



International  
Publishers  
Association

# Annual Report

*October 2012 – October 2013*

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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.

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# Foreword



**Dear Colleagues,**

**It has been another eventful and stimulating year for the International Publishers Association! We welcomed a new Policy Director, unveiled a new website, and launched a new international education conference. I continued to meet with member associations in Europe, Asia, Africa and the Americas, attending relevant industry events, speaking with IPA colleagues, and engaging with governments to reinforce IPA's positions on global debates about critical issues.**

On the freedom to publish front, we established a Publishers' Emergency Fund, conducted a fact-finding mission to Myanmar in June, and submitted a record seven reports to the Universal Periodic Review Working Group of the UN Human Rights Council.

In June, IPA welcomed the successful conclusion of the treaty on copyright exceptions and limitations for print disabled persons at the WIPO Diplomatic Conference in Marrakech, Morocco. We encourage all WIPO Member States to sign and ratify the treaty. In the meantime, we remain active in the WIPO Stakeholder Platform that seeks to address practical aspects of providing access to print-disabled readers. Looking ahead, the issue of international copyright exceptions and limitations will remain a key concern for IPA.

IPA continues to advocate strongly that voluntary agreements and collaboration can achieve faster and better results than legislative solutions. We will continue to concentrate our efforts on defending copyright as a flexible mechanism to ensure fair and balanced solutions.

I hope you are all eagerly anticipating the 30th IPA International Publishers Congress, to be held in Bangkok on 25-27 March 2014. Although this will be the first IPA Congress to be held only two years after the previous one, I can assure you that the quality of its planning has not suffered. The programme promises inspirational plenary sessions, informative practical workshops, and innovative breakout sessions. (For more about the Congress, please go to [page 31](#)) It will also be the first time the Congress is held in a World Book Capital City. Bangkok is already doing a fantastic job as the 2013 World Book Capital, and we look forward to witnessing its fruition first-hand!

By now, I hope you have all met José Borghino, our new Policy Director, who has been a wonderful addition to the Secretariat in Geneva. Soon, I hope you will have an opportunity to also meet Dougal Thomson, the incoming Director of Communications and Programmes. I'd like to thank every member of the Secretariat in our Geneva office for all their hard work as well as the members of the Executive Committee, our committee chairs—Bjørn Smith-Simonsen (Freedom to Publish), Peter Givler (Copyright), and José Manuel Gómez (Literacy and Book Industry Policy)—and all of you who have spent hours in working committees to further our important causes. I must thank in particular Vice-Presidents Ibrahim El Moallem and Richard Charkin, Treasurer Werner Stocker, and Secretary General Jens Bammel for

their invaluable counsel and support.

I'll conclude by noting that it is our member associations and their people who make IPA what it is, and who will make the difference in the future of our industry. To those of you already actively engaged, thank you! I hope you will continue to share your time and insights with us. To those of you who have been more passive, I encourage you to contribute your energy and expertise as we seek to promote publishing and copyright and defend the freedom to publish.

**See you in Bangkok!**

**Youngsuk 'Y.S.' Chi**  
President



# Does the world need publishers?



**‘Who Needs Publishers?’ was the title of a workshop IPA organised in December 2012 in London together with the UK and US publishers associations and representatives from a number of IPA members and European and international sister organisations present.**

The answer is obvious to us: of course the world needs publishers. Publishers are the curators and custodians of culture. We are at the centre of the knowledge economy—contributing our expertise to improve educational materials and scholarly communication. In the 21st century, publishers are drivers of the new digital economy.

Looking at the changes in international and national laws around the world over the past twelve months, however, it is clear this message has not got through. Whether it is the US Department of Justice prosecuting publishers, or the state-funded NDLA interfering in the Norwegian education market to the extent of cutting commercial publishers’ turnovers by more than 33 per cent, or the recent Australian proposals to do away with statutory collective licensing altogether—in all these cases, the possible negative effects of such measures for the publishing industry is met, at best, with indifference and, at worst, with glee.

Clearly, the public in many countries no longer worries about nurturing a healthy publishing industry. At IPA we have suffered the same problem: during the recent negotiations of the WIPO Marrakech treaty there was surprisingly little interest in the publishing industry’s perspective. Member States were less interested in actually solving the problem of providing access to books for persons with print disability than in creating a new precedent in copyright law.

Still, we must not resign ourselves to our fate. There are also examples where publishing industries are actively engaged in dialogues with other stakeholders and where the message is getting through that there is a public interest in a diverse, dynamic and entrepreneurial publishing industry. For instance, the persistence of the Israeli Publishers Association (and support from the IPA) paid off on 13 July this year when the Israeli government adopted a law to fix book prices. In another positive development, the Ukrainian Publishers Association has been able to persuade its national parliament to create a support programme to help strengthen the local publishing, bookselling and reading culture.

At an international level, in 2013 the IPA’s Educational Publishers Forum started a dialogue with stakeholders in the education sector with its new conference at the London Book Fair ‘What Works?’ For the first time, educational publishers discussed with policy makers and educational researchers how public policy can be shaped to make best use of available expertise, in particular as we migrate to a digital education environment.

For centuries, publishers have developed and refined the skill of telling other people’s stories. It is now more important than ever that we tell our own story.

Recognising this has had repercussions at IPA. We are strengthening our efforts to improve our collection of global publishing statistics. We are developing ‘What Works?’ into an annual conference. Internally, we are restructuring the Secretariat to acquire greater competence in communications. It is a challenge to do all this without weakening our commitment to our core issues: copyright and freedom to publish. But doing more and doing it better with fewer resources is something that the Internet both requires and empowers us to do. It is a challenge I am happy to embrace.

**Jens Bammel**  
Secretary General

# About IPA

**The International Publishers Association (IPA) is a federation of national, regional and specialist publishers' associations. Its membership comprises more than 63 organisations from more than 54 countries in Africa, Asia, Oceania, Europe, and the Americas. Based in Geneva, Switzerland, IPA represents the interests of the publishing industry in international fora and wherever publishers' interests are at stake.**

IPA was founded in 1896 in Paris by the leading publishers at the time. Its initial aim was to ensure that countries throughout the world showed respect for copyright, and properly implemented the (then) new international copyright treaty, the Berne Convention for the protection of literary and artistic works. The promotion and defence of copyright is still one of IPA's highest priorities.

Since its foundation, IPA has also promoted and defended the freedom to publish, a fundamental aspect of the human right to freedom of expression. Likewise, IPA stands for the promotion of literacy and reading, and has always been a forum for publishers to network, exchange views, and conduct business.

As an industry association, IPA also deals with a number of other issues affecting publishers, from book fairs to the development of standards. IPA is an accredited non-governmental organisation (NGO) enjoying consultative relations with the United Nations. It is administered by the General Assembly, the Executive Committee, the President, the Vice-Presidents, the Treasurer, and the Geneva-based Secretariat.

The **General Assembly** is the supreme body of the Association, and is convened by the President at least once a year, usually during the Frankfurt Book Fair. The General Assembly 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 the 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 no more than fifteen Directors elected 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 amongst the Directors.

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 'YS' Chi (Elsevier, USA).

The President is elected by the General Assembly for a period of two years. Until this year, the General Assembly also elected two Vice-Presidents for two years to support the President in her/his work. IPA's Vice-Presidents during the past year were Ibrahim El Moallem (Dar El Shorouk; Egypt) and Richard Charkin (Bloomsbury, UK). This year, amendments to the IPA Statutes mean that the General Assembly will elect only one Vice-President who will be intended to succeed the current President at the end of his term. For more details, please consult the IPA Statutes.

## About the President

Youngsuk 'YS' Chi was elected President of the International Publishers Association (IPA) in October 2009 and re-elected for a second two-year term in 2012.

Chi is an internationally recognised leader in the media-tech 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.

# About IPA *(cont)*

The **Secretary General** is appointed by the Executive Committee. S/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. S/He organises and undertakes the representational and liaison activities necessary for securing support for and the implementation of the 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 33](#)).

IPA, like the publishing industry, is undergoing significant changes. In early 2013 the IPA Secretariat moved offices and restructured. IPA would like to thank Legal Counsel and Deputy Secretary General Antje Sörensen and Director Freedom to Publish Alexis Krikorian for their many years of dedicated service, and wish them well in their future endeavours. In March 2013, we welcomed José Borghino as IPA's Policy Director; and in October 2013 Dougal Thomson joined the IPA as Director of Communications and Programmes. Both of these roles were newly created to help IPA better meet the evolving needs of its members. The IPA office continues to be managed by Joanna Bazan Babczonk.

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 Programme Committee for IPA's 30th Congress and the Educational Publishers Forum.

In addition, IPA and other 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.

## Reform of the IPA Statutes

Following the 2012 General Assembly, a working group was created to review the IPA Statutes under the leadership of the IPA President. The group submitted a proposal for revisions to the Statutes, which was widely circulated and discussed. The ensuing revised Statutes were approved by an e-vote which ended on 31 January 2013.

### The most substantive changes to the Statutes are as follows:

- The President is elected for a single term of two years;
- There is one Vice-President (instead of the current two Vice-Presidents). The Vice-President is the President designate, i.e. the Statutes foresee that s/he will normally be voted to succeed the outgoing President;
- The Executive Committee can designate further IPA Officers to assume specific responsibilities;
- Members that have not paid their membership fees are not eligible to vote at the AGM.

These changes mean that the IPA President will change more frequently. At the same time, the ability of the Executive Committee to assign specific responsibilities to further IPA Officers allows the President and Executive Committee to spread the work across more shoulders. For the 2013 General Assembly, the most important change will be that only one Vice-President will be elected and, in effect, this person will be expected to succeed YS Chi as IPA President in 2014.

