



FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

REPORT OF ACTIVITIES

2020/2021

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“I will quote the author of A Game of Thrones, George R.R. Martin: ‘... a mind needs books as a sword needs a whetstone, if it is to keep its edge.’ ”

Foreword by Peter Kraus vom Cleff, FEP President



Can one write a foreword to this year's FEP report of activities without mentioning the virus? And if I tried? I might reflect on the developments which happened over the course of the last twelve months; removing them from the context and simply sketching the consequences they might have on our sector in the coming years.

In any case: decades from now we will remember these months of the pandemic differently, as they have changed our lives and our habits. I am sure that some of these new ways of living and consuming will persist over time. Which ones, I don't know, as I don't have a crystal ball that would allow me to predict the future - but if you'll allow me, I'm going to imagine with you the consequences of these new behaviours on the book world. So here we go!

Books and bookshops; essential goods and businesses

I am a publisher, and I have never doubted that authors, books and their special partners - the booksellers - are essential. I will quote the author of A Game of Thrones, George R.R. Martin: "... a mind needs books as a sword needs a whetstone, if it is to keep its edge." I could fill this page with similar quotes highlighting the extraordinary power of books for our education, our mental health, our well-being, our empathy, our entertainment, etc. In some European countries, governments have - intelligently - decided that, like food or medicine, books are essential goods. Therefore, the bookshops where you can buy food for the mind and medicine for the soul are essential businesses that must remain open even under difficult circumstances. It would be wonderful if politicians in other countries on our continent and beyond could take inspiration from these countries to re-affirm the importance of books in society and ensure that bookshops can always be visited.

A more digital book world

Have we read more during these long months, or less? And how have we read? Well, I have read both the one extreme and the other in the press, so I

will not venture to draw any conclusions; especially as the European landscape is rather fragmented. What I have noticed, like all informed observers of our sector, is the growth of digital - both in terms of the production of works in digital format (either audio books or e-books) and also in terms of digital sales; with both the behemoths of the sector and the independents showing almost limitless imagination in serving their readers. Furthermore, one cannot look at digital developments in books without noting the extraordinary growth of book streaming services, whose growth in Northern Europe is impressive and will most likely influence our sector across the continent.

More books in libraries

To help the whole book chain, some governments have supported the sector financially, including by funding massive purchases of books for libraries. We all welcomed this, and encouraged governments in all European countries to do the same; to support editorial and therefore cultural diversity. More books on the shelves of our libraries will hopefully attract more readers. Readers who, at times, will go to the bookstore to buy books or join a streaming service like those referred to above. The challenge of the digital development of the book sector is to ensure that the fragile balance that sustains this ecosystem is preserved and nurtured. Libraries that sign agreements to allow

online access to digital works must contribute to this balance. In our view and given current circumstances, licensing agreements that allow for modulated access remain the way forward. We are ready to constructively continue the conversation with libraries alongside authors and booksellers.

Online gatherings

I have already spoken about the sale of and access to books online and now I would like to turn to the events that normally bring us together with our readers and professional colleagues at regular intervals: book fairs, literature festivals, public readings. For months now, the dire circumstances have forced us to merely meet virtually and sit in front of our screens; “socially distanced” and lonesome. Be it to meet an author whose latest book is in bookstores, or to buy or sell rights, these events no longer take place in the context of physical meetings but only online. Though I believe that a certain number of new reading behaviours will endure, the urge to meet personally and to communicate between human beings seems to me to be more essential than ever. I cannot (nor do I want to) imagine a world where human contact would be limited to meetings on a virtual platform.

During these last months, the bare necessities were the law. But in the future, we - being the social animals we are - will strive to re-establish

those unique links that only exist because we were able to meet in person; to appreciate each other; to live precious professional or social moments together: all that will (and will have to) return. Why not embrace digital technology as an ally? Why not move onwards with our new knowledge and newly developed digital tools like hybrid formats? For they will allow those who cannot travel to take part; to be with us in a reading or a meeting; to discover authors in more distant parts of the world. Less travelling will also help improve our carbon footprint and save us precious time so far wasted at airports and railway stations. With this new use of digital technology, it might be possible for all FEP members to attend our meetings - although,

and I do hope you all agree on this, meeting colleagues and friends in person will always be a better opportunity for more spontaneous and undoubtedly more creative conversations.

