, including 147 projects, 5,600 teaching and 1,200 non-teaching staff would be hired, and a total of 1.5m students would benefit. Allegedly, to date, just 100 administrative staff have been employed.

USAID has focused on the education sector in Pakistan, whereas DfID concentrates more on poverty reduction.

USAID funding is estimated at US\$265m* (£144m) for the period 2002–07 (67 per cent of this is for basic education), with US\$66m (£35.9m) spent in 2005. Of the education-specific funded projects, UNICEF is concentrating on increasing the school enrolment of girls, with a four-year US\$27m (£14.7m) project launched in 2004 that aims to add 175,000 to the numbers (currently only 28 per cent of girls are estimated to be enrolled).

Bilateral funding from DfID rarely results in book purchase, and is currently distributed over the projects shown in Table 3.3.

Table 3.3 2006 DfID Aid Projects

Project	Aim	Duration	Funding
National Education Assessment System (NEAS)	Education Quality – Student Learning Assessment	5 years 2005+	£700,000 (US \$1.346m) (Co-financed with World Bank)
Faisalabad	To establish efficient and effective local government in Faisalabad District, which is responsive to the needs of local communities and the priorities of poor people, and which can be replicated elsewhere in the country.	April 2004 to April 2008	£6.453m (US\$12.398m)
Centre for Higher Education Transformation	Knowledge-based facilitation of higher education transformation at the national policy, and university levels in Pakistan.	2 years 2005+	£100,000 (US\$ 0.192m)

Source: Ministry of Education.

A full listing and further details of current aid projects is shown in Appendix 3 with complete information at <http://www.moe.gov.pk/donorsdirectory.pdf>. PA members should also refer to the regular updated Asia section of the PA's Aid Information Digest at: <http://www.publishers.org.uk/aidigest.nsf>

4 The School Market

4.1 The Education System

4.1.1 The Public Sector

The structure of education in Pakistan is shown in Table 4.1.

Table 4.1 Structure of Education in Pakistan

Level	Age (Years)	Grade	Duration (Years)
Pre-primary*	3–5		2
Primary	5–11	1–5	5
Middle	11–13	6–8	3
Lower Secondary	13–15	9–10	2
Secondary School Certificate (Matriculation) examination			
Upper Secondary	15–17	11–12	2
Higher Secondary Certificate			

* Non-compulsory

Source: Ministry of Education

The government school system, despite some positive moves in recent years, still provides a sub-standard education. Teachers are poorly trained overall, and although officially the sector is English-medium, in practice much teaching happens in local languages.

The Ministry of Education, based in Islamabad, formulates education policy, and co-ordinates objectives, practices and standards throughout the provinces. Provincial governments are responsible for the actual delivery and administration of local education.

Javed Ashraf Qazi, a retired army general and former head of the military's powerful Inter-Services Intelligence (ISI) agency was appointed Minister of Education in September 2005, with a brief to speed up reform of the education system, which is still much criticised for the continuation of the 'Islamisation' policies implemented under the Zia regime. Some believe that General Musharraf wants to preserve some elements of this policy, to maintain the dominant role of the military in Pakistan society.

The latest official government statistics (2005) show that there are over 138,000 primary schools; 14,000 middle schools, and almost 10,000 secondary schools in the public sector. Only a small proportion of these cater for girls as well as boys: equality of access to education is still a major issue.

Table 4.2 shows the number of public-sector school enrolments in Pakistan in 2004–05, compared with those in 2000–01.

Table 4.2 Number of Public-sector Schools and School Enrolments in Pakistan, 2004–2005 and 2000–2001

Academic Year	Type	No. of Schools	Total Enrolment
2004–05	Primary	138,809	11,106,881
	Middle	14,622	3,292,230
	High	9,943	1,576,976
2000–01	Primary	118,764	12,429,773
	Middle	12,529	2,847,617
	High	9,374	1,325,937

Source: Academy of Educational Planning and Management, Ministry of Education, 2006.

Alongside the government schools (and included in the above statistics) runs the religious education system. At primary level are the *maktab* schools, which lead to the *madrassahs*, the vast majority of which operate outside the government system. There has been much controversy regarding the teachings of the latter, and alleged links to terrorism. Estimates suggest that there are 10,000–30,000 *madrassahs* in the country, with anywhere between 1 and 3m students, although recent research by the US-based Institute of Peace concluded that numbers might be at the lower end of these estimates. Following international pressure, the Pakistan government has begun to take direct action; initiatives (with US funding assistance) include:

- A five-year, \$1bn (£543.4m) plan introduced in 2003, aimed at putting secular subjects on syllabuses and bringing *madrassahs* under the purview of the Ministry of Education.
- A USAID \$100m (£54.4m) commitment to rehabilitating public schools, signed in 2002.
- A 2002 law requiring *madrassahs* to audit their funding, and foreign students to register with the government. The number of foreign religious students has since dropped from thousands to hundreds, as the government issued and renewed fewer visas to religious students.

Over 323,000 students graduate through the Matriculation examination each year, with some 50 per cent choosing degree-level courses, and 20 per cent vocational qualification courses.

There are substantial advantages to following higher education, with a 90 per cent fee subsidy available. Thus Pakistan tends to turn out quite high numbers of graduates, a very high proportion of whom are unable to find suitable level employment. Hence there is a much greater value placed on students who have qualified with an international-level qualification, and the high growth rate of the private sector catering to this demand.

At the school level, the provincial governments provide all resources, including textbooks. The sector is currently inaccessible to private publishers (see below for details).

In past years there have been two school years in Pakistan, the state sector starting in June and the private sector in September. In 2006 these are being harmonised (with some inevitable controversy) to August.

These developments form part of the overall Education Sector Reforms (ESR) within the 1998–2010 National Education Policy. The key areas are:

- The National Literacy Campaign
- Mainstreaming *madrassahas*
- Universal Primary Education
- Improving educational quality (curriculum, teacher training, assessment)
- Technical stream at secondary level
- Expansion of Higher Education
- Public-Private partnerships.

Implementation responsibilities are being devolved to the Provinces.

A summary of the ESR Policy Objectives is shown in Appendix 2, and further information can be found on the Ministry of Education's website at: <http://www.moe.gov.pk/>

4.1.2 Approval Systems for Books and Manuscripts

As indicated above, the state system is closed to international involvement (although in principle a partnership with a registered local company would be possible). Textbook provision is the remit of Provincial Textbook Boards, semi-autonomous bodies within the education administration.

Books are developed by the curriculum departments, and periodic (usually annual) calls for production submissions are made by the Textbook Boards. Local 'publishers' – actually printers – tender, and contracts are awarded – with the print run usually divided among a small number of successful bidders.

Inevitably, with a lot at stake (requirements of up to 2m copies of a title in the larger provinces), this system is open to undue influence.

A new National Textbook Policy Committee has been formed by General Qazi, the Federal Minister of Education. Chaired by Mr Ghiyasuddin, Chairman of the National Book Foundation, in 2006 the members are:

- **Ameena Saiyid** – Managing Director, OUP Pakistan
- **Zaheer Salam** – Pakistan Publishers & Booksellers Association, Chairman of the Provincial Textbook Boards
- **Aslam Ro** – National Book Foundation (Committee Secretary)

For the first time, the Committee has included members of the publishing industry and book trade. It has only met twice to date, but reports suggest that entrenched issues such as the monopoly of the Provincial Textbook Boards, one book/series per subject, and exclusion of the private sector from government book provision are at last being reviewed at the highest level.

Should this lead to a more open submission, multiple approved courses and a more devolved purchasing/distribution system, it would transform the Pakistan educational

market. Whether the government would ever allow a non-Pakistani company to be involved in textbook development and provision is a much less likely outcome.

4.1.3 Opportunities for UK Publishers

At present there is no direct access to the public-school system in Pakistan for either foreign or local private publishers. Only occasional aid-funded projects offer a glimmer of hope, but these are notoriously labyrinthine (even in the aid-funded world), and have yet to produce a project that has been a substantial success in book-supply terms.

Publishers are advised to watch the developments of the National Textbook Policy Committee, and where appropriate put in place links with local publishers to take advantage of any relaxation of the textbook provision system.

4.2 The Private Sector

In Pakistan, a much higher proportion of the education system than in other countries is in private hands. Schools teach in English towards the Matriculation examination. Table 4.3 show the number of schools and school enrolments in the private sector in 2004–05 compared with 2000–01.

Table 4.3 Number of Private-Sector Schools and Enrolments in Pakistan, 2004–2005 and 2000–2001

Academic Year	Type	No. of Schools	Total Enrolment
2004–05	Primary	17,621	5,828,337
	Middle	14,999	1,171,476
	High	6,901	363,637
2000–01	Primary	15,969	4,705,968
	Middle	13,590	911,708
	High	6,901	363,637

Source: Academy of Educational Planning and Management, Ministry of Education, 2006.

If anything, this proportion continues to grow, especially in urban areas (60 per cent+ of the total), with competition, demand, and the perceived higher value of private education as opposed to public. To an extent this is linked to the teaching of the English language at tertiary level – also perceived to be of a lower standard in public education.

This situation is now recognised at government level, and in 2004 the HEC formed the National Committee on English (NEC). Chaired by Professor Zakia Sarwar of the Society of Pakistani English Language Teachers, its current remit is to strengthen the existing ELT departments and Centres of English. A full list of committee members is available from the HEC website at:

http://www.hec.gov.pk/htmls/LI/nce/member_nce.htm

The Project is designed to help the graduates of public-sector universities. It *'envisages revolutionizing the socio-economic indicators of Pakistan and will contribute considerably to supplement the efforts of government to improve the standard of higher education and scientific learning'*. *Source: HEC website*

4.2.1 The 'International' English-medium Private-school Market

This premier part of the private sector (statistics included in Table 4.3) now numbers well over 2,250 private schools in the country. Key texts can sell 100–150,000 copies at an average price of PR100–110 (£0.98–£1.10).