# The IPA Executive Committee 2012/13

Name	Publishing House	Country
CHI, Youngsuk (YS)	Elsevier	President (USA)
BOMPIERI, Alessandro	RCS Libri	Italy
CABANELLAS, Ana María	Heliasta	Argentina
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
KOLMAN, Michiel	Elsevier	Netherlands
MEISTER, Urban	Cornelsen	Germany
MOTA, Henrique	Principia Editora	Portugal
MURRAY, Brian	HarperCollins	USA
PANSA, Karine	Girassol Brasil Edições	Brazil
SMITH-SIMONSEN, Bjørn	PAX Forlag	Norway
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)
MARCISZUK, Piotr	Stentor/President	FEP (Europe)
MERKEL-SOBOTTA, Eric	Springer/President	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
30th Congress Programme	GIVLER, Peter	IFSP and AAUP (USA)
Copyright	GIVLER, Peter	IFSP and AAUP (USA)
Educational Publishers Forum	TAYLOR, Graham	(UK)
Freedom to Publish	SMITH-SIMONSEN, Bjørn	PAX Forlag (Norway)
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	<a href="http://www.editores.org.ar">www.editores.org.ar</a>
AUSTRALIA	Australian Publishers Association Ltd	<a href="http://www.publishers.asn.au">www.publishers.asn.au</a>
BELGIUM (1)	Association des Editeurs Belges	<a href="http://www.adeb.be">www.adeb.be</a>
BELGIUM (2)	Flemish Publishers Association Het Huis van het Boek	<a href="http://www.boek.be">www.boek.be</a>
BOSNIA AND HERZEGOVINA	Association of Publishers and Booksellers of Bosnia Herzegovina	
BRAZIL (1)	Sindicato Nacional dos Editores de Livros	<a href="http://www.snel.org.br">www.snel.org.br</a>
BRAZIL (2)	Câmara Brasileira do Livro	<a href="http://www.cbl.org.br">www.cbl.org.br</a>
CANADA (1)	Association Nationale des Editeurs de Livres	<a href="http://www.anel.qc.ca">www.anel.qc.ca</a>
CANADA (2)	Association of Canadian Publishers	<a href="http://www.publishers.ca">www.publishers.ca</a>
CANADA (3)	Canadian Publishers' Council	<a href="http://www.pubcouncil.ca">www.pubcouncil.ca</a>
COLOMBIA	Cámara Colombiana del Libro	<a href="http://www.camlibro.com.co">www.camlibro.com.co</a>
DENMARK	Forlæggerforeningen	<a href="http://www.danishpublishers.dk">www.danishpublishers.dk</a>
EGYPT	Egyptian Publishers Association	<a href="http://www.egyptianpublishers.org">www.egyptianpublishers.org</a>
FINLAND	Finnish Book Publishers Association	<a href="http://www.publishers.fi">www.publishers.fi</a>
FRANCE	Syndicat National de l'Edition	<a href="http://www.sne.fr">www.sne.fr</a>
GEORGIA	Georgian Publishers and Booksellers Association	<a href="http://www.gpba.en">www.gpba.en</a>
GERMANY	Börsenverein des Deutschen Buchhandels	<a href="http://www.boersenverein.de">www.boersenverein.de</a>
GREECE	Hellenic Federation of Publishers and Booksellers	<a href="http://www.poev.gr">www.poev.gr</a>
HUNGARY	Hungarian Publishers and Booksellers Association	<a href="http://www.mkke.hu">www.mkke.hu</a>
ICELAND	Icelandic Publishers Association	<a href="http://www.bokautgafa.is">www.bokautgafa.is</a>
INDIA	Federation of Indian Publishers	<a href="http://www.fipindia.org">www.fipindia.org</a>
INDONESIA	Ikatan Penerbit Indonesia	<a href="http://www.ikapi.org">www.ikapi.org</a>
IRELAND	Irish Book Publishers' Association	<a href="http://www.publishingireland.com">www.publishingireland.com</a>
ISRAEL	Book Publishers Association of Israel	<a href="http://www.tbpai.co.il/">www.tbpai.co.il/</a>
ITALY	Associazione Italiana Editori	<a href="http://www.aie.it">www.aie.it</a>
JAPAN	Japan Book Publishers Association	<a href="http://www.jbpa.or.jp">www.jbpa.or.jp</a>
KENYA	Kenya Publishers Association	<a href="http://www.kenyapublishers.org">www.kenyapublishers.org</a>
KOREA	Korean Publishers Association	<a href="http://www.kpa21.or.kr">www.kpa21.or.kr</a>
LEBANON	Syndicate of Publishers Union of Lebanon	<a href="http://www.publishersunionlb.com">www.publishersunionlb.com</a>
LITHUANIA	Lithuanian Publishers Association	<a href="http://www.lit.lt">www.lit.lt</a>
MEXICO	Cámara Nacional de la Industria Editorial	<a href="http://www.caniem.com">www.caniem.com</a>
NETHERLANDS	Nederlands Uitgeversverbond	<a href="http://www.uitgeversverbond.nl">www.uitgeversverbond.nl</a>
NEW ZEALAND	Publishers Association of New Zealand	<a href="http://publishers.org.nz">publishers.org.nz</a>
NIGERIA	Nigerian Publishers Association	<a href="http://www.nigerianpublishers.org">www.nigerianpublishers.org</a>
NORWAY	Norske Forleggerforening	<a href="http://www.forleggerforeningen.no">www.forleggerforeningen.no</a>
PHILIPPINES	Philippine Educational Publishers' Association	
PORTUGAL	Associação Portuguesa de Editores e Livreiros	<a href="http://www.apel.pt">www.apel.pt</a>
RUSSIA	Russian Publishers Association	<a href="http://www.aski.ru">www.aski.ru</a>
SOUTH AFRICA	Publishers Association of South Africa	<a href="http://www.publishsa.co.za">www.publishsa.co.za</a>
SPAIN	Federación de Gremios de Editores de España	<a href="http://www.federacioneditores.org">www.federacioneditores.org</a>
SRI LANKA	Sri Lanka Book Publishers Association	<a href="http://www.slbpa.com">www.slbpa.com</a>



REGULAR MEMBERS		
SWEDEN	Svenska Förläggareföreningen	<a href="http://www.forlaggare.se">www.forlaggare.se</a>
SWITZERLAND (1)	Association Suisse des Diffuseurs, Editeurs et Libraires	<a href="http://www.asdel.ch">www.asdel.ch</a>
SWITZERLAND (2)	Schweizerischer Buchhändler und Verleger-Verband	<a href="http://www.swissbooks.ch">www.swissbooks.ch</a>
THAILAND	Publishers & Booksellers Association of Thailand	<a href="http://www.pubat.or.th">www.pubat.or.th</a>
TURKEY	Turkish Publishers Association	<a href="http://www.turkyaybir.org.tr">www.turkyaybir.org.tr</a>
UKRAINE	Ukrainian Publishers & Booksellers Association	<a href="http://uabooks.info">uabooks.info</a>
UNITED ARAB EMIRATES	Emirates Publishers Association	<a href="http://www.epa.org.ae">www.epa.org.ae</a>
UNITED KINGDOM	Publishers Association	<a href="http://www.publishers.org.uk">www.publishers.org.uk</a>
UNITED STATES OF AMERICA	Association of American Publishers	<a href="http://www.publishers.org">www.publishers.org</a>
VENEZUELA	Cámara Venezolana del Libro	<a href="http://www.cavelibro.org">www.cavelibro.org</a>
AFFILIATE MEMBERS		
ARMENIA	National Publishers Association of Armenia	<a href="http://www.bookpublishers.am">www.bookpublishers.am</a>
MACEDONIA	Association of Albanian Publishers	
SAUDI ARABIA	Saudi Publishers Association	<a href="http://www.saudipublishers.com/">www.saudipublishers.com/</a>
SERBIA	Publishers and Booksellers Association of Serbia	<a href="http://www.izdavaci.rs">www.izdavaci.rs</a>
SLOVENIA	Association of Slovenian Publishers	<a href="http://www.gzs.si">www.gzs.si</a>
ASSOCIATE MEMBERS		
APNET	African Publishers Network	<a href="http://www.african-publishers.net">www.african-publishers.net</a>
APA	Arab Publishers Association	<a href="http://www.arabpa.org">www.arabpa.org</a>
FEP/FEE	Federation of European Publishers / Fédération des Editeurs Européens	<a href="http://www.fep-fee.eu">www.fep-fee.eu</a>
GIE	Grupo Ibero-Americano de Editores	
IFSP	International Federation of Scholarly Publishers	<a href="http://www.scholarly-publishing.org">www.scholarly-publishing.org</a>
STM	International Association of Scientific, Technical and Medical Publishers	<a href="http://www.stm-assoc.org">www.stm-assoc.org</a>

### *New members welcomed in 2012-13*

At its last meeting, the IPA General Assembly voted to accept the Emirates Publishers Association (an affiliate member since 2009) as a regular member of IPA.

IPA President, YS Chi, and IPA Vice-President, Ibrahim El Moallem, with members of the Emirates Publishers Association in October 2012. From left: Mohamad Al Matroushi, Jamal Al Shehhi, Ali Bin Hatem, YS Chi, Bodour Al Qasimi, and Ibrahim El Moallem.



© Emirates Publishers Association

# 2012–2013 at a Glance

## October 2012

### 9 October

#### **Joint submission on Azerbaijan and Russia to the Universal Periodical Review (UPR) Working Group of the United Nations Human Rights Council**

Working with other NGOs in this field, IPA made joint submissions that recommended ways to improve governments' records on freedom of expression.

### 10 October

#### **IPA Executive Committee meeting, Frankfurt**

During its Frankfurt meeting, the IPA Executive Committee (EC) discussed the details of a reform of the IPA Statutes to be completed before 2013's General Assembly (GA). The EC presented the outcome of these discussions to the 2012 General Assembly the next day.

### 11 October

#### **IPA General Assembly (GA), Frankfurt**

The IPA GA re-elected YS Chi as President, elected Executive Committee Members, and welcomed the UAE PA as a Regular Member. The GA also approved the audited accounts for 2011 and the treasurer's report, including the budget for 2013, and unanimously approved a new membership fee structure.

### 15–16 October

#### **IPA addressed the UN Human Rights Committee, Geneva**

IPA Freedom to Publish Director Alexis Krikorian addressed the UN Human Rights Committee (UNHRC), speaking about freedom to publish in Turkey and Turkish obscenity laws and their impact on freedom to publish. Alexis drew attention to Turkish anti-terror legislation and its adverse effects on freedom of expression in Turkey, citing the Turkish trial where publishers Ragıp and Deniz Zarakolu are among the defendants. For more information, see [page 25](#).

## November 2012

### 6–7 November

#### **WIPO Regional Workshop on Copyright Exceptions for Visually Impaired Persons, Singapore**

IPA Secretary General Jens Bammel, along with representatives from the DAISY Consortium, IFLA, IFRRO, and WIPO gave a paper at this conference aimed at informing Southeast Asian participants.

### 9–11 November

#### **Copyright and licensing training in Yerevan, Armenia**

IPA organised an international copyright workshop in 2012 World Book Capital, Yerevan. IPA Legal Counsel and Deputy Secretary Antje Sörensen worked with copyright trainer Richard Balkwill, our affiliate member the National Publishers Association of Armenia (NPAA), the Armenian Ministry of Culture, and the Sofia-based Next Page Foundation. The workshop was attended by delegates from Armenia, Turkey, Tajikistan, Kyrgyzstan, Lithuania, and Russia.

### 16 November

#### **IPA addressed WIPO Stakeholder Platform meeting, Bangkok**

IPA Executive Committee member Trasvin Jittidecharak and IPA Secretary General Jens Bammel represented IPA at the WIPO Stakeholder Platform meeting. WIPO Director General Francis Gurry reconfirmed WIPO's commitment to continue the work of TIGAR beyond 2013. For more information, see [page 23](#).

### 19–23 November

#### **WIPO Standing Committee on Copyright and Related Rights (SCCR), Geneva**

IPA represented publishers at the 25th session of the SCCR as it prepared a copyright treaty for print disabled persons.

### 27 November

#### **The IPA Secretariat moved to its new offices at 23, avenue de France, Geneva**

For more information, see [page 34](#).

## December 2012

### 4 December

#### **IPACC Meeting in London**

14th meeting of representatives from IPA, the International Association of Scientific, Technical and Medical Publishers (STM), Federation of European Publishers (FEP), European Magazine Media Association (EMMA) and European Publishers Council (EPC).

### 5 December

#### **'Who Needs Publishers?' Workshop, London**

IPA organised a workshop about the importance of communicating the value of publishing and publishers in the new digital world.

### 17 December

#### **WIPO Advisory Committee on Enforcement, Geneva**

IPA represented publishers' interests.

### 18 December

#### **WIPO Extraordinary General Assembly, Geneva**

IPA represented publishers' interests as the WIPO GA agreed to convene a Diplomatic Conference in Marrakech in June 2013.

## January 2013

### 17–18 January

#### **9th IPA Education Publishers Forum (EPF) Meeting in Milan**

EPF developed and drafted a position paper on Open Educational Resources (OER).

### 31 January

#### **Closure of e-voting on the IPA Statutes reform**

By a majority e-vote, the amendments to the IPA Statutes recommended at the 2012 General Assembly were adopted.

**Antje Sörensen left the IPA Secretariat**

## February 2013

### 2 February

#### **Joint submission on Nigeria to the Universal Periodical Review (UPR) Working Group of the UN Human Rights Council**

Working with other NGOs in this field, IPA made joint submissions that recommended ways to improve governments' records on freedom of expression.

### 7 February

#### **IPA hosted delegation of international publishing industry journalists in Geneva**

#### **WIPO meeting with NGOs, Geneva**

IPA Secretary General, Jens Bammel, met with WIPO Director General, Francis Gurry, along with other NGO representatives.

### 18–22 February

#### **WIPO SCCR meeting, Geneva**

IPA represented publishers' interests at 26th meeting of the SCCR, which refined the draft text for the Marrakech Treaty.

## March 2013

### 1 March

#### **IPA Executive Committee meeting, New York**

The EC endorsed EPUB 3 as the preferred standard format for representing HTML and other web content for distribution as single-file publications. IPA recommended that publishers and their national publishers associations familiarize themselves with EPUB 3 and explore whether and how they can make best use of its functionalities. IPA urged all publishing industry stakeholders to adopt EPUB 3 so that the publishing industry can achieve an interoperable and fully accessible global standard for e-books and other digital publications.

