FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

REPORT OF ACTIVITIES

2019/2020

Published by

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RUDY VANSCHOONBEEK
FEP PRESIDENT

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FEP BOARD OF DIRECTORS

FEP SECRETARIAT

“Last March I would have reminded non-publishers of the good health of our sector, the first cultural industry in Europe and a leader across the globe;(...).”

FOREWORD BY RUDY VANSCHOONBEEK, FEP PRESIDENT

I started to write this foreword in early March.

Through the weeks as you can imagine the tone changed and what I wanted to tell you when I started reflecting on this year is quite different from what you will actually read.

Last March I would have reminded non-publishers of the good health of our sector, the first cultural industry in Europe and a leader across the globe; a sector which is very proudly not reliant on public funding (except maybe for translations), a fairly complicated market if you don't aim at bestsellers.

In March I would have reflected on the FEP February meeting showing the rapid increase of sales of audiobooks across Europe and how this would impact our industry.

When I now write these words I am not less impressed by how audiobooks and digital publications have served as surrogates for printed books. However when bookshops were closed or their activities severely limited in many countries; when books were not considered as essential products; when books could not or only with huge difficulty be delivered to readers, it became even more obvious that printed books remain the bulk of the market because they are the preferred choice of the readers. The COVID-19 crisis has also demonstrated, if anyone was ever doubting it, the paramount importance of brick and mortar bookshops in the fragile book ecosystem.

Last March I would have told you that I was looking forward to the Lillehammer IPA World Congress combined with the FEP general assembly where a new President, my friend and distinguished colleague Peter Kraus vom Cleff , would take up his duties. I would have emphasised how much I had enjoyed being FEP Treasurer for several years, then Vice-President before these two intense years as President. Now writing these words, I am still President since the elections have been postponed to September 2020. Due to safety measures in consequence of the Corona pandemic the Congress was cancelled; so was our meeting. For the first time in its existence FEP will hold its general Assembly virtually. The future board of FEP will be elected online.

Claiming that these two years plus four months have been intense is clearly an understatement. I would have thought that after the adoption last year of the Copyright in the Digital Single Market Directive, the second year of my Presidency would have been easier going. It certainly was in the beginning but the last months have been and will be key (and quite agitated) for our sector. I am proud and a bit apprehensive to continue the indispensable advocacy for publishers so they receive proper support to recover from the crisis and for solutions to be designed to continue promoting books while book fairs are cancelled or postponed.

I am and have been signing numerous letters to national politicians and to the European Union decision-makers to ask for their absolutely necessary support if we want a linguistically, culturally diversified book landscape to endure. Authors, translators, publishers, booksellers will not manage on their own to overcome the crisis. National (or regional) governments and the European Union must give them backing both financially through large investments in our sector such as our suggested vouchers for citizens and massive public purchases through local bookshops, and on policy, with fair legislation acting as incentives for the cultural sectors.

In March, as well as today, I wish to thank all colleagues who have demonstrated solidarity, empathy, and intelligence in this incredible crisis. All politicians who will be doing their upmost to help the whole book chain to overcome the losses. And obviously, authors and booksellers alike for their resilience, for being resourceful.

I wish us all a brilliant future, where books play an essential role.

Thank you for your attention.

Rudy Vanschoonbeek
President

“I am proud and a bit apprehensive to continue the indispensable advocacy for publishers so they receive proper support to recover from the crisis and for solutions to be designed to continue promoting books (...).”

COVID-19 CRISIS IN THE BOOK SECTOR

FACTS AND FIGURES

+33% MORE READING

33% of people worldwide read more books / listened to more audiobooks while at home during the crisis.

*source: Global Web Index Coronavirus Research April 2020

4.4 MILLION EDUCATIONAL RESOURCES

The weeks of lockdown saw a huge increase in access to online educational resources from publishers.

For example, in Italy, 4.4 million digital materials were downloaded from the platforms of educational publishers during the first 1.5 months of school closure.

*source: FEP members

5 TIMES MORE ACCESSES VIA ONLINE LIBRARIES

Paris online libraries recorded 1,000 downloads per day at the end of March, compared to 200 in normal times.

*source: Livres Hebdo

COVID-19 CRISIS IN THE BOOK SECTOR

FACTS AND FIGURES

SALES IN BOOKSHOPS SEVERELY DISRUPTED FOR WEEKS

In countries in lockdown, bookshops had to close for many weeks. Even where they remained open, safety measures and people's understandable caution meant business did not go on as usual.

*source: FEP members

80/90% LOSS OF SALES

'At the peak of the crisis, book sales were down 80% in Portugal and Spain, 85% in Italy and 90% in Slovenia. Similar losses were experienced all over Europe, with online sales growing everywhere but not enough to offset such losses

*source: FEP members

BOOK FAIRS CANCELLED ALL OVER EUROPE

Many book fairs had to be cancelled, suspended or moved online (such as Paris, London, Bologna, Leipzig, Tallinn, Bucharest, Turin, Budapest, Prague, Gotenburg, ...), to the detriment of authors, publishers and readers.

*source: FEP members

NEED FOR PUBLIC SUPPORT

European countries have reacted differently to the crisis with diverse measures to support the book value chain, and sometimes no support at all.

France devoted a total € 230 million to the support of the book sector. Many Member States allocated no specific funds for for authors, publishers, booksellers, libraries.

*source: FEP members

In the world after...
Before we started working from home; before all our activities faced major changes; before we had to cancel our General Assembly; before all that, we had decided to revise the format of our Report of Activities.

For the FEP team, this Report has a dual function: inform the members of the publishing associations of the main issues dealt with at EU level as well as share some insights into publishing with the politicians we meet. By using more figures and data in this new version, we hope we will achieve this two-fold exercise and provide an enjoyable reading or at least browsing.

FEP meets
In the course of 2019, we met in Brno, in the Czech Republic (May), then in Athens, Greece (September) before going to Antwerp, Belgium (October) at the invitation of our President Rudy Vanschoonbeek to visit the Boekenbeurs. In 2020, we met in Brussels (February) a few weeks before the whole continent went into lockdown. We were meant to gather in Lillehammer in May - it goes without saying we had to cancel the meeting and will be holding our next general assembly online in September. Each time, the colleagues who received us in their countries offered the best welcome possible and made our meetings not simply fruitful but also highly enjoyable.

Every year at the occasion of the Frankfurt book fair, we invite members and colleagues to listen to a politician or an official of the European Commission. In 2019, Werner Stengg and Marco Giorello, both of DG Cnect of the European Commission, gave us insights about policies and future developments in the field of e-commerce and copyright. Frankfurt, is also the chance to catch up with colleagues, including of sister organisations such as the international Publishers Association and the European and International Booksellers Federation, to coordinate activities and policies. Together with the latter and the European Writers Council, we are the promoters of the European Union Prize of Literature, giving us an extra chance to strengthen our cooperation on key joint issues.

FEP cooperates
As most of - if not not all - associations working at EU level, the word collaboration is central to our activities. As mentioned above we work with colleagues representing the book world which also includes the International Federation of Reproduction Rights Organisations. Broadening it to the cultural sector, FEP is a member of the Creative and Media Business Alliance and of Creativity Works! and regularly joins ad-hoc advocacies supporting freedom of expression, culture and cultural diversity.

FEP familiarises publishing
To achieve that we bring the book closer to our audience by organising dialogues between an author and their publisher. In 2019, David Lagercrantz and Eva Gedin captivated their audience during the dinner hosted by MEP Christian Ehler, attended by many MEPs and the Commissioner for Culture, Mariya Gabriel. In a perfect duo, David and Eva expressed the quintessence of the relationship between an author and the publisher, the reasons why such a relationship has to be nurtured and why our sector deserves legal incentives. This year, we brought in a new formula by inviting David's foreign publishers from France, Germany, Italy and the United Kingdom who shared with our guests what it meant to translate an author into another language and what role publishers play in reaching audiences for the author. The event was a great success and we look forward to a time where such social gatherings will be permitted again to renew the initiative.

As in May 2019, new MEPs were elected we organised a welcome pack with a children's book from each of the countries represented in FEP and a notebook especially published for the occasion with quotes from all these countries in the original languages; Unfortunately, the Covid-19 crisis prevented us from completing the distribution and we hope to be able to resume it as soon as possible.

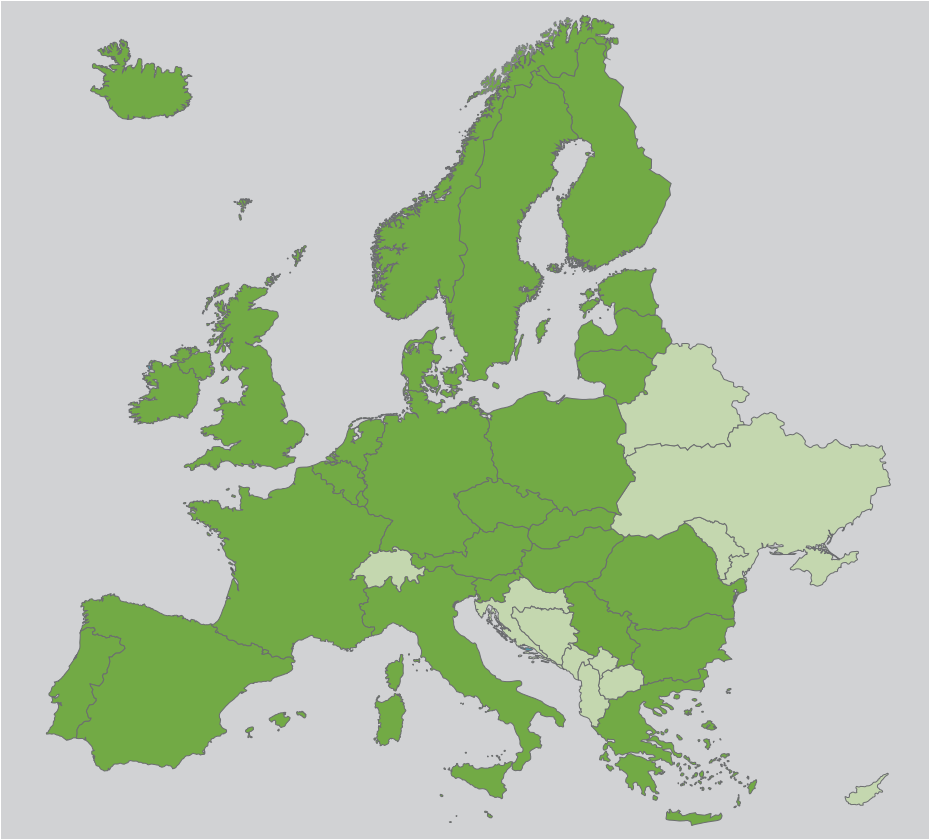
Ahead of us...
Face to face meetings should not be something of the past. We may have exchanged these social encounters for a string of video-calls in the last months - however, these meetings with politicians and officials, with colleagues, attending Parliamentary sessions, participating in conferences and seminars are key for us to properly deliver our messages in the right and fair manner.

