Croatian textbook market situation overview
Market sizes and prices

- Population 4,25 million people
- Avg. Salary 735€ net

- Total market size:
  primary school: 326,000 students
  secondary school: 176,000 students
  Cca. 40,000 students/generation
  Cca. 50 mio €

- Average price of a new textbook package (per student):
  primary school: 112 EUR
  secondary school: 213 EUR
Profil-Klett in data

- Our market share:
  - primary school: 30%
  - secondary school – Gymnasium: 36%
  - secondary school – Berufsschule: 20%

- Number of employees: 85
- 2014 revenue: 13 mil EUR
Croatian reality

- 4 year choosing cycle with publicly promoted 2nd hand and lending schemes
  - Approval from MoE
  - 1st round (10%, top 3) – individual choice
  - 2nd round – committee’s choice

- 3 major publishers dominate the market
Croatian reality

- Badly equipped schools
- Low education of teachers about using e-materials
- Low usage of e-materials

- CARNET project shows promise
  - 150 schools chosen
  - Several subjects of upper primary
Current Socio-democratic government’s slogan: Croatia – Country of Knowledge

• **BUT** – state investment in education remains meager

• Current government’s announced priorities in education:
  - change of primary and secondary school curricula
  - digitalization (switch to a 9 year primary school)

• Elections early in 2016

• Government’s position towards publishing: a very heavily regulated industry (textbook selection process once every four years, textbook prices dictated by the Ministry of Education)
Our next priorities

• Better content providing to achieve enlargement of market share in printed textbook

• Further development of the digital textbooks project and finding monetization possibilities

• Service providing - heavier participation in the teacher-training process (currently, this area is strictly state-sponsored, state-controlled and state-executed)
Thank you for your attention!