

Annual Report

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International
Publishers
Association

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The International Publishers Association (IPA) is an international industry federation representing all aspects of book and journal publishing. Established in 1896, our mission is to promote and protect publishing and to raise awareness

for publishing as a force for economic, cultural and political development. Around the world, IPA actively fights against censorship and promotes copyright, literacy and freedom to publish. IPA is an industry association with a human rights mandate.

Foreword

Dear Colleagues,

It is hard to believe that my time as IPA President is already nearing its end. It has been an honour to serve you over these past four years as we worked to advance the interests of publishers worldwide, to promote copyright and literacy, and to fight censorship and defend the freedom to publish.

This is a time of tremendous transformation for our industry. Advancements in technology have drastically altered the playing field for all members of the publishing ecosystem. The pace, breadth and complexity of the changes we're seeing are significant, challenging, and most importantly exciting. Digital migration has been the trend of the decade, but it has accelerated over this past year. Issues like the Amazon dispute over e-book prices, the HathiTrust v. Authors Guild copyright case, and the increasing number of OA initiatives around the world are posing new questions for publishers in the digital age. During this time of immense change, our role as publishers remains ever important, but increasingly difficult to understand. It is therefore our responsibility to communicate the value of publishers to society.

These changes make it incumbent upon us to adapt, not only as publishers, but also as the IPA. On this front, we are developing a new website that creates a fresh visual identity to bring the IPA into the digital age. We are also undertaking a project to redesign our logo to better express our close ties with the digital world. This year, we conducted our first membership survey, allowing us to gain a deeper understanding of how we can best address the issues that matter to our members. At the heart of all of these changes is a push to communicate the value of publishing, within IPA, to the greater publishing industry, and to the general public.

We are also continuing our efforts to promote copyright, literacy, and freedom to publish around the world. At the London Book Fair in April 2014, we awarded the IPA Freedom to Publish Prize



to Belarusian publisher Ihar Lohvinau. Mr Lohvinau has worked tirelessly to promote works of literature, history, politics and art in Belarusian, a language which is today demonized as the language of dissidents and opponents by the Lukashenko regime. In an act of political censorship, his publishing licence was revoked in October 2013. The IPA will continue to fight for the freedom to publish to support courageous publishers like Mr Lohvinau.

I hope you're all looking forward to the 30th IPA Congress in Bangkok as much as I am. The Publishers Association of Thailand (PUBAT) and IPA are actively preparing a stimulating and engaging program for the congress, which will take place on the 24th – 26th of March, 2015. We hope to see many of you there.

Finally, I'd like to acknowledge the efforts of the many people that make our work at IPA possible. In this time of rapid change, I've received constant support from the dedicated colleagues of the IPA Secretariat based in Geneva, wise members of the Executive Committee from all corners of the world, our experienced Committee Chairs, and our diverse member associations. I'd like to thank all of you for the many hours of tireless work you've put into advancing our meaningful causes. I hope to see many of you in Bangkok, and I look forward to seeing what the future brings for IPA!

Warm regards,

YOUNGSUK 'Y.S.' CHI
President

Disruptive & Destructive Innovation in Bookselling

In 2014 no other issue has grabbed so many headlines as online bookselling, whether of printed or digital books. Around the world publishers are adjusting to the habit of their consumers to buy more and more books via the Internet. At the same time they are adjusting to a new set of behaviours by their business partners, the online booksellers.



Competition authorities in the US and Europe have been looking closely at online book selling. Parliaments, such as the French Assemblée Nationale, have sought to strengthen fixed book price laws to create a level playing field on the Internet. Brick-and-mortar booksellers are rethinking their retail experience and trying to provide the kind of physical services no computer can replace. This summer even the authors, who traditionally don't get involved in their publisher's commercial disputes, and are making ample use of their newly found freedom to self-publish, are weighing in on the debate around Amazon's business practices.

Because much of these issues relate to commercial relationships, IPA can do no more than share information around the globe on how online markets are developing. But when parliaments and competition authorities are weighing up their policy options, publishing industry associations must help policy makers understand their choices as well as the long term interests of society.

To be clear, the move from physical bookselling to online bookselling is disruptive in the best sense of the word: new markets are created, new customers are reached, new technology is allowing the value chain to reinvent itself. A better product is being delivered in more convenient ways to a more satisfied customer. Players emerge, adapt or fade away along the way.

But disruption can turn into destruction when the end product is worse and when it is no longer possible to create the value customers want. Growing numbers of publishers, authors and readers are concerned that Amazon, the dominant marketplace in some countries,

doesn't care enough about books, treating them like any other catalogue product as opposed to recognising their crucial cultural value.

Similar problems arise for educational content in the Open Educational Resource debate. Equal access to educational content, free at the point of consumption, is a globally recognized political objective, and publishers support it. But by supporting policies that in passing destroy the creativity and innovation that a competitive educational marketplace brings, society loses in the end. In education, barely adequate content should not be good enough, and free content has proven to inherently trend in that direction.

It is the role of publishers associations to stand up for our ideal of an open, competitive, online bookselling environment; where authors can publish themselves or partner with the publisher best suited to develop and market them, where consumers have a choice between different retail channels and even ways of consuming content, and where publishers can be assured that the value they add will be compensated by the consumers who benefit from it.

The book industry is right to be wary of Amazon. The firm has its own strategy which is not bound to any third party's survival and its deep pockets mean it can maintain low prices to dissuade competition. But we should also be inspired by Amazon: its customer focus is legendary, its use of customer data skilful, its technology innovative, its strategic approach entrepreneurial.

Policy makers have a responsibility to safeguard a healthy, competitive, online publishing retail environment. They must step in whenever concentration leads to dominance and abuse and when publishers who invest into developing their authors and content can no longer compete, replaced by those who do not. Culture, education, and science benefit most where great books, paper or digital, compete against each other in open markets: books shouldn't have to compete against booksellers.

JENS BAMMEL
Secretary General

About IPA

The International Publishers Association (IPA) is a federation of national, regional and specialist publishers' associations. IPA represents publishers worldwide, promoting and defending publishing as an independent industry based on freedom of expression and the protection of intellectual property. IPA's membership comprises 55 full and associate members, representing 50 countries.

Founded in Paris in 1896, IPA's initial aim was to ensure that countries throughout the world showed respect for copyright and properly implemented the 1886 Berne Convention for the protection of literary and artistic works. In 2014, the promotion and defence of **copyright** remains one of IPA's highest priorities. In Geneva, IPA has observer status at the World Intellectual Property Organization, representing the publishing industry in discussions on copyright and monitoring threats to the intellectual property system. When national copyright reform is undertaken, IPA provides legal advice and lobbying services for member associations. IPA fights piracy by coordinating international enforcement efforts, notably through its Anti-Piracy Working Group.

A key mission for IPA is the promotion and defence of **freedom to publish**, a fundamental aspect of the human right to freedom of expression. IPA monitors cases of violations of freedom of expression and freedom to publish worldwide, supporting authors and publishers who face prosecution or persecution. IPA submits reports on publishers' human rights to the United Nations Human Rights Council. Since 2005, IPA's Freedom to Publish Prize has recognized exceptional examples of publishing courage.

IPA actively promotes the development of **literacy** and **reading** initiatives. IPA initiated World Book and Copyright Day (April 23rd) as well as the World Book Capital programme organised by UNESCO. IPA is a founding partner of the Accessible Books Consortium, coordinated by WIPO and which aims to increase the number of books worldwide in **accessible formats** – such as braille, audio and large print – and to make them available to people who are blind, have low vision or are otherwise print disabled.

Public policy is a key driver of publishing industry change and growth. IPA lobbies for the development of sustainable publishing sectors, particularly in emerging economies, and raises awareness for publishing as an essential force for economic, cultural and political progress. IPA is an accredited non-governmental organisation (NGO) enjoying consultative relations with the United Nations.

As an industry association, IPA has always been a forum for publishers to network, exchange views and conduct business, eg through events such as the IPA Congress and through IPA's Educational Publishers Forum, which brings together primary and secondary education publishers. IPA also promotes the development of global publishing industry standards. It has permanent observer status on the International ISBN Agency Board and is a charter member of EDItEUR.

IPA is administered by a General Assembly; the Executive Committee; the President, and Vice-Presidents; a Treasurer; and the Geneva-based Secretariat.

The **General Assembly** is IPA's governing body, meeting annually at the Frankfurt Book Fair. It consists of Delegates from IPA's Regular Members who are appointed for a term of three years. IPA Associate and Affiliate Members may send non-voting observers to meetings of the General Assembly. The General Assembly defines the general strategy of the Association and elects the Directors serving on the Executive Committee, as well as other unpaid Officers.

The **Executive Committee** is the governing board of our association and manages its activities in between meetings of the General Assembly. The Executive Committee is convened by the President at least twice a year. It is composed of the President, and Directors appointed by the General Assembly. The Statutes ensure that at least two thirds of the Executive Committee Directors are practising publishers, and that all geographic regions are represented.

The **President** of the Association is the official representative of the Association. S/he presides at meetings of the General Assembly and the Executive Committee and is accountable to them. Any Delegate to the General Assembly can stand for the office of President provided s/he is the appointed delegate of a Regular Member, and a practising publisher. IPA's current President is Youngsuk 'Y.S.' Chi (Elsevier, USA). The President is elected by the General Assembly for a period of two years. The General Assembly elects one Vice-President to succeed the current President at the end of his term. For more details, please consult the IPA Statutes.

About IPA (cont)

The **Secretary General** is appointed by the Executive Committee. He is responsible for the administration of the association, and directs the Secretariat. In accordance with the instructions given by the President and/or the Executive Committee, the Secretary General acts as IPA's spokesperson at meetings and in dealings with external organisations. He organises and undertakes the representational and liaison activities necessary for securing support for, and the implementation of, IPA's policies and the achievement and recognition of its objects. IPA's current Secretary General, Jens Bammel, joined IPA in 2003 (for more information, see page 34).

Several **Working Committees** shape and steer the key policy issues of IPA. Current working committees include the Copyright Committee, the Freedom to Publish Committee, the Literacy & Book Industry Policy Committee, the Membership Committee, the Programming Committee for the IPA's Bangkok Congress and the Educational Publishers Forum.