Tomorrow, and already today, the book world will experience a lot of upheaval and change - hopefully mostly for the better. I am deeply convinced that the essence of the book - this dazzling medium for transmitting knowledge; this fascinating carrier of stories - will continue to find its way to readers and continue to help us become better people.

Keep on reading! Keep on publishing!

“I am deeply convinced that the essence of the book - this dazzling medium for transmitting knowledge; this fascinating carrier of stories - will continue to find its way to readers and continue to help us become better people.”



NOT AS BAD AS EXPECTED

July 2020 pointed to an expected loss for the sector of 15% to 25% for the whole year. In reality, the overall loss across Europe is around 2% to 5%, with large disparities between countries and genres.

ONLINE SALES IN EUROPE GREW UP TO 50%

While physical stores struggled due to being closed in most countries, onlines sales grew significantly and were up 16% in Italy, 19% in Sweden, 40% in the Netherlands, 50% in Portugal and so on, although they rarely made up for the several losses.



BOOKS ESSENTIAL AT CHRISTMAS TIME



While Italy and Belgium were already considering bookshops as essential during lockdown, it was not the case in all Europe. However, countries such as France and Greece reopened their bookshops right before Christmas, allowing a +25% of December's sales in France.

ADAPTIVITY IS KEY: 3 MAJOR CHANGES FOR THE BOOK CHAIN



ONLINE SELLING

Countries with good online sales infrastructures have suffered less from the crisis

CLICK&COLLECT

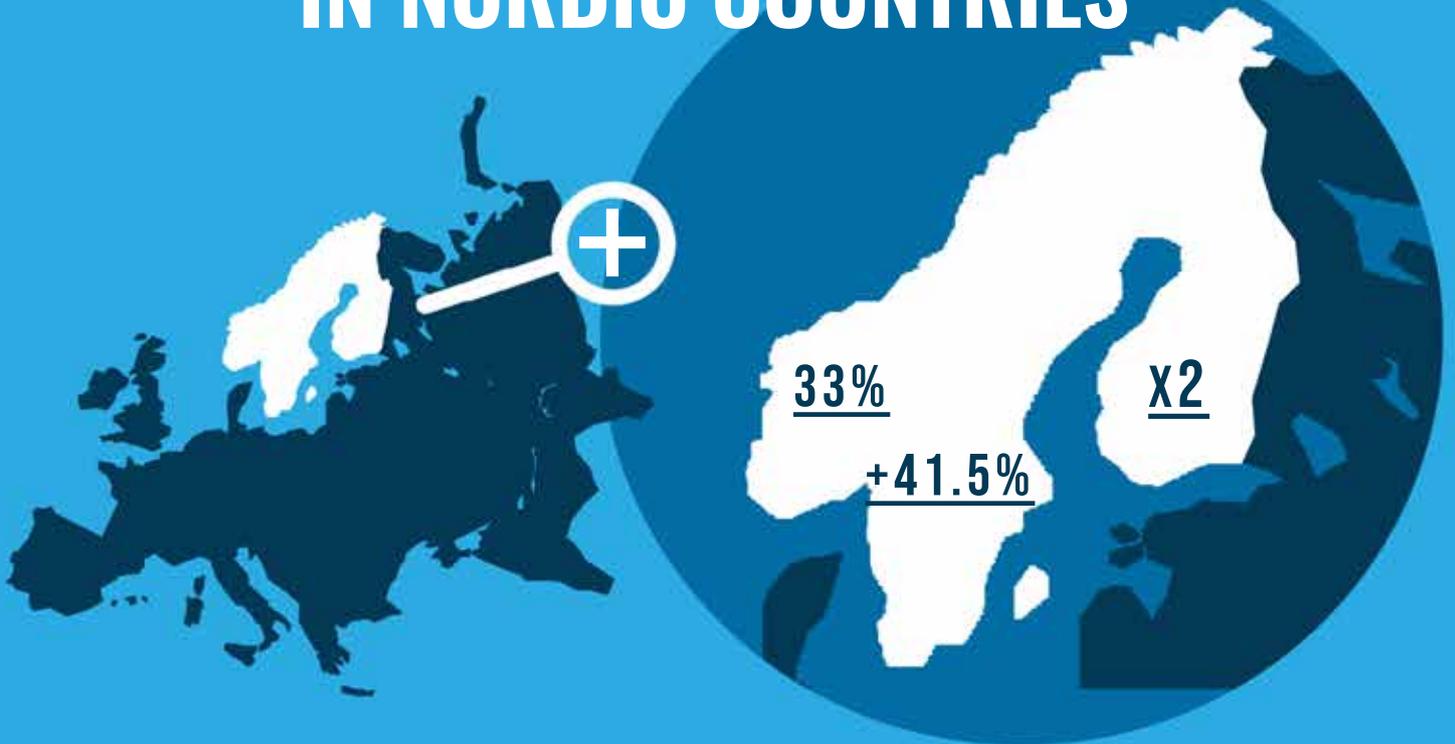
Small booksellers saw greater sales than average in book retail due to the support of local communities