### 4 March

#### **Joint submission on Kingdom of Saudi Arabia, and Malaysia to the Universal Periodical Review (UPR) Working Group of the UN Human Rights Council**

Working with other NGOs in this field, IPA Freedom to Publish Director Alexis Krikorian made joint submissions that recommended ways to improve governments' records on freedom of expression.

### 8 March

#### **Concerns about ICANN and Generic Top-Level Domain Names**

IPA made a formal submission to the Internet Corporation for Assigned Names and Numbers (ICANN), which coordinates the global system of domain names

(such as '.com' and '.org') and IP addresses. IPA was concerned about the registration process for the '.book' and '.author' descriptors because of the possibility of monopolisation of these important fields.

### 11 March

#### **José Borghino joined IPA Secretariat**

### 21–24 March

#### **IPA attended the Salon du Livre, Paris**

Meetings with publishers and representatives of Publishers Associations in preparation for, among other things, WIPO's Diplomatic Conference in Marrakech.

### 23–24 March

#### **2nd Arab Publishers Association Conference, Alexandria, Egypt**

More than 100 publishers from the Arab world gathered at the Bibliotheca Alexandrina in Alexandria, Egypt for the 2nd Arab Publishers Association Conference. The complex and difficult political and economic situation facing the Arab world formed the backdrop to a fascinating programme. IPA President YS Chi opened the conference, while Copyright Committee Chair Peter Givler, Vice-President Richard Charkin, and Secretary General Jens Bammel made presentations about three key issues for publishers: piracy, freedom to publish, and digital migration.

## April 2013

### 2 April

#### **Meeting with the Nederlands Uitgeversverbond (NUV), Amsterdam**

IPA EC member Michiel Kolman and José Borghino joined FEP Director, Anne Bergman-Tahon, to address the NUV about strategic issues for publishers.

### 17 April

#### **IPA's 'What Works?' Conference, London**

The IPA held its first international education conference in conjunction with the London Book Fair. For more information, see [page 29](#).

### 18 April

#### **10th IPA Education Publishers Forum meeting, London**

The meeting attracted 24 publishers and representatives from around the world. The EPF creation a new committee to liaise with the Federation of European Publishers (FEP).

### 18–22 April

#### **WIPO Informal negotiating session, Geneva**

Further complicated the draft Marrakech treaty.

### 21–23 April

#### **Opening of World Book Capital 2013, Bangkok**

EC member Trasvin Jittidecharak, LIBS Committee Chair José Manuel Gomez, and Freedom to Publish Director Alexis Krikorian took part in the opening of Bangkok World Book Capital 2013. Trasvin urged the Thai authorities to decriminalise defamation. José Manuel addressed the session entitled 'The Future of Reading, Reading for the Future'. Alexis introduced the World Book Capital initiative to the Asia Pacific Publishers Association (APPA).

### 25 April

#### **IPACC Meeting in Geneva**

15th meeting of representatives from IPA, International Association of Scientific, Technical and Medical Publishers (STM), Federation of European Publishers (FEP), European Magazine Media Association (EMMA) and European Publishers Council (EPC).



## May 2013

*15 May***Parliamentary hearings in Kiev, Ukraine**

IPA's Jens Bammel talked about the importance of reading and book policy. Following this short visit, IPA wrote 10 recommendations to the State Committee for Television and Radio Broadcasting of Ukraine for books and reading promotion policy. For more information, see [page 27](#).

*18 May***Thessaloniki Book Fair**

IPA's Policy director, José Borghino called for governments and education authorities to work closely with publishers to encourage them to produce more high-quality education and general reading resources. IPA stressed the strategic importance of education, literacy (and therefore a healthy and thriving local publishing industry) for the information economy of the future.

*28 May***IPA released a policy position paper on Open Educational Resources (OER)***29 May***IPA submission to ICANN**

The IPA strongly urged ICANN to support and implement its Government Advisory Committee's advice with regard to safeguards on new generic Top-Level Domain names (g-TLDs). IPA was concerned about questions of competition and consumer choice and coordinated a broad coalition of NGOs, other stakeholders from across the cultural industries and IPA members to make submissions.

## June 2013

*12–15 June***International fact-finding and culture building mission to Myanmar/Burma**

IPA Freedom to Publish Director Alexis Krikorian and EC member Trasvin Jittidecharak, along with representatives of the Association of American Publishers (AAP), PEN America and PEN Norway, assessed the conditions for publishing in Myanmar/Burma—in particular, freedom to publish issues—and made preliminary contacts with the local publishers' associations with a view to set up a local PEN centre. For more information, see [page 24](#).

*14 June***'Future Publishing and Accessibility' conference, Copenhagen.**

In a conference session, Secretary General of the Daisy Consortium, George Kerscher, and IPA's Jens Bammel discussed 'the road beyond the Marrakech Treaty'.

*17 June***Joint submission to the Universal Periodical Review (UPR) Working Group of the UN Human Rights Council on Vietnam**

Working with other NGOs in this field, IPA Freedom to Publish Director Alexis Krikorian made joint submissions that recommended ways to improve governments' records on freedom of expression.

*17–20 June***IFEX Annual General Meeting, Phnom Penh, Cambodia**

IPA Freedom to Publish Director Alexis Krikorian attended the AGM of the International Freedom of Expression Exchange. IPA successfully nominated Marian Botsford Fraser, Chair of the Writers in Prison Committee (WiPC) of PEN International, to the governing Council of IFEX.

*17–28 June***WIPO Diplomatic Conference in Marrakech**

IPA Secretary General Jens Bammel addressed the opening ceremony of the Diplomatic Conference, outlining the publishers' position on accessibility and the importance of maintaining the fundamental tenets of copyright. IPA President, Youngsuk 'YS' Chi addressed the closing ceremony of the Conference, congratulating WIPO and describing how publishers will continue to increase and improve access to their works for people with a visual disability. For more information, see [page 22](#).

*24 June***Joint submission to the Universal Periodical Review (UPR) Working Group of the UN Human Rights Council on Cambodia**

Working with other NGOs in this field, IPA Freedom to Publish Director Alexis Krikorian made joint submissions that recommended ways to improve governments' records on freedom of expression.

## July 2013

### 1 July

#### IPA Executive Committee meeting

The IPA's EC met via teleconference.

### 3 July

#### Meeting with WIPO, Geneva

IPA organized a meeting between WIPO and representatives of other media industries to discuss the future of digital content markets. IPA President YS Chi and Secretary General Jens Bammel attended.

### 16 July

#### World Book Capital Selection Committee, Paris

IPA Freedom to Publish Director, Alexis Krikorian, along with representatives of the International Booksellers Federation (IBF), the International Federation of Library Associations and Institutions (IFLA), and UNESCO chose Incheon, Korea, as the 2015 World Book Capital.

### 24 July

#### 2nd Freedom for Journalists Congress, Istanbul

Invited by the Turkish Publishers Association, IPA Policy Director José Borghino spoke in solidarity with other organisations fighting for freedom to publish and freedom of expression. IPA called on the Turkish government to make meaningful amendments to its anti-terrorist, defamation and criminal laws. For more information, see [page 25](#).

### 31 July

#### ALRC inquiry into copyright exceptions, Australia

IPA made a detailed submission to the ALRC inquiry in support of the Australian Publishers Association. IPA rallied members to also make submissions. Eleven submissions by IPA members were submitted.

## August 2013

### 19 August

#### 79th IFLA World Library & Information Congress in Singapore

IPA President YS Chi spoke on a panel about the transformations of the e-book market from the publisher perspective.

## September 2013

### 3 September

#### IPA at St Gallen, Switzerland

Secretary General Jens Bammel spoke at the St Gallen International Publishing Management Course.

### 6 September

#### IPA submission in support of the Norwegian Publishers Association (NPA)

IPA made a submission to the EFTA Surveillance Authority (ESA) commenting on a case where an entity (NDLA) that is in direct competition with commercial Norwegian publishers is receiving substantial state. IPA called on its members to support the NPA.

### 11–13 September

#### FEP meeting, Bucharest

IPA attended meeting of the Federation of European Publishers.

### 19–20 September

#### 11th IPA Educational Publishers Forum meeting in Dublin

The group discussed trends in online learning (including OERs and MOOCs), the 'What works 2?' conference in 2014, and EC's education initiatives.

### 23 September

#### IPACC meeting in Brussels

16th meeting of representatives from IPA, International Association of Scientific, Technical and Medical Publishers (STM), Federation of European Publishers (FEP), European Magazine Media Association (EMMA) and European Publishers Council (EPC).

## October 2013

### 4 October

#### LIBER Book Fair, Madrid

IPA President YS Chi and Policy Director José Borghino addressed the meeting of Grupo Ibero-Americano de Editores (GIE).

# IPA Global Publishing Statistics

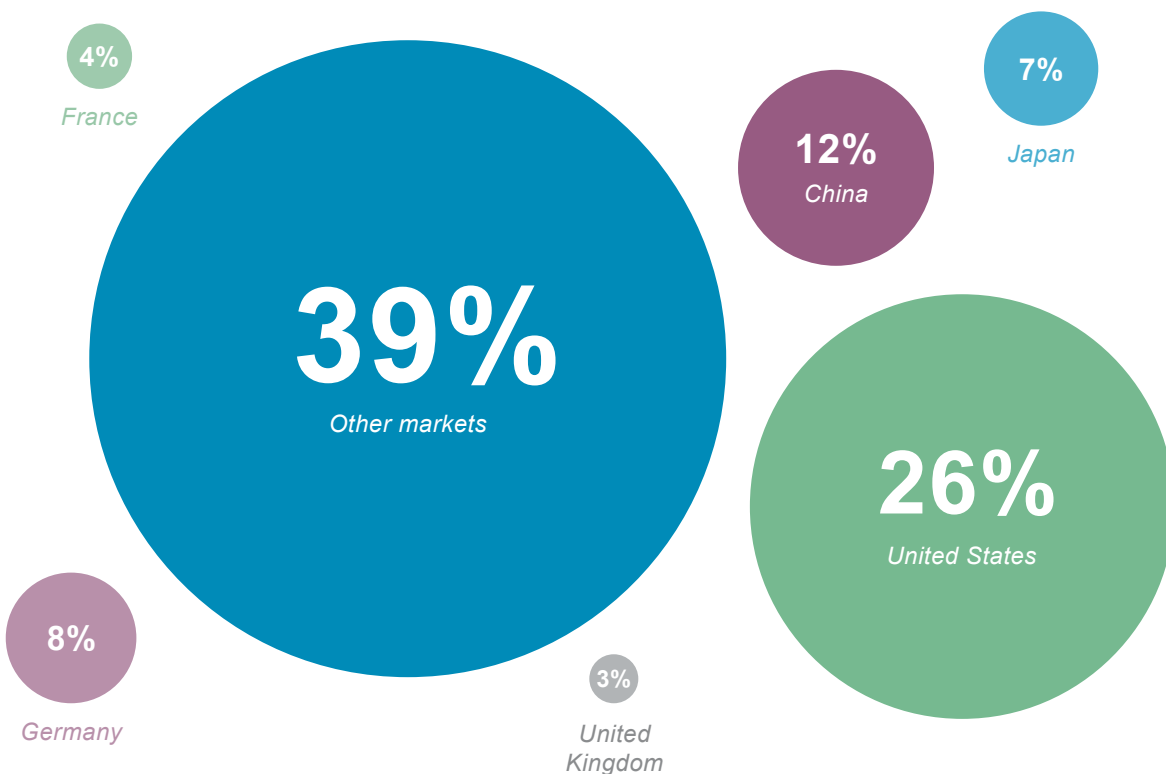
*Rüdiger Wischenbart*

## *Global Publishing Industry Slowly Shifts South*

Readers from around the world spend an estimated €114 billion on books per year. This amount includes not just print and digital editions of various kinds of trade books (like fiction, nonfiction and children's books), but also many sorts of educational materials, as well as professional and scientific publications.

The consumption—and in many places: the availability—of books is far from even across the almost 200 countries worldwide. On the contrary, with a combined value of close to €70 billion, the six largest book markets—the United States, China, Germany, Japan, France and Great Britain—together account for over 60% of the global spending on books.