IPA is an accredited non-governmental organisation (NGO) enjoying consultative relations with the United Nations. IPA and industry partners work together through a number of steering groups. IPA is also represented, at times in an observer capacity, on the boards of various sister organisations.

About the President

YOUNGSUK 'YS' CHI was elected

President of the International Publishers Association (IPA) in October 2010 and re-elected for a second two-year term in 2012.

Chi is an internationally recognised leader in the mediatech industry. As Chairman of Elsevier, he works directly with governments, Elsevier customers and in industry associations worldwide, leading the development of information solutions that are transforming the STM industry. In his primary role as Director of Corporate Affairs for Reed Elsevier, he oversees government affairs, corporate communications, corporate responsibility and Asia strategy for Elsevier's parent company. Educated at Princeton University and Columbia University, Chi began his career at American Express and then Ingram Micro. In 1996, he joined Ingram Book Group, where he co-founded Lightning Source, the first provider of print-on-demand and e-book delivery services in the book industry. After serving as President of Random House and Chairman of Random House Asia, Chi joined Elsevier in 2005. He has served on numerous boards, and currently serves on the Executive Committees of the Association of American Publishers and the International Association of Scientific, Technical & Medical Publishers.

The IPA Executive Committee 2013/14

Name	Publishing House	Country
CHI, Youngsuk (YS)	Elsevier	President (USA)
BONNIER Eva	Albert Bonnier Förlag	Sweden
CABANELLAS, Ana María	Heliasta	Argentina
CAVALLERO Riccardo	Mondadori	Italy
CHARKIN, Richard	Bloomsbury	UK
CREMISI, Teresa	Flammarion	France
EL MOALLEM, Ibrahim	Dar El Shorouk	Egypt
FERNÁNDEZ, Daniel	Edhasa	Spain
GHOSH, Asoke	PHI Learning Pvt. Ltd	India
JITTIDECHARAK, Trasvin	Silkworm Books	Thailand
KAUFMANN Joachim	Carlsen	Germany
KOLMAN, Michiel	Elsevier	Netherlands
MURRAY, Brian	HarperCollins	USA
PANSA, Karine	Girassol Brasil Edições	Brazil
SETZER, Hugo	Manual Moderno	Mexico
YAMAMOTO, Norio	Chuo-Keizaisha	Japan
STOCKER, Werner	Dike	Treasurer (Switzerland)

Non-voting Observers (Associate Member Representatives)		
Name	Publishing House/Association Office	Association
SHALABY, Assem	Egyptian Publishers Association	APA (Arab Region)
GIVLER, Peter	President	IFSP (Scholarly Publishers)
DUTILLEUL, Pierre	Editis / President	FEP (Europe)
MARKS, Jayne	Wolters Kluwer Health	STM (Scientific, Technical and Medical Publishers)
FAINGOLA, Boris	Cámara Uruguaya del Libro	GIE (Americas)
KOLAWOLE, Samuel	Nigerian Publishers Association	APNET (Africa)

Chairs of the IPA Working Committees		
Committee	Name	Affiliation
Copyright	GIVLER, Peter	IFSP and AAUP
Educational Publishers Forum	DISKEY, Jay	Association of American Publishers
Freedom to Publish	WALLIN, Ola	Ersatz + Coltsö (Sweden)
Literacy & Book Industry Policy	GÓMEZ, José Manuel	Ediciones Anaya (Spain)
Membership	GIVLER, Peter	IFSP and AAUP (USA)

List of Members

Regular Members		
ARGENTINA	Cámara Argentina del Libro	www.editores.org.ar
AUSTRALIA	Australian Publishers Association Ltd	www.publishers.asn.au
BELGIUM (1)	Association des Editeurs Belges	www.adeb.be
BELGIUM (2)	Flemish Publishers Association Het Huis van het Boek	www.boek.be
BOSNIA AND HERZEGOVINA	Association of Publishers and Booksellers of Bosnia Herzegovina	
BRAZIL (1)	Sindicato Nacional dos Editores de Livros	www.snel.org.br
BRAZIL (2)	Câmara Brasileira do Livro	www.cbl.org.br
CANADA (1)	Association Nationale des Editeurs de Livres	www.anel.qc.ca
CANADA (2)	Association of Canadian Publishers	www.publishers.ca
CANADA (3)	Canadian Publishers' Council	www.pubcouncil.ca
COLOMBIA	Cámara Colombiana del Libro	www.camlibro.com.co
DENMARK	Forlæggerforeningen	www.danishpublishers.dk
EGYPT	Egyptian Publishers Association	www.egyptianpublishers.org
FINLAND	Finnish Book Publishers Association	www.publishers.fi
FRANCE	Syndicat National de l'Edition	www.sne.fr
GEORGIA	Georgian Publishers and Booksellers Association	www.gpba.en
GERMANY	Börsenverein des Deutschen Buchhandels	www.boersenverein.de
GREECE	Hellenic Federation of Publishers and Booksellers	www.poev.gr
HUNGARY	Hungarian Publishers and Booksellers Association	www.mkke.hu
ICELAND	Icelandic Publishers Association	www.bokautgafa.is
INDIA	Federation of Indian Publishers	www.fipindia.org
INDONESIA	Ikatan Penerbit Indonesia	www.ikapi.org
IRELAND	Irish Book Publishers' Association	www.publishingireland.com
ISRAEL	Book Publishers Association of Israel	www.tbpai.co.il/
ITALY	Associazione Italiana Editori	www.aie.it
JAPAN	Japan Book Publishers Association	www.jbpa.or.jp
KENYA	Kenya Publishers Association	www.kenyapublishers.org
KOREA	Korean Publishers Association	www.kpa21.or.kr
LEBANON	Syndicate of Publishers Union of Lebanon	www.publishersunionlb.com
MEXICO	Cámara Nacional de la Industria Editorial	www.caniem.com
NETHERLANDS	Nederlands Uitgeversverbond	www.uitgeversverbond.nl
NEW ZEALAND	Publishers Association of New Zealand	publishers.org.nz
NIGERIA	Nigerian Publishers Association	www.nigerianpublishers.org
NORWAY	Norske Forleggerforening	www.forleggerforeningen.no
PHILIPPINES	Philippine Educational Publishers' Association	
PORTUGAL	Associação Portuguesa de Editores e Livreiros	www.apel.pt
RUSSIA	Russian Publishers Association	www.aski.ru
SERBIA	Publishers and Booksellers Association of Serbia	www.izdavaci.rs
SOUTH AFRICA	Publishers Association of South Africa	www.publishsa.co.za
SPAIN	Federación de Gremios de Editores de España	www.federacioneditores.org

Regular Members		
SRI LANKA	Sri Lanka Book Publishers Association	www.slbpa.com
SWEDEN	Svenska Förläggareföreningen	www.forlaggare.se
SWITZERLAND (1)	Association Suisse des Diffuseurs, Editeurs et Libraires	www.asdel.ch
SWITZERLAND (2)	Schweizerischer Buchhändler und Verleger-Verband	www.swissbooks.ch
THAILAND	Publishers & Booksellers Association of Thailand	www.pubat.or.th
TURKEY	Turkish Publishers Association	www.turkyaybir.org.tr
UKRAINE	Ukrainian Publishers & Booksellers Association	uabooks.info
UNITED ARAB EMIRATES	Emirates Publishers Association	www.epa.org.ae
UNITED KINGDOM	Publishers Association	www.publishers.org.uk
UNITED STATES OF AMERICA	Association of American Publishers	www.publishers.org
VENEZUELA	Cámara Venezolana del Libro	www.cavelibro.org
Affiliate Members		
ARMENIA	National Publishers Association of Armenia	www.bookpublishers.am
SAUDI ARABIA	Saudi Publishers Association	www.saudipublishers.com/
SLOVENIA	Association of Slovenian Publishers	www.gzs.si
TUNISIA	Tunisian Publishers Association	
Associate Members		
APNET	African Publishers Network	www.african-publishers.net
APA	Arab Publishers Association	www.arabpa.org
FEP/FEE	Federation of European Publishers / Fédération des Editeurs Européens	www.fep-fee.eu
GIE	Grupo Ibero-Americano de Editores	
IFSP	International Federation of Scholarly Publishers	www.scholarly-publishing.org
STM	International Association of Scientific, Technical and Medical Publishers	www.stm-assoc.org

New members welcomed in 2013-14

At its last meeting, the IPA General Assembly voted to accept the Tunisian Publishers Association as affiliate member.

IPA Activities, 2013-2014

Copyright

In November 2013, IPA participated in and jointly funded a conference in Lima, Peru entitled “Enhancing the Culture of Reading and Books in the Digital Age: Copyright as a means to foster creativity and access”. IPA President YS Chi and Executive Committee member Ana María Cabanellas spoke about the importance of balanced copyright and on enhancing access to works. IPA’s Policy Director José Borghino discussed the TIGAR project as a model for collaboration between publishers, libraries and the visually impaired.

On 2nd December, Executive Committee members Ana María Cabanellas and Hugo Setzer and IPA Policy Director José Borghino attended the latest meeting of the Grupo Iberoamericano de Editores (GIE), during the Guadalajara International Book Fair. The meeting discussed the digital migration of books, GST/VAT on books, the WIPO Marrakech Treaty for the visually impaired and a number of country-specific issues.

Throughout the year, IPA’s Anti-Piracy Working Group has organised physical meetings (eg at the Frankfurt and London Book Fairs) and teleconferences to discuss emerging piracy concerns. The Group has been involved in coordinating legal action in Germany, Spain, USA and Israel. In January, IPA Policy Director José Borghino set up a new group monitoring copyright in Brazil, which holds monthly teleconferences.

In April 2014, the IPA along with the International Association of Scientific, Technical and Medical Publishers (STM), International Federation of Reproduction Rights Organisations (IFRRO) and former U.S. Register of Copyrights Marybeth Peters submitted an ‘amicus curiae’ brief to the United States Court of Appeals, in connection with the ongoing copyright dispute between the Authors Guild and Google.

The amicus brief argued that a previous ruling that Google’s activities in developing its Google Book Search database were permissible under “fair use” contradicted international copyright obligations arising from the Berne Convention, the WTO Trips Agreement and the WIPO Copyright Treaty and that Google was failing to comply with the “three step test” whereby exceptions to copyright must be limited to (1) certain special cases (2) that do not conflict with the normal exploitation of works and (3) do not unreasonably prejudice the legitimate interests of copyright owners.