Mixing the physical presence with a social media one is today indispensable. FEP is active on the main social media platforms, promoting both its own messages and highlighting those of its members. And this means reminding the public again and again what publishers are doing and why their role remains essential in the era of disinformation. This is why we have been publishing BookFaces with portraits of publishers (the Fourteenth issue, introducing Edmund Austigard, Chair of the Norwegian Publishers Association, is published at the end of the report).

Our website hosts many resources: trade statistics, infographics, press releases and of course this very Report of Activities. Additionally, for FEP members, we can only encourage you to use the many resources on our website, especially our analysis that we share in the members' part.

Finally, although these last months have definitely been strange, FEP has continued its activities with the European institutions, colleague organisations and the publishing world because for many years we have been a trusted party and we plan on remaining one in quieter times.

MEMBERS



AUSTRIA - HAUPTVERBAND DES ÖSTERREICHISCHEN BUCHHANDELS
BELGIUM - GROEP ALGEMENE UITGEVERS & GROEP EDUCATIEVE EN WETENSCHAPPELIJKE UITGEVERS - ASSOCIATION DES EDITEURS BELGES
BULGARIA - АСОЦИАЦИЯ БЪЛГАРСКА КНИГА
CZECH REPUBLIC - SVAZ ČESKÝCH KNIHKUPCŮ A NAKLADATELŮ
DENMARK - DANSKE FORLAG
ESTONIA - EESTI KIRJASTUSTE LIIT
FINLAND - SUOMEN KUSTANNUSYHDISTYS
FRANCE - SYNDICAT NATIONAL DE L'EDITION
GERMANY - BÖRSENVEREIN DES DEUTSCHEN BUCHHANDELS
GREECE - ΣΥΜΠΡΑΞΗ ΣΩΜΑΤΕΙΩΝ ΕΚΔΟΤΩΝ ΒΙΒΛΙΟΥ ΕΛΛΑΔΑΣ
HUNGARY - MAGYAR KÖNYVKIADOK ES KÖNYVTERJESZTOK EGYESÜLESE
ICELAND - FELAG ÍSLENSKRA BOKAUTGEFENDA
IRELAND - PUBLISHING IRELAND
ITALY - ASSOCIAZIONE ITALIANA EDITORI
LATVIA - LATVIJAS GRĀMATIZDEVĒJU ASOCIĀCIJA
LITHUANIA - LIETUVOS LEIDĖJŲ ASOCIACIJA
LUXEMBOURG - FEDERATION LUXEMBOURGEOISE DES EDITEURS DE LIVRES
THE NETHERLANDS - DE MEDIAFEDERATIE
NORWAY - DEN NORSKE FORLEGGERFORENING
POLAND - POLSKA IZBA KSIĄŻKI
PORTUGAL - ASSOCIAÇAO PORTUGUESA DE EDITORES E LIVREIROS
ROMANIA - FEDERAŢIA EDITORILOR DIN ROMÂNIA
SERBIA - СРПСКО УДРУЖЕЊЕ ИЗДАВАЧА И КЊИЖАРА
SLOVAKIA - ZDRUŽENIE VYDAVATEĽOV A KNÍHKUPCOV SLOVENSKEJ REPUBLIKY
SLOVENIA - GOSPODARSKA ZBORNICA SLOVENIJE
SPAIN - FEDERACION DE GREMIOS DE EDITORES DE ESPAÑA
SWEDEN - SVENSKA FÖRLÄGGARE FÖRENINGEN
UNITED KINGDOM - THE PUBLISHERS ASSOCIATION

FEP STATISTICS

FEP conducts a yearly survey of its member associations to gather statistics about the book market in each country, focusing on a series of core data, which it assesses, integrates through external sources and compiles to produce an overview of the European book market.

According to the latest survey, the total annual turnover of book publishers of the EU and the EEA in 2018 was approximately € 22 billion. This represents a small decline from 2017 (22.2), due to sluggish growth or small contractions across the majority of markets, although recovery continued in several areas previously affected by the economic crisis. The largest markets in terms of publishers' turnover in 2018 were Germany, the UK, France, Spain and Italy. Total market value is estimated at € 36-38 billion.

The book market was hit by the economic crisis started in 2008, though less than other sectors, and experienced negative growth almost every year between 2008 and 2014. Recovery began in 2015, and continued until 2017, although partly offset by exchange rate effects. 2018 marked a trend reversal, whereas emerging data on 2019 paints a positive picture. 2020 will be marked by the effects of the COVID-19 crisis, likely to be very negative.

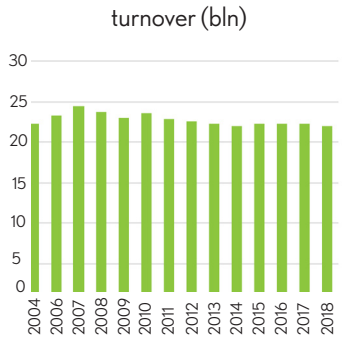
A total of about 585,000 new titles were issued by publishers in 2018. The figure comes from different sources, some of which included new editions or non-commercial titles, and has been adapted accordingly. There was a decrease in the title output from the previous survey, which presented a spike. The countries reporting the largest output of new titles were the UK, Germany, France, Spain and Italy. European publishers held more than 11 million titles in stock, the countries reporting the largest availability being the UK, Germany, Italy, France and Spain. This figure, ever-increasing, has been spiked by the surge in digital publishing (in different formats), the digitisation of back catalogues, the growth of print-on-demand services and the surge in self-published titles, as well as other phenomena.

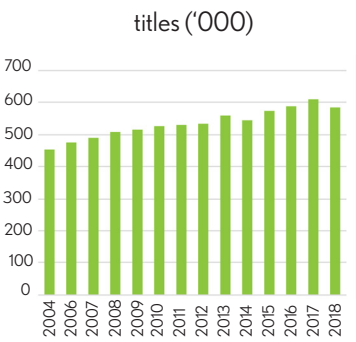
A total of approximately 130,000 people were employed full time in book publishing in 2018, a figure substantially equal to the previous year. This remains an area where it is difficult to gather reliable data. The entire book value chain (including authors, booksellers, printers, designers, etc.) is estimated to employ more than half a million people. It is worth mentioning that Eurostat calculates employment in book publishing at some 150,000 people, while a study published by EY in 2014 estimated that the book value chain employed some 650,000 people directly.

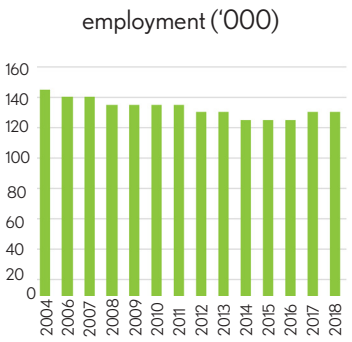
The digital share of sales was estimated at some 7-8% of the total, with 4-5% represented by ebooks and the rest by databases and other services. More recently, digital markets have witnessed the spectacular rise of audiobook sales, which will have a visible impact on figures in the coming years, while the ebook market showed signs of stagnation for the last 4 years (but it could be a matter of capturing the right data).

Figures on the overall economic significance of the publishing industry refer to net publishers' turnover, i.e. the publishers' total revenues from the sales of books, not the total market for books (margin of booksellers or other retailers). Figures were rounded conservatively.

There is consensus on the need to keep improving the collection of book industry statistics in order to support lobbying activities. Such a need is based on the importance of providing FEP's counterparts in the European Institutions with a reliable picture of the value of the book publishing industry, for instance in terms of income generation, employment, and the contribution to cultural diversity. It is also important to try to build a series of consistent data over a given period which would allow us to assess the impact of different variables (policy, economic conditions, etc.). In view of the difficulties in the collection of data on the book sector, especially with regard to reliable, comprehensive information on digital sales, FEP keeps reflecting on how to improve the situation, and has joined forces with IPA and WIPO to this end.







COPYRIGHT

FEP is active on European initiatives and discussions related to copyright, which is core to publishers' activities and to the sustainability of the overall publishing sector.

The protection of exclusive rights, freedom of contract and the fight against piracy are key aspects defended by FEP.

To this end, FEP collaborates with other cultural sectors and attends relevant events to present its position to the EU institutions.

Copyright had been identified over the past few years as a policy area relevant to achieving the European Digital Single Market.

COPYRIGHT

Under the new von der Leyen Commission, Thierry Breton, in charge of the internal market, is the Vice-President and Commissioner responsible for copyright policy, which is dealt with at a technical level by the Copyright Unit in the Directorate General for Communications Networks, Content & Technology (DG CNECT). In the EP, the relevant committees involved in copyright-related policies are JURI (Legal Affairs), IMCO (Internal Market and Consumer Protection), ITRE (Industry, Research and Energy), and CULT (Culture and Education). In the Council, copyright issues are discussed by the Working Group on Intellectual Property before political decisions can be made at a higher level.

In September 2016, the European Commission published its proposal for a Directive on Copyright in the Digital Single Market. The proposal aimed at modernising the European copyright framework to take into account the digital revolution and the evolution of practices over the past 20 years.