It is estimated that some 25–30 per cent of the Pakistan school-going population is in private education. The premier schools offer the opportunity to study towards CIE O and A level examinations. This is the accepted route for any student aiming for an overseas university or further education. Cambridge also make available examinations in Pakistan Studies and Urdu Language, which are taken by all students to satisfy the requirement for entry, if required, into any Pakistan higher education institution.

The Punjab Provincial government recently floated a proposal to ban students from taking the CIE exams, using the argument that local qualifications should be sufficient. Outcry was immediate, and the Federal Minister quickly stepped in and ruled that if the Punjab Ministry could bring its education provision up to international standards within five years then the proposal would be considered.

The two dominating groups in the Pakistan school market are Beaconhouse School System (BHSS) and The City Schools (TCS). The businesses were started by two sisters, with Beaconhouse slightly predating City. Both groups have grown substantially in the past 20 or so years, and have similar approaches.

4.2.2 The Beaconhouse School System

BHSS is owned by the Kasuri family. Mr Qasim Kasuri is the current Chief Executive, his mother (the founder) Mrs Nasreen Kasuri having now stepped back from day-to-day management. His father, Mr Mian Khurshid Mehmood Kasuri is Pakistan's Minister of Foreign Affairs.

From its base in Lahore, the System now has well over 100 wholly-owned schools in 25 cities around the country, and more recently has opened, or is opening, schools in the UAE, Malaysia and Bangladesh – an enrolment of more than 60,000 students in all. In addition, there is a Liberal Arts teacher-training Beaconhouse National University in Lahore, a Business School, and Beaconhouse Informatics offering computer studies degrees.

The schools offer a progression to CIE IGCSE and A level examinations, and also the local Matriculation. Since 2000, Beaconhouse has been developing a Matric-oriented franchise school operation called 'The Educators'. Investors can apply to run an Educator school with a minimum investment and the requirement to use the services offered by the System, including curriculum structure, teacher provision, marketing, etc. This has been so successful that there are now over 375 Educator schools in Pakistan, and others in the Middle East and Malaysia.

The Beaconhouse strategy is to have control of as much of the operation as possible. As they build their own schools, there is a land sourcing and purchasing division; a construction company; an IT supply company, and even a bus company to transport students to the schools.

Inevitably, they have now ventured into textbook publishing, originally undertaking the whole process internally using their own teachers as authors and, more recently, in partnership with Paramount Books. The books are authored by teachers, and Paramount undertakes the rest of the process, including all marketing and selling. Naturally the Beaconhouse brand makes these texts very attractive to other aspirational schools and pupils, and Paramount makes them generally available in the trade.

Further details, including lists of schools, are to be found at:
<http://www.beaconhouse.net>.

4.2.3 The City Schools

TCS were founded by Mrs Kasuri's sister, Mrs Ali. A little smaller in size than Beaconhouse, but of similar strategy, TCS has also expanded from its Lahore base, to include around 140 schools in 40 cities around Pakistan, together with branches in the UAE, Malaysia and Bangladesh.

Some 40,000 students are enrolled, and again study towards the CIE examinations. A parallel brand called *Kahkashan* (galaxy) competes with Beaconhouse's Educators, but is wholly owned by TCS. This is the Matric stream, and currently numbers 15 schools. City Schools do not seek to take such direct control of the whole process, but otherwise compete very closely with Beaconhouse.

Recent developments include a partnership with the Asia Pacific Institute of Information Technology (APIIT), with a Karachi campus offering progression to computing and business degrees awarded by Staffordshire University.

Further details, including lists of schools, are to be found at:
<http://www.cityschools.edu.pk>.

4.2.4 Cambridge International Examinations (CIE)

CIE are partners with the British Council in Pakistan, and with them organise and operate the O and A level examinations. There are seven Centres around the country, and examinations are held either in local hotel function rooms or, where suitable facilities exist, in schools. There are over 100,000 entries per year.

As mentioned above, Cambridge have developed and make available examinations in Islamic Studies, Pakistan Studies and Urdu, in addition to their normal suite of subjects, in order to fulfil the requirements of entry into Pakistan higher education institutions.

The security situation has made life rather more difficult for the staff managing and organising the examination system (especially as students and schools no longer have regular face-to-face access to the staff). Venues have to be more carefully vetted and secured, together with the carriage arrangements of papers and scripts etc.

4.2.5 Marketing and Publicity

There are few alternatives to personal visits and presentations in the private institutional sector. Catalogue mailing, while useful, will rarely result in significant sales. Schools are now more likely to request trial copies of material before placing orders, and for major adoption decisions these can be quite extensive.

With local publishers now producing more and more fully locally relevant materials, international publishers must deploy ever more resources to secure worthwhile adoptions.

4.2.6 Key Distributors

A number of local companies specialise in the private-school sector:

- **Oxford University Press, Pakistan:** With over 200 staff, the premier local publisher and distributor with a purpose-built head office and warehouse in the Korangi Industrial Area of Karachi, and subsidiary offices in Lahore and Islamabad. In addition there is a showroom/office in Multan, Peshawar, and Faisalabad, and a representative presence in Sargodha, Abbottabad and Quetta.

OUP Pakistan publishes a wide range of locally developed titles for schools, the academic market, libraries and the general market (adult and children's), predominantly in English but also extensively in Urdu.

Licensed titles from the UK and the USA (either adapted or reprinted) are also a key feature of OUP's output, as are low-priced editions of dictionaries and reference books.

There is some direct school supply, but the majority of business is via authorised distributors and OUP's own bookshops.

- **Publishers Marketing Associates:** A dynamic company based in Karachi, with offices in Lahore and Islamabad. Focused almost exclusively on school business, and representing Harcourt, Nelson Thornes and Letts, among others. The company has expanded in recent years with nationwide promotional activity and a strong reputation.
- **Ferozsons:** Now over 100 years old, this family business encompasses retail bookselling, publishing, printing and distribution. With a head office in Lahore, and outlets in Rawalpindi, Karachi and Islamabad, there are plans for further expansion in Karachi, Quetta, Islamabad, Faisalabad, Multan and Peshawar. Ferozsons publishes textbooks, reference books, dictionaries and children's books.
- **Keystone Educational:** A school specialist based in Lahore, and agent for Macmillan. Keystone publishes licensed and adapted titles from the UK and India.

Discounts on UK published prices are high (60 per cent+), and credit periods in excess of 120 days, but volumes can be good for core subject resources. Local stocking is less common until a history of sales can be called upon for future projection.

4.2.7 Opportunities for UK Publishers

With the public-education system closed to private publishers, the fast-growing private English-medium school sector represents a strong opportunity for those educational publishers not already active in the market. Most institutions at least shadow the UK curriculum, and schools are open to the promotion of UK materials, although the market is moving towards resources at least versioned for the local teaching environment.

The trend in UK educational publishing towards multi-component formats is less acceptable in Pakistan, where it results in an unnecessarily complex presentation and pushes the cost beyond what the market will bear. However, where selectivity in a programme is possible, compromises can be achieved. Partnership with a local publisher to version UK materials for the local teaching environment should be seriously considered. At primary level, core teaching programmes such as Read Tree (OUP) and Abacus (Ginn), and at secondary level Nelson English and Physics Matters (Hodder) have all been successful in the market.

Pricing is a key factor, with even private school groups looking increasingly for economies of scale and special deals. UK published prices still tend to be the starting point, but discounts have crept up in recent years, with 60 per cent and more now not unusual. A good local representative will build business for the long term, but direct approaches to the larger school groups may also bear fruit.

4.3 English-language Teaching

While not strictly an ELT market, there are private ELT institutes in the country which, by all accounts, are finding plenty of students. However, they are very variable and not well regulated at this stage.

Most operate at the adult education level, with the British Council as the premium provider. With the security restrictions the British Council courses now have to be delivered largely online, and without the support of the formerly very well resourced libraries in the main cities.

The Pakistan American Cultural Center (PACC), established in 1960, has four campuses – three in Karachi (the Fatima Jinnah Road Center; the Karimabad Center, and the Gulistan-e-Jauhar Center), and one in Hyderabad (the Hospital Road Center). PACC is now locally owned and managed, deriving its income from course fees.

Private institutes are to be found in the major cities, and OUP among others find a ready market for their key courses.

A short list of institutes is to be found in Appendix 10.

5 Academic and Professional

5.1 Educational Structure

A schematic layout of the educational structure is shown in Appendix 16.

The academic market, split between the government-funded state institutions and the private sector, has grown substantially in recent years. Table 5.1 shows the higher education institutions and enrolments in 2003 (the most recent breakdown available).

Table 5.1 Higher Education Institutions and Enrolments in Pakistan, 2003

Subject	Institutions	Enrolments
Arts and Science	964	801,746
Medical	29	19,189
Law	54	20,173
Engineering	13	9,403
Education	22	8,302
Commerce	88	58,425
Agriculture	4	872
Home Economics	4	4,317
Others	168	43,171
Universities	29	126,870

Source: Provincial Bureau of Statistics, *Pakistan 2005 Statistical Pocket Book*, Federal Bureau of Statistics, 2006.

However, currently (2006) the HEC recognises 50 universities and eight degree-awarding institutes in the public sector, and 37 universities and 18 degree-awarding institutes in the private sector. A full list is shown in Appendix 7.

As Table 5.2 shows, growth in the number of higher education institutions has been very rapid since 2000.

Table 5.2 High Education Institutions – Growth in Numbers 1990, 2000, 2004, and 2006

Year	Universities		Degree-awarding	
	Public	Private	Public	Private
1990	20	2	3	0
2000	32	14	5	8
2004	47	33	8	17
2006	50	37	8	18

Source: Higher Education Commission, 2006.

New funding has been poured into the public institutions – the HEC budget has grown from PR7bn (£70m) in 2003 to the current PR23bn (£220m) in 2006 – and there is no shortage of demand in the more highly regarded private sector. With such demand there is an enormous range of quality in the market, and very many less than reputable establishments have sprung up, especially in the metropolitan areas.