GOING DIGITAL

Sales of digital books and audio books increased in almost all countries surveyed!

GROWTH OF AUDIO BOOK SALES IN NORDIC COUNTRIES



Readers have been going digital with greater ease during the lockdown, especially in the Nordic countries. Audio books sales went up 41.5% in Sweden, doubled in Finland and were up to 33% of consumed books in Norway.

CHILDREN'S BOOK SALES SKYROCKETED WHILE TRAVEL BOOKS DROPPED



Children's book sales grew in Germany, Austria, France, Poland, The Netherlands and Italy, finishing the year with better sales than the year before. Meanwhile, the travel book sector shrank significantly in countries such as Germany (-26%), Austria (-36%) and France (44%)



FEP

A different year

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: to inform the members of the publishing associations of the main issues dealt with at EU level as well as to 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 enjoyable reading or at least browsing.

FEP meets virtually

It took us a few months to apprehend the new situation; months during which we rescheduled some meetings only to ultimately cancel them. However, the technologies we all discovered almost instantly like Zoom and Teams allowed us to remain in close contacts even without formal meetings. Importantly, we cancelled the meeting we were meant to have during the IPA Congress in Lillehammer in May and agreed to re-organise our schedules into two meetings under the form of a

General Assembly: the first in September, virtually replacing the much-expected Riga meeting, and the second in November. In 2021, the first meeting in February was online and it is expected that most meetings in the course of the year will have only a digital format.

At the September meeting, we elected a new Board (09-2020 - 11-2022) composed of German publisher Peter Kraus vom Cleff as President; the President of the Italian Publishers Association, Ricardo Franco Levi, as Vice-President; Austrian publisher Benedikt Foeger as Treasurer; and Catherine Blache, Michiel Kolman and Sakari Laiho as Board members. All FEP members thanked outgoing President Rudy Vanschoonbeek for his dedication and hard work for FEP over his slightly longer Presidency (which should have ended in May 2020).

Virtual meetings and, sadly enough, virtual book fairs. Every year at the occasion of the Frankfurt Book Fair we invite members and colleagues to listen to a politician or a European Commission official. In 2020, we ruled out meeting in person; inviting seven MEPs to answer a series of questions on publishing, freedom of expression, copyright and competition laws. The webinar was moderated by our President and attracted a nice crowd. Normally, Frankfurt is also the chance to catch up

with colleagues, including our sister organisations such as the International Publishers Association and the European and International Booksellers Federation, to coordinate activities and policies. And we did not break the habit of meeting with their Boards; either during the Fair or shortly after.

FEP cooperates

Life did not stop: it might have forced us all to regularly work from improvised offices, but the cooperation and coordination with other trade associations remained intense, with perhaps even more meetings than usual organised over the last year. As mentioned above, we work with colleagues representing the book world. This also includes the European Writers' Council with whom we regularly exchanged and the International Federation of Reproduction Rights Organisations. Broadening the view 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 also partnered with EY on a study of creative industries which was presented in early 2021 and was invited to join a seminar promoting the study in March 2021.