IPACC (the International Publishers Association Copyright Coordination Committee) met several times during the year. Bringing together representatives from IPA the International Association of Scientific, Technical and Medical Publishers (STM), the European Publishers Council (EPC), the Federation of European Publishers (FEP) and the European Magazine Media Association (EMMA), IPACC aims for a coordinated response to emerging copyright challenges.

In September 2014, IPA made a submission to Farida Shaheed, Special Rapporteur in the field of cultural rights at the Office of the United Nations High Commissioner for Human Rights (OHCHR), as part of a consultation on the impact of intellectual property regimes on the enjoyment of right to science and culture. The submission stressed that human rights and intellectual property rights are not only compatible, but also mutually supportive and interdependent. IPA plans to participate actively in the debate ahead on this issue, making the point that copyright is based on human rights and justice and that it promotes both access and prosperity.

Freedom to Publish

The IPA Freedom to Publish Prize was a major focus throughout the year, with IPA’s Freedom to Publish Chair Ola Wallin and Policy Director José Borghino devoting considerable effort to raising awareness of the award and to generating nominations from around the world. A formal call for nominations went out on 6th November 2013, and José met with a number of NGOs involved in freedom of expression (PEN International, Index on Censorship, Reporters Sans Frontières, International Federation of Journalists, PEN UK, Article 19) to solicit their support in gathering nominations.

On April 8th, the Prize winner was announced as Ihar Lohvinau, a publisher from Belarus. The Prize was accepted on Mr Lohvinau’s behalf by his daughter Alexandra, during the London Book Fair’s International Publishing Industry Excellence Awards. In June, Mr Lohvinau was honoured at a special ceremony in Vilnius, organised by the Federation of European Publishers with the participation of Šarūnas Birutis, Lithuanian Minister of Culture and IPA Vice-President Richard Charkin.

In Geneva, IPA Policy Director José Borghino attended the Universal Periodic Reviews organized by the UN Human Rights Council, which critically assess states’



The award of the 2014 IPA Freedom to Publish Prize. It was accepted on his behalf by his daughter and co-worker, Alexandra Logvinova, during the London Book Fair. (Image courtesy of Roger Tagholm)

efforts to improve the human rights situations in their countries and to fulfil their human rights obligations.

Concerned about government censorship in Turkey, Ola Wallin made a statement during the IFRRO World Congress in Istanbul condemning the harassment of publishers, translators, writers and journalists and calling for urgent legislative and judicial reform. With the Turkish Publishers Association, IPA organized a press conference in Istanbul on 30th October, drawing attention to the upcoming trials of publisher Irfan Sancı, translator Ismail Yerguz and writer Deniz Zarakolu. Ola subsequently attended the trial of Irfan Sancı and Ismail Yerguz on 17th December.

José Borghino, in consultation with the European Federation of Journalists, PEN International, the Turkish Publishers Association, PEN Turkey and the Journalists Union of Turkey set up the International Committee of Media Freedom in Turkey to monitor attacks on freedom to publish and freedom of expression in Turkey, to publicise these attacks and to intervene where appropriate.

IPA President's activity

IPA President Youngsuk 'YS' Chi has been travelling around the world, promoting and defending the publishing industry. A focus has been on China: in November, he gave a lecture at the Chinese Academy of Sciences Library Meeting about the future of publishing, returning in March for a meeting with the

National People's Congress Education, Science, Culture and Public Health Committee Director, where they discussed the possibility of Beijing International Book Fair becoming an IPA member.

YS made several visits to the Middle East and North Africa, giving the opening speech at the Sharjah International Book Fair in November and meeting Tunisia's Minister of Culture in March. He spoke at a large number of events worldwide, including the PA UK International Conference, the IPA's What Works event and the Publishers Association of New Zealand's International Conference.

IPA and WIPO

IPA Secretary General Jens Bammel organized a WIPO VIP Stakeholder meeting in Geneva on 19th November. He and IPA Policy Director José Borghino participated at the 26th, 27th and 28th meetings of WIPO's Standing Committee on Copyright and Related Rights (SCCR), which took place in December, April and June. At the June meeting, IPA's Communications Director Dougal Thomson moderated an event on e-lending initiatives which coincided with the release of an IPA Special Report on the topic.

Also in June, the IPA, along with the World Blind Union, International Authors Forum and other stakeholders, launched the Accessible Books Consortium (ABC) to increase the number of e-books and digital publications available in braille, audio and large print. The project is being hosted by WIPO, its board chaired by WIPO Director General, Francis Gurry.

Currently, less than 10% of all published books can be read by blind or low vision people, for whom the lack of books is a very real barrier to getting an education and leading an independent, productive life. In August 2014, Elsevier became the first publisher to sign the ABC Charter for Accessible Publishing, which commits publishers to eight measures designed to make books accessible to all.

IPA Secretary General Jens Bammel coordinated a special meeting which took place on July 3rd in Geneva with WIPO Director General Francis Gurry and a number of WIPO Ambassadors, and which was attended by IPA President YS Chi and education publishers from Germany (Frank Thalhofer), UK (Richard Charkin), Brazil (Daniela Manole), Egypt (Ibrahim El Moallem), and South Africa (Brian

IPA Activities, 2013-2014 (cont)



Wafawarowa). The meeting was designed to inform WIPO about the climate for educational publishing, revealing what publishers do and the factors which support quality content, and illustrating how society benefits from publishers' investments and innovations. IPA made the case that capacity building was more important than international treaties in order to improve access for competitive and open markets,

Publishing standards development

In July 2014, the IPA appointed Mark Bide as its special adviser on digital publishing, standards and accessibility strategy. The appointment will strengthen IPA's know-how in the area of standards, metadata and infrastructure development and enable IPA to provide leadership and strategic advice to members. A long-time expert in the application of technology to the management of intellectual property on the Internet, Mark Bide is Chairman of the Publishers Licensing Society. Until March 2014 he was the Executive Director of EDItEUR, the global trade standards organisation for the book and journal supply chains.

In January, the IPA announced its support for the THEMA scheme, a new international subject category standard for books and e-books. A number of IPA members are now actively collaborating on Thema, as publishers become more aware of the power of metadata to improve merchandising, sales and market intelligence.

Visits and meetings

In February, IPA Secretary General Jens Bammel visited Jamaica, giving a speech on Publishing, IP and Digital Migration at a WIPO conference in Kingston and meeting local publishers.

In March, IPA Executive Committee member Trasvin Jittidecharak and Secretary General Jens Bammel visited Saudi Arabia, attending the Riyadh Book Fair and meeting with the Saudi Publishers Association.

In May, Jens Bammel met the International Federation of Library Associations and Institutions (IFLA) to discuss issues affecting both parties: library e-lending, text and data mining and remote access to collections. He also met UNESCO in Paris, discussing the future for the World Book Capital programme.

In July, José Borghino visited IPA's Indonesian member, IKAPI, to advise on government relations, strategic planning, translation grants and the country's Guest of Honour status at the 2015 Frankfurt Book Fair. The same month, José visited IPA's Australian member, APA to advise on the implications of WIPO's Marrakesh Treaty and to discuss an IPA submission to Australian government copyright consultations.

In August, EPF member Catherine Lucet spoke at IFLA's World Library and Information Congress in Lyon, presenting the publisher's perspective.

Report for the International Publishers Association Global Publishing Monitor 2014

Rüdiger Wischenbart, Jennifer Krenn

Introduction: Scope, ambition and methodology of this report

The Global Publishing Monitor aims at mapping international book publishing markets, by countries, in order to track and analyze an industry that is currently undergoing deep structural change.

Globalization, digitization, and structural change within the industry are transforming each of the book business' main sectors: trade (or general public reading), educational publishing and professional (or Science-Technical-Medical, STM).

Mapping and analyzing these developments involves confronting several layers of complexities, notably a lack of standard definitions even for the most generic parameters, such as what kind of publishing should be included and which sectors can be excluded (eg newspapers, magazines, or business and wire services). Furthermore, even the most basic statistical references are available for only a very limited number of countries.

For pragmatic reasons, our research aimed at gathering information from reasonably trustworthy sources (primarily local publishers trade organizations and recognized experts, or media reports quoting such trade statistics), focusing on the following indicators:

- Total market value, at consumers' (or retail) prices;
- Total net revenues of publishers;
- Title production, as the number of new titles and re-editions.

In order to contextualize those indicators, we also broke down the number of new titles per million inhabitants of a country, and looked at its GDP per capita (PPP), as a reasonable basic economic indicator.

This approach allowed us to document for this report a total of 40 countries, for which we could identify at least a reasonably reliable value for either the total book market, or for publishers' net revenues, preferably based on 2013 or 2012 earnings, and not older than 2010.

Among the largest markets – with populations of more than 100 million inhabitants – which we tried to document for this report, a few are missing, notably Nigeria, Bangladesh and the Philippines. Here, our efforts to find market data have thus far been in vain. At a later stage, however, we will develop a scheme for reasonable estimates to frame the size of such markets. For the moment though, we choose to list only those countries where empirical evidence could be found.

The book business, worldwide

Documenting the book business, even with only very generic parameters, such as total market value at consumer (or retail) prices, and publishers' net reve-

nues, at least with some basic statistical indicators, for 40 countries worldwide allows for a complex and informative snapshot of the worldwide industry.