The process began in 2003 when, to bring some order and credibility to the system, President Musharraf appointed Dr Atta-ur-Rahman, an academic by training and then Federal Minister for Science and Technology, to head a new HEC. This organisation, outside the MOE and of an equivalent level to the National Atomic Commission, is directly funded by and reports to the Federal Cabinet. It has full control of the sector in Pakistan (both public and private) and, while controversial in the country, has made considerable progress in a short period.

All institutions are required to be registered by the HEC, and cannot award degrees without registration. Action is being taken by the HEC, including full-page press announcements, to make students and parents aware of those institutions not fulfilling the required criteria and therefore operating illegally (175 institutions were named and shamed in January 2006). The HEC also has the power to close them if, after warnings, they still fall below standard.

Private institutions, in addition to their HEC Registration, are required to be validated by a recognised state entity or foreign partner, to ensure the standard of qualifications issued.

Overall, however, there are a much greater number of institutions of all kinds in the country, with the *Educational Guide of Pakistan*, published by Ibrahim Publishers in Lahore, currently listing 7,348. Caution should be exercised in dealing with organisations outside those officially recognised; the market is very volatile, and establishments can appear and disappear with surprising regularity.

State institutions such as Karachi University (eight Institutes, 52 Departments, and 21,000 registered students) are funded via the Higher Education Council, and while funds have been raised at least in line with inflation, departments can never be sure of increased annual budgets.

However, spending on higher education has increased from 2.4 per cent of GDP to 4.3 per cent since the mid- to late-1990s, to a current value of £8.5bn. A very large proportion (perhaps over 90 per cent) is allocated to salaries. Expansion continues, however, with six new public-sector science and engineering universities due to be built over the next ten years, with government funding of US\$15bn (£8,151m).

Texts promoted by publishers and distributors to departments and lecturers are listed for faculty and central library purchase, and/or student purchase.

Pricing, as always, is critical, with an increasing number of titles being sourced from Indian suppliers. Anything recommended for student purchase must be affordably priced, or the title will be immediately pirated. Some institutions operate a loan or 'Book Bank' system (usually an unofficial part of the administration), whereby students pay 20 per cent of the value of a title for a specified period loan. However, even this is far from immune to pirated copies.

5.2 Market Size and Characteristics

A major feature of the current market is the increasing presence of Indian-printed titles. Major STM publishers with wholly owned offices in India are taking advantage of the EPZ system to produce low-cost student editions (particularly at undergraduate level) and supply the region – India, Pakistan, Sri Lanka, Bangladesh, Nepal (and, in some cases, the Maldives). Retail prices for these texts are now under the equivalent of £10.

Pakistan booksellers and distributors have welcomed this approach for the more affordable prices that are now available, but feel less comfortable at having to source them from Indian suppliers.

With readily available low-cost student editions now consistently in the market, this is going some way to combating piracy of this kind of title. Lack of availability has always been the concomitant to unaffordable prices in the argument around piracy in the market.

As noted above, the STM market size is estimated in 2005–06 at £18m – around 12 per cent of the size of the Indian market. The currently accessible part, though, is only around one-third of this, making the ongoing campaign against piracy of substantial value to all concerned.

While local publishers are producing STM titles, these tend to be more oriented to local and Islamic studies, and regional issues. The great majority of resources in use are international publications from the UK and the USA and, to a lesser extent, Australia and New Zealand.

5.3 The Library Market

The academic libraries form a substantial part of the total STM market value.

For each institution, library purchasing tends to be organised via a chosen group of official suppliers (perhaps 20 for a large institution such as Karachi University). Collections are almost all foreign publications, with sourcing at the cheapest prices available.

Public institutions are required by the government to tender among a minimum of three suppliers for all orders. However, in 1979 a Library Import Committee was formed, with the agreement of the General Federal Audit and the Accountant General, bringing together the Director General of the Culture, Tourism & Libraries Ministry, Directors of the Provincial Library bodies, and the Importing Booksellers Group of the PPBA.

In 1986, this became the Library Rates Committee, whose monthly bulletin removed the tendering requirement from libraries. Imported product supplied at the publisher's original price is subject to the Department of Libraries official conversion rates. The rates (now reviewed quarterly) include a mark up (13 per cent for general titles, 15 per cent for journal subscriptions, 18 per cent for publications of 'Learned bodies and societies' and 18 per cent on back volumes of journals). Customers receive a standard discount of 10 per cent on General titles only. The current release is shown in Appendix 1. (Corresponding discount to the private sector averages 20 per cent.)

5.4 Journals and Electronic Markets

Since 2004, all public institutions have been able to take advantage of a centralised service provided via the HEC. Online subscriptions are purchased on behalf of all such institutions, and are made available via the Pakistan Educational Research Network (PERN), a national fibre-optic network. A list of the journals currently available is shown in Appendix 8, and more details of the system are at <http://www.pern.edu.pk>. Subscription negotiations take place between the publisher and PERN.

Private institutions sometimes source journals direct from publishers, but more common are arrangements with a small number of subscription agents, such as Progressive International and Allied Book, providing more cost-effective import and promotional services through sales teams.

For other material, CDROM-based resources are still preferred by most organisations, for ease of use and to reduce reliance on recurring funding.

5.5 Distance Learning

With Internet access becoming more readily available (currently estimated at 1,500,000 users), and competition for better academic qualifications always increasing, distance education is expanding.

A number of UK and US institutions have been active in the market, and this has picked up as the difficulties of obtaining visas to study overseas have increased in recent years.

The HEC-accredited Allama Iqbal Open University of Pakistan (AIOU) established in 1974 is today concentrating on the in-demand subjects of Business Administration, Computer Science, Medicine, and Engineering, with fee levels set to make higher education much more widely available to those otherwise less able to access courses. The nature of the AIOU has also much enhanced the delivery of higher education to the female population.

A more recent establishment is the Virtual University (VU) of Pakistan (<http://www.vu.edu.pk>), based in Lahore. With Faculties of Computer Science & IT, Management, and Arts, the VU commissions course development from lecturers and professors of other institutions for delivery over the Internet, and free-to-air satellite television.

Individual awarding bodies such as the Ireland-based ECDL Foundation have widely promoted the International Computer Driving Licence (ICDL), and now have 21 partner centres around the country offering the qualification. A full list is available at: <http://www.icdlap.com/pakistan/findacentre.htm>.

5.6 Vocational Education

Vocational education is generally regarded as patchy, and not well aligned with the requirements of an expanding country. Of the working population of around 45m, only 5 per cent are classed as skilled.

Table 5.3 shows the number of vocational institutions in Pakistan.

Table 5.3 Number of Vocational Institutions in Pakistan, 2003

Commercial	164
Enrolment	24,270
Vocational	209
Enrolment	10,596
Polytechnic/Technical	78
Enrolment	33,663

Source: Pakistan Federal Bureau of Statistics

Public and private colleges have tended to offer a variety of courses in popular subjects, such as Business & Management, IT, Law, Medicine, and Engineering, with little reference to the needs of industry. Some 90,000 students are registered for existing places – out of more than 300,000 students aged 15 years and above. Those who qualify well often seek employment outside the country, especially in the Middle East.

Responsibility for this sector is now with the Islamabad-based National Vocational & Technical Education Commission (NAVTEC), established in early 2006 and chaired by Mr Altaf Muhammad Saleem. NAVTEC will regulate, co-ordinate and provide policy decisions at the federal level for technical education and vocational training.

It is planned that a vocational school will be set up at each *tehsil* (a local administrative sub-division similar to a county) and in industrial areas. In addition, each district will also have a polytechnic institute with technical colleges expanded at provincial level.

Through the Education Sector Reforms (ESR), the Ministry of Education has proposed a plan to broaden the base for technical and vocational education by the introduction of a technical stream in secondary schools – 1,100 secondary schools across the country are designated for a first phase.

Funding for this project – which is still to be fully specified – will come from the Japan International Co-operation Agency (JICA), and may, in due course, substantially increase demand for vocational teaching resources. Again, a priority is to increase the number of female students, who currently represent only 15 per cent of the total enrolment.

More complete details of the initiative are due to be announced by the Ministry of Education during 2006.

5.7 Distribution and Terms of Trade

Once again there are a small number of importing booksellers well known to UK and US publishers. They are:

- **Allied Book Company:** Lahore-based, with branches in Rawalpindi and Faisalabad, the Allied Book Company stock a very wide range of titles, and import extensively from the UK, the USA and India.
- **Ferozsons:** Now over 100 years old, this family business encompasses retail bookselling, publishing, printing and distribution. With a head office in Lahore, and outlets in Rawalpindi, Karachi and Islamabad, there are plans for further expansion in Karachi, Quetta, Islamabad, Faisalabad, Multan and Peshawar.

Ferozsons publishes textbooks, reference books, dictionaries and children's books.

- **Mirza Book Agency:** Lahore-based importer and distributor covering the full range of academic titles. Long established and well respected company with strong relationships with institutions.
- **Saeed Book Bank:** an Islamabad/Rawalpindi retailer, often styled the 'best bookshop in Pakistan'. It carries a wide range of stock, covering general titles, academic, school and children's books.
- **Multiline Books:** Lahore-based, with an office in Islamabad, Multiline Books are academic specialists, importing, retailing, wholesaling, and library suppliers. They are well respected, and well-known to UK publishers.
- **Pak American Commercial:** Founded in 1949 in Karachi, and with office in Lahore. Importing bookseller and publisher of academic titles.
- **PakBook Corporation:** Established in 1975 in Lahore, and now with offices in Karachi and Islamabad, this is a highly professional operation, importing

from all major publishers, and specialising in Applied Sciences, Biological Sciences, Physical Sciences, Medical Sciences, and Social Sciences.

- **Royal Book Company:** a Karachi-based importing bookseller and publisher of local reference titles.

Contact details for these companies can be found in Appendix 6.

These distributors sell either direct or via sub-distributors to cover the country. In some cases the supply chain can be quite long, to accommodate the less accessible parts of the country.

Discounts are high at 65 per cent and more, but adjusted where either local net pricing or special low-cost editions are made available. Credit terms tend to the long, with perhaps 150 days an average.