After 2 and a half years of negotiation which saw the proposal significantly evolve and a lobbying campaign never seen before in terms of intensity and aggressivity, the European Union adopted in April 2019 the Directive on Copyright in the Digital Single Market, which marked the most significant European copyright review since 2001.

The adopted text introduced four new mandatory exceptions for the illustration for teaching, the use of text and data mining for research and non-research purposes and the preservation of cultural heritage. It also created a legal mechanism to facilitate collective licensing agreements for all types of out-of-commerce works which are held in a permanent collection of cultural heritage institutions. It gave Member States the option of granting book publishers the right to claim a share of the compensation for the uses of the work made under an exception.

It stops the irresponsible behaviour of digital platforms who communicate to the public copyright protected works by formally recognising that they are liable for the content hosted on their services, and by introducing new obligations for platforms to obtain licencing agreements with rightholders and to deploy measures in cooperation with them to fight effectively against unauthorised content.

Finally, authors were also granted mandatory mechanisms to ensure they receive appropriate and proportionate remuneration, can request additional remuneration from their contractual partners when revenues generated by the work are too low, settle disputes related to the application of obligations imposed to publishers and producers, set out transparency obligations according to which authors would receive information on the exploitation of their work from their contractual partners, as well as the possibility to revoke the rights on their works they transferred or licensed should there be no exploitation of the work by the contractual partner.

Following the adoption of the Directive, the Commission launched, as prescribed by the Directive, a stakeholder dialogue for the preparation of guidelines regarding the implementation of certain parts of Article 17. FEP took part in the 6 meetings that took place between September 2019 and February 2020.

The new European Commission made the creation of a European framework around Artificial Intelligence (AI) one of its priorities for this mandate, pledging to make propositions within its first 100 days.

On 19 February, the European Commission released a White Paper on AI, which stated that high-risk AI should be subjected to new requirements, including certification, test and controls. These AI would be those used in critical sectors (such as heath healthcare, transport, police, recruitment, and the legal system) and those deemed to be of "critical use" (such as involving a risk of death, damage or injury, or with legal ramifications).

Debates on AI also have an impact on copyright, as these technologies are increasingly used in the field of cultural creation, and pose questions notably regarding the use of existing works to "feed" AI processes as well as the legal status of "works" produced by AI. While the new Copyright Directive already provides a legal framework for the use of works to feed an AI, reflexions are under way to determine if and how the current copyright framework could apply to AI production.

COPYRIGHT

FACTS AND FIGURES

528 MILLION EURO IN LOSSES FOR PIRACY (ITALY)

€ 528 million is the estimated yearly damage to the book value chain in Italy due to piracy. This corresponds to a total damage to the country's economy of € 1.3 billion , of which 216 million in lost tax income.

*source: "La pirateria nel mondo del libro", AIE

80% OF COPIES IN SCHOOLS ARE FROM TEXTBOOKS

In France, extracts of textbooks represent 80% of the copies of protected works used in schools by teachers to illustrate their lessons to students.

*source: CFC

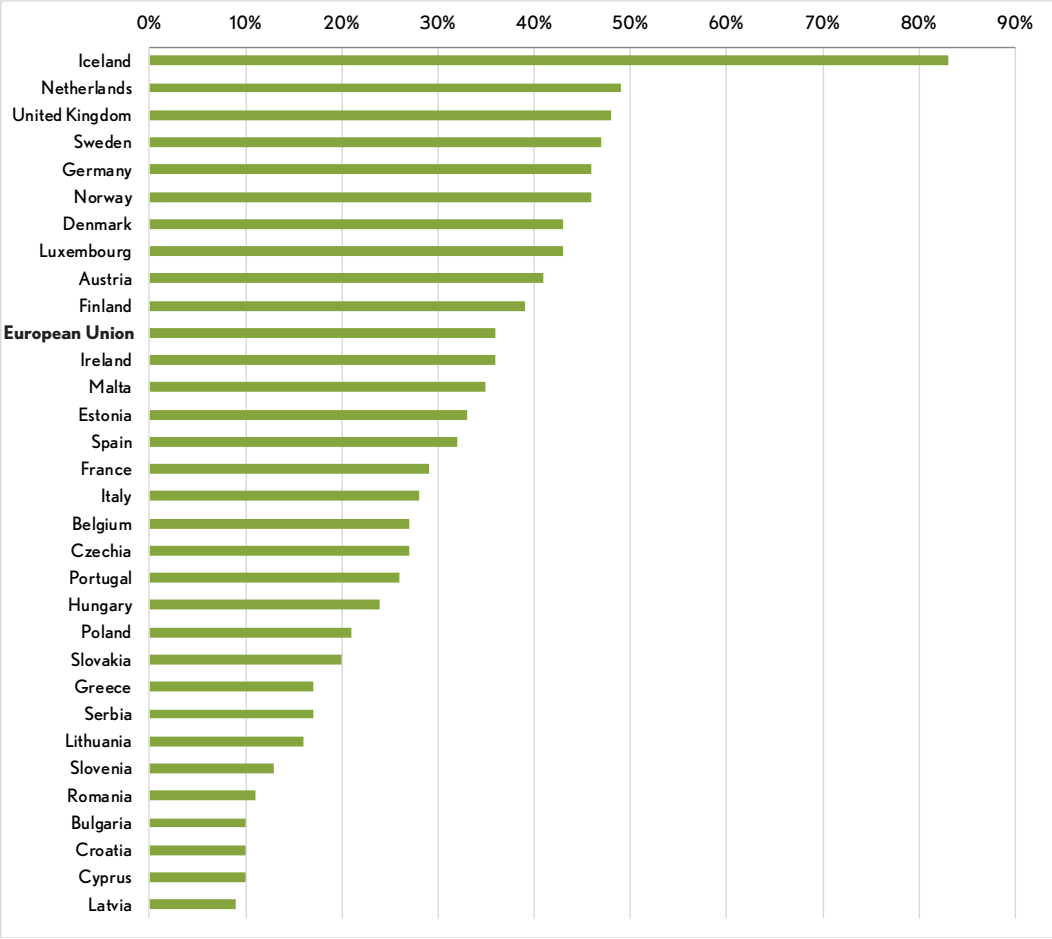
THE FIRST MACHINE-GENERATED BOOK

In 2019, Springer Nature published its first machine-generated book. New technologies around Natural Language Processing and Artificial Intelligence pose questions regarding the use of existing works to "feed" them.

*source: Springer Nature

COPYRIGHT

BOOKS, WIDELY AVAILABLE, ARE AT THE HEART OF E-COMMERCE



Online purchases of books/magazines/e-learning materials online as percentage of individuals who ordered goods or services, over the internet, for private use (2019).

*source: EUROSTAT

EDUCATION

FEP follows initiatives and discussions that affect the educational publishing sector. Though education is an area in which the EU has no legislative power, modernisation of education is high on the agenda of the EU Institutions, and education policies implemented by individual countries have significant impacts on publishers.

The EU plans to establish a European Education Area by 2025, and the Commission is updating its Digital Education Action Plan.

EDUCATION

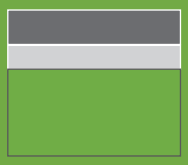
To address the specificities of the sector, FEP collaborates with European members of the IPA Educational Publishers Forum, involving them in advocacy and drawing from their expertise. A session on EU affairs features regularly in the agenda of EPF meetings. FEP attends relevant events and presents its position to the EU Institutions (FEP submitted comments to the consultation on the update of the Digital Education Action Plan). FEP has also been invited to the meetings of the IP in Education Network launched by the EUIPO, which gathers national IP offices, ministries of education and other experts, to increase awareness of the value of IP among students and teachers.

FEP upholds the value of educational publishers in providing curricula-compliant quality learning materials in all formats, in a competitive environment. FEP maintains that Open Educational Resources (OER) need not be seen as alternative or antagonist to professionally produced content but can be a complement. However, the production of OER with public funds to substitute textbooks constitutes unfair competition to educational publishers and can jeopardise the whole sector, while at the same time being a very inefficient use of resources, and a threat to the independence and pluralism of education. Moreover, the notion of OER should not lead to infringing the rights of educational content producers. FEP also looks at topics such as use of data and the role of Big Tech in education, and calls for research on the impact of digital on learning. These matters overlapped with the discussions on the copyright reform; in this context, FEP looks at the implementation of the exception for illustration for teaching.

The EU addressed the topic of education in several instances, with OER initially in the spotlight. Examples: EC Communication 'Rethinking Education' (2012), with a stated aim to scale up the use of ICT and OER in education; Council Conclusions on Rethinking Education (2013), inviting Member States to optimise ICT-supported learning and access to OER; EC Communication 'Opening up Education' (2013), emphasising potential of ICT and OER and encouraging production of public educational materials; EP reports on the Communication (2013), supporting the notion of open resources, and on new technologies and OER (2014); Council debate on OER and digital learning (2013), acknowledging that digital distance-learning tools offer opportunities, but also raise issues (including quality, copyright); Council Conclusions (2014), encouraging partnerships to increase supply of OER and other digital educational materials, with due regard to copyright and licensing issues; EC/Council report on New Priorities for European Cooperation in education and training 2015), recommending use of ICT to improve education and availability and quality of open and digital educational resources.

Attention then shifted from OER to cross-border uses and MOOCs: EC Communication 'Improving and Modernising Education' focused on teacher training, quality, inclusion; Council Conclusions 'High quality education for all' (2017) called for inclusivity, use of digital; EC roadmap 'An agenda for the modernisation of higher education' (2017) focused on skills, inclusion, innovation; EC Communication 'A renewed EU agenda for higher education' (2017) followed roadmap, also mentioning potential of OER and learning analytics; Council Conclusions on the Communication (2017) encouraged Member States to open up higher education for people at any life stage, making higher education more flexible, via blended learning and OER. The EC's Digital Education Action Plan (2018), aimed at adapting education to the digital age, marked a partial return of the topic, stating that education could benefit from new tools, materials and OER. Afterwards came: EP reports on modernisation of education (2018), stressing potential of new technology, and recommending assessing the quality of e-learning, MOOCs and open access resources, and on 'Education in the digital era' (2018), insisting on potential benefits of digitising education, but also warning against downsides, and recommending research on the impact of digital technologies on education; Council Conclusions (2018) on a European Education Area, recommending innovative use of digital technologies.