Country	Year	Net revenue/ million€	Market Value/ million€	Change from previous year
United States ⁽¹⁾	2013	19563	27400	0%
China ⁽²⁾	2013	9173	15342	9%
Germany ⁽³⁾	2013		9536	0%
Japan ⁽⁴⁾	2013		5409	-2%
United Kingdom ⁽⁵⁾	2013	4662	3875	0%
France ⁽⁶⁾	2013	2639	4401	-3%
Italy ⁽⁷⁾	2012		3110	-6%
South Korea ⁽⁸⁾	2012		2974	2%

The book business, worldwide

Country	Year	Net revenue/ million€	Market Value/ million€	Change from previous year
Spain ⁽⁹⁾	2013		2708	-10%
Brazil ⁽¹⁰⁾	2013	1645	2239	8%
Canada ⁽¹¹⁾	2013 (est.)	1496	2100	
Turkey	2012	1198	1752	0%
India ⁽¹²⁾	2013 (est.)		1680	
Russia ⁽¹³⁾	2013		1582	-3%
Netherlands ⁽¹⁴⁾	2012		1431	
Australia ⁽¹⁵⁾	2013 (est.)		1373	
Poland ⁽¹⁶⁾	2013	646	1025	0%
Mexico ⁽¹⁷⁾	2012	606		3%
Taiwan ⁽¹⁸⁾	2013		855	-4%
Switzerland ⁽¹⁹⁾	2012 (est.)		828	
Sweden ⁽²⁰⁾	2012	214	783	-4%
Austria ⁽²¹⁾	2013	95	761	
Norway ⁽²²⁾	2013		743	3%
Indonesia ⁽²³⁾	2013	415		16%
Thailand ⁽²⁴⁾	2010	414	528	
Argentina ⁽²⁵⁾	2013	278	477	
South Africa ⁽²⁶⁾	2010	379	464	-4%
Czech Republic ⁽²⁷⁾	2012	328		ca. 5%
Malaysia ⁽²⁸⁾	2012	263		
Colombia ⁽²⁹⁾	2012	254		7%
Finland ⁽³⁰⁾	2013	254		-3%
Denmark ⁽³¹⁾	2013	243		0%
Singapore ⁽³²⁾	2011	230		
New Zealand ⁽³³⁾	2012	73	205	6%
United Arab Emirates ⁽³⁴⁾	2011		200	
Hungary ⁽³⁵⁾	2013		149	
Ukraine ⁽³⁶⁾	2011		108	
Slovenia ⁽³⁷⁾	2013	81	100	-7%
Pakistan ⁽³⁸⁾	2012		89	
Georgia ⁽³⁹⁾	2011		18	

The book business, worldwide

- [1] Data from BISG, BookStats 2013
- [2] Market value: <http://www.gapp.gov.cn/news/1656/223118.shtml>; net revenues: <http://www.gapp.gov.cn/news/1656/223118.shtml>
- [3] Börsenverein, Buch und Buchhandel in Zahlen, 2014.
- [4] Japanese publishers Association
- [5] Compiled from UK PA Statistics Handouts (for "Home physical sales at end consumer prices", www.publishers.org.uk) and The Bookseller's estimate of domestic e-book sales in value (<http://www.thebookseller.com/news/digital-growth-relents-big-five.html>)
- [6] Syndicat national de l'édition
- [7] AIE (www.aie.it)
- [8] Korean Publishers Association
- [9] FGEE, <http://www.federacioneditores.org/> and Javier Celaya, www.dosdoce.com
- [10] www.PublishNews.br and Carlo Carrenho
- [11] Estimate by RWCC, based on data from BookNet Canada, Noah Genner, and earlier Canadian government data
- [12] Confederation of Indian Industry on piracy in India, Nielsen Book Scan, and research by Vinutha Mallya, Linespace, www.mapinpub.com
- [13] Russian Book Industry Magazine, Olga Ro
- [14] Dutch Publishers Association
- [15] Estimate based on figures from Australian publishers' association
- [16] Polish Book Institute
- [17] Caniem, www.caniem.org/archivos/estadistica/Indicadoresbooklet2012.pdf
- [18] Various local sources, compiled by TIBE; Taipeh Book Fair, www.TaipeiBookFair.com, Pao Ping
- [19] Swiss Publishers Association
- [20] Swedish Publishers Association, compiled by Svensk Bokblad, www.sve.se, Tove Leffler
- [21] Austrian Publishers and Booksellers Association, HVB, Inge Kralupper
- [22] Norwegian Publishers Association
- [23] Indonesian Publishers Association
- [24] Publishers and Booksellers Association of Thailand
- [25] Promage Consultancy, Buenos Aires, Fernando Zambra, www.promage.com.ar
- [26] South African Publishers Association, <http://www.publishsa.co.za/about-us/industry-statistics>; Francis Galloway
- [27] Association of Czech Booksellers and Publishers (SČKN)
- [28] Malaysian Book Publishers Association
- [29] Cerlalc. Growth rate from 2010 to 2012
- [30] Finnish Book Publishers Association
- [31] Danish Publishers Association
- [32] PA Market Report Singapore by Peter Schoppert
- [33] PwC report on the New Zealand publishing industry 2014
- [34] Report by Rüdiger Wischenbart and Nasser Jarrous, for Emirati Publishers Association, <http://www.epa.org.ae/>
- [35] Hungarian Publishers & Booksellers Association
- [36] Only Ukrainian language. Book Platform, <http://www.bookplatform.org/>
- [37] estimates by Miha Kovač
- [38] Various local sources, compiled by Ameena Saiyid
- [39] Book Platform, <http://www.bookplatform.org/>

Table 1:

Publishing in (domestic) markets in 40 countries, by total market value and/or publishers' net revenues, in m€, multiple sources (mostly national publishers' associations, if not detailed differently in footnotes). The percentage of positive, or negative, growth has been calculated from local currencies, to avoid exchange rate effects.

Looking at these data, a number of observations can be made. First, it is striking to what extent the size of book markets relates to affluence rather than population size of a country.

Second, in many wealthier countries, the book business has shown mostly negative growth in recent years, while most emerging economies have seen an expansion in the book sector, as emerging middle class populations embrace books and reading for both educational and entertainment purposes.

Third, for countries with strong exports (notably the United Kingdom), net revenues of publishers (which

obviously include income from exports), and domestic market turnover show a different distribution than in most other countries, where the domestic audience largely defines the industry. Also, growing e-book sales, notably in US and UK, also produce new patterns, as e-books facilitate exports, not just to other countries with a native English speaking population, but also to all other territories with a readership that embraces (second language) English reading. These are issues which will require more scrutiny in future reports, as those segments foreseeably will expand.

Title production across countries and continents

As the following table illustrates, the production of titles is distributed very unevenly between countries, in complex patterns, which indicates that only a few are in a position to export their books internationally, thereby taking advantage of globalization (this is

the case notably for the United Kingdom, the United States of America, Spain and Taiwan). Another group of countries is mainly built around strong domestic production, while a third group depends largely on imports from abroad.

COUNTRY	YEAR	NewTitles + re-editions	Change on prev. Year	New titles per million inhabitants	GDPpC(PPP)
United States	2013	304912	-2%	959	\$ 53.143
China	2013	444000	7%	325	\$ 11.904
Germany	2013	93600	3%	1156	\$ 43.332
Japan	2013	77910	-1%	613	\$ 36.315
United Kingdom	2013	184000	8%	2875	\$ 36.209
France	2013	66527	2%	1008	\$ 36.907
Italy	2012	61100	-4%	1002	\$ 34.303
Korea	2012	39767	-10%	795	\$ 33.140
Spain	2013	76434	-3%	1626	\$ 32.103
Brazil	2013	21085	1%	104	\$ 15.034
Turkey	2012	42626	-1%	561	\$ 18.975
Russia	2013	101981	-13%	699	\$ 24.120
Australia	2013	28234	34%	1176	\$ 43.550
Poland	2013	13410	10%	353	\$ 23.275
Mexico	2012	23948	-11%	200	\$ 16.463
Taiwan	2013	42118	0%	1831	\$ 41.581
Austria	2013	6811		757	\$ 44.168
Norway	2013	6373	-14%	1275	\$ 65.461
Indonesia	2013	30000		119	\$ 9.559
Thailand	2010	14000		215	\$ 14.390
Argentina	2013	26387		614	\$ 18.917
South Africa	2010	3653		68	\$ 12.504
Czech Republic	2012	16600	1%	1509	\$ 27.344
Malaysia	2012	19171	7%	639	\$ 23.298
Colombia	2012	10922	3%	229	\$ 12.371
Finland	2013	3965	13%	793	\$ 38.251
New Zealand	2012	2394		479	\$ 34.227
Hungary	2013	9202		920	\$ 22.190
Ukraine (1)	2011	21500		500	\$ 8.788
Slovenia	2013	3661	-36%	1831	\$ 27.915
Pakistan	2012	3500		19	\$ 4.699
Vietnam	2009	24589		273	\$ 5.293
Georgia	2011	7736		1547	\$ 7.165

(1) Only Ukrainian language

Table 2:

Title production: Selected countries, by number of titles per 1 million inhabitants, and GDP per capita, PPP

COUNTRY	YEAR	NewTitles + re-editions	Change on prev. Year	New titles per million inhabitants	GDPpC(PPP)
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Book exports: Re-invented in the digital age

It is noteworthy how some small countries are particularly focused on fostering local title productions, eg Slovenia, Norway, or Georgia, while other countries have a particularly strong vocation for producing more titles, driven by their export potential (e.g. the United Kingdom, Spain and more recently the United States).

Regarding exports, a sales channel that should benefit from globalization and which had shown significant overall growth in the past decade (eg for the United Kingdom, Spain and the United States), there is quite a different evolution today.

Exports from the US are rising – with digital exports growing by 63% (against only 1.4% for print), while the UK and Spain have witnessed a slowdown in their recent exports. While US exports grew by 7.2% in 2012 (against 2011), exports from the UK (-4%) and Spain (-5%) declined.

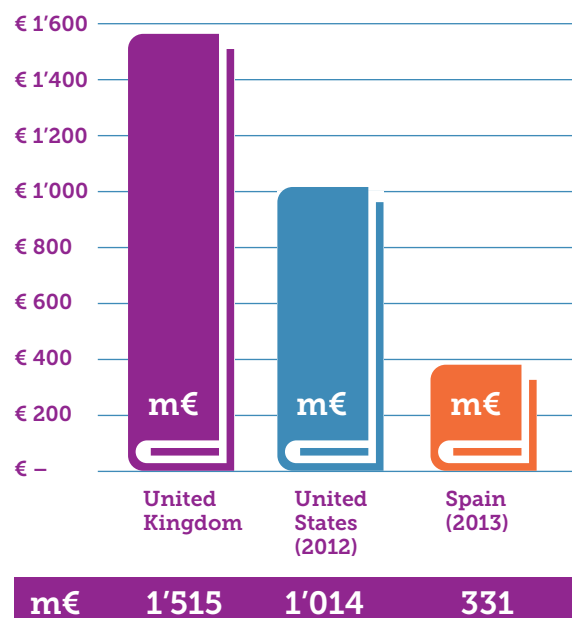


Chart and table 1: Absolute exports from the 3 leading exporting nations.