### » The six largest book markets



**Chart 01:** Market share of the six largest publishing markets worldwide. (Source: IPA research.)

## The 20 Largest Publishing Markets

A list of the 20 largest publishing markets therefore highlights complex dynamics between publishing, the general economy and the size of the included countries:

Country	Year	Publishers' total net revenue (m€)	Total market value at consumer prices (m€)	New titles & re-editions per 1m inhabitants	2012 GDP per capita PPP in US\$ (Worldbank)	Population
<b>World</b>			<b>114,000</b>		<b>12,189</b>	<b>7,046,368,813</b>
<b>USA</b>	<b>2012</b>	20,750	<b>29,643</b>	1,080	49,965	313,914,040
<b>China</b>	<b>2012</b>		<b>14,200</b>	306	9,233	1,350,695,000
<b>Germany</b>	<b>2012</b>	5,407	<b>9,520</b>	1,115	40,901	81,889,839
<b>Japan</b>	<b>2012</b>		<b>7,878</b>	617	35,178	127,561,489
<b>France</b>	<b>2012</b>	2,771	<b>4,534</b>	1,321	36,104	65,696,689
<b>UK</b>	<b>2012</b>	3,736	<b>3,975</b>	2,459	36,901	63,227,526
<b>Italy</b>	<b>2012</b>		<b>3,072</b>	1,049	33,111	60,917,978
<b>Spain</b>	<b>2011</b>	1,820	<b>2,890</b>	1,692	32,682	46,217,961
<b>Brazil</b>	<b>2012</b>	1,884	<b>2,810</b>	339	11,909	198,656,019
<b>Korea, Rep.</b>	<b>2012</b>		<b>2,734</b>	1,257	30,801	50,004,000
<b>India</b>	<b>2010</b>	1,675	<b>2,500</b>		3,876	1,236,686,732
<b>Canada</b>	<b>2010</b>	1,535	<b>2,342</b>		42,533	34,880,491
<b>Turkey</b>	<b>2012</b>	1,096	<b>1,682</b>	564	18,348	73,997,128
<b>Australia</b>	<b>2011</b>		<b>1,520</b>	877	44,598	22,683,600
<b>Russian Federation</b>	<b>2012</b>		<b>1,494</b>		23,501	143,533,000
<b>Netherlands</b>	<b>2012</b>		<b>1,363</b>	1,412	43,198	16,767,705
<b>Poland</b>	<b>2012</b>	654	<b>1,053</b>	775	22,162	38,542,737
<b>Belgium</b>	<b>2011</b>	519	<b>850</b>		39,788	11,142,157
<b>Switzerland</b>	<b>2011</b>		<b>806</b>		53,367	7,997,152
<b>Norway</b>	<b>2012</b>		<b>743</b>	1,486	65,640	5,018,869
<b>Top 20 Publishing Markets</b>			<b>95,609</b>			
<b>Other Markets</b>			<b>18,391</b>			

**Table 01:** The 20 largest publishing markets worldwide, ranked according to domestic market value at consumer prices. (Various sources; research and compilation by IPA. Estimated values in italics.)

With a total market value of €95.6 billion, we estimate that the 20 largest publishing markets account for just under 84% of global spending on books.

The figures for the United Kingdom show how, a comparative ranking of markets sometimes throws up paradoxes, depending on the metric chosen. In this case, British publishers' net sales are much closer to the domestic market value at retail prices, due to exceptionally strong exports worth £1,211 million (or €1,480 million). (For a more detailed discussion, see the UK case study below.)

Books and publishing thereby closely reflect the evolution of a global knowledge society. Together with access to the Internet and to modern communication networks, published book content is a measure of a country's or a region's position in the global commercial exchange of knowledge, which must be seen as the true global currency in the early 21st century.

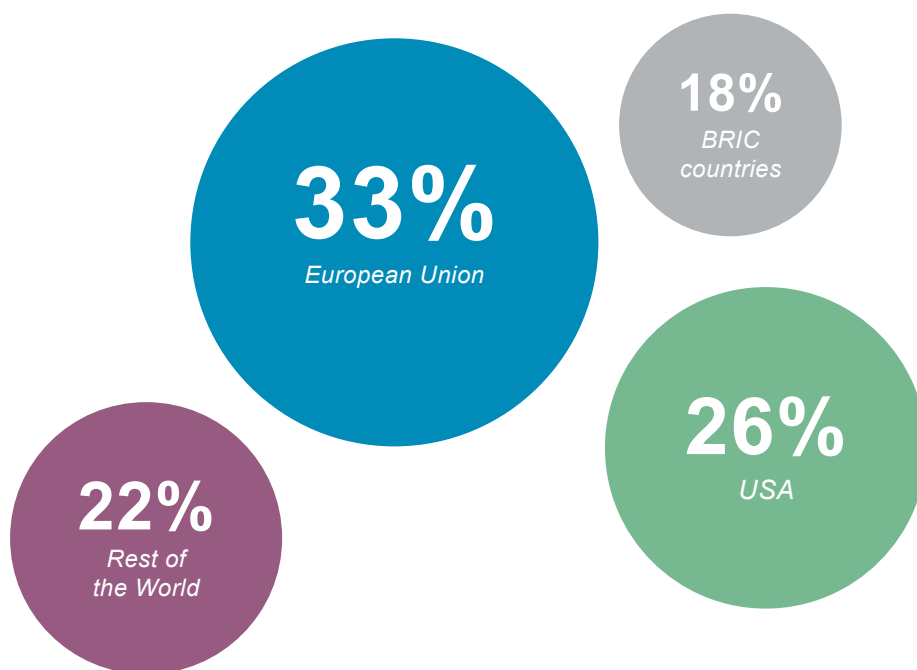
To understand in more detail what publishing and book markets represent, we have started to juxtapose market size to the number of new titles (and re-editions) released per one million inhabitants (as a measure for domestic production), and to the GDP per capita (PPP or Purchasing Power Parity) as an indicator of a country's relative affluence.



## The Rise of Emerging Markets in Global Publishing

Over the past decade, several new centres of gravity for global publishing have emerged. The demand for books and educational material reflect overall economic growth patterns with remarkable precision.

» Share of global publishing industry, by region



**Chart 02:** Market share in global publishing industry of selected regions, at consumer value. (Source: IPA research.)

China alone, by now the second largest publishing market worldwide, accounts for more than half of the BRIC countries' global market share (to be exact, over 12% of global publishing). The Chinese publishing industry is expected to grow further, driven by domestic consumption and the aspiration for a better education of the expanding middle class in China's large urban regions. Meanwhile, other BRIC countries, notably Brazil, have recently hinted that the expansion of their book sectors could be coming to an end.

Such growth patterns—including an eventual a slow-down in publishing, in accordance with overall development—can be observed in several other countries after stupendous recent growth, notably in Turkey and Mexico, as we will show in case studies, below.

Unfortunately, for some of the most dynamic markets—for example India or Korea—a continuous overview of trends and developments is almost impossible due to gaps in availability of reliable data.

## A Global Digital Expansion

In 2012, e-books worth US\$3.5 billion were sold in the United States, equalling 13% of all publishers' combined net sales. In the United Kingdom, digital revenues were worth £411 million, as compared to £2,932 million for sales of physical books. In a largely mature publishing market which has seen declining revenues in recent years, digital sales clearly helped balance the losses in revenue from printed books for the first time in the UK in 2012.

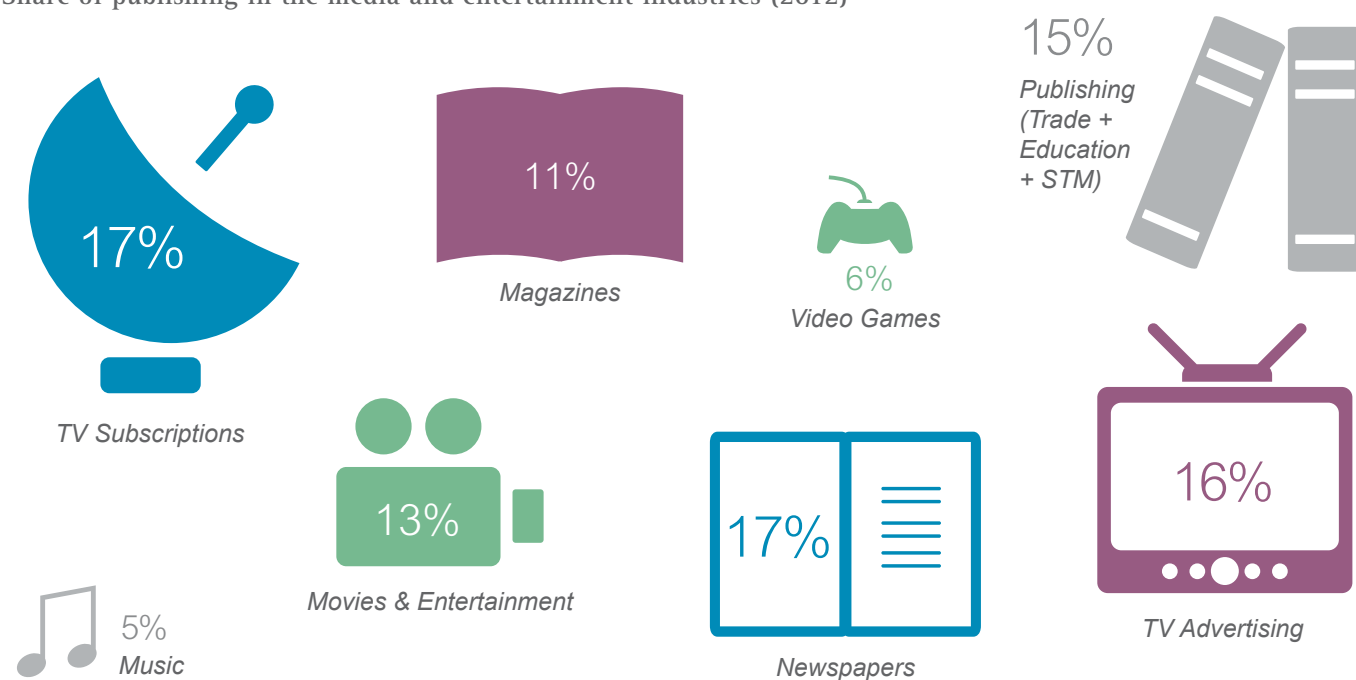
This is even more remarkable as e-books only started to gain significant market share in North America and Great Britain as recently as 2010. The music industry, by comparison, had to wait much longer before digital sales (by rising to 34% of income) helped to tip the overall market into new growth for the first time in over a decade in 2012.

No other markets can boast comparable market share for digital publishing as the US and the UK. But in contrast to trade (or general consumer) publishing, other sectors of the industry have already largely and successfully completed their digital migration. Leading companies in scientific, technical and medical publishing (STM) as well as professional publishing, today get over 80% of their revenues from digital. Educational publishing is now closely replicating this pattern, driven particularly by strategic government programs in both developed and emerging economies.

## Publishing Plays a Particularly Strong Role in Global Media and Entertainment

In the global publishing, media and entertainment industries—in total, worth over US\$1,000 billion—books account for 15% of the value.

