



international
publishers
association

The
International
Sustainable
Publishing and
Industry
Resilience
Plan:

**A COLLECTIVE
COMMITMENT TO
A SUSTAINABLE,
RESILIENT, AND
INCLUSIVE FUTURE**



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FOREWORD

The pandemic is likely to go down as one of the most challenging moments in the history of global publishing. The industry faced down and overcame a barrage of challenges from lockdowns, hobbled supply chains, abrupt digital transformations and printing delays to cancelations of physical industry events, and more. Through ambitious agendas like the International Sustainable Publishing and Industry Resilience (InSPIRe) initiative, global publishing weathered these setbacks and channeled renewed industry solidarity into engaging in critical, long-overdue industry conversations to emerge even stronger.

However, the recovery of global publishing has not been equally distributed. While some publishing markets have fully recovered, some of our colleagues are still struggling. The risk we face now is an uneven, multi-track recovery which produces publishing haves and have-nots. Many of our colleagues, including authors, illustrators, printers, distributors, booksellers, libraries, and retailers, are still deeply affected by the pandemic. They continue to need support and initiatives like InSPIRe that allow them to find community and assistance.

With the second anniversary of the pandemic passing, I am happy to have engaged with over 150 senior international publishing leaders in this time of uncertainty. I have had many enriching conversations on where global publishing stands now and the progress we have made through InSPIRe. Through these conversations I have become even more optimistic about the future of publishing, but I have also

realized how much more we have to do on critical issues like copyright, freedom to publish, global climate change, diversity and inclusion, and upskilling the publishing workforce.

I would like to thank all those who contributed including members of the InSPIRe Taskforce, signatories to the InSPIRe Charter, and participants in the InSPIRe consultations. On behalf of the InSPIRe Taskforce, we look forward to continuing our dialogue and working across the publishing ecosystem to ensure a sustainable, resilient, and inclusive global publishing recovery.



Bodour Al Qasimi
President,
International Publishers Association

HOW WE GOT HERE: THE INSPIRATION BEHIND InSPIRe

When Covid-19 was declared a pandemic on March 11, 2020, the trajectory of global publishing was fundamentally altered. The pandemic pushed the publishing industry into survival mode, and the industry's subsequent multi-track recovery has resulted in a rethink on what the future holds for publishing. The first few weeks of March 2020 set the stage for two years of industry introspection.

In the first week of March, The London Book Fair and The Paris Book Fair were canceled, with several other major publishing industry events following suit in the subsequent weeks. On March 13th, the International Publishers Association (IPA) had to come to grips with a stark reality — the International Publishers Congress scheduled for May 2020 would need to be canceled.

Within days the IPA took action by publishing an online compendium offering support to members in lobbying for government assistance. Throughout April and May the IPA built publishing ecosystem solidarity through partnerships with international organizations, like the World Health Organization, UNICEF, and UNESCO, focused on connecting authors, teachers, and readers in response to remote schooling, movement restrictions, and lockdowns. To pilot how publishtech and edtech could help the more than 250 million children in Africa who were out of school as a result of the pandemic, the IPA and Dubai Cares' Africa Publishing Innovation Fund offered grants to innovative programs that enabled children to continue their studies and access books.



Tariq Al Gurg,
Chief Executive Officer,
Dubai Cares

In rural communities, the lack of internet connectivity, library facilities, and significant urban-rural digital divides have left students unable to attend remote learning. Girls, in particular, have been affected more by closures since they are often expected to take on childcare responsibilities and household chores. In addressing these challenges through publishing innovation, the African Publishing Innovation Fund is helping to prevent the loss of a generation of young people who lack critical literacy, livelihood, and life skills.



Starting in June 2020, the IPA kicked off a series of webinars and member engagement events that began to survey the damage on the frontlines of global publishing. The IPA interviewed senior global publishing executives to understand how the pandemic was affecting the broader publishing ecosystem. This engagement culminated in the Moscow Call for Action which reasserted the value of publishing globally and reiterated calls for government assistance from the publishing ecosystem.

Based on the findings from frontline member and ecosystem conversations, the IPA released its landmark report, [*From Response to Recovery: The Impact of Covid-19 on the Global Publishing Industry*](#), in November 2020. This study, which involved interviews with publishing executives in more than 30 countries — accounting for 70% of global publishing sales and 3 billion readers, was one of global publishing's first primary research attempts to understand the impact of the pandemic on publishers. The report called for a dedicated initiative to support global publishing recovery to be stewarded by IPA — a call subsequently heeded through the creation of the InSPIRe Initiative.