Emerging Economies: The new engines of the global book business

Book publishing is a sector of growth –at least when it comes to emerging economies. In countries like Brazil, China, Korea, Mexico or Turkey, books, as both

learning and entertainment, are finding an expanding audience among the new global middle classes.

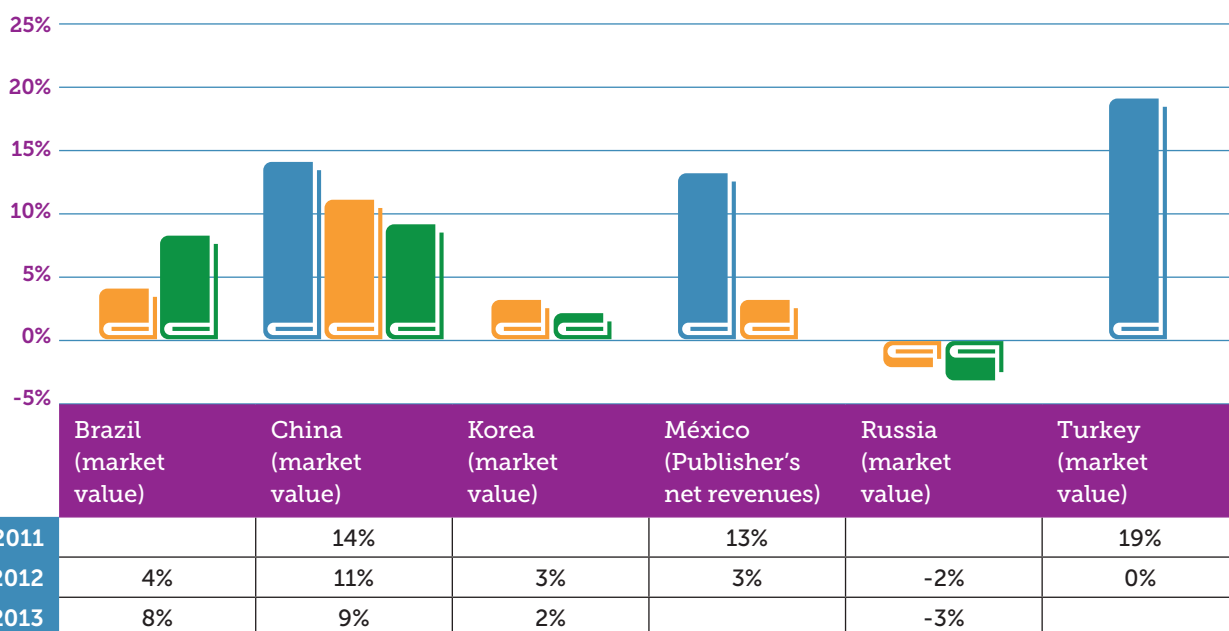


Chart and table 2: Book markets in emerging economies. Various local sources.

Russia is currently the one exception among the BRIC countries which had witnessed strong economic performances over the past decade. It is true that many of the other engines, like Brazil or even Korea,

have lost some of their steam, but the upward movement up is broadening, as examples such as Mexico or Turkey illustrate.

FOCUS: Title production in Latin America

ISBN Registered Titles, 2012-2013

Country	2012**	2013**	Annual variation 2013/2012
Argentina	27.661	27.757	0,3%
Bolivia	1.748	1.200	-31,4%
Brazil	85.360	85.809	0,5%
Chile	5.872	5.961	1,5%
Colombia	14.220	15.811	11,2%
Costa Rica	1.843	1.709	-7,3%
Cuba	3.099	3.199	3,2%
Dominican Republic	1.508	1.385	-8,2%
Ecuador	3.694	3.422	-7,4%
El Salvador	495	627	26,7%
Guatemala	991	1.030	3,9%
Honduras	494	328	-33,6%
Mexico	27.751	29.474	6,2%
Nicaragua	129	328	154,3%
Panama	803	2.783	246,6%
Paraguay	1.169	865	-26,0%
Peru	5.972	6.491	8,7%
Uruguay	1.945	2.216	13,9%
Venezuela	3.635	3.614	-0,6%
Latin America	188.389	194.009	3,0%

Source: El Centro Regional para el Fomento del Libro en América Latina y el Caribe (CERLALC), with information from ISBN National Agencies.

** : Preliminary numbers

Production of new titles does not in itself measure the development of a book market. But it is an indicator of relevant dynamics, and the huge range between increases and declines in title production

across 19 Latin American countries illustrates how differently the ecosystem of books, reading, and domestic versus imported book production is evolving.

Book publishing in the context of publishing and entertainment industries

With an estimated value, at customer prices, of ca. US\$ 151 bn, book publishing is the largest of the publishing and entertainment industries.

bn\$

Movies and Entertainment



\$133

Publishing (Trade +Edu +STM)



\$151

Magazines



\$107

Video games



\$63

Music



\$50

Chart: Publishing and entertainment media, US\$, bn, 2012, various sources per sector.

Conclusions and outlook

Book publishing is at the core of the dynamically evolving global "Knowledge Economy". Yet its evolution is far from easy to understand or predict in a regional or vertical manner.

One critical ambition throughout ongoing change must be to foster the key qualities of cultural production and consumption, such as freedom of expression, cultural diversity in production, broad access for readers, but also an ability for creators – authors –, as well as go-betweeners – publishers, distributors and retailers – to find a legal, economic and cultural context which allows them to participate in sustainable fashion.

The transforming forces of globalization and digitalization have made it clear in recent years that the

future of books and reading, whatever their accidental formats and momentary nature, will be highly complex and diverse. Not one global manifestation of the book, and of reading and learning, is shaping the future, but, quite the opposite; a flurry of different, related, yet nuanced and highly fragmented variants of producing and reading complex forms of content will coexist, and compete for the attention of volatile audiences.

Collecting meaningful data, at various levels of granularity but in a widening scale of local, regional, national and global perspectives will form an essential toolset for influencing the future of books and reading. This Global Publishing Monitor has the ambition to gather such information, put it in context, and link the findings to relevant sources to enable further research.

30th IPA Congress All set for Bangkok!

The 30th IPA Congress, originally scheduled to take place in Bangkok on 25-27 March 2014, will now be held on 24-26 March 2015. The event will be hosted by the Publishers and Booksellers Association of Thailand (PUBAT) thanks to the generous support of the Bangkok Metropolitan Administration. With the political situation in Thailand now peaceful, we are looking forward to a productive and enjoyable week of discussions.



For over a hundred years, the IPA Congress has attracted the world's leading publishers, offering a platform for open discussion of the most important challenges facing the industry. With a wide range of forces disrupting publishing markets, the Congress plays a critical role in educating publishers on emerging threats and opportunities and assisting them to develop sustainable publishing businesses. Bringing the entire publishing value chain together under one roof, the Congress delivers expert guidance into the issues that matter most to publishers: the challenges and opportunities of digitalization, threats to copyright, piracy, STM and educational publishing, etc. The event is designed with one main purpose in mind: to help publishers build profitable businesses.

The 30th IPA Congress will be hosted in the heart of South-East Asia. The dynamic ASEAN region has over 600 million inhabitants and is preparing for full regional economic integration in 2015. The publishing industry there is thriving. As 2013 World Book Capital, Bangkok led an impressive program of events promoting reading and literacy. The Bangkok International Book Fair—held immediately after the Congress—is a high-profile event drawing millions of domestic visitors each year.

Publishing leaders from across Asia will be attending the Congress, which features a rich mix of keynote presentations, expert panel discussions and practical workshops. The speaker line-up includes HRH Princess Maha Chakri Sirindhorn, Indonesian author Ayu Utami, and leaders from HarperCollins, Google, Elsevier, Springer, Flammarion, The World Bank, Pearson, Stanford Law School and many more.

Registration is now open at:

www.ipa2015bangkok.com, with a special early-bird rate until October 31st 2014.

We look forward to seeing you in Thailand!

IPA Working Committees

Copyright Committee

The Copyright Committee provides a key forum for the exchange of information among IPA members and other stakeholders about national copyright legislation, and helps to formulate copyright policy for the association.



The Committee has an active subgroup, the Anti-Piracy Working Group (APWG). The APWG, following on from previous successful prosecutions of the pirate sites library.nu and ifile.it, has identified another large-scale international pirate site for prosecution, has raised the funds for investigation and possible litigation, and has retained outside counsel. Preliminary actions are now underway in Spain, Germany and the USA. Depending on progress, further fund-raising will be required.

A core element of the Committee's work is advising the Secretariat in its representation of publishers' interests at diplomatic conferences and committees of the World Intellectual Property Organization (WIPO). At the heart of the WIPO debates this year was the introduction of international mandatory copyright exceptions for the visually impaired following the adoption in June 2013 of the Marrakech Treaty to Facilitate Access to Published Works for Persons Who Are Blind, Visually Impaired, or Otherwise Print Disabled. IPA has advised members about the implications of the Marrakech Treaty and has disseminated a number of briefings on this.

IPA supports the implementation of the Marrakech Treaty in such a way that gives publishers the option to serve visually impaired readers. The IPA believes that best practice in copyright law allows publishers to make their titles commercially available in accessible formats and to establish a close working relationship with their local Authorised Entities.

IPA insists that stakeholder collaboration remains key to improving access. We are an active member of the Accessible Books Consortium (ABC), the successor of the WIPO Stakeholder Platform. Under the auspices of WIPO and in collaboration with other stakeholders including the World Blind Union, International Authors Forum, International Federation of Library Associations and Institutions (IFLA) and the International Federation of Reproduction Rights Organisations and many others, ABC promotes the international exchange of accessible format copies through a designated network, it provides capacity building in developing countries and it promotes inclusive publishing, i.e. the creation of e-books that are accessible to all from the outset.

As part of this work IPA and other stakeholders have created a Publishers Charter, a document signed by publishers that encourages them to take specific steps to improve accessibility.

The past year has been a difficult year for WIPO. While the re-election of Director General Francis Gurry went relatively smoothly, a number of WIPO committees have found themselves in the unusual situation of being unable to even agree on a formal conclusion of their meetings. The most contentious issues include the role of the "Development Agenda" in WIPO's committee work. Progress has been very slow in the Committee that for more than ten years has been trying to achieve an international instrument on Traditional Knowledge and Expression of Folklore. At the heart of the current discussions at WIPO's Standing Committee on Copyright and Related Rights (SCCR) are the issues of exceptions for libraries and archives, for education and for other persons with disabilities. These issues have been at the heart of IPA's efforts at WIPO this year.