### » Share of publishing in the media and entertainment industries (2012)



	US\$	Share in %	Source <sup>1</sup>
<b>TV Subscriptions</b>	\$172	17%	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Newspapers</b>	\$170	17%	IbisWorld, Global Newspaper Publishing industry
<b>TV Advertising</b>	\$162	16%	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Publishing (Trade + Education + STM)</b>	\$151	15%	IPA (RW): Global Publishing Markets 2013
<b>Movies &amp; Entertainment*</b>	\$133	13%	Lucintel, Global Movie and Entertainment Industry 2012-2017: Trends, Profits and Forecast Analysis
<b>Magazines</b>	\$107	11%	Lucintel, Global Magazine Publishing Industry 2013-2018: Trend, Profit, and Forecast Analysis
<b>Video games</b>	\$63	6%	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Music</b>	\$50	5%	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Total publishing, media &amp; entertainment</b>	<b>\$1,008</b>	<b>100%</b>	
<b>* broader definition than PwC</b>			
Book Publishing (Trade + Edu)	112		IPA (RW)
Book Publishing (Trade + Edu)	104		PwC Global Entertainment and Media Outlook: 2013-2017
Recorded music (net industry sales, not market value; excl. Live revenues)	16.5		IFPI
Filmed Entertainment	106		PwC Global Entertainment and Media Outlook: 2013-2017

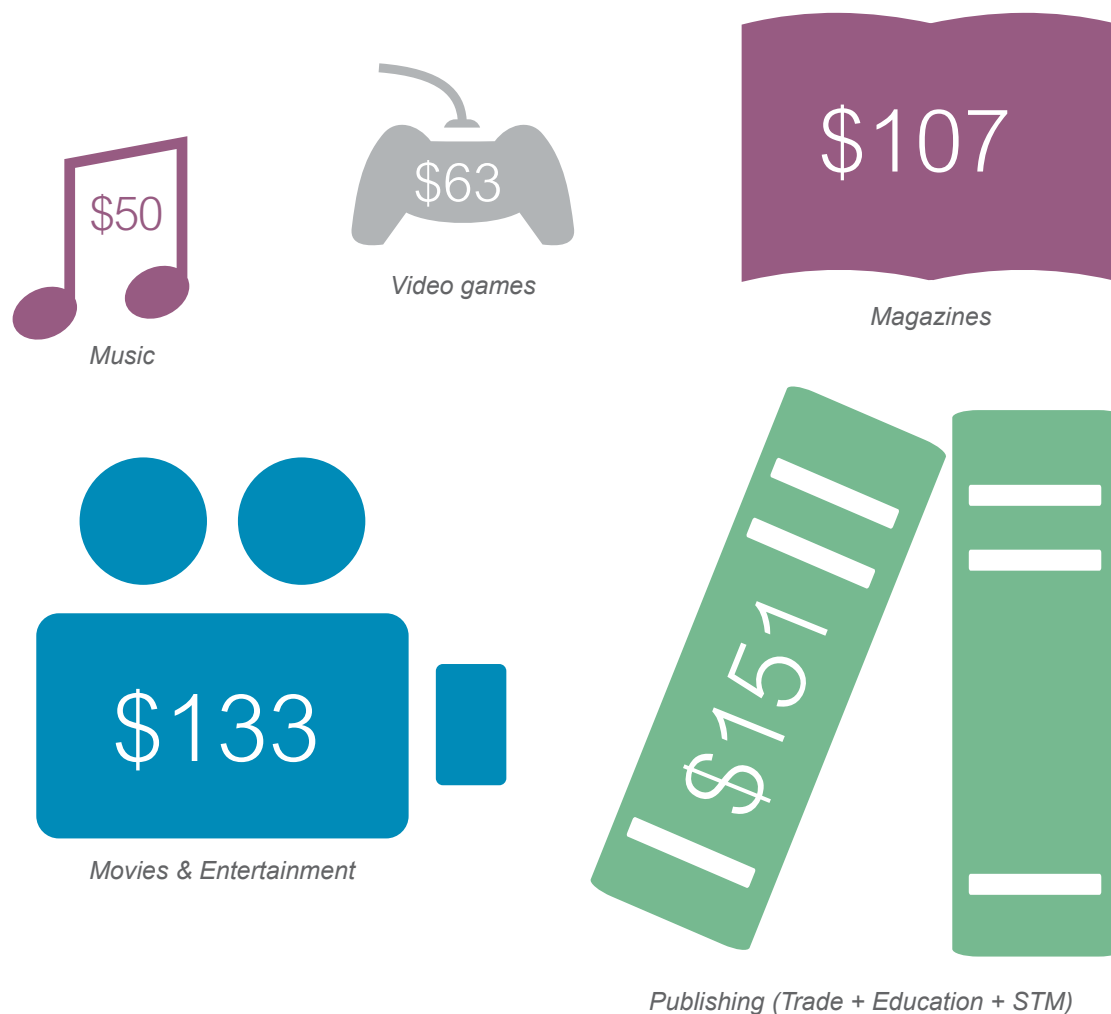
**Table 02, Chart 03:** Consumer spending on TV, filmed entertainment, video games, music, and all sectors of publishing. (Various sources, compiled by IPA/RW)

<sup>1</sup> Research from various sources, and IPA/RW research for book publishing, including the following:

- PwC Global Entertainment and Media Outlook: 2013-2017, [www.pwc.com/outlook](http://www.pwc.com/outlook)
- Lucintel (Movies & entertainment) - [http://www.researchandmarkets.com/reports/2172264/global\\_movie\\_and\\_entertainment\\_industry](http://www.researchandmarkets.com/reports/2172264/global_movie_and_entertainment_industry)
- Lucintel (Magazines) - <http://www.prweb.com/releases/2013/3/prweb10565084.htm>
- IbisWorld (Newspaper) - <http://www.prweb.com/releases/2013/6/prweb10834034.htm>

Among entertainment products, book publishing is clearly the largest industry, equalling roughly three times the turnover of the global music industry, and almost 14% more than the value of global movies and entertainment.

» Publishing and entertainment media (bn US\$, 2012)



	US\$ bn	Source <sup>2</sup>
<b>Publishing (Trade + Education + STM)</b>	151	IPA (RW): Global Publishing Markets 2013
<b>Movies &amp; Entertainment</b>	133	Lucintel, Global Movie and Entertainment Industry 2012-2017: Trends, Profits and Forecast Analysis
<b>Magazines</b>	107	Lucintel, Global Magazine Publishing Industry 2013-2018: Trend, Profit, and Forecast Analysis
<b>Video games</b>	63	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Music</b>	50	PwC Global Entertainment and Media Outlook 2013 - 2017
<b>Total</b>	<b>504</b>	

**Table 03, Chart 04:** Market share of book publishing, as compared to filmed entertainment, video games and music (Various sources, IPA/RW research)

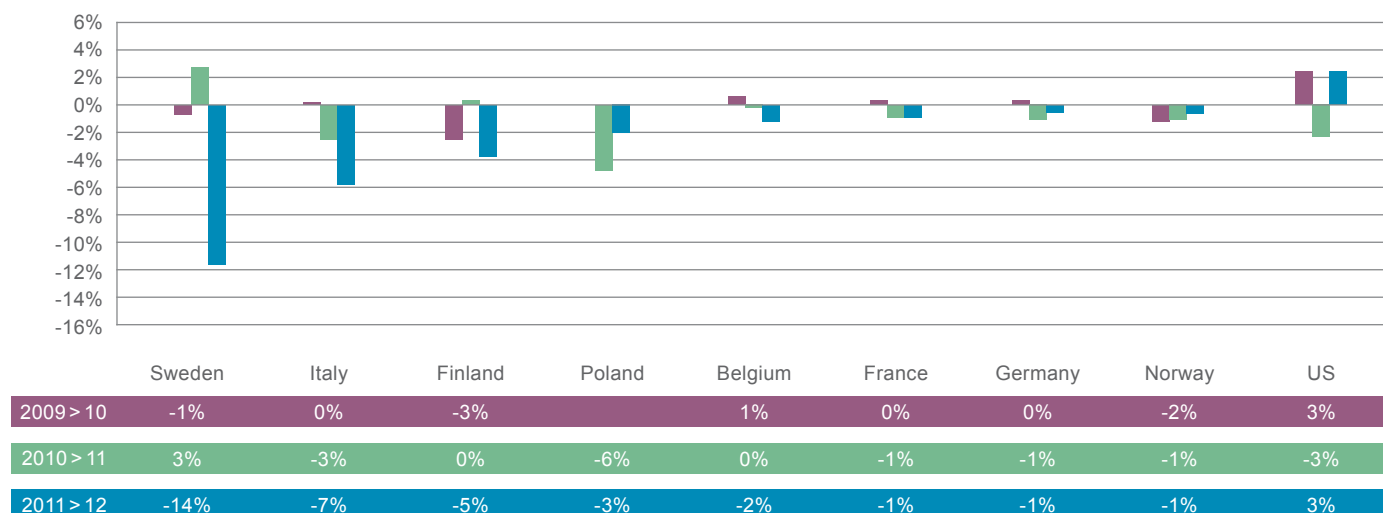
<sup>2</sup> Research from various sources, and IPA/RW research for book publishing, including the following:

- PwC Global Entertainment and Media Outlook: 2013-2017, [www.pwc.com/outlook](http://www.pwc.com/outlook)
- Lucintel (Movies & entertainment) - [http://www.researchandmarkets.com/reports/2172264/global\\_movie\\_and\\_entertainment\\_industry](http://www.researchandmarkets.com/reports/2172264/global_movie_and_entertainment_industry)
- Lucintel (Magazines) - <http://www.prweb.com/releases/2013/3/prweb10565084.htm>

# Case Studies and Close Ups

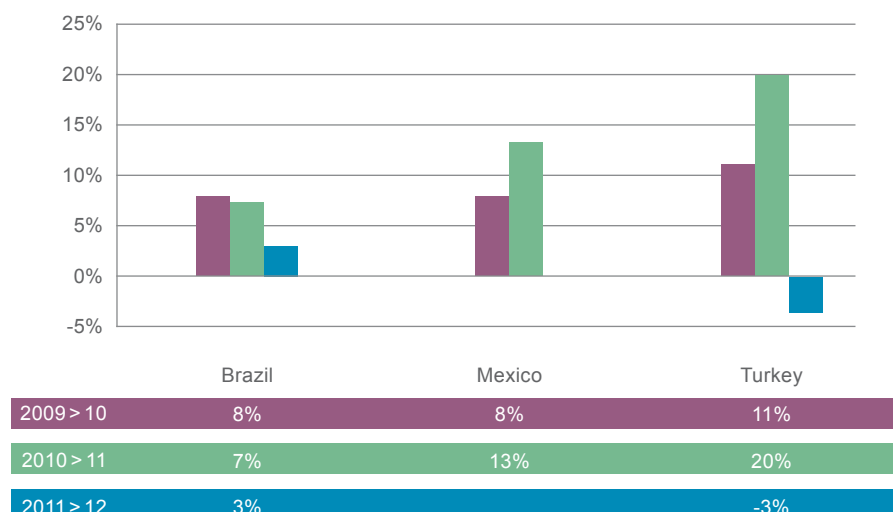
## Comparing Complex Developments: Mature Versus Emerging Economies In Publishing

A comparison of mature book markets from across Europe, plus the United States, clearly shows how most European markets recently suffered the consequences of the economic crisis of 2008, while the US market experienced a recovery largely driven by the recent strong expansion of its e-book market segment.



**Chart 05:** Selected mature markets: Relative annual growth or decline between 2009 and 2012, in local currencies, in %. (Sources: Various national statistics.)

The picture is significantly different for selected emerging economies, where growth had been much more vibrant, before a harsh slowdown hit in 2012.

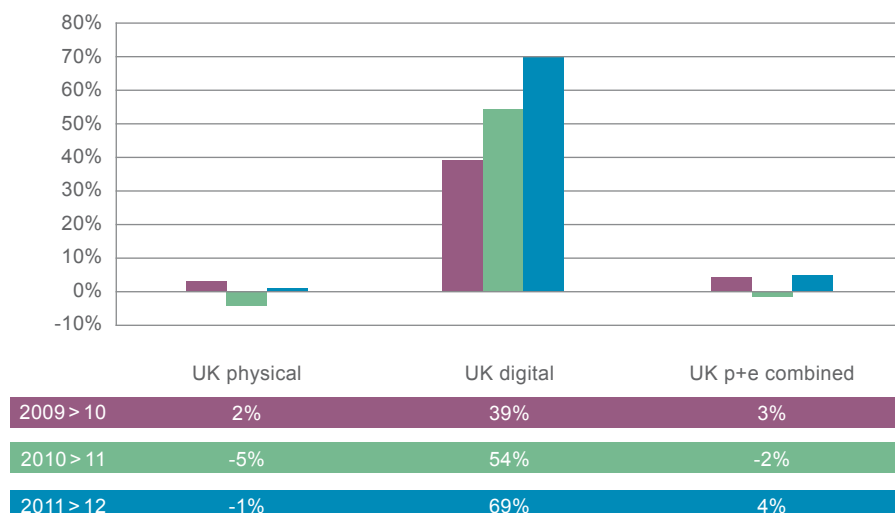


**Chart 06:** Selected emerging economies: Relative annual growth or decline between 2009 and 2012, in local currencies, in %. (Sources: Various national statistics.)