At national level, publishers are concerned by various cases of governmental interference in the educational publishing market, often linked to OER projects in broader education digitisation initiative. These frequently envisage the substitution of good quality, professionally published educational resources, and in many cases result in a waste of resources, or worse in the stifling of teachers' freedom of choice and in the imposition of politicised materials.



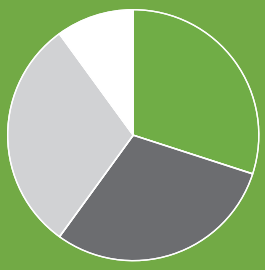
EDUCATIONAL PUBLISHING IS WORTH € 6-7 BILLION IN EUROPE

- Educational (21,2%)*
- Academic (18,5%)
- Trade (60,3%)

Educational publishing is a very important component of the overall publishing industry (€ 6-7 billion value). In some countries, it is the backbone of the local publishing industry.

*up to 30% (Spain, Poland), 60% (Ireland)

*source: FEP members



MAIN COSTS IN EDUCATIONAL PUBLISHING

- Production/Storage 30%
- Trade 30%
- Overhead costs 30 %
- Authors' royalties 10%

*source: FEP members

50% OF DANISH PRIMARY SCHOOL TEXTBOOK MARKET IS DIGITAL

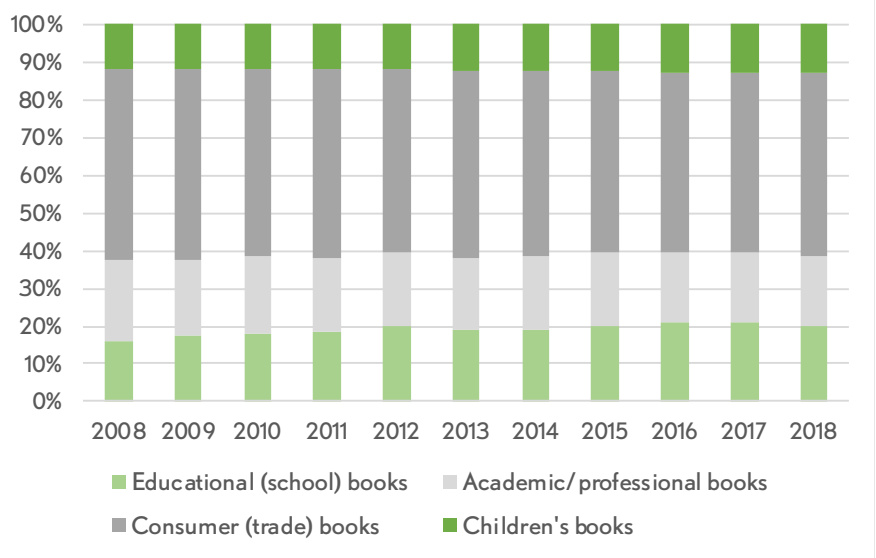
50% of the Danish primary school textbook market stems from sales of digital content.

In the period 2012-2017 the Danish government subsidised the schools with 50 % of the expenses for digital learning materials.

*source: FEP members

EDUCATION

PUBLISHERS' TURNOVER BY SECTOR



Breakdown of publishers' turnover by main categories.

*source: FEP

EUPL AND CULTURE

The aim of the European Union Prize for Literature is to put the spotlight on the diverse creative wealth of Europe's contemporary literature, to promote the circulation of literature within Europe, and to foster a greater interest in foreign literary works.

Each year, in a three-year cycle, the juries representing a selection of the 41 countries which participate to the EU's Creative Europe programme select one emerging fiction writer from their own country.

The first three-year cycle was completed in 2009-2011, the second cycle in 2012-2014, the third cycle in 2015-2017.

In 2018, EUPL celebrated its tenth Anniversary with a writing contest open to all previous 108 winners.

The fourth three-year cycle started in 2019 and will be completed in 2021.

EUPL AND CULTURE

The European Union Prize for Literature

Beqa, Daina, Giovanni, Haska, Ivana, Jan, Laura, Marta, Melissa, Nikos, Pia, Réka, Sophie, Tatiana in 2019.

Asta, Francis, Irene, Laura, Maria, Masa, Matthias, Mudlum, Nathalie, Petar, Shëptim, Stavros, Stefan in 2020.

Find more information on all EUPL winners on the website of the Prize.

An anthology of extracts from their winning books in the original language and in translation is available both in digital and printed versions. The 2020 anthology should be available during the Summer.

FEP has been co-organising the European Union Prize for Literature since 2009, together with the European Writers Council and the European and International Booksellers Federation. EUPL is supported by Creative Europe, the culture programme of the European Commission.

In 2019, on 2 October in the landmark building BOZAR in Brussels, the Commissioner for Culture, Tibor Navracsics, the Finnish Minister of Culture, Hanna Kosonen and the Vice-President of the Culture Committee of the European Parliament, Dace Melbārde celebrated the laureates with a large audience. Earlier in the evening, in various rooms of the Palace of Culture, authors read extracts of their books and exchanged with their readers (or future readers). Finnish bestseller author Sofi Oksanen gave a remarkable keynote about the need to foster diversity in writing. Alongside the festive event, the EUPL consortium planned a seminar to brief the winning authors on the opportunities offered to them by the Prize.

The 2019 laureates promoted their books at bookshops' events, book festivals, book fairs and even in schools. In addition to the anthology, they could choose to have 50 pages of their books translated by professional translators to improve their chances to catching the interest of agents and foreign publishers.

The consortium was meant to go with the 2019 anthologies and some of the winning authors to the London and Paris book fairs which were unfortunately cancelled due to COVID-19 restrictions. In the coming months we will seek ways to continue promoting them while presenting the 2020 laureates. We are especially looking forward to Frankfurt 2020.

This year's laureates were announced online in May 2020 and the Consortium is now working with the Publications' Office of the European Union on their anthology.

The award ceremony will be taking place on 29 September again in BOZAR.

Culture and the EU

FEP has been promoting a book strand within the Creative Europe programme for years and was delighted when the Commission, then the Parliament endorsed such an idea in their Multi-Annual Financial Framework. Now the negotiations are with the Council and we are encouraging Member States to support such an ambitious cultural programme.

Together with many other cultural organisations, we have been calling for culture to receive proper recognition in the financial perspectives of Europe, moreover since the COVID-19 crisis has affected our industries and artists more than many other sectors.

FEP has demanded that the European Union carves proper support for the cultural and creative industries (CCIs) within the recovery funds administered by the Member States. FEP welcomed that the von der Leyen Commission and in particular, Commissioners Mariya Gabriel and Thierry Breton recognised CCIs as a strategic industry for Europe and included them in the longer-term recovery plan. FEP calls on Member States to make sure that publishing alongside all the other CCIs are adequately supported, in order to allow Europe to remain a hub for cultural diversity. FEP Board and members virtually met the Commissioner for Culture, Mariya Gabriel and appreciated her active commitment to European culture and to books especially.

During the crisis, FEP together with the European and International Booksellers Federation published 10 measures to help the book world to overcome the crisis, including providing European citizens with vouchers to buy books in local bookshops and to massively buy books for libraries and other institutions in order to support the entire book chain.

Through the whole crisis, FEP has supported the exchange of best practices and smart solutions between member association thanks to the publication of a daily newsletter; we have also measured the impact of the crisis on the sector and share this information with the policymakers. We are currently working on a first assessment of the consequences of the crisis on European publishing now that bookshops have reopened across the continent. We will also benchmark the various national support schemes to hopefully inspire those Member States which have so far been less supportive of the book chain to step up their efforts.

FACTS AND FIGURES

12 EDITIONS

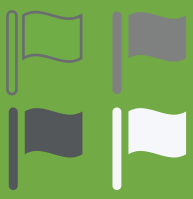
The EUPL has been organised since 2009 in a three-year rotation.

43 PARTICIPATING COUNTRIES

By 2021, the EUPL will have been awarded to authors representing 43 different countries taking part in the Creative Europe programme.

135 WINNING AUTHORS

Up to 2020, 135 authors have been awarded the EUPL. The 2020 edition had 13 laureates.