It is our greatest concern that WIPO will embark on an enterprise of regulating international copyright exceptions. The discussions at the WIPO have been slow to progress and the SCCR was unable to agree on any text based instrument (treaty or otherwise) for the benefit of libraries and archives.

IPA is delighted with WIPO's repeated declarations that they are willing to support industry-led initiatives to create and promote global digital markets for copyright protected content.

The IPA's Copyright Committee also oversees the various submissions IPA makes in national copyright reforms. In 2013-14, IPA intervened in copyright consultations in Australia, Ireland, France, Germany, Nigeria, Norway and Saudi Arabia and supported its members in their submission in a number of countries.

About the Chair

PETER GIVLER is Special Advisor to and former Executive Director of the Association of American University Presses and President of the International Federation of Scholarly Publishing. He is Chair of IPA's Copyright and Membership Committees, and of the Programme Committee for the IPA Congress to be held in Bangkok in March, 2015. He is a past Director of the Ohio State University Press. His writings about publishing have been published in, among others, *The Chronicle of Higher Education*, *Library Journal*, and *Academe*.



Chair

Peter Givler, Special Advisor to, and former Executive Director of the Association of American University Presses (AAUP) and President of the International Federation of Scholarly Publishers (IFSP).

Secretariat contact

José Borghino
borghino@internationalpublishers.org

Freedom to Publish Committee

The Freedom to Publish Committee formulates IPA's freedom to publish policy. It also takes a leadership role in the United Nation's Universal Periodical Review process, drafting submissions on the freedom of expression and freedom to publish situation in countries coming up for review by the UPR Working Group of the UN Human Rights Council.

After seven years as Freedom to Publish Committee Chair, Bjørn Smith-Simonsen retired at Frankfurt 2013 to be replaced by Ola Wallin.

The IPA took an active interest in monitoring and reporting freedom to publish issues in many countries in 2013-14, including Belarus, Cambodia, China, France, Saudi Arabia, Tunisia, Turkey and Russia.

Firstly, some good news. We are delighted to report that Turkish writer, publisher and translator Deniz Zarakolu has been released from prison, after spending two and a half years in detention as part of a crack-down against publishers, writers and journalists who were seen to be affiliated to the pro-Kurdish Peace and Democracy Party. The IPA provided support to Deniz and his father Ragip throughout this time, and we are particularly grateful to the efforts of Bjørn Smith-Simonsen and IPA's former Freedom to Publish Director, Alexis Krikorian.

Elsewhere, the IPA issued a statement condemning the 10-year prison sentence handed down by a Chinese court to 73 year-old publisher Yao Wentian, chief editor of Morning Bell Press. The IPA believes that Mr Yao's sentence is politically motivated, due to his publishing of dissident writers.

The IPA condemned the Russian government's introduction of a law seeking to ban the use of obscene language at arts, cultural and entertainment events, and which requires books containing swearing to carry a warning on the cover stating 'Contains obscene language'.

In Turkey, Ola Wallin made a statement in defence of publishing freedom during IFRRO World Congress and the IPA was one of the founding bodies of the new International Committee for Media Freedom in Turkey. The Turkish Publishers Association and IPA jointly denounced Prime Minister Erdoğan's attempt to block his compatriots from accessing Twitter and other social media channels. In December 2013, Ola Wallin attended the Istanbul trial of publisher Irfan Sancı and translator Ismail Yerguz.

An IPA-authored article in The Bookseller attacked Apple for withdrawing a French novel (*La Femme*,

published by Editions des Equateurs) from its online store because of its cover art.

About the Chair

OLA WALLIN is co-founder of Ersatz, a general-interest book publisher in Stockholm.

Ola Wallin founded Ersatz in 1994. He has worked as a freelance editor and designer for Bonniers and Norstedts publishing houses, and is a past Board member of the Nordic Association of Independent Publishers (NOFF).

He was the initiator of De Oberoende, an association of twelve independent publishers, and is a board member of Swedish PEN and the Swedish Publishers Association. Mr Wallin was elected Chair of IPA's Freedom to Publish Committee in 2013.



Chair

Ola Wallin, Ersatz + Coltso, Sweden

Secretariat contact

José Borghino

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IPA Freedom to Publish Prize

A major focus in the last year has been to develop and promote the IPA Freedom to Publish Prize. Created in 2005, it honours an individual or organization that has defended freedom to publish in significant ways — sometimes at the risk to personal safety — and is the only human rights award which explicitly recognizes the contribution of publishers.

At its meeting in Frankfurt in 2013, the Executive Committee decided to expand the number and range of nominations for the Freedom to Publish Prize. To achieve this, IPA worked with key NGOs including Reporters Sans Frontières, International Federation of Journalists, PEN International, PEN UK, Article 19 and Index on Censorship. A call for nominations was issued in November, generating nominations for 23 people or organisations from 18 countries in 6 continents. Reflecting on the large number of nominations, IPA Vice-President Richard Charkin commented that it was “good news for the award, bad news for the world”. After a selection process involving the Freedom to Publish Committee and the Executive Committee, the following shortlist was established:

- Irina Balakhonova (Samokat publishing house, Russia)
- Ihar Lohvinau (Lohvinau Publishing House, Belarus)
- Afghan PEN Centre (Afghanistan)
- Ilbay Kahraman (Ayrinti Publishing House, Turkey)
- Nguyen Vu Binh (writer and human rights campaigner, Vietnam)
- Myay Hmone Lwin (Ngar Doe Sar Pay publishing house, Myanmar)

Ihar Lohvinau was the winner of the Prize, which was accepted on his behalf by his daughter and co-worker, Alexandra Logvinova, during the London Book Fair.



IHAR LOHVINAU received the 2014 IPA Freedom to Publish Prize, in recognition of his achievements in defending freedom of expression in Belarus. Since 2000 he has run Lohvinau Publishing House, printing foreign and local works of literature, history, politics and art, with a focus on work by repressed Belarusian writers. His bookshop in Minsk is a vital hub for the country’s fragile literary community.

In October 2013, Ihar Lohvinau’s publishing licence was withdrawn by Belarus’s Ministry of Information after he printed a book containing a photo of a protester who had been assaulted by police. Having lost his licence to publish in Belarus, Ihar Lohvinau is now compelled to publish in exile, from Lithuania. Withdrawing Lohvinau Publishing House’s licence was a political attempt to stifle a creative and courageous publisher and to silence the voice of freedom in Belarus. Ihar Lohvinau’s story highlights how publishers are at the frontline in the defence of universal human rights. The IPA Freedom to Publish Prize is our opportunity to pay tribute to them.

We are very grateful to the following companies for pledging to sponsor the Freedom to Publish Prize: Albert Bonniers Förlag, Elsevier, HarperCollins, Kodansha, Macmillan, Oxford University Press, Penguin Random House, Simon & Schuster, Springer.

Educational Publishers Forum

The Educational Publishers Forum, organized by the IPA in 2009, brings together professional educational (K-12) publishers from around the world. Its purpose is to share experiences regarding the evolution of learning resources, especially the application of technology and the impact on classroom pedagogy. The Forum has established links with international agencies including the European Commission, OECD, UNESCO, WIPO and the World Bank and aspires to be the leading global Forum for debate about the evolution of effective learning resources.

Education Publishing is a strategic resource for the global knowledge economy. This is true for developed countries but even more important for developing ones. The task of producing high-quality educational resources requires unique skill sets. Education publishers bring together and manage expert teams of authors, curriculum designers, pedagogues, graphic designers, marketers and others to deliver up-to-date materials for students and teachers in a timely and affordable way. This is little understood and often undervalued by governments and educational authorities eager to find populist, technological 'fixes' to promote.

The IPA's Educational Publishers Forum has noted with concern the growing trend of governments intervening in the process of educational resource production and delivery and in 2014 began a process of developing a series of policy documents and responses, which will accentuate the importance of a strong, independent, competitive, local, educational publishing industry for the economic, cultural and social development of nations and regions.

The Forum holds four meetings each year with delegates (and guest speakers) at rotating venues and organizes an annual international education conference. IPA members can each send two delegates to Forum meetings and individual publishers can pay to attend. Representatives from the following countries have participated in IPA-EPF activities:

Australia	Germany	Poland	Thailand
Austria	Iceland	Portugal	Turkey
Belgium	Ireland	Russia	UAE
Canada	Italy	Slovenia	UK
Denmark	Mexico	South Africa	Ukraine
Egypt	Netherlands	Spain	USA
Finland	New Zealand	Sri Lanka	
France	Norway	Sweden	

About the Chair

JAY DISKEY is Executive Director of the Association of American Publishers' Pre K-12 Learning Group. In that role he directs the division's advocacy, public policy development, and operations. Diskey has worked in education policy for more than three decades. Prior to joining AAP in 2006, he served as Communications Director for the U.S. House of Representatives' Committee on Education and the Workforce. Previously he served as Special Assistant to the U.S. Secretary of Education. Jay Diskey has been active in the IPA-EPF since its founding in 2009. He will serve a two-year term, running to April 2016.



Chair

Jay Diskey, Executive Director, PreK-12 Learning Group, Association of American Publishers.

Secretariat contact

José Borghino
borghino@internationalpublishers.org

'What Works? Successful Education Policies, Resources & Technologies'

The IPA organized its second international education conference in conjunction with the London Book Fair, on 10 April 2014.



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Entitled *What Works? Successful Education Policies, Resources & Technologies*, the conference featured top-level speakers, presenting original research and analysing whether the tech solutions being touted today in education actually worked.

Attendees heard from representatives of the World Bank, the OECD and the European Commission as well as from publishers, policy makers and cutting-edge researchers. Speakers considered how best to deliver different kinds of information in a classroom for maximum effect, and teachers talked about what resources they most needed.

Education is a strategic concern for all governments and the interest generated by this conference has encouraged the IPA to put on another international education conference in 2015, again in conjunction with London Book Fair and PA (UK). It will take place on **16 April 2015**.