The *From Response to Recovery* research found several examples of publishing stakeholders — including value chain players which are sometimes at odds with each other — coming together to keep books in the hands of readers. Most importantly,

the data provided evidence that markets in which publishers, booksellers, libraries, teachers, tech companies, regulators, and other publishing stakeholders came together exhibited more resilience and made faster recoveries. This increased level of industry solidarity was also echoed in the IPA's extensive on-the-ground member engagement and needs assessment tours conducted in early 2021.



Marisol Schulz Manaut,
Guadalajara International Book Fair

There are many independent, small publishing houses which are really struggling to survive in Mexico. The only way they can survive is for the industry to come together.

In February 2021, the IPA acted on the recommendation from the *From Response to Recovery* study to establish an IPA-led industry initiative called the InSPIRe Initiative, to support global publishing recovery. The InSPIRe Initiative, led by the newly elected President of the IPA, Bodour Al Qasimi, was implemented to continue fostering industry solidarity and channel it towards developing a roadmap for global publishing recovery. It also inspired the creation of an online training platform called the [IPA Academy](#), to support members in digital transformation and in developing new leadership and management skills to capitalize on post-pandemic opportunities.



Ahmed Al Ameri,
Chairman,
Sharjah Book Authority

The IPA Academy is a gamechanger for the global publishing industry. As an entity dedicated to promoting knowledge and learning and boosting growth and opportunities for publishers, the Sharjah Book Authority is honored to partner with the IPA in helping co-create forward-thinking solutions to the challenges facing the publishing industry.

One of the first achievements of InSPIRe was the [InSPIRe Charter](#) which was signed by more than 50 publishing ecosystem stakeholders when it was launched in September 2021. By signing the charter, signatories from across the publishing ecosystem – including publishers, booksellers, authors, educators, bookfairs, international reading and literacy organizations, and free expression groups – agreed to continue cooperating on supporting publishing's post-Covid recovery. Stakeholder consultations for the Charter also led to a second IPA report [on the impact of the pandemic](#) on global publishing released at Frankfurt Book Fair in October 2021.



Lawrence Njagi,
Chair,
Kenya Publishers Association

Working together has always been critical in the publishing industry, but it is even more important today that we stick together, plan together, and think together. The pandemic has taught us one major lesson — that, East, West, North, South — we are all the same, and the global pandemic affects us all. We need to come together to face these challenges. The InSPIRe Charter has been critically important in making the publishing ecosystem collaborate to turn common challenges into opportunities.



IPA MEMBER PANDEMIC SUPPORT TIMELINE

March 11, 2020: World Health Organization declares Covid-19 a Pandemic

March 26, 2020: The IPA [mobilizes its members](#) to develop a global compendium of government support and member support resources

March 30, 2020: The IPA publishes a [compendium](#) to support members in lobbying for industry assistance from national governments and exchanging [industry response best practices](#)

April 1, 2020: The IPA President issues a [video message](#) of industry solidarity

April 2, 2020: The IPA, World Health Organization, and UNICEF partner on [Read the World](#) in which children's book authors read their works online to reach children and families in lockdown

April 3, 2020: The IPA joins UNESCO's [#LearningNeverStops](#) coalition

April 22, 2020: On World Book Day, the IPA leads a [global appeal](#) for governments to include publishing in industry stimulus packages and pandemic recovery strategies

April 27, 2020: On World Intellectual Property Day, the IPA [issues a statement](#) articulating the importance of copyright as schools and businesses moved online and digital piracy surged

April 30, 2020: The IPA and Dubai Cares' [Africa Publishing Innovation Fund](#) offers grants for edtech solutions that enable out-of-school children to continue their studies and access books

June – August 2020: The IPA kicks off a [series of webinars](#) to discuss the impact of the global pandemic on publishing and provide member support and community

September 3, 2020: The IPA issues a [Call for Action](#) reasserting the value of publishing and reiterating calls for government assistance for the publishing industry

A key finding from the industry discussions for the InSPIRe Charter was just how much uncertainty still existed in global publishing. Many of the core questions being pondered by the publishing ecosystem about how the pandemic might shape the industry's future remained unanswered. A recommendation was made to host an ecosystem-wide symposium in early 2022 to further explore these industry uncertainties. In response, the InSPIRe taskforce convened the InSPIRe Symposium in February 2022.