267 TRANSLATION DEALS FOR THE LAUREATES 2015/2017

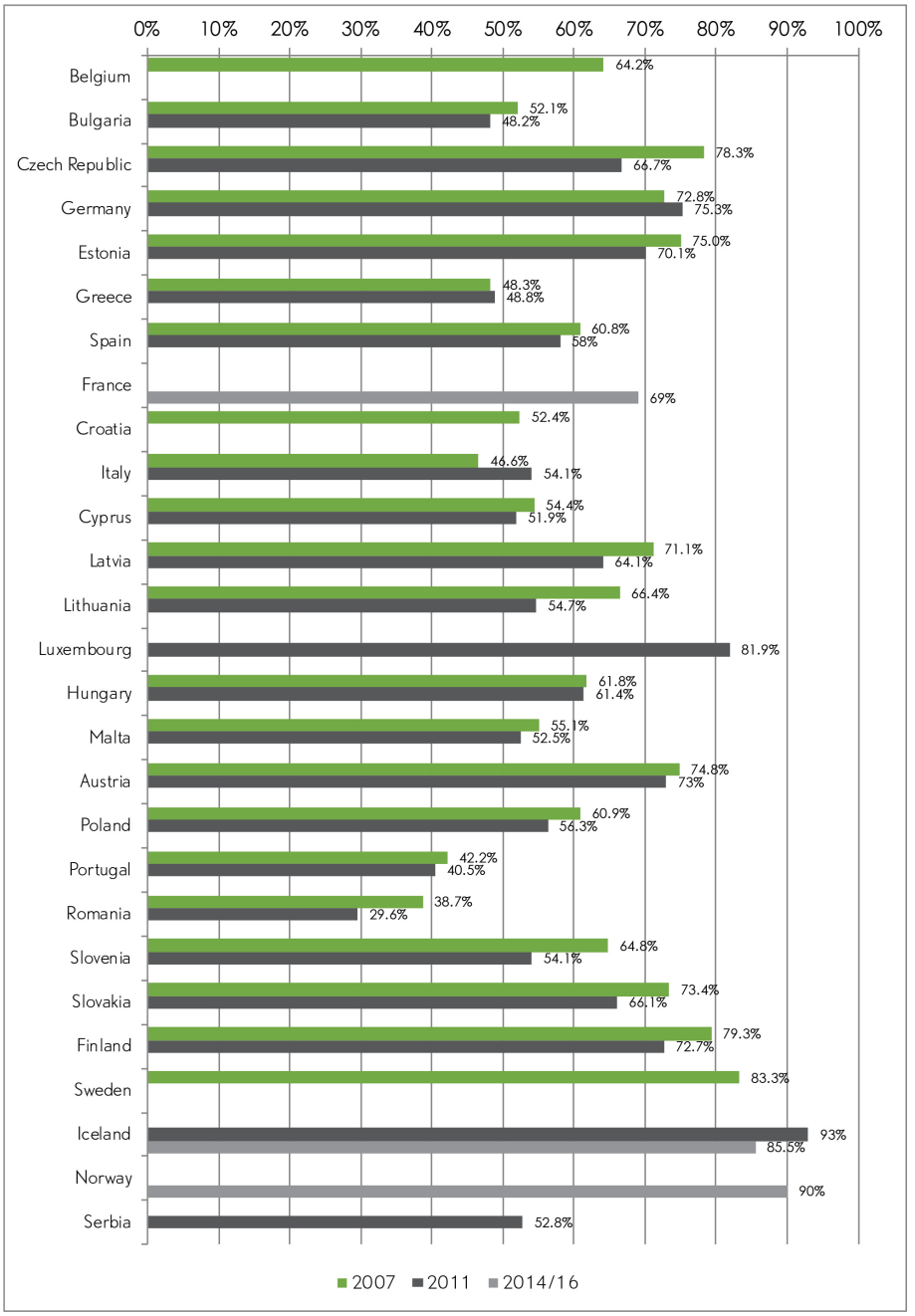
The 36 laureates of the 3rd cycle (2015/2017) signed overall 267 translation deals to date.

The most translated authors of the cycle were Benedict Wells (DE, 20 deals) and Donal Ryan (IE, 17 deals).

* source: EUPL website

CULTURE

PERSONS READING BOOKS IN THE LAST 12 MONTHS PER COUNTRY, AGE 25-64 – PERCENTAGE OF PEOPLE WHO READ AT LEAST ONE BOOK, 2007/2011



*source: EUROSTAT - except France (data 2014), Norway (data 2015): population age 15 and older, and Iceland (data 2016): source FEP survey

FRANCE, 18,1% OF NEW TITLES TRANSLATED

In 2019, 18.1% of the new titles published in France were translations.

*source: FEP members

ITALY, 8,569 RIGHTS SALES

Over 2018, the Italian market registered 8,569 book rights sales abroad.

*source: FEP members

TAXATION

The last twelve months have seen widespread adoption of reduced rates of VAT on digital publications across Europe. In a year and a half since the entry into force of the Directive allowing this, implementation of the new measures has been extensive:

18 Member States currently apply reduced rates of VAT to digital publications, as well as several EEA and candidate countries, and the UK - the largest ebook market in Europe - and a few more are carrying out discussions. [See map p. 25]

TAXATION

FEP campaigned unrelentingly for the Directive to be proposed by the Commission and to be endorsed by the Member States. Since its entry into force, FEP has been gathering information on implementation at national level and supporting its members on interpretation and in discussions with their respective governments. We will keep doing so in order to maximise the uptake of reduced or zero rates on books and journals.

The possibility to apply reduced rates of VAT to books has been enshrined in European legislation (and in that of many Member States) for a long time, in recognition of the cultural, social and economic value of books and reading. FEP relentlessly supports this attitude and encourages its preservation and expansion.

The option of course applied first to print publications and was widely taken up: today 25 out of 27 EU Member States allow reduced or zero VAT rates on printed books, as well as the UK, EEA members Iceland and Norway, and candidate country, Serbia. Due to the nature of fiscal law, as the book evolved with technology and embraced new formats and supports, the inclusion of new types of books in the scope of reduced rates required legislative changes.

In May 2009, a new Directive on VAT rates extended the possible application of reduced rates to books on all physical supports, such as CDs, DVDs, USB sticks. However, it excluded downloads and access online, which as electronic services must normally be taxed at the full rate. As of April 2020, 19 Member States have taken advantage of this provision.

However, differences remained in the fiscal treatment of books based on their format and means of delivery. FEP started an extensive campaign, cooperating with representatives of magazines and newspapers, and for years advocated for the VAT framework to be adapted to technological progress. The European Commission showed awareness of the issue, but the services in charge of taxation had a negative stance toward the use of reduced rates. Nonetheless, pressure mounted, and the Commission increasingly looked at the different treatment of print and digital publications. The European Parliament repeatedly expressed support for the cause, whereas Member States had diverse views.

As discussions continued, some Member States took the initiative. As of January 2012, France and Luxembourg began applying reduced VAT rates to all kinds of books, regardless of the support. In July 2012, the Commission commenced an infringement procedure against them and in 2013, it referred the matter to the Court of Justice of the EU, which ruled against the two Member States in March 2015. Meanwhile, in January 2015, Italy began applying reduced rates of VAT on ebooks as well, while Luxembourg re-established the standard rate in May 2015.

A new Commission started in 2014 with a cautious approach, which gradually evolved into increasing support, manifested in several high-level declarations in 2015. The Commission's Action Plan for a definitive VAT system of April 2016 announced that the specific issue of e-publications would be addressed in a proposal under the DSM Strategy; the Council invited the Commission to put forward its proposal, which it did in December. Shortly after, in March 2017, the European Court of Justice ruled that the VAT discrimination was justified under the current legislative framework. In June, the European Parliament adopted a consultative report fully in support of the Commission's proposal.

Political infighting on a different file kept the proposal blocked in the Council for almost two years, despite broad support among Member States. Finally, in October 2018 the Council reached a political agreement, which was adopted in November. Council Directive (EU) 2018/1713 of 6th November 2018 amending Directive 2006/112/EC as regards rates of value added tax applied to books, newspapers and periodicals, entered into force on 4th December 2018. Reduced VAT can now apply to the "supply, including on loan by libraries, of books, newspapers and periodicals either on physical means of support or supplied electronically or both (including brochures, leaflets and similar printed matter, children's picture, drawing or colouring books, music printed or in manuscript form, maps and hydrographic or similar charts), other than publications wholly or predominantly devoted to advertising and other than publications wholly or predominantly consisting of audible music or video content". Reduced rates on e-publications are optional. Super-reduced and zero rates are only available in Member States that already had them when the new Directive was proposed.

IMPLEMENTATION OF REDUCED VAT ON EBOOKS IN EUROPE

*source: FEP members

VAT DOWN

+16 % SALES

MORE BOOKSHOPS

In 2002, Sweden reduced VAT on print books from 25% to 6%. Sales increased 16% in one year and the decreasing trend in the number of booksellers across the country was reversed.

*source: FEP members

VAT UP

- 43% SALES

- 23% TITLES PUBLISHED

In Latvia, in 2009, VAT on books was increased from 5% to 21%. Publishers' sales went down 43% from January to July and 23% fewer titles were published that year.

*source: FEP members

TAXATION

VAT RATES ON BOOKS IN EU COUNTRIES AND FEP MEMBERS 2020 AS OF JUNE 2020

Country	Standard rate %	Book rate %	Audio- and e-book physical support rate %	E-book download/ online rate %
Austria*	20	10	10	10
Belgium	21	6	6	6
Bulgaria*	20	20	20	20
Croatia	25	5	5	5
Cyprus	19	5	19	19
Czech Republic	21	10	10	10
Denmark	25	25	25	25
Estonia	20	9[1]	9	9
Finland	24	10	10	10
France	20	5,5	5,5	5,5
Germany*	19	7	7	7
Greece	24	6	24	24
Hungary	27	5	5	27
Iceland	22,5	11	11	11
Ireland	23	0	9	9
Italy	22	4	4	4
Latvia	21	12	21	21
Lithuania	21	9	21	21
Luxembourg	17	3	3	3
Malta	18	5	5	5
Netherlands	21	9	9	9
Norway	25	0	0	0
Poland	23	5	5	5
Portugal	23	6	6	6
Romania	19	5	5	19
Serbia	20	10	10	10
Slovakia	20	10	10	20
Slovenia	22	5	5	5
Spain	21	4	4	4
Sweden	25	6	6	6
United Kingdom	20	0	0[2]	0

[1] 0 on certain textbooks
[2] audiobooks excluded; reduced rate for audiobooks provided to charities for people with disabilities and visually impaired

reduced
super-reduced (< 5%)
0 or exempt

* Temporary COVID-19 measures: Germany to lower standard rate to 16% and reduced rate to 5% from 1 July to 31 December 2020. Austria to lower rate on all books to 5% from 1 July to 31 December 2020. Bulgaria to apply reduced rate of 9% to all books from 1 July 2020 to 31 December 2021.

*source: FEP

ACCESSIBILITY

Offering the chance to all citizens to have access to the books we publish is now made easier by appropriate technology developed together by representatives of the Visually Impaired Persons' community and the book world. More and more e-books are made accessible from the outset. It may seem simple, however for many genres, accessibility raises some challenges which are best addressed at early production stages and with specialised staff. It is our joint challenge to work towards the greatest accessibility possible and for those works that cannot be made accessible, to cooperate with the organisations serving the persons with disabilities so that these books are also accessible.

ACCESSIBILITY

With last year's legislation (the European Accessibility Act, 2019), from June 2025, it will be a legal obligation for all e-books sold on the European market to be fully accessible. FEP was always supportive of this legislation and was involved in lobbying the institutions to explain how to best involve the entire chain so that e-books would be accessible to all.