Speakers at the 'What Works?' conference in 2014 included

- Graham Taylor, past Chair of the Educational Publishers Forum
- Youngsuk 'YS' Chi, IPA President
- Jay Diskey, Association of American Publishers
- Jeffrey Brand, Bond University
- Pablo Zoido, OECD
- Michael Trucano, The World Bank
- Ricardo Ferreira, European Commission
- David Langridge, Microsoft Corp
- Jakob Harder, Danish Ministry of Education
- Keith R. Krueger, Consortium for School Networking
- Sunshik Min, YBM Korea
- Andreas Baer, Bildungsmedien
- Alfons ten Brummelhuis, Kennisnet
- Christina Preston, University of Bedfordshire
- Emrah Özpırınçci, OUP Turkey

Literacy & Book Industry Policy Committee

IPA's Literacy & Book Industry Policy Committee guides the IPA Secretariat on all general industry policy matters, including taxation, fixed book price, import/export restrictions and other policies impacting publishing markets. The Committee also guides specific IPA initiatives to promote literacy and reading, eg the World Book Capital project.

VAT rates

In February 2014, the IPA and PricewaterhouseCoopers published a new global survey on the application of VAT on printed books and e-books. The research covered 51 countries, gathering data on national VAT rates for books and e-books. It revealed that much progress remains for countries to adopt a non-discriminatory, consistent tax regime for printed and e-books.

Among the key findings:

Close to 50% of countries surveyed continue to apply the standard VAT rate to e-books

- VAT rates for printed books are much lower in Latin America (1.94%) than in the EU (7.83%)
- All major publishing markets surveyed (France, Germany, Italy, Spain, UK, Argentina, Brazil) provide for reduced VAT rates or exemptions, at least for printed books
- Argentina, Brazil and France are among the few countries to provide an equal, special VAT treatment for e-books
- Denmark applies the highest VAT rate, a whopping 25% on both print and e-books

Fixed Book Price

In May 2014, the IPA launched the Global Fixed Book Price Report. With the book supply chain under pressure from a number of forces, notably the rise of online retail, there is renewed debate about the merits of fixed book price. IPA neither advocates for or against fixed book price; we are however interested in the effect FBP produces within countries that adopt it. The report contained details of the FBP schemes currently in operation, a history of the development of FBP and sets out the arguments commonly presented for and against FBP. The IPA is grateful to the many member publisher associations who contributed to the report.



E-book lending

In June 2014, the IPA published a special report, [Innovation in E-book Lending](#), which revealed how collaborative models and market-driven solutions are emerging which give publishers enough control to maintain a sustainable business model while guaranteeing excellent access to libraries and readers. The report assessed a number of e-lending models in Europe, North America and Brazil which manage to align the interests of publishers and libraries, based on transparent and reasonable licensing terms. These new approaches to e-book lending promise to be of major benefit in building market demand for e-books, which should lead to increased revenue for publishers, booksellers and authors alike.

Legal deposit schemes

In June, the IPA published a special report on Digital Legal Deposit, revealing how policies and processes are being developed and implemented which allow digital content, whether in the form of e-books, journals, blogs or website content, to be collected and archived. It analysed schemes in Germany, the Netherlands, the UK, France and Italy, as well as detailing the approaches of Japan, China, Brazil, the United States, Australia and Canada.

In light of the different national experiences with digital legal deposit, IPA's recommendations for countries setting up such a scheme are as follows:

- The more voluntary a digital legal deposit scheme is at the outset, the better

- Emphasis must be put on publishers and librarians collaborating to address copyright protection, digital security and monitored access
- There needs to be a clear structure for mediation and arbitration, and an ability to deal with different publishers, types of publications and business models differently
- Schemes need to be properly funded

World Book and Copyright Day 2014

Since 1995, the 23rd of April has been designated by UNESCO as World Book and Copyright Day, celebrating books, authors, illustrators and reading. The IPA published a report on April 23rd, explaining the different traditions associated with World Book Day, which is also celebrated in some countries on March 6th

World Book Capital

In June, the IPA, along with the International Booksellers Federation, the International Federation of Library Associations & Institutions and UNESCO, awarded the title of World Book Capital 2016 to Wrocław, in Poland. The Wrocław bid impressed through its focus on grass-roots community reading initiatives, as well as its wide-ranging support of book publishing.

The World Book Capital title is bestowed to a city in recognition of the quality of its programs to promote books and reading and the dedication of all players in the book industry. The nominating committee gives particular importance to the following criteria:

- the degree of participation of all levels (from the municipal to the international level)
- the programme's potential impact
- the scope and quality of the activities proposed by the candidates, and the extent to which they involve writers, publishers, booksellers and libraries
- any other projects promoting books and reading
- the extent to which the programme respects the principles of freedom of expression

Member associations interested in submitting a World Book Capital application are encouraged to ask for guidance from IPA.

About the Chair

JOSÉ-MANUEL GÓMEZ started his career within the publishing sector as a bookseller in Madrid. Later, he joined John Wiley in London and New York, and then Hermann Editeurs in Paris. In 1975, he joined Ediciones Anaya, getting involved in the creation and acquisition of the publishing companies that later became Grupo Anaya. He has been its Chairman & CEO since 1998. He is a member of the International Executive Committee of Hachette Livre and Chair of the IPA Literacy & Book Policy Committee. Among other prizes and recognitions, he has been honoured with several civil awards and Order Decorations from Argentina, Brazil, Colombia, France, and Spain.



Chair

José Manuel Gomez, Grupo Anaya, Spain.

Secretariat contact

Dougal Thomson
thomson@internationalpublishers.org

International Publishing Standards Development and Governance Committee

Publishing, in particular digital publishing, requires a range of special, open, interoperable and widely-adopted standards. A range of organisations manage existing standards for book distribution and develop new standards for the digital environment. IPA is a charter member of EDItEUR, has a statutory non-voting seat on the board of the International ISBN Agency, and is a coalition partner of the Linked Content Coalition, a cross media initiative for a global cross media licensing framework.

In January 2014, IPA announced its support of Thema, the new international subject category standard for books and e-books. In July 2014 the IPA appointed **Mark Bide** as its special adviser on digital publishing, standards and accessibility strategy.

Secretariat contact

Jens Bammel bammel@internationalpublishers.org



Membership Committee

All decisions regarding IPA membership are made by the Annual General Meeting. However, the Membership Committee is tasked by the Executive Committee to prepare such decisions and to guide interested publishers associations through the application process. The Committee examines the membership applications of publishers associations, and may make recommendations to the AGM to allow affiliate members into full membership and the suspension and termination of association membership.

Chair

Peter Givler, Special Advisor to, and former Executive Director of the Association of American University Presses (AAUP) and President of the International Federation of Scholarly Publishers (IFSP).

Secretariat contact

Jens Bammel bammel@internationalpublishers.org

Collaboration with other international NGOs

IPA maintains good working relationships with a variety of organisations that share common values or seek to campaign about common causes.

IPA represents publishers on the board of the **International Federation of Reproduction Rights Organisations (IFRRO)** through the substitute board membership of IPA Executive Committee member Ana Maria Cabanellas. IPA coordinates the publisher coordination group that meets during the IFRRO World Congress, which among other things also works with the creator organisations represented at IFRRO. IPA is also involved in many of IFRRO's task forces and working groups including the Legal Issues Forum, membership committee, and various regional development groups. A current focus is the development of global strategic messages in support of copyright and intellectual property.

IPA and the **International Federation of Library Associations (IFLA)** share concerns, but not always positions on matters pertaining to publisher-library relations. IPA's Secretary General Jens Bammel has regular meetings and phone conferences with IFLA, discussing issues affecting both parties such as library e-lending, text and data mining and remote access to collections.

Through the WIPO Stakeholder Platform, IPA works with stakeholders representing the disability community, including **World Blind Union (WBU)**, the **DAISY Consortium** and others. In June 2014, the IPA, WBU, International Authors Forum and other partners launched the **Accessible Books Consortium (ABC)** to increase the number of e-books and digital publications available in braille, audio and large print.

IPA is one of the founding members of the **International Publishers Association Copyright Coordination Committee (IPACC)**. Other members are the International Association of Scientific, Technical and Medical Publishers (STM), the European Publishers Council (EPC), the Federation of European Publishers (FEP), and more recently the European Magazine Media Association (EMMA).

IPA and **PEN International** cooperate closely on multiple projects promoting freedom of expression and freedom to publish. IPA similarly partners with the **World Association of Newspapers (WAN-IFRA)** on human rights projects. In June 2004, IPA joined the **International Freedom of Expression Exchange (IFEX)**. In 2014, the IPA, along with the European Federation of Journalists, PEN International, the Turkish Publishers Association, PEN Turkey and the Journalists Union of Turkey set up the **International Committee for Media Freedom in Turkey** to monitor attacks on freedom to publish and freedom of expression.

The IPA sits on the selection committee for the World Book Capital City, along with representatives of the **International Booksellers Federation (IBF)**, the **International Federation of Library Associations and Institutions (IFLA)**, and **UNESCO**.

IPA is a Charter member of **EDiTEUR**, has a statutory non-voting seat on the board of the International **ISBN Agency**, and is a Coalition Partner of the **Linked Content Coalition**, a cross media initiative for a global cross media licensing framework.

IPA attends meetings of the **Grupo Iberoamericano de Editores**, the federation of publishers' associations from Latin America and the Iberian peninsula.



IPA Communications

Delivering more value, helping more publishers

In October 2013, IPA created a new role at the Geneva secretariat by employing a Communications and Programmes Director, Dougal Thomson. Here, Dougal explains where his efforts have been focused so far, and what projects lie ahead for 2015.

In my first year at IPA I've learnt a lot, and through your support we have been able to do a lot. Excitingly, we now have communication tools in place which will allow us to do much more.

IPA's Executive Committee and national publisher associations provided insight and guidance on ways to improve IPA's communications with members, stakeholders and the wider public. At the start of 2014 IPA conducted a survey with key stakeholder groups, designed to learn about their perception and experiences with IPA, to understand the issues affecting them and how the IPA could deliver most value.

Our communications strategy developed out of these consultations and is based around some key ideas: IPA can help members and the wider publishing community by identifying and explaining the changes impacting the industry (threats, opportunities, policies etc). Our communications should help publishers adapt, and build sustainable businesses. We can use it to fight for, and defend publishers' interests.