In the lead up to the InSPIRe Symposium, five working groups, comprised of more than 50 participants from across the publishing value chain, were formed around the priority themes of copyright, freedom to publish, sustainability, diversity and inclusion, and publishingtech. The working groups were led by chairs who sought consensus on opportunities and challenges for each of the five priority themes.

November 23, 2020: IPA releases its landmark report [*From Response to Recovery: The Impact of Covid-19 on the Global Publishing Industry*](#) recommending a dedicated initiative to support global publishing recovery to be headed by the IPA's President which became the InSPIRe Initiative

January – February 2021: IPA President Bodour Al Qasimi conducts several member engagement and needs assessment tours

February 2021: The IPA adopts the [*International Sustainable Publishing and Industry Resilience \(InSPIRe\)*](#) Initiative to develop a roadmap for global publishing recovery and an online training platform called the IPA Academy to support members in digital transformation

February 2021: The IPA appoints a working group for InSPIRe implementation

March 2021: Development of the IPA Academy begins

March – April 2021: The InSPIRe working group drafts the [*InSPIRe Charter*](#), a commitment to continuing publishing ecosystem cooperation for industry recovery, resilience, sustainability

May – September 2021: More than [*50 institutions*](#) sign the InSPIRe Charter and contribute to the InSPIRe Consultation

October 2021: A [*second report on the impact of the pandemic*](#) on global publishing is released at Frankfurt Book Fair highlighting priority areas for industry cooperation

November 2021 – January 2022: InSPIRe priority areas are explored in more depth by specialized working groups focused on, freedom to publish, copyright, sustainability, diversity and inclusion, and publishingtech in the InSPIRe Consultation

February 2022: The InSPIRe Symposium is convened for the working groups to present their findings from the InSPIRe Consultation and engage with authors, booksellers, illustrators, and other ecosystem stakeholders

March 7, 2022: The IPA Academy, sponsored by the Sharjah Book Authority, is launched

March 2022: Findings from the InSPIRe Consultation and Symposium are compiled into a report to be previewed at the Bologna Book Plus (BB+) and released at the London Book Fair



TWO YEARS ON: WHAT WE HAVE FOUND THROUGH InSPIRe

Over the last two years, the InSPIRe Initiative has invited over 150 publishing leaders from across the publishing ecosystem to reflect on the post-pandemic future of publishing. Through its reports, consultations, and capacity development offerings, InSPIRe has sought to shed light on the challenges and opportunities faced by global publishing in adapting to the post-pandemic future.

With participation from value chain participants from across the publishing ecosystem in more than 40 countries, drawing definitive conclusions from the InSPIRe consultations has been extremely challenging. However, several consistent themes have emerged.

Promoting Strong Copyright Frameworks: Copyright is a flexible, effective, and rights-protecting system. It allows publishing companies to invest in creative, informative and educational content and innovative delivery and access models. While the pandemic spurred record demands for both print books and digital formats, we also saw a surge in online piracy. The extent of the problem illustrates the need for enhanced enforcement tools against both physical and online piracy, confirming the need for multi-stakeholder anti-piracy campaigns. At the same time, the rise of the creator economy is opening up new ways for authors, creators, and other publishing value chain participants to be fairly compensated for their work. A robust copyright framework should ensure that the exclusive rights of publishers remain secure in the digital economy, while providing incentives for protecting existing and emerging digital business models. Furthermore, the publishing industry and its allies should continue to engage with policy makers and the public to counter rhetoric from interest groups that seek to weaken the existing international legal framework for copyright protection. Engagement with policy makers can be better informed through the development of robust industry data collection.