Indeed, for many years, FEP has been working with its member associations and bodies representing Visually Impaired Persons to find ways to facilitate access to books. Technology increasingly helping, it made sense for publishers and the whole book chain to be covered in the European Accessibility Act adopted in the spring of 2019. With this legal instrument, the book world has guidelines on how to integrate accessibility into its workflow. FEP and other organisations active in this field are pleading for the Commission to use existing open industry standards as technical specifications so that publishers using these today would already be conforming with the legislation when it enters into force (June 2025).

After supporting the legislation, the question now is how can FEP be instrumental in better understanding of the issues at stake including the continuous development of the right technologies and 'standards' for the sector? We also trust that we can achieve positive results in informing and encouraging publishers to adapt their production processes for the inclusion of accessibility features as early as possible. We are also working on alerting the other actors of the chain, in particular the booksellers and the technology vendors that they also must comply with the legislation and how best to do it in cooperation as the book chain.

Finally (last but definitely not least), FEP and its member associations will be working with the Authorised Entities providing access to books to Visually Impaired Persons (to use the terminology of the Marrakesh Treaty and its implementing Directive and Regulation) to make sure they are informed of which books are accessible in an e-book format in order to avoid them adapting it while an accessible version already exists. With some half a million new books a year, it is important to develop communication between parties and to share the information as soon as it becomes available.

Experts from our sector are working on metadata on accessibility which will provide the Autorised Entities with the right information.

To complete these ambitious objectives, when the legislation was adopted FEP prepared briefings on both the implementation of the Marrakesh Treaty in European law (adopted the year before) and the European Accessibility Act. We will keep updating them and trying to reach as many interested parties as possible. We are providing expertise to our members whenever they are faced with national implementation or questions from their membership.

These are among the issues we have been covering in the last year(s) and will continue to cover until the Act enters into force in 2025.

FEP members were privileged to have listened to Cristina Musinnelli of the LIA Foundation (Libri Italiana Accessibili) and Luc Audrain, who used to work with Hachette Livres, our two experts on including accessibility in workflow in order to fulfil legal and social obligations. We worked and are working with them, the European Blind Union and the European Disability Forum to provide the technological solutions that will make accessibility a feature of the publishing workflow.

In the coming months and years, we are planning, together with the International Publishers Association (as the obligation will apply to all companies selling e-books into the European market, hence the international dimension), to organise seminars and briefings at bookfairs as these are ideal places to gather interested parties. We are planning to hold our first post-COVID-19 seminar in Frankfurt 2020.

Together, we can.

24,000 ACCESSIBLE TITLES CATALOGUE

The catalogue of Italian accessible books by LIA Foundation (www.libriitalianiaccessibili.org), currently features more than 24,000 born accessible titles created with the collaboration of 82 editorial imprints.

*source: LIA Foundation

*source: E-Books for all: towards an accessible publishing ecosystem by LIA Foundation

425 NEW ACCESSIBLE TITLES

At the occasion of the "rentrée littéraire" in September 2019, 425 titles (compared to 371 in 2018) were made available for visually impaired or blind readers.

*source: Livres Hebdo

ACCESSIBILITY

FACTS AND FIGURES

ACCESSIBLE FROM 2025

June 2025, all ebooks placed on the EU market need to be accessible for people with disabilities

*source: European Commission

AUDIOBOOKS IMPROVE ACCESSIBILITY FOR PEOPLE WITH VISUAL IMPAIREMENT

25% GROWTH IN 2020

Deloitte projects audiobook sales to grow 25% in 2020.

*source: Deloitte. "The ears have it: The rise of audiobooks and podcasting"

10% OF BOOK SALES IN FINLAND 20% IN SWEDEN

The Nordic phenomenon: audiobook sales represent 10% of book sales in value in Finland, 20% in Sweden (2019).

*source: FEP members

SALES UP 200% IN 5 YEARS

In UK, audiobook sales have tripled in the last 5 years and 15% of people listened to an audiobook in 2019.

*source: FEP members

TRADE

The EU is a major trade power, due to the importance of the European Single Market, and therefore concluded or is negotiating trade agreements with countries and regions all around the world. These trade agreements are essentials to facilitate access of goods and services to and from the European markets. European publishers are strongly export-oriented as one-fifth of their turnover comes from export, amounting to € 4 to 5 billion per year.

FEP therefore follows European Trade policy as counterfeiting and piracy in third countries affects European companies, including publishers, on a large scale.

TRADE

There are three types of EU Trade Agreements: Customs Unions, which eliminate customs duties in bilateral trade and establish joint customs tariffs for foreign importers; Association Agreements (alongside Stabilisation Agreements, Free Trade Agreements and Economic Partnership Agreements), which strive to remove or reduce customs tariffs in bilateral trade, and Partnership and Cooperation Agreements, which provide a general framework for bilateral economic relations, without touching customs tariffs. Intellectual property rights are regularly included by the Commission in dedicated chapters during the negotiations of trade agreements, in order to ensure the proper protection of European rightholders' legitimate interests abroad.

In addition, the EU regularly hosts IP dialogues with third countries (for instance with China, Russia, Ukraine or Brazil), which are also opportunities to give feedback on their IPR legislation and to help address problems that EU industries encounter in their daily operations, to exchange best practices and to discuss concrete issues. Through these IP dialogues, the Commission aims to establish a positive relation with local authorities, to create a favourable atmosphere for discussion, and to find solutions for cases reported by European rightholders.

In March 2019, DG TRADE launched a public consultation to identify third countries where IPR protection and enforcement is a cause for concern, as well as to update the European Commission's report on the protection and enforcement of IPR rights in third countries. The report based on this consultation was released in January 2020. According to the findings, the level of counterfeiting and piracy remains high and is reinforced by weak IP enforcement and weak sanctions and penalties in a number of third countries. The report also takes stock on the evolution of the situation in some key third countries (such as China, India or Indonesia) as well as the bilateral actions taken, such as through IP cooperation programs or IPR SME helpdesks.

In February 2020, the Commission launched a public consultation to update its Counterfeit and Piracy Watch List. The aim is to identify online and physical marketplaces (cyberlockers, stream-ripping websites, peer-to-peer, etc) located outside the European Union that engage in or facilitate substantial IPR infringements, and in particular piracy and counterfeiting. The list, managed by DG TRADE, aims to encourage the operators of these marketplaces, local enforcement authorities and governments to take action to crack down on IPR abuse, as well as to raise awareness of problematic markets among consumers.

In June 2020, the Commission announced it would undertake a Trade Policy Review. Its main objectives are to ensure the continuous flow of goods and services worldwide in the context of a more challenging environment, to reform the World Trade Organisation and to make trade part of the European "Open Strategic Autonomy", which aims to reinforce the EU's international leadership, increase its protection against unfair practices and allow it to assert its rights under international law and trade agreements.

To feed this review, dedicated consultations will be deployed with a deadline in September and which would be followed by a report by the end of the year. The review notably includes the improvement of the existing IPR legal standards and a focus on facilitating the access to international trade to European SMEs.

EUROPEAN PUBLISHING, WORLD LEADER

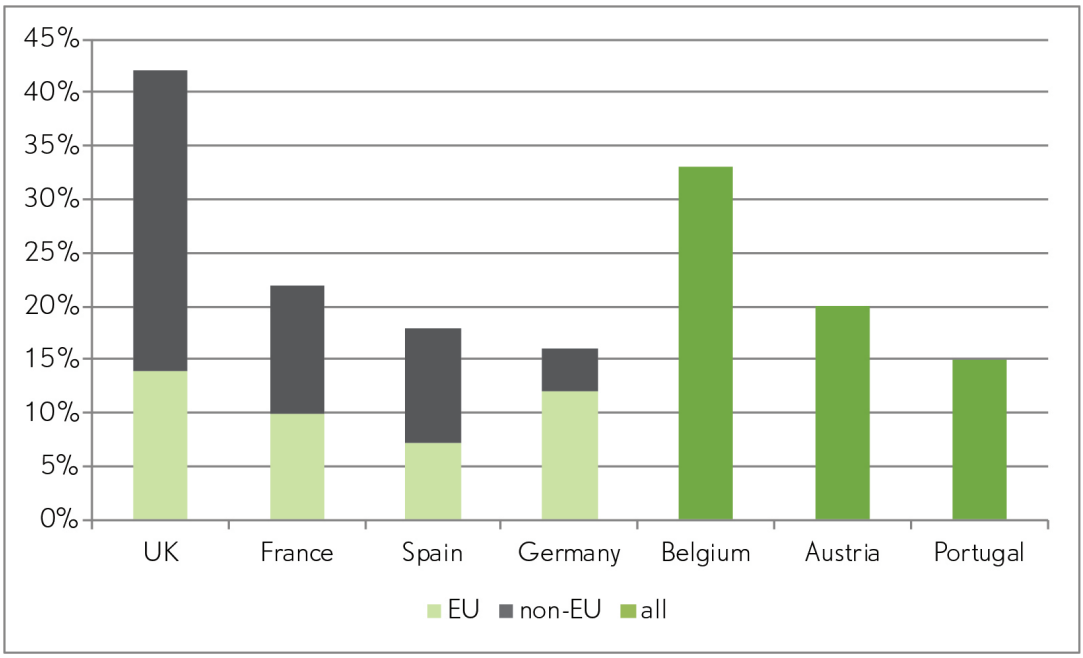
Out of the top 10 publishing groups in the world, 6 are European

*source: Global 50: The Ranking of the Publishing Industry 2019

THE ROLE OF DG TRADE

DG TRADE looks after European Union interests with foreign countries

PROPORTION OF EXPORTS IN TOTAL PUBLISHERS' REVENUE IN SELECTED COUNTRIES



*source: FEP

GEO-BLOCKING

FEP closely follows the discussions around geoblocking, as it directly impacts the commercial sustainability of European publishers. Geoblocking primarily designates the practice of limiting access to content or to a service on the basis of the geographical location of a user. It is a commercial practice that is justified by the need to respect both the territoriality of rights and the numerous different rules that the book sector must follow in the different Member States (VAT, consumer protection, fixed price, etc.). Despite this practice, consumers currently have little difficulty to find the books they want in the digital single market.