By producing content in different forms (special reports, market data, interviews, breaking news etc) and by making smart use of the different channels

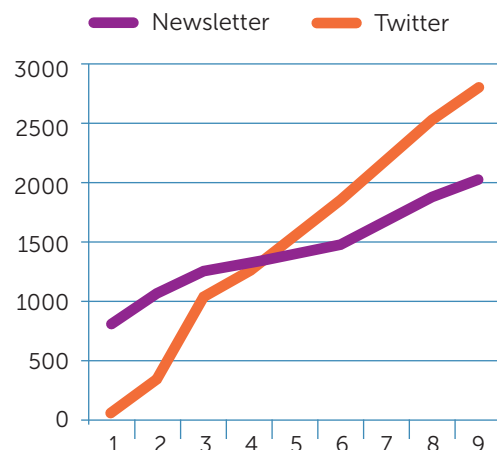
available, we can disseminating content as widely and quickly as possible. In doing so, we can serve IPA members, develop the IPA's reputation and reach, and build for the future.

Our communications have different audiences in mind. Member associations are the top priority: everything is designed to be relevant to them. We also want our content to go directly to publishers who might otherwise not hear from IPA. We want it to go to a wider, book industry ecosystem which includes trade media, bloggers, tech firms and suppliers. We also want to talk directly to young publishers and people aspiring to work in the industry.

And we're using a number of tools to do this. Our regular special reports are designed to be easily-digestible, information-rich guides to critical issues. Our website (a brand new version will be launched in October) is designed to be a valuable repository for content. Our monthly e-newsletter allows us to share market insight from around the world. Our social media channels let us get messages quickly to publishers; they're also our main vehicle for listening to and engaging with them.

Newsletter and Twitter subscribers, Nov 2013 – Sept 2014

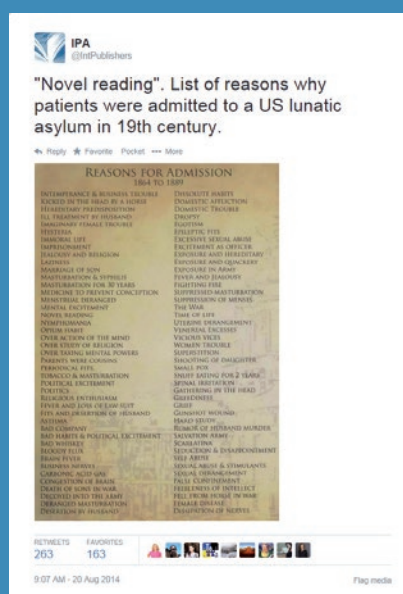
The growth in our "reach" which you see in the graph has been possible because of the effort invested into building a Global Publishers Database, which now contains details of over 6,000 publishers in over 100 countries. We will start to exploit it properly in 2015. One plan is to run surveys which generate market sentiment data across regions. This database will also allow us to promote and drive attendance to IPA events, build awareness of IPA activities, and to connect and engage with publishers around the world. We will be able to achieve a lot with this valuable resource.



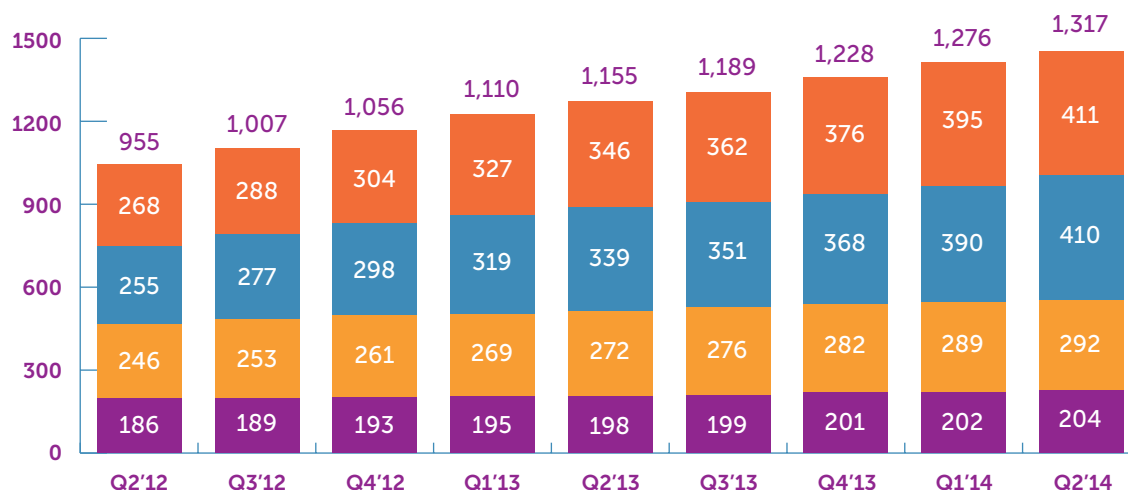
During the last year we have launched dedicated IPA Facebook, Twitter, LinkedIn and Youtube channels. These allow us to disseminate publishing industry news, IPA commentary and market data quickly to large groups. It's clear that publishers of all nationalities (and all ages – people over 55 are the fastest growing group on Facebook) are embracing social media, and IPA will make full use of it as an engagement tool. In 2015, we will launch a Google+ page to complement existing social media channels. If you're active on social media and are not already following IPA, please do so!

The IPA has used its current logo, a globe with an open book, for fifty years. We are conscious that a logo, as part of a wider portfolio of branding elements, plays a crucial role in establishing and reinforcing an association's identity and mission. We also understand that in 2014, IPA has a vital role to play in helping publishers and publisher associations embrace the challenges of digitalization. With this in mind, we are currently developing a new visual identity which recognizes and embraces publishing's digital reality and which will manifest itself in a new IPA logo, colour scheme and website, to be revealed in October after a final design has been adopted at the IPA General Assembly in Frankfurt.

IPA's twitter account mainly sends out breaking industry news, but occasionally we diversify. Our most impactful tweet was this, which was retweeted 263 times, gaining us many new followers.



Rest of World Asia Europe US & Canada



The IPA Secretariat

Jens Bammel, Secretary General



Jens Bammel became Secretary General of the International Publishers Association in September 2003.

He studied law in Berlin, Geneva and Heidelberg. Following two years of legal training in Germany,

France and Indonesia he worked in the United Kingdom, joining the Periodical Publishers Association in 1997 as Head of Legal Affairs, then Head of Legal and Public Affairs. In June 1998, Jens was appointed Chief Executive of the Publishers Licensing Society Ltd., the organisation that represents UK publisher interests in collective reprographic licensing in the UK. He is a member of the boards of the publishing standards body EDItEUR and the International ISBN Agency. He is married with one child.

Dougal Thomson, Director of Communications and Programmes



Dougal Thomson joined IPA as the new Director of Communications and Programmes in October 2013.

Dougal spent the last six years at The Economist Group. As Head of Programmes for The

Economist Events, he ran an editorial team delivering a wide range of products on issues including global trade, energy, healthcare, technology and the environment. He was also a contributing editor at www.management-thinking.org website, blogging on a range of trade and development issues. Dougal has worked in media and publishing since 2000. Prior to joining The Economist he worked for the research firm Datamonitor, and was previously Head of Content for business publisher SPG Media. Dougal's academic background includes a BA Hons in English Literature from Trinity College Dublin and a Masters in Theatre Studies from Université Sorbonne Nouvelle Paris 3.

José Borghino, Policy Director



José Borghino was appointed to the newly created position of Policy Director in March 2013.

José came to the IPA from the Australian Publishers Association where he served as Manager of Industry

Representation. His previous professional roles include lecturer in journalism and creative industries at the University of Sydney, editor of the online news magazine NewMatilda.com, executive director of the Australian Society of Authors, and senior positions at the Literature Board of the Australia Council. In the newly created position, José's responsibilities include enriching IPA's lobbying activities towards international organisations and NGOs, as well as consulting and communicating with publishing industry representatives around the world about those lobbying campaigns; managing and developing the IPA's activities promoting educational publishing, including the IPA Educational Publishers Forum; and advising member associations on national policy issues and effective communications strategies.

Joanna A. Bazan Babczonek, Office and Project Manager

Joanna joined the IPA Secretariat in December 2007. She ensures the smooth running of the office, coordinates projects and helps to channel communications to her colleagues.



Recently, she has also been in charge of the World Book Capital project. Having initially trained in the hospitality industry services and worked as a French teacher, she graduated in Political Science from the

University of Geneva. Joanna is married with one child.

IPA Meetings: 2014 Frankfurt Book Fair

Tuesday, 7 October 2014		
18:00 – 20:00	"Club Voltaire Sessions"*	Braubachstrasse 16, Börsenverein's Building, "Leipzig" room
Wednesday, 8 October 2014		
Hall 8.1 Room "Symmetrie 2"		
09:00 – 10:00	IPA Literacy and Book Policy Committee	Hall 8.1 Room "Symmetrie 2"
10:00 – 12:00	IPA Copyright Committee	Hall 8.1 Room "Symmetrie 2"
12:00 – 13:00	IPA Anti-Piracy Working Group*	Hall 8.1 Room "Symmetrie 2"
13:00 – 15:00	IPA Freedom to Publish Committee	Hall 8.1 Room "Symmetrie 2"
15:00 – 18:00	IPA Executive Committee*	Hall 8.1 Room "Symmetrie 2"
Thursday, 9 October 2014		
09:30 – 12:00	IPA General Assembly	Hall 8.1 Room "Symmetrie 2"
12:30 – 13:30	Bangkok Congress Organizing Committee meeting*	Hall 8.1 Room "Symmetrie 1"
12:00 – 13:00	Global Book Monitor 2014: Publishing trends and statistics	Hall 4.0 Room "Dimension"
17:00 – 18:00	Reception promoting the 30th IPA Congress in 2015 in Bangkok	Hall 5.0 Stand D26
Friday, 10 October 2014		
08:00 – 10:00	UK PA, AAP and IPA Anti-Piracy Breakfast	Room "Illusion 3" on C3 of the Congress Centre
10:30 – 12:30	IPA Educational Publishers Forum Open Meeting	Room "Illusion 3" on C3 of the Congress Centre
Saturday, 11 October 2014		
10:00 – 11:30	Meeting of National Collective Stands Directors	Hall 3.C West, Room "Argument"

*open to members of the group only



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