Challenges

- Promoting robust copyright law frameworks that promote and protect exclusive rights
- Countering physical and online piracy with new enforcement and technical tools
- Lack of consumer and regulator understanding of copyright principles
- Pressure to grant free access to copyrighted works
- Data collection and sharing to counter efforts to weaken copyright protection

Opportunities

- Increase engagement with policy makers on the importance of a robust copyright framework, highlighting the significant economic contributions of a resilient publishing ecosystem — and its important contributions to culture, education, and societal discourse
- Work with authors, booksellers, educators, librarians, and other stakeholders to build copyright awareness and counter efforts by companies interest groups working to undermine copyright
- Support authors and creators in protecting copyright in the emerging creator economy and ensuring they are fairly compensated
- Implement technical measures to promote lawful access and usage of copyrighted content



Dr. Mohammed Sulaiman,
Head of Cultural Communications,
Bibliotheca Alexandrina

The InSPIRe Charter is addressing all of the challenges we face as an industry in Egypt including promoting the value of publishing, addressing piracy, promoting copyright, and fostering dialogue between publishers, governments, and communities. InSPIRe has our full support since we think its message of solidarity and cooperation can have both global and national impact by catalyzing critical conversations and forging partnerships.

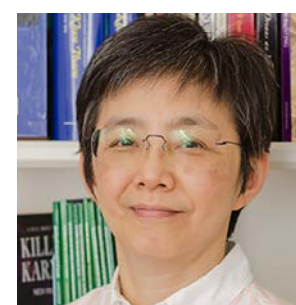
Freedom to Publish is an Ongoing Concern: Political fear and coercion is increasingly being used to promote self-censorship globally, and the legal foundations that protect freedom of expression and deter self-censorship are continually under threat. The publishing industry plays a vital watchdog role to ensure the freedom to publish by challenging government overreach, including challenging technology platforms that work in concert with repressive governments to stifle freedom of expression.

Challenges

- Self-censorship due to the erosion of legal protections for freedom to publish
- Government overreach and use of special powers to limit expression
- Technology companies working in concert with repressive regimes to stifle freedom of expression

Opportunities

- Gain international consensus on a working definition for freedom to publish
- Establish an international freedom to publish day
- Highlight champions of freedom to publish to secure justice and provide a watchdog function to prevent government encroachment of rights
- Benchmark global libel and expression laws for targeted advocacy



Trasvin Jittidecharak,
Secretary General,
ASEAN Book Publishers Association

Each country has its own cultural and political tradition, and this is also shaped by geopolitics. Some countries have authoritarian governments which try to control information, but this power is being eroded with technology. Supporting our colleagues in advocating for freedom to publish requires a range of approaches including advocating for freedom to publish as a foundational human right, embracing technical workarounds, and providing collegial support.

Multi-stakeholder Engagement is Critical to Sustainability: More industry dialogue is urgently needed on how the publishing industry can take action on sustainable development and climate change. These discussions must encompass the entire value chain, including publishers, printers, bookstores, libraries, authors, educators, book fairs, distributors, international organizations, and other stakeholders, to institutionalize sustainability standards, ensure widespread adoption of progress reporting, and promote multi-stakeholder action. While efforts to reduce the industry's environmental footprint often get more attention, the important role that books play in increasing understanding and promoting positive action on complex societal challenges, like climate change, should not be understated.

Challenges

- Greening supply chains requires the commitment of all participants and this commitment to action differs across value chain participants and countries
- No common reporting standards to measure and communicate sustainability efforts

Opportunities

- Compile and share a compendium of best practices for greening all stages of the supply chain such as design, printing, distribution, and packaging
- Develop a common sustainability measurement and reporting framework for the publishing industry linked to normative standards and a certification process



Andre Breedt,
Managing Director,
Nielsen Book

The publishing industry has to come up with ways of measuring sustainability — what sort of paper is the book printed on, what is the ecological cost of e-books versus paper books? The industry must be analyzed to come up with step-by-step goals. The pandemic has highlighted the lack of resiliency in parts of the supply chain, and figuring out how to build a better more sustainable supply chain requires looking closely at the shortfalls of the current supply chain.





Diversity and Inclusion Requires More Attention: While there is a deep willingness by the industry and publishing ecosystem stakeholders to embrace change, many organizations don't know where to find resources to start taking action. More attention must be focused on translating good intentions, well-meaning statements, and on-paper commitments into actionable objectives to achieve meaningful outcomes.