Exclusivity by title is rare, as this approach allied to the nature of the distribution system would probably simply limit the availability of a title.

5.8 Other Information

The British Council is also in collaboration with the HEC to develop the research and training capacity of Pakistan's higher education sector. The Links Programme has the following objectives:

- The development of research and training capacity of the higher education institutions
- Improved teaching methodologies
- Improved management systems within the departments
- Course and curriculum development
- Faculty development.

Open to any HEC-registered institution, and backed by DfID funding, links are arranged with UK universities and colleges to foster exposure to high-quality academic facilities; to give assistance with curriculum development, and to widen Pakistan's international networking.

For the UK institution, the programme improves awareness of UK courses, and opens the possibilities for arranging split degree or distance learning courses in the country.

5.9 Opportunities for UK Publishers

The academic sector is probably the most readily accessible to foreign publishers, having the most widely established promotional networks, and well-resourced distributors and retailers.

No adaptation is required for the market, and the best international material is much in demand. Engaging with the market is one of the best defences against piracy, making low-priced official editions readily available. Any title that achieves recognition is in danger of being pirated, and without presence in the market there are few opportunities to combat the threat, which will run unchecked.

Where low-priced/EPZ editions are not possible sales of relevant original titles can also be achieved through the existing system of Library rates (see Appendix 1).

Relationships with the main importing booksellers should be established, and catalogues and brochures supplied for promotional activity. For those not able to visit the market, meetings can usually be arranged at the major book fairs.

6 The Trade Market

6.1 Market Characteristics

Modest compared with Education and Academic, the Trade sector in Pakistan is still growing quite quickly, and perhaps especially for children's books.

The overall market is estimated at around £10m per annum, at publisher's net revenue, split equally between imported and locally published books. Perhaps 60 per cent is lost to piracy. Particularly vulnerable are international bestsellers in fiction, self-help and business, popular television tie-ins shown via satellite, and key children's titles.

The average paperback sale of a big-name author may be 2,000 copies, with a special retail price of PR295 (£2.90). In comparison, a pirated copy may be available in the Urdu Bazaar at PR30 – one-tenth of the official price.

Trade publishers are now also taking advantage of reprinting key titles in India under the EPZ system, and making them available in Pakistan via India-based branch offices, although there is a large prevalence of specially discounted titles imported directly into the market.

Liberty Books, with nine retail shops in and around Karachi, is probably the key importer of trade titles, and has sub-distributors around the country. Saeed Book Bank in Islamabad is the largest retail shop in Pakistan, with an excellent range of stock from trade, to children's books, school and academic titles, and magazines. This caters in particular to the upper end of the market, and to the international community in the Capital Territory.

6.2 Market Size

The official ex-UK DTI figures (see Table 3.1 above) mask a more complex market structure. The DTI figures include single sheets, atlases not in book format, and so on, but is not helpful as an indication of total market size.

The incidence of local piracy; the substantial and fast-growing India/Pakistan trade, and imports of UK-published titles from third-party countries (Malaysia, Singapore, Australia, and New Zealand particularly) should all be taken into account in evaluating the market.

Current estimates of this total suggest a figure of around £10m net per annum.

6.3 Opportunities for Rights Sales

UK and US publishers are inevitably cautious in granting reprint rights to local Pakistan companies. A similar situation existed in India when only one or two international publishers had wholly owned local offices, and before the EPZ system was in place.

The greater levels of confidence now achieved through the system have led directly to a very wide range of titles being locally published in India and supplied to Pakistan.

The Pakistan trade would prefer to have access to this sort of direct relationship themselves, and with a more active stance being taken in the war against piracy this may be an opportune time for UK publishers to test the water, and access the greater volume sales by granting licences to reputable local partners.

Translation rights into Urdu have increased in recent years, perhaps led by the Bloomsbury licensing of Harry Potter to OUP Pakistan. Only the biggest titles are feasible, but such initiatives also help to combat piracy.

6.4 Other Opportunities for UK Publishers

For those publishers without India-based operations, the most straightforward route to at least protect business from increased piracy is special net pricing for the market. Reliable retailers all seek a range of stock, albeit limited, of bestsellers.

It is now possible either to use local printers, or to extend runs of India requirements for shipping direct to Pakistan customers. This involves rather more awkward UK-based administration, and may not be ideal for many publishers, although Indian printers are now offering additional services to smooth such trading.

7 Appendices

Appendix 1: Library Rates Committee Conversion Schedule, January–March 2006

GOVERNMENT OF PAKISTAN
MINISTRY OF EDUCATION
DEPARTMENT OF LIBRARIES
(LIBRARY RATES COMMITTEE)

No.F.5-3/2006-P&R

National Library of Pakistan,
Constitution Avenue,
Islamabad, the 13th January, 2006.

To

The Accountant General
Pakistan Revenues,
G-8/4,
ISLAMABAD

SUBJECT:- **LIBRARY RATES FOR LIBRARIES AND INSTITUTIONS FOR THE PERIOD 01ST JANUARY TO 31ST MARCH 2006.**

Sir,

The Library Rates Committee, constituted by Ministry of Education with the approval of Finance Division, Government of Pakistan vide their U.O. No.919-R.12/86, dated 06-7-1986 and Finance Division's subsequent U.O. No.4(4)Exp.III/2002-525, dated 26-7-2003, has determined the following schedule for conversion and discount for purchase of books/journals and other library materials by the libraries and institutions in Pakistan for the period 1st January to 31st March, 2006.

AVERAGE OF SPOT BANK SELLING EXCHANGE RATES FROM 21-11-2005 TO 20-12-2005.

U.S. Dollar	59.94
British Pound Sterling.	104.31
Australian Dollar.	44.59
Swedish Krona	7.48
Swiss Franc	45.87
Indian Rupee	1.34
Saudi Rial	15.98
Singapore Dollar	35.58
Euro	70.79

P.T.O.

2. LIBRARY RATES FOR :

A) IMPORTED PUBLICATIONS :

<u>NAME OF CURRENCY</u>	<u>GENERAL BOOKS (MARK-UP 13% + 6% W. H. TAX)</u> (i)	<u>SUBSCRIPTIONS TO CURRENT JOURNALS (MARK-UP 15% + 6% W. H. TAX)</u> (ii)	<u>PUBLICATIONS OF LEARNED BODIES/ SOCIETIES (MARK-UP 18% + 6% W. H. TAX)</u> (iii)	<u>BACK VOLUMES OF JOURNALS (MARK-UP 18% + 6% W. H. TAX)</u> (iv)	<u>DISCOUNT</u>
U.S. Dollar	71.33	72.53	74.32	74.32	Uniform discount of 10% on all imported titles of General books Cat.(I). No discount on Materials in Other Categories.
British Pound Sterling	124.13	126.21	129.34	129.34	
Australian Dollar	53.07	53.96	55.30	55.30	
Swedish Krona	08.91	09.06	09.28	09.28	
Swiss Franc	54.58	55.50	56.88	56.88	
Indian Rupee	1.59	1.62	1.66	1.66	
Saudi Rial	19.02	19.34	19.82	19.82	
Singapore Dollar	42.34	43.05	44.12	44.12	
Euro	84.24	85.66	87.78	87.78	

B) PAKISTANI PUBLICATIONS :

DISCOUNT.

- | | |
|---|---|
| a) Local Text Books Produced by Text Book Boards, publications of Federal and Provincial Governments and non-profitable special publications. | (a) No discount |
| b) The Holy Quran (Text only) | (b) No discount |
| c) General Books | (c) 15% More discount is |
| d) Fiction including drama | (d) 20% negotiable on purchase of ten or more copies. |

C) SPECIAL LIBRARY MATERIALS/ AUDIO-VISUAL MATERIALS :

Rates as in Category A (iii) above depending upon the rates of discount allowed by the foreign suppliers. Taxes/duties shall be paid actual. The educational institutions, which are exempted from such duties, can claim refund.

Contd.....P/3.

3. The booksellers/suppliers will supply the original editions and show the actual prices in foreign currency as well as Pak. Rupees on the bills. The following certificate duly signed by the booksellers will be given on the bills:

“Certified that the prices charged are correct. If any “discrepancy” at any stage is found, we undertake to refund the excess payment made to us. It is further certified that the publications listed in the bill are original authorized editions/reprint and not pirated ones, it is further certified that the titles supplied are not remainders”.

4. The booksellers/suppliers will provide on demand the original or authenticated photocopies of foreign publishers invoices upto 20% or foreign publisher’s catalogues of publications/library materials listed in bill whenever so requested for price verification.

5. If the books/library materials ordered by libraries and institutions are available in stock, the rates will be charged according to the schedule prevailing at the time of placing confirmed order. If an import order is placed the supplier will intimate the approximate date of delivery and will also mention that the rates will be charged according to the schedule prevailing at the time of delivery.

6. As the subscription of journals/periodicals/society publications and CD-ROM database are not a one time payment, so the same may be paid in advance in case of extreme necessity, provided subscribing agency is reputable and gives undertaking to refund the amount paid in case of failing to supply in toto.

7. Postal/forwarding charges on supply of books/library materials, both foreign and local shall be borne by the booksellers.

8. Since the books/library materials can be purchased according to standards schedule rates from any bookseller in the country, tenders need not to be called.

9. It was felt that the payments of the booksellers are delayed by some institutions. They are requested that the outstanding bills of the booksellers may be settled in time.

10. The rates letter will be displayed by all booksellers at a prominent place in their shops/showrooms.

NOTE :- These Library Rates are available on the website www.nlp.gov.pk
E-Mail. ghyour_hussain@hotmail.com



(CH. MUHAMMAD NAZIR)
DIRECTOR GENERAL/CONVENER
Phone : 051-9214523
Fax : 051-9221375

P.T.O.