## The United Kingdom: The Role of Digital and Exports

The US example highlights how the evolution of an e-book market can make good for lost ground in print once e-books have evolved beyond their very early stages.<sup>3</sup> Recent numbers from the United Kingdom showcase some remarkable details:



**Chart 07:** Evolution of print and digital in the United Kingdom. (Source: The Publishers Association.)

In these UK figures, we see a declining print book market being counter-balanced by e-book sales, resulting in overall growth in 2012, as compared to 2011.

Also, the United Kingdom example is even more relevant as it allows us to show the impact of exports. The UK is traditionally one of the strongest exporting markets for several sectors in the cultural industries, and notably for books.

Analysing the total value created by the UK book industry in 2012 reveals that exports (£1,211 million) were a particularly significant portion of the £2933 million generated in overall net sales, plus another £125<sup>4</sup> million coming from digital domestic revenues.

	2012 (m£)
<b>UK domestic print sales</b>	1,721
<b>UK domestic digital sales</b>	125
<b>UK exports</b>	1,211
<b>Total</b>	<b>3,057</b>

**Table 04:** British publishers' value creation. (Source: The Publishers Association.)

Overall the UK publishing industry clearly stands out among all international markets by virtue of the important share of overall revenue generated by both digital sales and exports.

## The Data Challenge

This report looks at an old cultural industry—rich in traditions and characterized by deep regional differences— from a truly global perspective.

Its ambition is to collect existing data from a wide array of sources, always aiming to identify the best and most reliable statistics, retrieving the information either directly from local professional and government organizations, or, as a second-best choice, from authoritative professional publications. In many cases, we have had detailed discussions with those local information providers, aiming at a well-founded understanding of what their data represent.

With standardized definitions missing even for the most basic identifiers—such as what is included under the term ‘book publishing’, and what needs to be excluded (e.g. newspapers and magazines)—the International Publishers Association has begun a process engaging with its members to define a set of basic identifiers. A working group was established in 2012, with members representing both professional trade and commercial market research organizations to oversee best practices and provide valuable conceptual as well as technical advice. All research has been conducted by Rüdiger Wischenbart and his team at ‘Content and Consulting’.

Still, users of this report should be aware of the complexities and uncertainties involved, and their critical feedback is therefore highly encouraged.

### Contacts:

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internationalpublishers.org  
ruediger@wischenbart.com

<sup>3</sup> All data as reported by the UK Publishers Association in ‘The UK Book Publishing Industry in Statistics 2012’, [www.publishers.org.uk](http://www.publishers.org.uk)

<sup>4</sup> The total digital revenues of £411 million in 2012 includes digital exports. Domestic digital sales account for £125 million. Clarification by PA, for this report.

# IPA WORKING COMMITTEES:

## Copyright Committee

### **Chair:**

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

### **Secretariat contact:**

*José Borghino*  
(borghino@internationalpublishers.org)

### *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 30th IPA Congress to be held in Bangkok in March 2014. He is a past Director of the Ohio State University Press. His writings on publishing have appeared in *The Chronicle of Higher Education*, *Library Journal*, and *Academe*, among others.



The Copyright Committee helps to formulate copyright policy for the Association and provides a key forum for the exchange of information among IPA members and other stakeholders about national copyright legislation. Subgroups include a Policy Steering Group (PSG) and an Anti-Piracy Working Group (APWG). This year, following the successful prosecution of the pirate sites library.nu and ifile, the APWG identified another large-scale international pirate site for possible prosecution, raised the funds for preliminary investigation, and retained outside counsel. The preliminary investigation is now underway. If, based on the evidence that emerges from this investigation, a decision is made to proceed with prosecution, further fundraising will be required.

A core element of the Committee's work is advising the Secretariat in its representation of publishers' interests at the World Intellectual Property Organization (WIPO), particularly on the Standing Committee on Copyright and Related Rights (SCCR). At the heart of the WIPO debates this year was the introduction of international mandatory copyright exceptions for the visually impaired, a process that concluded this June with adoption of the Marrakech Treaty to Facilitate Access to Published Works for Persons Who Are Blind, Visually Impaired, or Otherwise Print Disabled. Next on the SCCR agenda are the issues of exceptions for libraries and archives and for education. IPA is also working on finding acceptable solutions with regard to WIPO's efforts to protect traditional knowledge and folklore at the international level.

The Committee also oversees the various submissions IPA makes in national copyright reforms. In 2013, IPA intervened in copyright consultations in Australia, Ukraine and Norway.

### *WIPO Marrakech Treaty*

On 27 June 2013 a WIPO Diplomatic Conference concluded the Marrakech Treaty to Facilitate Access to Published Works for Persons who are Blind, Visually Impaired, or otherwise Print Disabled. In order to enter into force the treaty needs to be ratified by 20 countries. Over fifty countries have signed the treaty so far; therefore, a sufficient number of ratifications can be expected within the next three to five years. In any case, national governments will now debate whether they should change their laws to allow for ratification.

The treaty obliges contracting states to introduce copyright exceptions for persons with print disabilities. It allows authorised entities—a special type of organisation supporting persons with print disabilities—to share accessible format copies of books with other authorised entities and with individual blind and otherwise print disabled persons, across borders and around the world.

This is a landmark treaty because it harmonises national copyright exceptions, not rights, and because it enables international exchange of copyrighted works under copyright exceptions.

From a publisher perspective, it was important to ensure that this new type of treaty did not change the fundamental principles of international copyright law. The preservation of the so-called 'three-step test' as the outside limitation for any and all exceptions was successful. The concept of authorised entities making the international exchange means it is possible for rights holders to track how their works are used by libraries that are servicing persons with print disabilities.

Looking forward, some Member States of WIPO may seek to use this treaty as a model for future treaties on international copyright exceptions. Given the unique humanitarian purpose, the specific circumstances of the production of special accessible copies and the special network of authorised entities that have been introduced, the principles of this treaty cannot apply outside of a very specific scope.

IPA has been carefully following the treaty negotiations since their inception. We are delighted that publishers can avoid the effects of the treaty by providing accessible format copies themselves. The recent developments in reader technology and publishing formats point to a future, not so far away, where e-books are fully accessible to all persons, regardless of print disability, and can be read using tablets, smart phones, or special reading devices.

IPA will support its members with advice and information when national governments seek to change their national laws to implement this treaty.

### *WIPO Stakeholder Platform and the TIGAR Project*

While the Marrakech treaty may provide the legal foundation for some special accessible format copies to cross borders, its effect in practice is still be many years away. The need for accessible books around the world is, however, immediate. Since 2009, IPA has been working with other organisations representing rights holders, WIPO, and a range of libraries serving persons with print disabilities to create practical solutions.

**This so-called WIPO Stakeholder Platform has worked in three areas:**

- 1. The Inclusive Publishing Working Group** has focused on developing and promoting tools that enable publishers to produce accessible format copies. This working group has developed publisher guidelines for accessible publishing and has held events and courses that enabled publishers to modify their production procedures in such a way that they could produce highly accessible e-books.
- 2. The Capacity Building Working Group** has focused on identifying ways that accessibility can be improved in developing countries. Fact finding missions to Namibia and Bangladesh have provided insights into how internationally produced accessible works can be put to use in developing countries in an effective and safe way.
- 3. The TIGAR Project** is a pilot to create the technical and social infrastructure for a global network of libraries serving persons with print disability. In such a network accessible format copies can be exchanged safely, production programmes can be coordinated to avoid duplication, and publishers can be empowered to provide such accessible copies themselves. During the pilot phase more than 20 organisations serving visually impaired persons have signed up to become 'Trusted Intermediaries', including the Library of Congress, the national libraries of Malawi, Namibia and Jamaica, as well as a large number of national library services for the blind, including from Denmark, Norway, Sweden, Canada, South Africa, Sri Lanka, and many more. The same Memorandum of Understanding that binds these libraries together was also signed by more than 45 publishing houses whose works could be exchanged.

The pilot began in 2010 and will continue until mid-2014. The TIGAR Project group has now built the technical infrastructure for search and discovery in an integrated global library catalogue. There is a request and delivery mechanism in place. While the number of works that have actually been exchanged has been small (about 1000 titles uploaded and 550 downloaded), all Trusted Intermediaries are enthusiastic about the system's potential. The number of titles catalogued in the TIGAR catalogue is rapidly approaching 200,000 titles. Should the major VIP libraries, for example in the US, UK and Spain, join up and once we find a streamlined mechanism to accelerate necessary rights clearances, then the benefits for persons with print disability around the world will be enormous.

All participants are very enthusiastic about creating a more permanent follow-up project to TIGAR with close proximity to WIPO. Work on a possible foundation has begun. The creation of a sustainable, effective and secure network of trusted intermediaries will be an important work for IPA for 2014.



Picture © WIPO 2013. Photo: Emmanuel Berrod

# Freedom to Publish Committee

## **Chair:**

*Bjørn Smith-Simonsen,  
PAX Forlag, Norway*

## **Secretariat contact:**

*José Borghino  
(borghino@internationalpublishers.org)*

### *About the Chair*

**Bjørn Smith-Simonsen** is the publisher of Pax Forlag. Born in Oslo, Norway, in 1946, he trained both as an economist and a psychologist. His publishing career began in 1975. In 1992, he was elected to the board of the Norwegian Publishers Association, of which he was the chairman from 1999 to 2005. In 2006, he succeeded Lars Grahn both as a member of IPA Executive Committee and Chairman of IPA's Freedom to Publish Committee.



**The Freedom to Publish (FtP) Committee formulates IPA's freedom to publish policy. From 2012-2013, IPA focused on monitoring freedom to publish issues in Cambodia, Egypt, France, Georgia, Iran, Saudi Arabia, Thailand, Tunisia, Turkey, UAE, and Vietnam.**

The FtP Committee takes a leadership role in IPA's participation in the Universal Periodical Review (UPR) Project, drafting submissions on the freedom of expression and freedom to publish situation in countries up for review by the UPR Working Group of the UN Human Rights Council. This year, the Committee submitted a record seven UPR reports on Azerbaijan, Cambodia, Malaysia, Nigeria, Russia, Saudi Arabia, and Vietnam. IPA found widespread censorship in all seven countries and recommended ways of improving their records. Overall, IPA found that freedom of expression recommendations previously accepted by these states had not been implemented—in particular in Vietnam and Saudi Arabia. In addition, IPA called on Malaysia and Saudi Arabia to sign and quickly ratify the International Covenant on Civil and Political Rights (ICCPR) to signal their real intent to respect freedom of expression.

This year, IPA also led an international fact finding and culture building mission to Myanmar/Burma. The delegation included representatives from the Association of American Publishers (AAP), PEN America, PEN Norway, and IPA. It assessed the conditions for publishers and freedom to publish in Myanmar/Burma, made preliminary contacts with local publishers' associations, and investigated the possibility of setting up a local PEN centre. The delegation found that although conditions were improving, there is still a real risk of censorship, with politics, the military, sex/nudity and ethnic minorities as the main taboo subjects. The understanding of the role of publishers is rudimentary, with almost no Burmese publishing houses using editors and very few with any professional marketing or distribution staff. Self-publishing is prevalent. Awareness of copyright is low or non-existent (although a Berne-compliant copyright law is almost ready for adoption).

Following the unanimous approval by the IPA Executive Committee in December 2012, the Publishers' Emergency Fund was established to provide a safety net for publishers in emergency situations. The Fund has a starting value of 8,500 CHF and will remain independent, with no financing from IPA membership fees. IPA now has a fully functioning support mechanism, which can help publishers in emergency situations, in particular where their hardship is a direct result of their fight for freedom to publish. The regulations of the Publishers' Emergency Fund are available from the Secretariat.

Finally, IPA is re-launching the Freedom to Publish Prize. Created in 2005 to honour an individual or organisation that has defended freedom to publish in significant ways—sometimes at the risk to personal safety—the IPA Freedom to Publish Prize is the only human rights award which recognises the contribution of publishers. IPA will link the Prize to its biannual Congress and will use it as an advocacy and lobbying tool. The 2014 Prize will be awarded during the 30th IPA Congress on 27 March 2014 in Bangkok, Thailand. In early 2013, the IPA embarked on a new approach to funding the Prize, approaching the world's largest publishers for monetary support to bolster the PR surrounding the Prize as well as the Prize itself. The funding target is USD 140,000 for the next two rounds of the Prize in 2014 and 2016.