Challenges

- The imprecise meaning of diversity and inclusion and the extent to which it includes social identifiers, socioeconomic status, education level, level of physical ability, and other factors
- Lack of common diversity and inclusion reporting standards or benchmarks to gauge progress
- Building organizational cultures that value inclusive and diverse workplaces

Opportunities

- Develop common reporting standards to promote progress and accountability
- Provide diversity and inclusion training and capacity building
- Collaborations with book fairs, bookstores, and libraries to catalyze conversations about diversity and inclusion, inclusive publishing, and indigenous language publishing



Jorge Gutiérrez Brianza,
Commercial and Operations Director,
Buenos Aires International Book Fair

Our industry is very important — it is not just about selling books, it is about diversity, gender empowerment, and freedom. Coming together to support industry recovery and important issues like diversity and inclusion now is vital for our industry's recovery and future.



Embracing Technology is Needed for Innovation and Transformation: The global pandemic pushed national publishers associations to pivot to digitally enabled member services such as taking in-person book fairs online, engaging members through online events, establishing online marketplaces, and introducing innovations to diversify non-membership revenues like monetizing online training. Meanwhile, pandemic-induced digital transformation to keep books in the hands of readers pushed more markets around the world to embrace digital formats, adopt online marketing and selling strategies, and employ other digital resilience strategies. Unfortunately, the ability of publishing ecosystems to leverage digital transformation to weather the pandemic is not uniform, and a multi-track industry recovery is underway that risks some markets taking far longer to rebound than others, with smaller publishers potentially being left behind.

Challenges

- Workforce upskilling to fully benefit from digital opportunities and new business models
- Evolving business models, formats, and sales channels require digitizing the full value chain
- Format and distribution innovation to counter platform and streaming competition

Opportunities

- Train publishing ecosystem players on emerging digital sales, distribution, licensing, piracy mitigation, and publishing strategies and use cases for artificial intelligence and Web3
- Build stronger partnerships with authors, distributors, other creative industries, and governments to support industry technology adoption and co-develop mutually beneficial use cases for disruptive technologies
- Adopt enhanced technologies and emerging decentralized strategies to fairly compensate content creators and rights holders to prepare for the rise of Web3



Gbadega Adedapo,
Chairman,
Nigerian International Book Fair

I believe creativity develops in crisis. Due to the pandemic, publishers realized that there are a lot of gaps to fill. Especially in Africa, we have more of a physical print book market. With the challenges brought on by the pandemic, we realized that we need to move forward and embrace digital and audio publishing. We realized that there are lots of digital opportunities.

WHERE DOES InSPIRe GO FROM HERE?

Some two years into the pandemic, global publishing is in the throes of a multi-track recovery which offers opportunity and optimism tempered by ongoing uncertainty for some. Throughout the pandemic, the publishing ecosystem stepped up with inventive and resourceful efforts to keep books in the hands of readers, fast-track science for pandemic containment and vaccination, and support educators to continue teaching.

At one of the most uncertain times in modern history, books fulfilled a need for normalcy at a time when communities around the world needed it most. However, in stretching publishing ecosystems to the limit, the need for systemic industry change was also exposed. Publishing ecosystems saw that the industry has much more to do on industry challenges like promoting strong copyright frameworks, ensuring freedom to publish, contributing to global climate change, progressing diversity and inclusion, and upskilling the publishing workforce to benefit from digitization.

In 2020, at the height of the global pandemic, the IPA used its convening power to unite industry stakeholders for sector-wide recovery around the InSPIRe Initiative. Continuing to capitalize on this renewed sense of solidarity and focus on common priorities catalyzed by InSPIRe is critical to a broad-based global publishing industry recovery. Addressing the priorities highlighted by InSPIRe's consultations will ensure developed and developing publishing ecosystems come back stronger, more resilient, and adaptive to change.

The InSPIRe Initiative has taken an ecosystem-based approach to bringing global

publishing together at one of the most uncertain times in the industry's history. In the process, InSPIRe has solidified multi-stakeholder coalitions to effectively lobby governments for support while also forging a renewed sense of industry cohesiveness focused on common priorities and rooted in partnership.


InSPIRe stands out as one of the few times in recent history when the publishing industry was able to establish a global, multi-stakeholder discussion on the future. From this crisis emerged strengthened ecosystem relationships — authors are engaging in long overdue dialogues with publishers, teachers are working with educational publishers, the industry is collectively supporting the recovery of book fairs, and there is enhanced cooperation between publishers and bookstores on digitization. Despite exposing cracks in the foundation of global publishing, the pandemic has strengthened publishing ecosystem cooperation and mutual respect. This renewed sense of industry solidarity seems likely to be one enduring positive of the pandemic on global publishing.

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