Appendix 2: Education Sector Reforms (Policy Decisions)

- 1 Uniform Academic Session from 1 September throughout the country.
- 2 Free Education up to Matriculation.
- 3 Provision of missing facilities in schools.
- 4 Provision of free textbooks.
- 5 Grant of scholarships and incentives to girl students.
- 6 Composite examination at Matric level throughout the country from 2007.
- 7 Composite examination will be introduced in 2009 for HSSC.
- 8 English language has been made compulsory from Class 1 onwards.
- 9 The grievances of a particular sect or community to be addressed by removing controversial books in Northern Areas. However, in next review/revision:
 1. Emphasis to be placed on language and literature learning instead of repetition of topics of Islamiyat in language-learning i.e. Urdu/English textbooks, etc.
 2. Overlapping and duplication of contents in various subjects needs removal, and the contents of subjects need to be examined to make them non-controversial.
- 10 Social Studies for classes VI–VIII bifurcated into History and Geography, and will be taught as compulsory subjects from the academic year 2006. The curriculum has been prepared and notified, and provincial textbook boards are preparing the books for these subjects.
- 11 Introduction of English as medium of instruction for Science, Mathematics, Computer Science and other selected subjects like Economics and Geography in all schools in a graduated manner was endorsed.
- 12 Budgetary allocations for education from existing 2.7 per cent of GDP to be increased to 4 per cent of GDP.
- 13 Revise curriculum to ensure that:
 1. Technical stream of education is introduced from Class 8th.
 2. Information Technology/Computer education is introduced from lower classes.
 3. All duplication of subjects is eliminated.
 4. Contents do not reflect thinking of any particular sect or school of thought.
 5. Ethics, moral education and Haqooq-ul-ibad are to be included and stressed.
 6. Curriculum to be upgraded to ensure latest developments and ideas in science and technology are included, and it is progressive with vertical and horizontal linkages.
- 14 Marks allocated for practical examinations in Science and Social Science subjects will be reduced from 25 per cent to 15 per cent, due to inadequate

lab facilities available in the country. It will be applicable for examinations to be conducted in the year 2007.

- 15 Registration of private-sector educational institutions to be done on the pattern of *madaris*.
- 16 Format of the question papers for the Board examinations will be revised. The papers will have three parts:
 - (i) 20 per cent will be objective questions. The questions will have multiple choices.
 - (ii) 50 per cent of questions will be for short answers.
 - (iii) 30 per cent of questions will be for descriptive answers.
 - (iv) During the year 2006, teachers will be trained to prepare the children to answer the questions on this pattern.
 - (v) Question papers will be prepared in this format from the year 2007.
- 17 Reduction in number of elective subjects at SSC and HSSC.
- 18 College-level education to be run by provincial education departments.
- 19 Availability and accessibility of schools, particularly in rural areas.
- 20 Setting up of NTEVA (National Technical Education and Vocational Training Authorities) be expedited to ensure:
 1. **Vocational Schools:** at each *Tehsil* and at industrial clusters. All dropouts from schools to be encouraged to enroll.
 2. **Polytechnic Institutes:** at District level for matriculates to produce technicians and supervisors.
 3. **Technical Colleges:** four or five in each province for F.Sc. qualified students to produce technical graduates.
- 21 Teachers' status and recruitment of female teachers.
- 22 Strategy for National Textbook Policy:

Literacy	from 49 per cent to 60 per cent
Gross Primary Enrolment	from 83 per cent to 100 per cent
Net Primary Enrolment	from 66 per cent to 76 per cent
Middle School Enrolment	from 47.5 per cent to 55 per cent
Secondary School Enrolment	from 29.5 per cent to 40 per cent
Technical Stream Schools	from 100 to 1,100
Polytechnics/mono-technics	from 77 to 160
Madaris Mainstreaming	from 148 to 8,000
Public-Private Partnerships	from 200 to 26,000
Higher Education Enrolment	from 2.6 per cent to 5 per cent

Source: Ministry of Education

Appendix 3: Donors' Assistance for Pakistan's Education Sector (Summary US\$m)

NB: S# Agency Name Coverage Year Amount

Multilateral Organisations

A. Loans

- 1 ADB National 2004–09 US\$293,200
- 2 IDB National and Karachi 2003–07 US\$35,240
- 3 The World Bank Sindh, Punjab and NWFP 2004–07 US\$625,000

B. Grants

- 1 ILO National 2003–07 US\$11,427
- 2 UNDP 42 District 2004–08 US\$9,300
- 3 UNESCO National 2005 US\$0.351
- 4 UNFPA 2 District from each province and AJK 2004–08 US\$1,600
- 5 UNICEF 23 District/All provinces 2004–08 US\$14,600
- 6 WFP Punjab, NWFP, Sindh Balochistan and AJK(34 poor Districts) 2004–08 US\$52,000

Bilateral Organisations

- 1 AusAid All 4 provinces 2003–06 US \$ 2,400
- 2 CIDA National 2000–09 US \$75.447 (70.0 Debt Swab)
- 3 DFID National 2004–08 US \$14.505 (7,253 GBP)
- 4 EC Sindh and Northern Areas 2001–08 US\$85,566
- 5 GTZ (Government of Germany) NWFP and Punjab 2004–08 US\$43,358 (Debt Swab 31,702)
- 6 JICA (Government of Japan) National 1997–06 US\$43.1(Counterpart 39.00)
- 7 NORAD (Norwegian government) 6 district in Punjab, NWFP and FATA 2002–08 US\$49.6 (Debt Swab 26.00)
- 8 USAID Focus on Sindh and Balochistan some national coverage, Rawalpindi, Islamabad, Karachi and MoE 2002–06 US\$5.299

Non-governmental Organisations

- 1 SCF-UK Districts Sheikhpura and Kasur in Punjab and District Khairpur in Sindh, Pakistan 2002–06 US\$6.109

Total US\$1,462,012

Appendix 4: Government and Official Bodies

Academy of Educational Planning and Management

Taleemi Chowk G-811
Islamabad 44000
Pakistan
Tel: +92-51 926 1096
Email: webinfo@aepam.edu.pk
Web: <http://www.aepam.edu.pk>

British Council, Pakistan

PO Box 1135
(32 Street 19, F-6/2)
Islamabad
Pakistan
Tel: +92-51 111 424 424
Fax: +92-51 111 425 425
Email: info@britishcouncil.org.pk
Web: <http://www.britishcouncil.org/pakistan>

Shahrah-e-Iran

Clifton
Karachi 75600
Pakistan
Tel: +92-21 111 424 424
Fax: +92-51 111 425 425
Email: karima.kara@britishcouncil.org.pk
Contact: Ms Karima Kara, Director: Examination Services
The British Council also has offices in Lahore, Faisalabad, Quetta, Peshawar, Multan

British Deputy High Commission

Shahrah-e-Iran
Clifton
Karachi 75600
Pakistan
Tel: +92-21 572 7000
Fax: +92-21 582 7005
Email: tradeuk@cyber.net.pk

British High Commission

Diplomatic Enclave
Ramma 5, Blue Area
Islamabad
Pakistan
Tel: +92-51 201 2000
Fax: +92-51 282 3439

Department of Libraries

National Library
Constitution Avenue
Islamabad 44000
Pakistan
Tel: +92-51 921 4523, 920 26436,920 6440
Fax: +92-51 922 1375
Email: nlpiba@isb.paknet.com.pk
Web: <http://www.nlp.gov.pk>
Director of Department of Libraries: Mr. Muhammad Azam Ch

Federal Bureau of Statistics

5—Slic Building, f-6/4
Blue Area
Islamabad
Pakistan
Fax: +92-51 920 3233
Email: stapak@isb.paknet.com.pk
Web: <http://www.statpak.gov.pk/depts/index.html>

Higher Education Council (HEC)

H-9 Islamabad
Pakistan
Tel: +92-51 904 0000
Fax: +92-51 929 0128
Email: info@hec.gov.pk
Web: <http://www.hec.gov.pk>
Director: Dr Atta Ur-Rahman

Ministry of Education

12th Floor Shaheed e'Millat Secretariat
Blue Area
Islamabad
Pakistan
Tel: +92-51 920 4517
Web: <http://www.moe.gov.pk>
Minister of Education: Lt Gen (Rtd) Javed Ashraf

National Book Foundation

(Ministry of Education)
6 Mauve Area, G-8/4
Taleem Chowk
Islamabad
Pakistan
Tel: +92 (51) 255 572, 9261533, 9261534, 9261535
Email: nbf@isb.paknet.com.pk
Web: <http://www.nbf.org.pk>
Contact: Mr Ahmed Fazaz

UK Trade & Investment Office

65 Mozang Road
PO Box 1679
Lahore
Pakistan
Tel: +92-42 631 6589-90
Fax: +92-42 631 6591
Email: btolahor@lhr.comsats.net.pk

Book Trade Associations**Pakistan Publishers & Booksellers Association**

YMCA Building
Shahrah-e-Quaid-i-Azam
Lahore
Pakistan
Tel: +92-42 352 444/722 4210
Fax: +92-42 712 0077
Contact: Mr Zubair Saeed
Organisers of Lahore Book Fair

Appendix 5: Local Publishers

Danesh Publications (Pvt) Ltd

241/1-E Khawaja Street
Block 2, PECHS
Karachi
Pakistan
Tel: +92-21 452 9182-57
Fax: +92-21 431 4106
Email: danesh@cyber.net.pk
Contact: *Mr Maeel Khaledi*

Dost Publications

410, Shams Chambers
Shahrah-e-Liaquat
Karachi
Pakistan
Tel: +92-21 241 7723
Web: <http://www.dostpublications.com/> (new site under construction)

Ferozsons (Pvt) Ltd

60-Shahrah-e-Quaid-e-Azam
Lahore
Pakistan
Tel: +92-42 62 6262
Email: muqheet@ferozsons.com.pk
Web: <http://www.ferozsons.com.pk>
Contact: *Mr Zaheer Salam, Mr Muqheet Salam*

Liberty Books (Pvt) Ltd

3 Rafiq Plaza 1st Floor
MR Kayani Road
Saddar
Karachi 74400
Pakistan
Tel: +92-21 568 4319
Email: libooks@cyber.net.pk
Web: <http://www.libertybooks.com>

Oxford University Press (Pakistan)