GEOBLOCKING

Putting an end to unjustified geoblocking has been identified over the past few years as a political priority to achieve the European Digital Single Market. FEP, along with the rest of the creative sector, has always advocated that geoblocking practices in the book sector are justified by objective legal and practical constraints that make it unsustainable (for book-sellers) and unnecessary (for consumers) to allow online book sales and other digital uses across the entire EU. Under the new von der Leyen Commission, Thierry Breton, in charge of the internal market, is the vice-president and Commissioner responsible for overviewing the implementation of the recent Geoblocking Regulation and to assess the possible need for a review.

In May 2016, the European Commission proposed a Regulation on geo-blocking within the internal market in order to prevent discrimination based on the nationality, place of residence or place of establishment of customers. After long and difficult negotiations, the Regulation finally entered into force on March 2018 and took effect on 3 December 2018.

The text forbids traders from blocking or limiting customers' access to their online service and from redirecting them to a version of their service that is different from the one the customer originally sought to access, unless explicit consent was given. Traders shall not apply different general conditions of access to their goods or services when the trader sells goods and those goods are not delivered cross-border, and when the trader provides electronically supplied services, except those providing access to and use of copyright-protected works.

The prohibition regarding electronically-supplied services shall not apply to traders exempted from VAT registration according to the threshold system. Prohibitions shall also not apply when other provisions in EU or Member State law prevent the trader from selling the goods, or providing the services, to certain customers or to customers in certain territories; and with respect to sales of books, when traders are required to apply different prices to customers in certain territories under the laws of Member States in accordance with EU law.

After difficult negotiations with the European Parliament, copyrighted digital content services (including e-books) sold online were kept out of the scope of the Regulation, but this exclusion will be subject to a two-year review clause accompanied by an assessment of whether to include them in the scope or not.
The Commission launched a call for proposals in July 2018 for the study to underpin its Impact Assessment on the scope of the Regulation. It was awarded in March 2019 to a consortium of consultants, for a study to be delivered around December 2019. The review clause will be applied by 23rd March 2020, based on an Impact Assessment from the Commission, as well as the new study and a consultation open to all stakeholders. The study will factually analyse the situation in terms of geoblocking, including concerning the exclusion of copyright protected digital content from the scope of the Regulation, in a sector by sector approach.

The publication of the study was delayed due to the Covid-19 crisis, which mobilised all the Commission's energy and focus, and the publication is foreseen for the summer. FEP will analyse the results of the study and answer the following consultation to ensure that the exclusion of copyright-protected digital content, including e-books, from the scope of the Regulation remains applicable and with no need for changes.

A second evaluation report will follow 12 to 18 months later to clarify whether a new legislative proposal is necessary ahead of the next official review of the Regulation which is supposed to take place in March 2025.

9,803 TRANSLATIONS INTO GERMAN IN ONE YEAR

9,803 first releases from the most important languages were translated into German in 2018, with a 1.8 % increase over the previous year.

63.1 % of them were translated from English, 10.3 % from French, 9.1 % from Japanese.

*source: Börsenverein des Deutschen Buchhandels, "Buch und Buchhandel in Zahlen 2019"

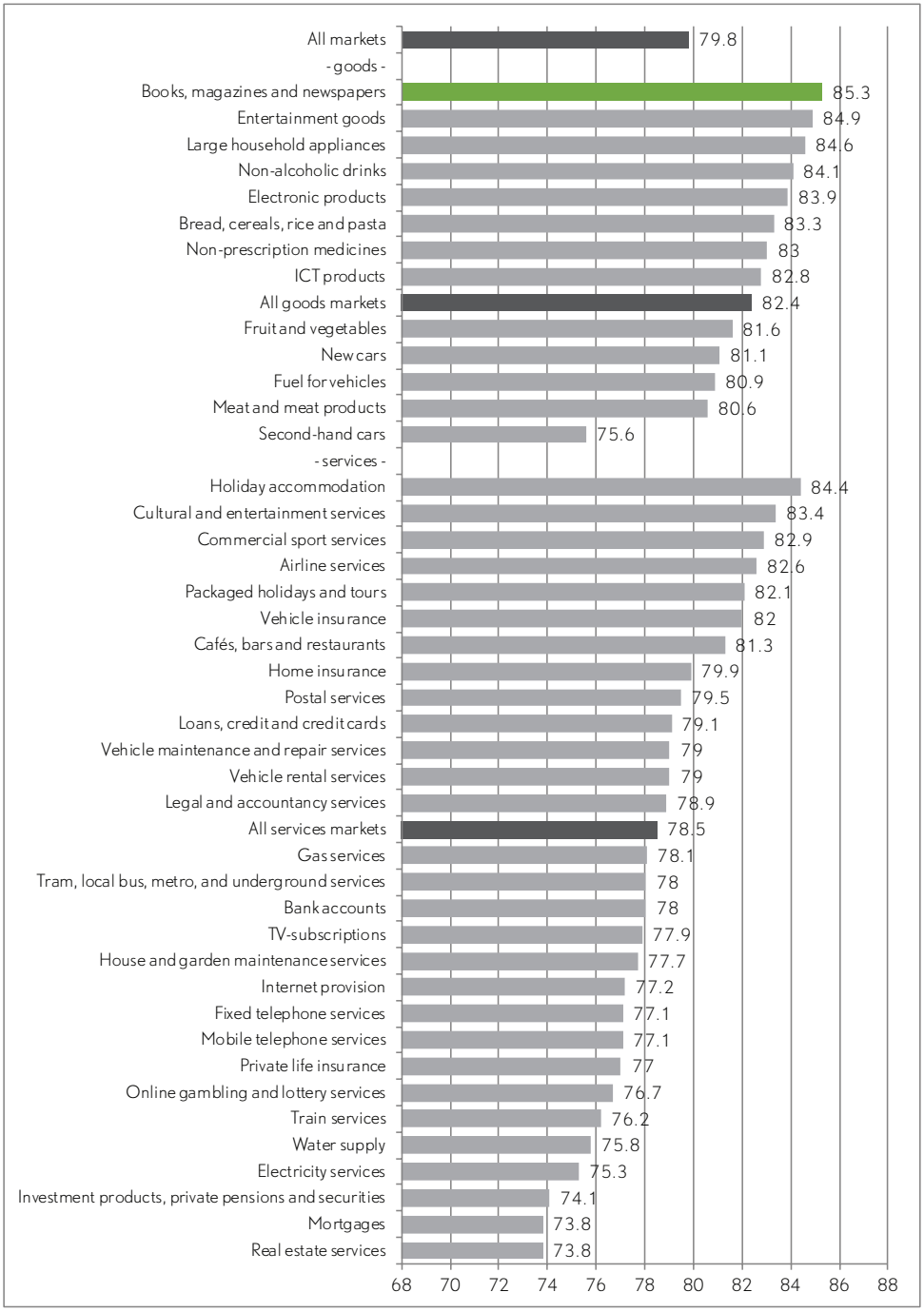
3% OF INTERNET USERS TRIED TO ACCESS EBOOKS ACROSS BORDERS

3% of European internet users tried to access ebooks across borders; 11% of them (0.33% of internet users) were blocked often; since 88% of people in the EU are internet users, geo-blocking for ebooks is a significant issue for about 0.29% of the population (February-March 2019).

*source: Flash Eurobarometer 477b: Cross-border access to content online / EUROSTAT

GEO-BLOCKING

RANKING OF MARKETS BASED ON THE MARKET PEFORMANCE INDEX[1] IN THE EU



[1] The Market Performance Index (MPI) is a composite indicator that rates consumer experience based on 5 key aspects: comparability, trust, expectations, choice and overall detriment.

*source: Market Monitoring Survey 2015, 2016 Consumer Markets Scoreboard, European Commission

EU PROJECTS

FEP has participated in a number of EU-funded project over the years: ARROW (Accessible Registries of Rights Information and Orphan Works towards Europeana) and its follow-up ARROW Plus, TISP (Technology and Innovation for Smart Publishing), Europeana Food and Drink, just to name a few. FEP is always glad to take part in initiatives that support innovation in publishing or that in general result in outcomes that are valuable for the publishing sector.

Two more projects, presented here, have come to a conclusion during the preparation of this report: Aldus, an initiative aimed at creating a network of European book fairs, and ASAP (Anticipatory Skills for Adapting the Publishing sector), which developed training courses for the main professional profiles in publishing with a focus on digital competences.

In 2020, four other projects have been granted EU funding in which FEP is a partner: CreativeShift, a pilot project on innovation; Aldus Up, a follow-up to Aldus; Strengthen Distribution of European Digital Comics (EUDICOM), aimed at providing capacity building for European comics publishers; and Sustaining Cultural Diversity in Literary Translation (SDT), focusing on sharing information capacity building in the domain of literary translations. The later three are co-funded under the Creative Europe programme.

EU PROJECTS: ALDUS

The year covered by this report coincides with the final year of the Aldus project, which closed on 31 May 2020. Aldus (named after Aldo Manuzio) is a network of European book fairs, set up by a project co-funded by the European Union under the Creative Europe programme. The project started in June 2016 and was initially meant to end in September 2019, but it was prolonged. FEP was a project partner, in charge of dissemination, organising information sessions for publishers and promoting the European Union Prize for Literature within the Aldus framework.

In this capacity, FEP in these twelve months continued to exploit synergies between the Aldus network and the European Union Prize for Literature, organising or coordinating events at a number of book fairs to promote the Prize and its winners. Activities took place at the fairs in Frankfurt, Antwerp, Rome and Vilnius (plus in several others not in the Aldus network).

FEP also organised, in cooperation with the German Publishers and Booksellers Association, a seminar called "Young Publishing Professionals in Brussels", a training and networking initiative aimed at young people working in publishing houses from all over Europe. The event, which took place in September 2019, was organised in the framework of the Aldus project and represented for the participants an opportunity to engage with both the Federation of European Publishers and the EU Institutions, to be involved in the overall European idea and the upholding of the publishing industry values at EU level, to network and benchmark with colleagues from different countries and to be introduced to policy and advocacy work in the sector.