## *Situation in Turkey: Spotlight on Ragıp and Deniz Zarakolu*

In 2012, IPA spearheaded an international campaign seeking the release of the iconic publisher and recipient of the 2008 IPA Freedom to Publish Prize, Ragıp Zarakolu, from prison in Turkey. On 10 April 2012, Ragıp<sup>5</sup> was finally freed, pending trial, after spending 160 days in a high-security prison. Unfortunately, his son, Deniz Zarakolu<sup>6</sup>, also a publisher as well as a writer and translator, remains in prison.

Ragıp and Deniz Zarakolu are among the 205 defendants in the so-called ‘Silivri’ branch (named after Europe’s biggest prison, holding over 10,000 inmates) of the Koma Civakên Kurdistan (KCK) mass trials which began in Turkey in October 2010. There are other branches of this trial in Istanbul and Diyarbakır. In all, more than 1,800 people have been detained.

Ragıp is charged with ‘aiding and abetting an illegal organisation’ and is threatened with up to fifteen years in prison, while Deniz is charged with ‘being a member of an illegal organisation’ and risks up to twelve years in prison if found guilty. Deniz was arrested on 7 October 2011 after giving a lecture at the Political Science Academy of the pro-Kurdish Peace and Democracy (BDP) opposition party. This party is legal, and such party-affiliated research academies are common in Turkey. IPA believes that Ragıp and Deniz, as well as several other writers and intellectuals, have been charged solely because of their publications, which violates Turkey’s international human rights obligations.

At the end of 37th hearing of the KCK trial in Silivri on 7 June 2013, only 14 defendants were released, while 111 were left in prison. IPA’s Freedom to Publish Committee Chair, Bjørn Smith-Simonsen commented, ‘The decision not to release Deniz Zarakolu in this branch of the KCK trial is simply incomprehensible. IPA urges the Turkish authorities to drop all charges against Deniz and Ragıp Zarakolu, and secure the immediate release of Deniz.’

In July 2013, IPA Policy Director, José Borghino, was invited by the Turkish Publishers Association and the Turkish Freedom for Journalists Platform to speak at the 2nd Freedom for Journalists Congress, which was held in Istanbul across Taksim Square from Gezi Park<sup>7</sup>. IPA protested strongly that, at that time, there were not only 64 journalists in Turkish jails, but there were also Turkish publishers, writers, and translators (like Deniz Zarakolu), as well as teachers, thinkers and ordinary citizens, all of whom were threatened by laws that give the state draconian power over their lives.

### **IPA called on the Turkish authorities to do the following:**

- Refrain from prosecuting writers, publishers and others who have expressed non-violent opinions;
- Lift the conditional three-year ‘pardon’ on those writers and publishers involved in freedom of expression cases and acquit them immediately;
- Amend Article 26 of the Turkish Constitution to ensure its consistency with international human rights standards;
- Amend the definition of terrorism in Article 1 of the Anti-Terrorism Law to bring it in line with the definition proposed by the UN Special Rapporteur; repeal Article 6/2 of the Anti-Terrorism Law; and amend Article 7/2 of the Anti-Terrorism Law to ensure that it only prohibits advocacy of the incitement to violence;
- Remove criminal defamation from the Turkish Penal Code by abolishing Articles 125 and 299, and by repealing Law 5816;
- Annul Article 301;
- Redefine obscenity under Article 226.

The latest hearings of the KCK trial began on 9 September 2013 with 97 jailed defendants and are still continuing. Monday 7 October will be the 2nd anniversary of Deniz Zarakolu’s arrest. IPA will continue to campaign for the release of Deniz Zarakolu.

<sup>5</sup> December 2012 video of Ragıp Zarakolu with blogger and journalist Mehmet Koksall and Philippe Leruth of the European Federation of Journalists: <http://www.youtube.com/watch?v=dOa7uipNneA#t=29>

<sup>6</sup> GIT initiative website: <http://www.gitinitiative.com/article-one-year-anniversary-of-the-arrest-of-deniz-zarakolu-110989803.html>

<sup>7</sup> ‘Freedom of Turkish Journalists Congress a “Magnificent Show of Solidarity”’: <http://www.ifj.org/en/articles/congress-of-campaign-for-freedom-of-journalists-a-magnificent-show-of-solidarity-say-ifj-efj>

# Literacy & Book Industry Policy Committee

## **Chair:**

*José Manuel Gómez,  
Grupo Anaya, Spain*

## **Secretariat contact:**

*Jens Bammel  
([bammel@internationalpublishers.org](mailto:bammel@internationalpublishers.org))*

IPA's Literacy & Book Industry Policy (LIBS) Committee guides the IPA Secretariat on all general industry policy matters, including taxation, import/export restrictions, and textbook adoption policies. Key publications include the annual survey of VAT rates on print and e-books. The Committee has also designed specific initiatives to promote literacy and reading. For example, IPA initiated the World Book Capital City project, now administered by UNESCO. IPA remains a member of the selection committee. A very popular subgroup of the Literacy and Book Industry Policy Committee is the Educational Publishers Forum (see page XX) which focuses on issues surrounding digital migration and government policies in the area of education and textbook adoption.

## *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 Editores 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.



## *2013 World Book Capital (WBC)*

Book lovers all over the world celebrated World Book and Copyright Day on 23rd April 2013. IPA took part in the opening of Bangkok as the 2013 World Book Capital from 21–23 April. Represented by EC member Trasvin Jittidecharak, LIBS Committee Chair José Manuel Gómez, and Freedom to Publish Director Alexis Krikorian, IPA congratulated Bangkok and invited the local authorities to seize the historic opportunity to promote reading and take other related measures as essential components of an ambitious national book policy supporting the development of a knowledge-based economy. During the main opening ceremony on 23rd April 2013, Trasvin urged Thai authorities to decriminalise defamation, a direct reference to Article 112 of the Thai Penal Code (lèse-majesté). José Manuel addressed the well-attended opening round-table session entitled 'The Future of Reading, Reading for the Future'. Alexis explained the basics of the WBC initiative during the Annual General Meeting of the Asia Pacific Publishers Association (APPA).

In July 2013, Incheon, Korea, was named the 2015 World Book Capital. Incheon was selected based on 'the quality of its programme, and the impact it will have on improving good integration of all stakeholders in the promotion of books and reading, access to books and writing in all formats to the citizens of Incheon and the Korean Peninsula during World Book Capital year and beyond'. Incheon is the fifteenth city to be designated World Book Capital. Previous WBCs are Madrid (2001), Alexandria (2002), New Delhi (2003), Antwerp (2004), Montreal (2005), Turin (2006), Bogotá (2007), Amsterdam (2008), Beirut (2009), Ljubljana (2010), Buenos Aires (2011), Yerevan (2012), Bangkok (2013), and Port Harcourt, Nigeria (2014). The selection committee is comprised of representatives from IPA, the International Booksellers Federation (IBF), the International Federation of Library Associations and Institutions (IFLA) and UNESCO. Each year, the quantity and quality of applications to be World Book Capital continues to rise. Member associations interested in submitting a World Book Capital application are encouraged to ask for guidance on the selection criteria from IPA.

## VAT rates

For the fourth consecutive year, the International Publishers Association (IPA), along with PricewaterhouseCoopers (PwC) Belgium and the Global PricewaterhouseCoopers Indirect Taxes Network, carried out a global survey on the application of VAT/GST on printed books and e-books.

While the first three IPA/PwC VAT/GST surveys aimed solely at learning more about the availability and use of special tax rates for printed and e-books in general around the world, and attempted to assess the extent to which the tax treatment of e-books was aligned with a given special tax treatment for printed publications, this fourth edition sought to sharpen the focus by concentrating exclusively on Europe, Canada and Latin America.

**IPA and PwC collected answers to the following questions from their contacts in 51 countries (34 in Europe, Canada and 16 in Latin America):**

- What is the standard VAT/GST rate?
- Is there a reduced VAT/GST rate?
- Does a special VAT/GST regime apply to books?
- Does a special VAT/GST regime apply to the supply of e-books?

## IPA's recommendations

Reduced VAT/GST rates remain the norm for printed books. Despite the global economic crisis and the subsequent VAT/GST reforms in many countries, books are consistently confirmed to be among the goods and services that merit a special, reduced VAT/GST rate or exemption. Bulgaria, Chile, Denmark and Guatemala are currently the exceptions, and should align themselves with the other countries surveyed.

In Latin America, those countries which apply a regime of VAT/GST exemption to books should shift towards a zero VAT/GST rate (as is the case in Bolivia, Ecuador, Honduras and Colombia). Indeed, we believe the zero VAT/GST rate to be the best way to support the entire publishing chain, fight piracy, encourage a thriving knowledge economy and create jobs.

Similarly, in Europe and Canada, there should be a shift to a zero rate of VAT/GST on printed books (as is already the case in the UK, Ireland and Norway). It is to be regretted that Croatia had to give up its zero VAT rate on books when joining the European Union to adopt a reduced VAT rate of 5% instead. In order to support the knowledge economy European Member States and Canada should adopt as low as possible a reduced VAT/GST rate on books and e-books.

In Europe, the trend towards the inclusion of e-books in special VAT regimes should be encouraged. A consistent treatment for all types of books is the direction towards which we are heading and the most logical way to achieve this is by reducing VAT on e-books. The practical issues that enable such special rates have already been resolved in pioneering countries. The future will tell whether the other Member States, the EU Commission and the CJEU will follow their lead.

The rate applied to all e-books, irrespective of the physical carrier, should match the rate for printed books to create a level playing field for all publications.

## *Ukraine heeds IPA national book policy recommendations*

On 15 May 2013 parliamentary hearings entitled 'The problems of the Ukrainian book publishing, bookselling and perspectives of support of book reading in Ukraine' were held in Kiev, Ukraine. Members of the Ukrainian Supreme Council (Verkhovna Rada), the Ukrainian government, and all stakeholders of the book chain were present.

At the joint invitation of the Ukrainian Book Publishers Association (UBPA) and Next Page Foundation, IPA Secretary General Jens Bammel delivered a short speech about why publishing matters. He presented a brief overview of international publishing figures in comparison to those for the Ukrainian market and underlined the importance of a successful national book policy. Following these hearings, IPA submitted 10 recommendations to strengthen book policy in Ukraine.

In early August, Publishing Perspectives, an online newsletter, reported that the Ukrainian government had announced the approval of a new book programme for 2014–18, aimed at strengthening interest in reading by funding the promotion of the local publishing, printing and bookselling industries. Some US\$61 million will be allocated to this programme. Many of the recommendations were inspired by the IPA submissions.

# Educational Publishers Forum

## **Chair:**

*Graham Taylor, Consultant, The Long Game (Publishers Association [UK] until February 2013)*

## **Secretariat contact:**

*José Borghino  
([borghino@internationalpublishers.org](mailto:borghino@internationalpublishers.org))*

### *About the Chair*

**Graham Taylor** is an independent consultant and chair of the IPA Educational Publishers Forum. Until February 2013 he was Director of Educational, Academic and Professional Publishing at The Publishers Association (UK). He is also a Director of the Publishers Licensing Society and of the Copyright Licensing Agency. Prior to joining the PA (UK) in 2001, he worked for several prominent UK-based publishers in editorial, sales and management roles, starting as a science publisher with Heinemann Educational in 1973 and finishing as Managing Director of International Education at Longman, both now part of Pearson Education.



The Educational Publishers Forum was first convened in January 2010 and has since developed into the key international meeting place for educational publishers from the IPA membership and other publishers associations. The Forum provides an opportunity for educational publishers to exchange experiences and debate the implications for our markets of issues in particular relating to digital migration and policy interventions. IPA members can each send two delegates to Forum meetings. In April 2013, the Forum convened our first international conference that brought together educational publishers, policy makers and development agencies to debate 'What Works? Policies, Resources and Technologies'. The conference was a success, and we are planning a second event on the same theme for 10 April 2014.