No. 38, Sector 15
Korangi Industrial Area
Karachi-74900
Pakistan
Tel: +92-21 111 693673,5071580-86.
Email: academic.sales.pk@oup.com
Contact: *Ameena Saiyid, Managing Director*
Offices in Islamabad, Lahore, Multan, Faisalabad, Peshawar, Quetta

Paramount Books (Pvt) Ltd

152/0, Block 2, PECH Society
Karachi 75400
Pakistan
Tel: +92-21 431 0030
Fax: +92-21 455 3772
Email: paramount@cyber.net.pk
Contact: Mr Salahuddin Iqbal

Royal Book Company

BG-5 Rex Centre
Fatima Jinnah Road
Karachi 75530
Pakistan
Tel: +92-21 565 3418
Fax: + 92-21 565 3419
Email: royalbook@hotmail.com,royalbookcompany@yahoo.com
Web: <http://www.royalbook.org>

Sunrise Publications

C-14g: KDA Scheme Extension 1A
off Karsaz Road near Masjid-e-Uzma
Karachi
Pakistan
Tel: +92-21 4931001
Email: pma@cyber.net.pk

Vanguard Books

72 FCC
Gulberg-4
Lahore
Pakistan
Tel: +92-42 576 3510
Fax: +92-42 575 1025
Web: <http://www.vanguardbooks.com>

Appendix 6: Importers, Distributors and Retailers

Allied Book Company (Academic)

New Market
75 The Mall
Lahore
Pakistan
Tel: +92-42 631 0907
Fax: +92-42 636 0662
Email: allied@ihr.consats.net.pk
Web: <http://www.alliedbook.com>
Contact: *Mr Dost Muhammad*

Ferozsons (Pvt) Ltd (Academic/School/Trade)

60-Shahrah-e-Quaid-e-Azam
Lahore
Pakistan
Tel: +92-42 62 62 62
Fax: +92-42 636 9204
Email: muqheet@ferozsons.com.pk
Web: <http://www.ferozsons.com.pk>
Contact: *Mr Zaheer Salam, Mr Muqheet Salam*

Liberty Books (Pvt) Ltd (Trade)

3 Rafiq Plaza 1st Floor
MR Kayani Road
Saddar
Karachi 74400
Pakistan
Tel: +92-21 567 1240
Fax: +92-21 568 4319
Email: libooks@cyber.net.pk
Web: <http://www.libertybooks.com>
Contact: *Mr Saleem Hussain, Director*

Mr. Books (Trade)

10-D, Super Market
Islamabad
Pakistan
Tel: +92-42 227 8843
Email: mrbooks@isb.comsats.net.pk
Web: <http://www.mrbooks.com.pk>
Contact: *Mr Saleem Hussain*

Mizra Book Agency (Academic)

65 Shahrah-e-Quaid-e-Azam
Lahore 54000
Pakistan
Tel: +92-42 735 3601
Email: knowledge@brain.net.pk
Web: *Mr Qasim Mahmood Mirza*

Multi-Line Books (Academic)

Shop #03, Ahmad Mansion
Regal Chowk
Hall Road
(PO Box 1268)
Lahore 54000
Pakistan
Tel: +92-42 721 0089
Email: info@multilinebooks.com
Web: <http://www.multilinebooks.com>
Contact: Mr Zubair Khalid Mirza

Pak American Commercial (Pvt) Ltd (Academic)

60-A Khan Chambers
Canning Road
PO Box 294
Rawalpindi
Pakistan
Tel: +92-51 556 3709
Email: pacl@isd.wol.net.pk
Contact: Mr Abbas Jaffri

Pak Book Corporation (Academic)

Aziz Chambers
21 Queen's Road
Lahore
Pakistan
Tel: +92-42 111 636 3222
Fax: +92-42 636 2328
Email: info@pakbook.com
Web: <http://www.pakbook.com>
Offices in Islamabad & Karachi
Contact: Mr Iqbal Cheema

Paramount Books (Pvt) Ltd (Trade/School/Academic)

152/0, Block 2
PECH Society
Karachi 75400
Pakistan
Tel: +92-21 431 0030
Fax: +92-21 455 3772
Email: paramount@cyber.net.pk
Contact: Mr Salahuddin Iqbal

Publishers Marketing Associates (School)

C-14g: KDA Scheme Extension 1A
off Karsaz Road near Masjid-e-Uzma
Karachi
Pakistan
Tel: +92-21 493 1001
Email: pma@cyber.net.pk

Royal Book Company (Academic)

BG-5 Rex Centre
Fatima Jinnah Road
Karachi 75530
Pakistan
Tel: +92-21 565 3418
Fax: +92-21 565 3419
Email: royalbook@hotmail.com
Web: <http://www.royalbook.org>

Saeed Book Bank (Academic/School/Trade)

Al-Rehman Centre
F-7 Markaz, Jinnah Super
Islamabad
Pakistan
Tel: +92-51 2651656
Fax: +92-51 265 1660
(PO Box 515, Post Mall, F-7, Islamabad)
Email: sales@saeedbookbank.com
Web: <http://www.saeedbookbank.com>

Appendix 7: Publishers' Agents

Addison Wesley Longman (Singapore) Pte Ltd (India Branch)

482, F.I.E. Patparganj
Delhi-110 092
India
Tel: +91-11 214 6067
Email: mail@pearsonedindia.com

Pearson (managed via India)

Book Bird

Pak Chambers
5 Temple Road
(GPO Box 518)
Lahore
Pakistan
Tel: +92-42 724 7887
Fax: +92-42 636 1370
Email: bookbird@brain.net.pk
Contact: Mr Anwer Iqbal
Palgrave Macmillan, Taylor & Francis, Blackwell, Ashgate, Thieme

Cambridge University Press

(Managed ex-Singapore)
43-45 Kreta Ayer Road
Singapore 089004
Tel: +65 6323 2701
Fax: +65 6323 2370
Email: Singapore@cambridge.org
Contact: Peter Davidson

Keystone Educational Publishing

Pak Chambers
5 Temple Road
(GPO Box 518)
Lahore
Pakistan
Tel: +92-42 735 3750/636 7275
Fax: +92-42 636 1370
Email: macedu@lhr.comsats.net.pk
Contact: Mrs Rubina Farooqui
Macmillan Education

Publishers Marketing Associates

C-14g:KDA Scheme Extension 1A
off Karsaz Road near Masjid-e-Uzma
Karachi
Pakistan
Tel: +92-21 493 1001
Fax: +92-21 493 1004
Email: pma@cyber.net.pk
Harcourt, Nelson Thornes

Tahir Lodhi

Publishers Representatives

14-G, Canalberg H.S

Thoker Niaz Biag

Post Office 53700

Lahore

Pakistan

Tel: +92-42 541 2680

Fax: +92-42 541 2690

Email: tml@ihr.comsats.net.pk

Boydell & Brewer Co Ltd, Columbia University Press, New Holland Publishers

World Press

27-A Al Firdous Avenue

Faiz Road

Muslim Town

Lahore

Pakistan

Tel: +92-42 599 0101

Fax: +92-42 585 8827

Email: worldpress@gmail.com

Contact: Mr Salim A. Malik, Chief Executive

US University Presses, Grandreams

Appendix 8: Accredited Higher Education Institutions*

Agha Khan University http://www.aku.edu/	Al-Khair University
Al-Mashriq University of Information Technology	Allama Iqbal Open University http://www.aiou.edu.pk/
American University of Hawaii, Punjab Campus	CECOS University of IT & Emerging Sciences http://www.cecocos.com/
City University of Science & Information Technology http://www.cityuniversity.edu.pk	Gandhara University http://www.gandhara.edu.pk
Greenwich University http://www.greenwichuniversity.edu.pk	Hamdard University http://www.hamdard.edu/
Institute of Computer Science (now National University of Computer & Emerging Science) http://www.nu.edu.pk/default.aspx	International Islamic University http://www.iiu.edu.pk/
Iqra University http://www.iqra.edu.pk/	Jinnah University for Women http://www.juw.edu.pk/
Lahore University of Management Sciences http://www.lums.edu.pk/	Mehran University of Engineering and Technology Jamshoro http://www.muett.edu.pk/
Muhammad Ali Jinnah University http://www.jinnah.edu.pk/	National University of Science and Technology http://www.nust.edu.pk/
NED University of Engineering and Technology Karachi http://www.neduet.edu.pk/	Pak-AIMS (American Institute of Management Sciences) http://www.pakaims.edu
Planwel University http://www.planwel.edu/university.htm	Preston University, Pakistan Campus http://www.prestonpak.edu.pk/
Pyramid Education Center http://www.pedu.edu.pk	Quaid-e-Awam University of Engineering Sciences & Technology http://www.quest.edu.pk
Shaheed Zulifqar Ali Bhutto Institute of Science and Technology http://www.szabist.edu.pk	Sir Syed University of Engineering and Technology http://www.ssuet.edu.pk
Textile Institute of Pakistan http://www.tip.edu.pk/	University of Agriculture Faisalabad http://www.uaf.edu.pk/index.html
University of Arid Agriculture, Rawalpindi http://www.uaar.edu.pk	University of Baluchistan http://www.uob.edu.pk

University of Engineering & Technology Peshawar http://web.nwfpuet.edu.pk	University of Engineering and Technology Lahore http://www.uet.edu.pk
University of Engineering and Technology Taxila http://www.uettaxila.edu.pk/	University of Islamic Studies
University of Karachi http://www.ku.edu.pk	University of Peshawar http://www.upesh.edu
University of the Punjab http://www.pu.edu.pk/home	Zia-ud-Din Medical University http://www.geocities.com/CollegePark/7329/main.html