In addition, FEP dedicated the professional sessions of its meetings to topics of relevance for Aldus. The meetings took the form of information events for publishers and publisher representatives on a wide range of topics, namely: "Focus on the Czech Book Market" (Brno, May 2019), with presentations on the Czech book market and the Book World Prague festival; "Technology, law and economics: the rationale" (Athens, September 2019), focusing on the technologies affecting the present and future of publishing, and especially how emerging technologies can facilitate the work of publishers; "Aldus Focus on Book Fairs" (Antwerp, October 2019), an occasion for sharing experiences regarding the organisation of book fairs from all over Europe, all belonging to the Aldus network, and "Are audiobooks transforming the publishing landscape?" (Brussels, February 2020), an exchange of information about the rise of audiobooks in many European markets and a reflection on the strategic drivers related to the phenomenon.

The Aldus project was coordinated by the Italian Publishers Association. The project established a first core group of book fairs and then started working to broaden it at pan-European level. The presence in Europe of the two leading B2B book fairs in the world (both Aldus partners), and the rich variety of national book fairs open to the public (5 are project partners), are the starting point. The former are already the place for professionals to meet at global level, and the latter have great potential to complement this by offering visibility to national book communities at European level. The network fosters targeted mobility between professionals, through visits and joint events. By mid-2020, the network has grown to include 18 European book fairs.

Dialogue between publishers is the prerequisite for translations, i.e. for mobility of literary works, which is the primary objective of the project, supported by dedicated networking and training activities. Book fairs are also an opportunity for capacity building, in particular in the areas of internationalisation, digital shift, and audience development. Aldus aims at experimenting with new, more interactive, and engaging event formats in these areas. Supporting publishers to experiment with new ways of using the fairs to engage with their audience is another project objective.

ALDUS
EUROPEAN BOOKFAIRS' NETWORK

Co-funded by the
Creative Europe Programme
of the European Union

The ASAP project (Anticipatory Skills for Adapting the Publishing sector) concluded its time span in April 2020. Co-funded by the Erasmus Plus programme, it aimed at developing tools to support the update and upgrade of skills for people working or seeking to work in the book publishing sector in the digital age. The project started in November 2016 and was due to end in October 2019, but it was granted an extension. FEP was a project partner, responsible for the definition of the sector skill shortages, through a state of the art analysis of the status quo and of the strategic perspectives with regard to the publishing sector in the digital era and of how digital books are changing the reading and writing behaviours and how these changes impact on the publishing sector. FEP was also in charge of designing the project's exploitation plan, as well as of dissemination in the publishing community.

In the period covered by this report, FEP continued to contribute to the project's objectives, providing input to project deliverables and carrying out dissemination initiatives, both within the publishing community and more broadly - for example representing ASAP at a monitoring meeting of Sector Skills Alliance projects under Erasmus Plus. FEP also worked on the exploitation plan that explores the options for the sustainability of the project results and organised the project's final conference, which took place in videoconference form in March 2020.

ASAP was initiated after a reflection on the changes brought about by the digital shift on the book publishing sector, especially with regard to skills and competences. Technology has had a significant impact and prompted massive economic changes for publishing. It is affecting the traditional business model sand giving a key role to new distribution channels such as aggregation platforms. Technological evolutions affect the consumption patterns of publishing products and production processes, impacting all areas of the book publishing value chain. The passage from physical to digital distribution, the reduced marginal cost of producing an additional book, the many competitors entering this industry thanks to digital technologies, and the problems linked to electronic security, are only some of the characteristics of this revolution.

The project takes into account the impact of the changes in competences and skills to propose an evolutionary map of skills needs, and to design and deliver flexible training programmes (one for each area of the publishing supply chain) which, according to EQF/ECVET standards and the quality principles of the EQAVET framework, will provide employees (but also the unemployed, self-employed, low skilled employees and young VET students) with the opportunity to update their professional skills and knowledge, thus bridging the gap in specific skills brought about by the digital revolution. The project expects to promote broad cooperation among the different stakeholders using a participatory portal and a MOOC (Massive Open Online Platform) platform to make the content available to a massive target group even after the formal end of the project.

ASAP was coordinated by the Fondazione Hallgarten Franchetti – Centro Studi Villa Montesca (Italy) and had partners in Greece, Italy, Spain and the UK. The consortium, comprised of organisations in the publishing and vocational education and training sectors, mapped the key skills required in the publishing sectors in the countries involved. Based on this, it specified the training requirements and certification for the target groups in the countries involved, developed the contents of the MOOC programme and delivered the pilot courses.

ASAP

Co-funded by the Erasmus+ Programme of the European Union

BOOK'S FACE

EDITORIAL
. Reading panel
. Commissioning or acquisition
. Copy editing/Full text editing
. Proofreading
. Index making
. Translation
. Technical revision
. Infographics
. Legal reading if necessary
. Relations with the author

FINANCIAL
. Authors royalties & copyrights fees
. Management accounts
. Creditors & debtors
. Legal procurement
. Sponsors
. Audits
. Tax

PRODUCTION
. Typesetting
. File conversion
. Layout & design
. Paper buying & storage
. Printing
. Insurance & shipping

SALES & MARKETING
. Representation
. Marketing plans
. Foreign rights
. Publicity
. Contracts with the media
& PR approaches of opinion
. Leaders & institutions
. Social media
. Parties

FULFILMENT & DISTRIBUTION
. Order processing & servicing
. Fulfilment & delivery
. IT systems
. Warehouse management
. Digital warehouse & distribution
. Physical bookstores
& other stores selling books
. Electronic bookstores
. Libraries
. Consignment processing, returns,
used/damaged books sales
. Management of unsold stock

EDMUND AUSTIGARD

Edmund Austigard's background was largely in the areas of technology and finance before he made his way to publishing. Having worked since the internet was new on digital business models and content he spent four years managing international M&A projects for Telenor, a telecom company, before overseeing the establishment of the Norwegian distribution database for e-books.

After joining the publishing house Samlaget as CEO/Managing Director in 2011 he chaired the Freedom of Speech Committee of the Norwegian Publishing Association (PA) from 2015 to 2019, when he became chairman of the PA. Austigard is also a keen author, and has written and published four novels.

1. Can you please describe your job in 100 words?

Someone is always writing. Someone is always reading. Some voices are kept quiet looking for a way out. Something is always happening. Something that could become literature and change the way we think and act. Managing a publishing house is arguably the most challenging and at the same time most enjoyable job one can have.

2. What did you want to be when you were five years-old?

My father was a bus driver. Those days safety came down to the driver, not seat belt and security measures. The countryside buses had a front engine covered by an isolated case. I was sitting on that case admiring how the Scania bus scaled the steep mountains of west coast Norway, how my father was mastering the small and winding roads, stopping to put on chains on snowy and slippery ground, passing remote villages and scattered farms, providing a lifeline. I wanted to become a bus driver.

3. Can you describe a typical working day?

One where you get to do none of what you planned to do. On the other hand, I have the pleasure of coping with daily surprises. Like bumping into an author and spending the next hour exchanging views on trout fishing in alpine surroundings, and perhaps how that relates to literature.

4. What would happen to the book if you were not there?

There would have been an essential gap to fill in football literature. Aspiring young goalkeepers in Norway would not have had the book Ørjans keeper-skule, written by Ørjan Nyland himself, at their disposal. Nyland is now keeper in Premiere League for Aston Villa, he was formerly with FC Ingolstad 04.

5. What is the most exciting /striking thing that ever happened to you in your job?

Publishing Jon Fosse in his mother tongue.

ACRONYMS

ALDE Alliance of Liberals and Democrats for Europe

AIE Italian Publishers Association

ARROW Accessible Registries of Rights Information and Orphan Works

BEREC Body of European Regulators for Electronic Communications

CMO Collective Management Organisation

CEN European Standardisation Committee

CENELEC European Committee for Electrotechnical Standardisation

CENL Conference of European National Librarians

CETA Comprehensive and Economic Trade Agreement

CJEU Court of Justice of the European Union

CMBA Creative Media Business Alliance

DG CNECT Directorate General for Communications Networks, Content and Technology

DG EAC Directorate General for Education and Culture

DG ENVI Directorate General for the Environment

DG GROW Directorate General for Internal Market, Industry, Entrepreneurship and SMEs

DG JUST Directorate General for Justice and Consumers

DG TAXUD Directorate General Taxation and Customs Unit

DG TRADE Directorate General for Trade

DSM Digital Single Market

EBLIDA European Bureau of Library Information and Documentations Associations

EC European Commission

ECR European Conservatives and Reformists Group

EIBF European and International Booksellers Federation

EMMA European Magazine Media Association

ENPA European Newspaper Publishers Association

EOCP European Counterfeiting and Piracy Observatory

EP European Parliament

EPC European Publishers Council

EPP European People's Party

ETUCE European Federation of Teachers' Trade Unions.

EUEB European Union Ecolabelling Board

EUIPO European Union Intellectual Property Office

EUN European Schoolnet

EUPL European Union Prize for Literature

EWC European Writers' Council

GDPR General Data Protection Regulation

ICT Information and Communications Technology

IFRRO International Federation of Reproduction Rights Organisations

IPA International Publishers Association

IPR Intellectual Property Rights

IPRED Intellectual Property Rights Enforcement Directive

iTEC (Innovative Technologies for Engaging Classrooms)

JRC Joint Research Centre

MEP Member of the European Parliament

MOOC Massive Open Online Course

NEM New European Media

NME News Media Europe

OA Open Access

OER Open Educational Resources

OHIM Office for Harmonization in the Internal Market

RRO Reproduction Rights' Organisation

S&D Group of the Progressive Alliance of Socialists and Democrats in the European Parliament

STM International Association of Scientific, Technical & Medical Publishers

TDM Text and Data Mining

TiSA Trade in Services Agreement

TISP Technology and Innovation for Smart Publishing

TTIP Transatlantic Trade and Investment Partnership

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