### *Educational Publishers Forum and the development of online education*

All over the world, politicians want to improve the standard of education in their countries and the quality of the educational experience for their students. They respond critically to the results of international surveys, such as the OECD's PISA study, and are eager to believe that the future of education lies in digital technology. It is all too easy—and increasingly common—for the vital role of quality learning resources (and publishers' role as investors in those resources) to be side-lined or even ignored in the drive to transform educational systems.

The IPA Educational Publishers Forum (EPF) provides a unique opportunity for specialist educational publishers to debate these trends and to rehearse the arguments that will allow us to advocate our role as stakeholders in the educational process. Since its inception in January 2010, the Forum has met three times a year, enabling publishers from over twenty countries to share their experiences of digital migration projects around the world. Many such projects fail, often because too much attention is paid to the technology itself and not enough to the learning content and pedagogical issues of concern to teachers. Digital tools do not in themselves provide a solution: content remains key to ensuring improved educational outcomes. As these digital migration initiatives continue to spread across borders and consumer technology creeps into classrooms around the world, there is much that publishers can learn from each other and much that we can give back to the debate.

With these thoughts in mind, the EPF convened a very successful international educational conference in London on 17 April 2013 (for a full report on the conference, please see below). We were supported and informed by speakers from OECD, the World Bank, UNESCO and the European Commission, the first time we believe that these agencies have together engaged with publishers across a broad front. The full list of speakers is below, and a fascinating collection of presentations is available from the IPA secretariat.

The EPF will be convening a second 'What Works' conference, again in London, on 10 April 2014.

The EPF will continue to monitor and debate national and international developments in the areas of open education, OERs, MOOCs, and digital migration policies. We will also continue to share experiences and develop advocacy messages to help publishers sustain our crucial role as providers of high-quality learning resources.



### *2013 IPA International Education Conference: 'What Works? Policies, Resources & Technologies for International Educational Success'*

IPA organized its first ever international education conference in conjunction with the London Book Fair on 17 April 2013. Entitled 'What Works? Policies, Resources & Technologies for International Educational Success,' the conference was universally praised. The programme included 15 top-level speakers (full list below) who presented original research and analysed whether the tech solutions being touted today in education actually work.

Over 150 attendees from 24 countries heard from representatives of the World Bank, the OECD, UNESCO and the European Commission as well as publishers, policy makers, cutting-edge researchers looking at how best to deliver different kinds of information in a classroom for maximum effect, and teachers who 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 a second international education conference in 2014.



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#### **Speakers, in order of appearance:**

- **Graham Taylor**, Chair of the Educational Publishers Forum (UK)
- **YS Chi**, IPA President; Chairman Elsevier (USA)
- **Pablo Zoido**, Analyst, OECD (France) – Keynote Address
- **Miha Kovač**, Publisher, Mladinska knjiga Založba (Slovenia)
- **Michael Trucano**, Senior ICT & Education Policy Specialist, World Bank (USA)
- **André Tricot**, Professor, South Pyrenees University for Teachers' Education (France)
- **Maria Langworthy**, Founder and Principal, Langworthy Research (USA)
- **Richard Noss**, Co-director, London Knowledge Lab, University of London (UK)
- **Jay Diskey**, Executive Director, School Division, Association of American Publishers (USA)
- **Catherine Lucet**, Chief Executive, Nathan/Editis (France)
- **Francesc Pedró**, Head of Teacher >Development & Education Policies UNESCO (France)
- **Tim Oates**, Group Director, Assessment Research & Development, Cambridge Assessment (UK)
- **Kate Harris**, Managing Director, Oxford Education, Oxford University Press (UK)
- **Heikki A Karjalainen**, Teacher (Finland)
- **Pierre Mairesse**, Director, DG Education & Culture, European Commission (Belgium)



# International Publishing Standards Development and Governance Committee

**Secretariat contact:** Jens Bammel ([bammel@internationalpublishers.org](mailto:bammel@internationalpublishers.org))

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 2013, IPA endorsed EPUB 3, the first truly global open standard adapted to the publishing needs of the 21st century.

IPA's standards work is managed by the Secretariat.

## Membership Committee

**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](mailto:bammel@internationalpublishers.org))

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.

# 30<sup>th</sup> IPA Congress: See you in Bangkok!

**The 30th Congress of the International Publishers Association (IPA) will be held in Bangkok, Thailand, on 25-27 March 2014. It is hosted by IPA's Thai member, the Publishers and Booksellers Association of Thailand (PUBAT), with generous support from the Bangkok Metropolitan Administration (BMA).**

Increasingly, publishers around the world are meeting the same challenges. Since the 29th IPA Congress in Cape Town just last year, our industry has already witnessed several significant changes, from the Wiley-Kirtsaeng Supreme Court decision to the WIPO copyright treaty for the print disabled, to the Big Six becoming the Big Five. These will all undoubtedly have a significant impact going forward.

More than ever, the IPA Congress is the international forum in which insights, expertise and experiences are shared and industry best practices are developed. The Congress attracts a broad array of international delegates, including publishers, authors, copyright specialists, librarians, and officials from NGOs and governments. It is an important opportunity for publishers from developing countries to learn from and network with industry leaders. These publishers then return home to develop viable and sustainable contributions to their societies, supporting and bolstering democracy and education through literacy and knowledge.

The IPA's programme and organising committees for Bangkok have been working assiduously to put together an exciting and stimulating agenda. In addition to the more traditional elements, including cultural tours and plenary and breakout sessions, the 30th Congress will feature practical workshops and rotating sessions. Speakers will include HRH Princess Maha Chakri Sirindhorn of Thailand, Indonesian author Ayu Utami, Supap Kirtsaeng of the Wiley-Kirtsaeng decision, and representatives from Google, Kobo, Oxford Analytica, and DeepDyve. Sessions will cover the future role of publishers, digital distribution developments, changing copyright legislation, digital migration in educational publishing, and freedom to publish in the digital age, to name only a few. Delegates attending practical workshops will receive guidance on various critical capacity-building skills—from buying and selling rights, to digital publishing strategies, to leading an anti-piracy campaign.

The Congress's location in Bangkok, the 'Venice of the East,' is ideal as a jumping off point for Southeast Asia. Singapore, Hong Kong, Malaysia, Cambodia, Laos, Myanmar and Vietnam are all within easy reach, with the rest of Asia (Japan, Korea, China and India) within a five-hour flight. Those looking to explore Thailand before or after the Congress are sure to discover why Thailand is known as the Land of Smiles and renowned for its hospitality, delicious food, impressive architecture, and magnificent beaches.

Online registration is already up on the Congress website at <http://ipa2014bangkok.com/>. Early bird registration closes on 1st December, so register today.

**We look forward to seeing you in Bangkok!**



# IPA and 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. This year a special focus has been 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. In the past we have worked together successfully on matters such as orphan works and legal deposit. Currently, e-lending is our greatest challenge. IPA President YS Chi spoke on this issue at the IFLA World Library and Information Congress in Singapore in August 2013.

Through the WIPO Stakeholder Platform, IPA works with stakeholders representing the disability community, including **World Blind Union (WBU)**, the **DAISY Consortium** and others. In the run-up to the WIPO Diplomatic Conference in Marrakech, IPA organised cross-sectorial consultations between the international publishing, film, and music sectors, including their publisher, creator and collective management organisations.

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 **International PEN** cooperate closely on multiple projects promoting freedom of expression and freedom to publish, as well as on defending publishers and writers in danger. Often, IPA 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 June 2013, IPA attended the IFEX General Meeting and Strategy Conference in Phnom Penh, Cambodia.

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.

# 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.

## *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. Previously José studied English literature in Sydney and Melbourne.

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.

## *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](http://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.

## *Joanna A. Bazan Babczonek, Office Administrator*



Having graduated in Political Science at the University of Geneva and after having worked among others for Médecins sans frontières,

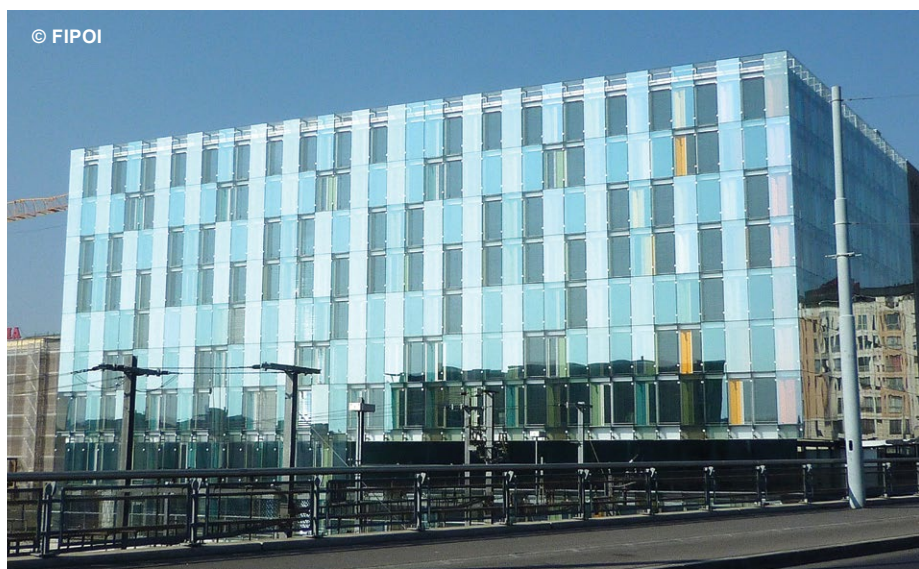
Joanna has joined the IPA Secretariat in December 2007. Since then she ensures the overall smooth office running and helps to channel communication to her colleagues. Joanna is married and mother of one child.

**IPA would like to thank Legal Counsel and Deputy Secretary General Antje Sörensen and Director Freedom to Publish Alexis Krikorian for their many years of dedicated service. We miss Antje's acute judgement and thoroughness, and Alexis's tenacity and passion for freedom to publish. We wish them all the best.**



# IPA Office Move

After 48 years based at 3, avenue de Miremont, in a residential area of Geneva, the IPA Secretariat moved on 27 November 2012. The new offices are located at 23, avenue de France, in a state-of-the-art building in the heart of international Geneva, near WIPO, WTO, ITU, the Palais des Nations, the Office of the High Commissioner for Human Rights and the 'Maison de la paix'. IPA's direct neighbours are other NGOs and several country missions to the UN in Geneva, including those of Democratic Republic of Congo, Finland, Guatemala, Jamaica, and Kazakhstan. IPA's telephone numbers and emails remain unchanged.





# IPA Meetings: 2013 Frankfurt Book Fair

## Tuesday 08.10.2013

*Club Voltaire\**  
*Kleine Hochstrasse 5*

**18:00 - 19:30**

The Club Voltaire Sessions: best practice by members for members

**19:30**

Drinks at Club Voltaire:  
IPA members and friends

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## Wednesday 09.10.2013

*Hall 8*  
*Room: Symmetrie 2*

**9:00 - 10:00**

IPA Literacy & Book Policy Committee

**10:00 - 12:00**

IPA Copyright Committee

**12:00 - 13:00**

IPA Anti-Piracy Working Group\*

**13:00 - 15:00**

IPA Freedom to Publish Committee

**15:00 - 18:00**

IPA Executive Committee\*

## Thursday 10.10.2013

*Hall 8*  
*Rooms: Symmetrie 2+3*

**9:30 - 12:00**

IPA General Annual Meeting

*Hall 8*  
*Room: Symmetrie 1*

**12:30 - 13:30**

Programme Committee:  
IPA Congress, Bangkok\*

*Hall 3C West*  
*Room: Apropos*

**16:30 - 17:30**

Meeting on Global Statistics\*

*Hall 5.0*  
*Stand: E905*

**17:00**

Reception: 30th IPA Congress,  
Bangkok

## Friday 11.10.2013

*Congress Centre C3*  
*Room: Illusion 3*

**8:30 - 10:00**

UK PA, AAP and IPA  
Anti-Piracy Breakfast

**10:30 - 12:30**

IPA Educational Publishers  
Forum Open Meeting

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## Saturday 12.10.2013

*Hall 3.C West*  
*Room: Argument*

**10:00 - 11:30**

Meeting of National Collective  
Stands Directors



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