* IUAA & BAC

Appendix 9: Institutions Officially Recognised by the HEC

A *Public Sector*

- 1 Air University, Islamabad
- 2 Allama Iqbal Open University, Islamabad
- 3 Bahauddin Zakariya University, Multan
- 4 Bahria University, Islamabad
- 5 Balochistan University of Engineering and Technology
- 6 Balochistan University of Information Technology, Islamabad
- 7 COMSATS Institute of Information Technology, Islamabad
- 8 Dow University of Health Sciences, Karachi
- 9 Fatima Jinnah Women University, Rawalpindi
- 10 Federal Urdu University of Arts, Sciences and Technology, Islamabad
- 11 Gomal University, D I Khan
- 12 Government College University, Faisalabad
- 13 Government College University, Lahore
- 14 Hazara University, Dodhial, Mansehra
- 15 Institute of Business Administration, Karachi
- 16 Institute of Management Sciences, Peshawar
- 17 Institute of Space Technology, Islamabad
- 18 International Islamic University, Islamabad
- 19 Islamia University, Bahawalpur
- 20 Karakoram International University, ,Gilgit
- 21 Kohat University of Science and Technology, Kohat
- 22 Lahore College for Women University, Lahore
- 23 Liaquat University of Medical and Health Sciences, Jamshoro Sindh
- 24 Mehran University of Engineering and Technology, Jamshoro
- 25 National College of Arts, Lahore
- 26 National University of Modern Languages, Islamabad
- 27 National University of Sciences and Technology, Rawalpindi
- 28 NED University of Engineering & Technology, Karachi
- 29 NWFP Agriculture University, Peshawar
- 30 NWFP University of Engineering & Technology, Peshawar
- 31 Pakistan Institute of Engineering & Applied Sciences, Islamabad
- 32 Pakistan Military Academy, Abbottabad

- 33 Pakistan Naval Academy, Karachi
- 34 Quaid-e-Awam University of Engineering, Science & Technology, Nawabshah
- 35 Quaid-i-Azam University, Islamabad
- 36 Sardar Bahadur Khan Women University, Quetta
- 37 Shah Abdul Latif University, Khairpur
- 38 Sindh Agriculture University, Tandojam
- 39 University of Agriculture, Faisalabad
- 40 University of Arid Agriculture, Murree Road, Rawalpindi
- 41 University of Azad Jammu & Kashmir, Muzaffarabad, Azad Kashmir
- 42 University of Balochistan, Quetta
- 43 University of Education, Lahore
- 44 University of Engineering & Technology, Lahore
- 45 University of Engineering & Technology, Taxila
- 46 University of Health Sciences, Lahore
- 47 University of Karachi, Karachi
- 48 University of Malakand, Chakdara, Dir. Malakand
- 49 University of Peshawar, Peshawar
- 50 University of Sargodha, Sargodha
- 51 University of Sindh, Jamshoro
- 52 University of the Punjab, Lahore
- 53 Lasbelaa University of Agriculture, Water & Marine Science, Othal
- 54 University of Veterinary and Animal Sciences, Lahore
- 55 Virtual University of Pakistan, Lahore
- 56 University of Gujrat, Gujrat

B *Private Sector*

- 1 Agha Khan University, Karachi
- 2 Al-Khair University, AJK
- 3 Baqai Medical University, Karachi
- 4 Beaconhouse National University, Lahore
- 5 CECOS University of Information Technology & Emerging Sciences, Peshawar
- 6 City University of Science & Information Technology, Peshawar
- 7 Dadabhoj Institute of Higher Education, Karachi
- 8 Foundation University, Islamabad
- 9 Gandhara University, Peshawar

- 10 Ghulam Ishaq Khan Institute of Engineering Sciences & Technology, Swabi
- 11 Greenwich University, Karachi
- 12 Hajvery University, Lahore
- 13 Hamdard University, Karachi
- 14 Imperial College of Business Studies, Lahore
- 15 Indus Valley School of Art and Architecture, Karachi
- 16 Institute of Business Management, Karachi
- 17 Institute of Business & Technology BIZTEK, Karachi
- 18 Institute of Management Sciences, Lahore
- 19 University of South Asia, Lahore
- 20 Iqra University, Quetta
- 21 Iqra University, Karachi
- 22 Isra University, Hyderabad
- 23 Jinnah University for Women, Karachi
- 24 Karachi Institute of Economics & Technology, Karachi
- 25 KASB (Khadim Ali Shah Bukhari) Institute of Technology, Karachi
- 26 Kinnaird College for Women, Lahore
- 27 Lahore School of Economics, Lahore
- 28 Lahore University of Management Sciences, Lahore
- 29 Mohi-ud-Din Islamic University, AJK
- 30 Mohammad Ali Jinnah University, Karachi
- 31 College of Business Administration & Economics (NCBA&E) Lahore
- 32 National University of Computer and Emerging Sciences, Islamabad
- 33 Newports Institute of Communications and Economics, Karachi
- 34 Northern University, Nowshera Cantonment
- 35 Preston Institute of Management Sciences and Technology, Karachi
- 36 Preston University, Kohat
- 37 Preston University, Karachi
- 38 Qurtaba University of Science and Information Technology, D I Khan
- 39 Riphah International University, Islamabad
- 40 Sarhad University of Science & Information Technology, Peshawar
- 41 Shaheed Zulfikar Ali Bhutto Institute of Science & Technology, Karachi
- 42 Sir Syed University of Engg. & Technology, Karachi
- 43 Textile Institute of Pakistan, Karachi

- 44 University of Central Punjab, Lahore
- 45 University of Faisalabad, Faisalabad
- 46 University of Lahore, Lahore
- 47 Zia-ud-Din Medical University, Karachi
- 48 National Textile University, Faisalabad (Federal Chartered)
- 49 GIFT University, Gujranwala
- 50 The Superior College, Lahore
- 51 The University of Management & Technology, Lahore
- 52 Forman Christian College, Lahore
- 53 Indus Institute of Higher Education, Karachi
- 54 University of East, Hyderabad

Further details via <http://www.hec.gov.pk/htmls/hei/collunilist.htm>

Appendix 10: Databases Currently Available on PERN via the HEC

- 1 American Association of Physics Teachers
- 2 American Chemical Society
- 3 American Institute of Physics
- 4 American Mathematical Society
- 5 American Physical Society
- 6 American Society of Microbiology
- 7 American Society of agricultural engineers
- 8 American Society of Civil Engineering
- 9 American Society of Mechanical Engineering
- 10 Association of Computing Machinery
- 11 Blackwell Synergy
- 12 Bentham Science
- 13 Ebscohost
- 14 Elsevier (Science Direct)
- 15 Institute of Electrical and Electronics Engineers
- 16 ISI Web of Knowledge
- 17 JSTOR
- 18 Mary Ann Liebert
- 19 Nature Publishing
- 20 Optical Society of America
- 21 Oxford University Press
- 22 Palgrave Macmillan
- 23 Royal Society of Chemistry
- 24 Science Online
- 25 Scopus
- 26 Springerlink

Appendix 11: Language Institutes

Australian Cultural Centre

69 G Commercial Area, DHA
Lahore
Pakistan
Tel: +92-42 573 0137
Web: <http://www.accpakistan.com>

British Council, Pakistan

PO Box 1135
(32 Street 19, F-6/2)
Islamabad
Pakistan
Tel: +92-51 111 424 424
Fax: +92-51 111 425 425
Email: info@britishcouncil.org.pk
Web: <http://www.britishcouncil.org/pakistan>

Shahrah-e-Iran

Clifton
Karachi 75600
Pakistan
Tel: +92-21 111 424 424
Fax: +92-21 111 425 425
Email: karima.kara@britishcouncil.org.pk
Contact: Ms Karima Kara, Director: Examination Services
The British Council also has offices in Lahore, Faisalabad, Quetta, Peshawar, Multan

Domino English Language Centre

Fl 3/8-9, Main Rashid Minhas Road
Gulshan-e-Iqbal Block-5
Karachi 75300
Pakistan
Tel: +92-21 481 8381
Fax: +92-21 496 6114
Email: info@dominoenglish.com; dominoenglish@yahoo.co.uk
Web: <http://www.dominoenglish.com/default.asp>

The Linguistic Centre

2-C 1/2. Nazimabad No.2.
Karachi 74600
Pakistan
Tel: +92-21 668 2378
Fax: +92-21 662 3872
Email: info@thelinguisticcentre.com
Web: <http://www.thelinguisticcentre.com/>

Pakistan American Cultural Center

11 Fatima Jinnah Road
Karachi
Pakistan
Tel: +92-21 521 5305
Fax: +92-21 565 3837
Email: info@pacc.edu.pk

Appendix 12: Private English-medium Schools

The two key groups are Beaconhouse and City Schools:

Beaconhouse School System (Head Office)

10/11, Gurumangat Road

Gulberg III

Lahore

Pakistan

Tel: +92-42 111 232 266

Fax: +92-42 576 0254

Email: info@beaconhouse.edu.pk

Web: <http://www.beaconhouse.edu.pk>

86 schools around the country plus 300+ Educators' franchise schools; full details on website.

The City Schools (Head Office)

77/B-1, Sarfaraz Rafiqui Road

Lahore Cantt.

Lahore

Pakistan

Tel: +92-42 667 3561-4

Fax: +92-42 665 3369

Email: csnho9@csn.edu.pk

Web: <http://www.cityschools.edu.pk/>

129 schools around the country plus 'Kehkashan' (Matric focus) schools; full details on website.

Also significant are:

Bloomfield Hall Schools

BH Secretariat

26/C3, Gulberg-3

Lahore

Pakistan

Tel: +92-42 575 9192

Lahore Grammar Schools

55-Main Gulberg

Lahore 54660

Pakistan

Tel: +92-42 572 566

Fax: +92-42 587 7853

E-mail: info@lgs.edu.pk

Web: <http://www.lgs.edu.pk>

A list of other private English-medium schools, with hyperlinks where available, can be found on the International Education website at:

<http://www.internationaleducationmedia.com/pakistan/schools.htm>

International Schools

The International School of Islamabad

via DOS/Administrative Officer
8100 Islamabad Place
Washington DC 20521-8100
USA
Tel (Pakistan): +92-51 443 4950
Fax (Pakistan): +92-51 444 0193
Email: school@isoi.edu.pk
Web: <https://www.edline.net/pages/isoi>

The British Overseas School of Karachi

AL 7/8, 14th Lane, Phase 7
Off Khayaban-e-Hilal
DHA
Karachi
Pakistan
Tel: +92-21 584 5606
Fax: +92-21 584 5606
Email: bos@cyber.net.pk

Appendix 13: The Lahore Book Fair 2005

Report From: Deutsche Welle

Lahore feted the bibliophiles in Pakistan March 3 to 7 (2005) with books and educational products, newly released titles and bestsellers from select Indian, Bangladeshi and Pakistani publishers

The Lahore International Book Festival, with 100 publishers from around the world, was set up at a building, officially titled the Expo Centre, in the Punjab provincial capital's posh cantonment area.

The organizers of the fair which boasted more than 0.1 million books said the five-day mega event drew in nearly 20 to 25 thousand people daily.

Talking at the launch, Punjab Governor Khalid Maqbool said that the fair was the first of its kind in the history of Lahore. 'It's a personal honor to be here,' he said.

Encouraging response

Entry to the fair was free and so people from all walks of life including students, from schools and colleges, men and women, young and old browsed through the stalls lined with book-filled shelves jostling against each other.

With food, snacks, beverages and ice cream parlour to turn the event to a fun outing, on display was a range of books where fiction rubbed shoulder with South Asian history. Textbooks were also available in plenty.

Some publishers organized drawing competitions among children aged four to six. The innovative idea proved a hit and lured more than 2,000 children who were given short story books, color pencil boxes and drawing books as prizes.

People praised the fair as an effort to promote book reading in society.

Positive reactions

Qazi Hussain Ahmed, who heads Jamaat-e-Islami party and an alliance of six religious parties, Muttahida Majlis-e-Amal said that knowledge was of primary importance in the development and character-building of young people.

The exchange of newspapers, books and magazines would give Pakistanis and Indians a better understanding of each other hence it is essential that New Delhi and Islamabad lift the ban on publications, said Dr Gopi Chand Narang, an Urdu writer from India.

Narang heads an Indian writers' delegation which is in Lahore to take part in the book fair. The delegation will also attend International Urdu Conference in Islamabad later this week.

Allowing the exchange of publications would promote people-to-people contact. Books could be a 'source of dialogue' between the two countries, he said.

Prof K Satchidanandan, a Malayalam poet, critic and translator, said that the people of Pakistan and India should urge their governments to cut their defence budget and spend more money on development. He said that writers should help arrange national and international seminars and translate literature from the other side of the border.

Dr Bipan Chandra, the chairman of the National Book Trust of India, said books, newspapers, magazines, radio, television and other communication tools could bring

people closer. Written material was particularly good at depicting the many similarities between Indians and Pakistanis.

Booksellers reported brisk sales.

'We are very impressed by the organisation of the fair and more impressed by the flow of visitors from the public,' exclaimed an Indian publisher.

"Pakistan is a big market for Indian books and there is a great demand for Indian books. This fair provided a great opportunity for us to reach out to book lovers in Pakistan," Federation of Indian Publishers President Anand Bhushan said.

Sadaf Arshad, a journalist, however, complained of prices. 'The books are quite costly. I could have bought some more books had they been cheaper,' she said carrying four or five books she had purchased.

But organizers did have some argument in defence. Najam Sethi, editor of The Friday Times and Daily Times and one of the organizers of the fair, said some visitors to the Lahore book fair had complained that the Indian books were expensive, but added that this was because of the disparity between the Pakistani and Indian rupee.

He said books were not expensive in Pakistan, but most people were poor, making it difficult for them to buy books. 'Otherwise, our books are cheaper compared to many countries in the world including Britain and other European countries.'

Sethi said there weren't that many titles on display at the book fair because of time constraints.

'However, we will double the number of stalls next year and will also invite publishers from Iran, Egypt and the Middle East.'

Pakistan Publishers and Booksellers Association (PPBA) chairman Zubair Saeed said the event would be made a regular feature in Lahore.

Appendix 14: Pakistan English-language Press

Dawn

Haroon House
Dr. Ziauddin Ahmed Road
Karachi 74200
Pakistan
Tel: +92-21 111 444 777
Fax: +92-21 569 3995
Web: <http://www.dawn.com>

The Daily Times

41-N, Industrial Area
Gulberg II
Lahore
Pakistan
Tel: +92-42 587 8614
Fax: +92-42 587 8620
Web: <http://www.dailytimes.com.pk/>

The Nation

NIPCO House
4 Shaarey Fatima Jinnah
Lahore
Pakistan
Tel : +92-42 636 7580
Fax: +92-42 636 7005
Web: <http://www.nation.com.pk>

A full list is to be found at: <http://www.theworldpress.com/press/pakistanpress.htm>

Appendix 15: Other Useful Addresses/Resources and Websites

Ibrahim Publishers

12-13 Lower Ground

Gohar Centre

7-A Wahdat Road

Lahore

Pakistan

Tel: +92-42 585 0100

Publishers of the Educational Guide to Pakistan (annual editions)

Royal Book Company

BG-5 Rex Centre

Fatima Jinnah Road

PO Box 7737

Karachi 75530

Pakistan

Tel: +92-21 565 3418

Email: royalbook@hotmail.com

Web: <http://www.royalbook.org>

Publishers of the Pakistan Almanac (annual editions)

Both titles above available for reference at the PA.

General government information

<http://www.infopak.gov.pk/>

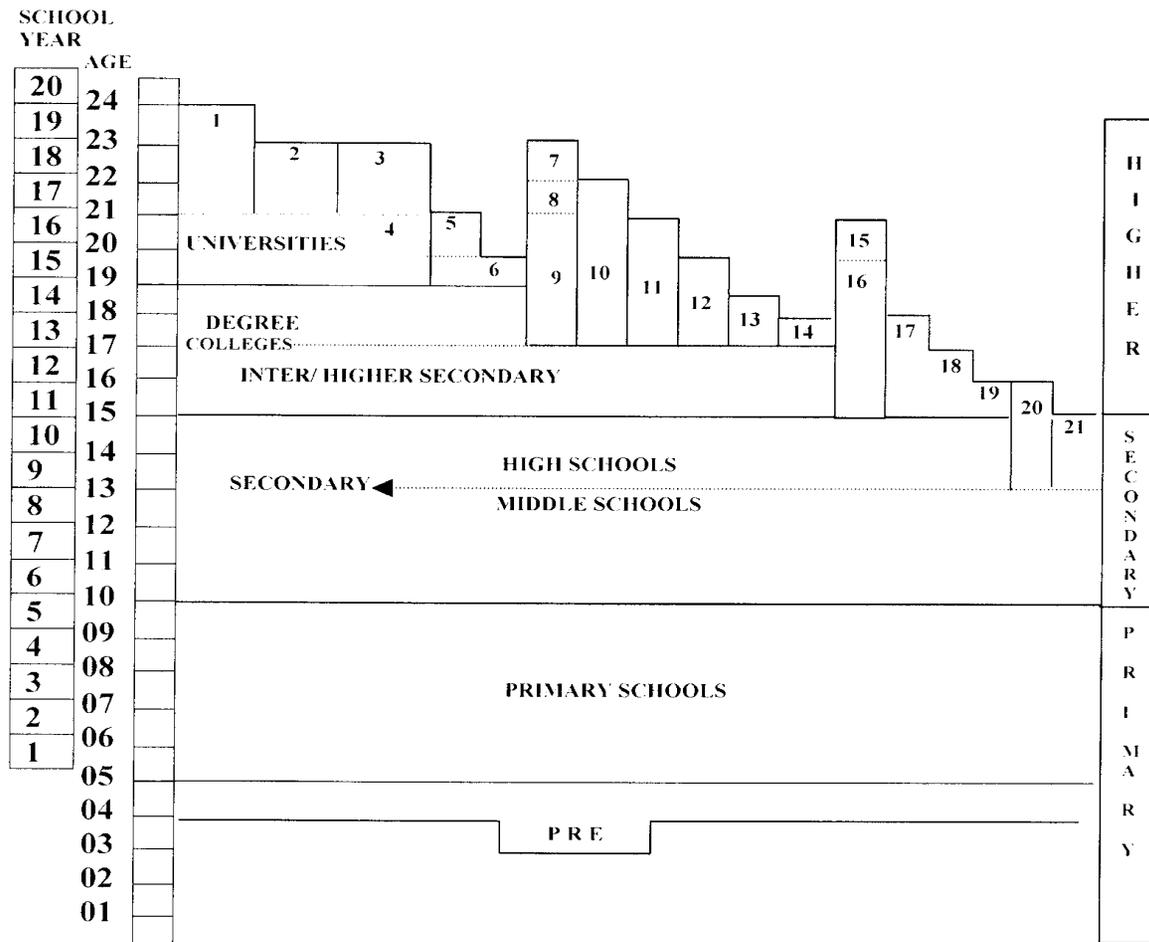
UK FCO Pakistan Country Study

<http://www.fco.gov.uk/servlet/Front?pagename=OpenMarket/Xcelerate/ShowPage&c=Page&cid=1007029394365&a=KCountryProfile&aid=1019041564003>

The US Library of Congress Pakistan Country Study

<http://lcweb2.loc.gov/frd/cs/pktoc.html>

Appendix 16: Education Structure in Pakistan



Key	
1.	Ph.D.
2.	M.Phil.
3.	L.L.M
4.	L.L.B/M.A/M..Sc.
5.	M.Ed.
6.	B.Ed. (14 +1)
7.	Ph.D. (Agri)
8.	M.Sc. (Agri)
9.	B.Sc. (Agri)
10.	M.B.B.S
11.	B.Sc. (Agri)
12.	B.A./B.Sc (Hon)/ B.Ed. (12+3)

Market research
and statistics

THE **PUBLISHERS**
ASSOCIATION

The Publishers Association
29b Montague Street
London
WC1B 5BW

t +44 (0)20 7691 9191
f +44 (0)20 7691 9199
e mail@publishers.org.uk
w www.publishers.org.uk

The Publishers Association Limited is a company limited by
guarantee. Registered in England and Wales number 3282879
Registered office 2 Bloomsbury Street, London WC1B 3ST

200903-01-H