FEP familiarises publishing

Over the past years, we have aimed at helping our counterparts better understand what

publishing really means and involves. To achieve that, we bring the book closer to our audience by organising dialogues between authors and publishers. Unfortunately, it has been virtually impossible to organise such social opportunities with all the health restrictions and we are still considering options to reveal to politicians and officials what lies behind the façade of publishing houses. Although we were not able to bring real people to explain what we stand for, we have published two extremely relevant reports: the first after what we all thought were the worst months of the crisis and the second, taking stock of the world of books in Europe one year later. These were very broadly distributed to ensure all stakeholders are aware of the current situation of our sector.



We had also started distributing a welcome pack to all elected MEPs when the COVID-19 crisis began, ending our near daily visits to the Parliament. Thanks to an extremely dedicated stagiaire, all the children books provided by our members together with a notebook especially published for the occasion with quotes from all these countries in the original languages were sent to the MEPs and we have received many positive messages.

Ahead of us...

This is a new year – that much is obvious. We can only foresee many very different months ahead of us, with a slow and gradual return to some normality (whatever it means today). We have continued engaging with politicians and officials from the European institutions. The absence of face-to-face meetings complicates relations and requires new skills (even if one has

to recognise that it simplifies colleagues' lives with less travelling to be done). One of our strengths is the recognition by European institutions of FEP as the trusted voice of European publishers. This must remain the objective of the Federation and we will keep on sharing our (and your) expertise with the policymakers to continue to inform their decisions. Today, we can only be online and therefore social media is even more important. We are aiming to step up this presence in the coming months so that publishers and everything they stand for are heard and listened to. In addition, you can find many resources on our website: trade statistics, infographics, press releases and, of course, this very Report of Activities. Additionally, we can only encourage FEP members to use the many resources on our website, especially our analysis that we share in the members' section.

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'ÉDITION

GERMANY - BÖRSENVEREIN DES DEUTSCHEN
BUCHHANDELS

GREECE - ΣΥΜΠΡΑΞΗ ΣΩΜΑΤΕΙΩΝ ΕΚΔΟΤΩΝ
ΒΙΒΛΙΟΥ ΕΛΛΑΔΑΣ

HUNGARY - MAGYAR KÖNYVKIADOK ÉS
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 - ASSOCIAÇÃO PORTUGUESA DE
EDITORES E LIVREIROS

ROMANIA - FEDERAȚIA 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

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 2019 was approximately € 22.4 billion. This represents a significant increase from 2018 (€22 billion), with most markets continuing a recovery trend initiated a few years earlier and exchange rate effects no longer masking such growth. 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 which started in 2008, though less severely 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 in 2019 growth resumed at a steadier pace. 2020 was

characterised by the effects of the COVID-19 crisis, which were negative although not as much as feared. The overall market is estimated to have lost between 2 and 5%, but the impact has been very uneven, and several elements of fragility have been introduced, the effects of which will be felt for years to come and are, as of yet, not fully predictable.

A total of about 605,000 new titles were issued by publishers in 2019. 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 12.5 million titles in stock; the countries reporting the greatest availability being the UK, Germany, Italy, France and Spain. This figure, ever-increasing, has been spiked by the surge in multi-format digital publishing; the digitisation of back catalogues; the growth of print-on-demand services; and the surge in self-published titles, as well as other phenomena. More than 2.5 million digital book titles are available to European readers.

A total of approximately 130,000 people

were employed full time in book publishing in 2019, 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 close to 10% of the total, with some 5% represented by e-books and audiobooks and the rest by databases and other services. For the last couple of years, digital markets have witnessed the spectacular rise of audiobook sales, which will have a visible impact on figures in the near future; while the e-book market has shown signs of stagnation for the last 5 years (though it could be a matter of capturing the right data), with an upturn during the pandemic.

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 continues to reflect on how to improve the situation and has joined forces with IPA and WIPO to this end.

COPYRIGHT

INTRO

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. Despite the recent adoption of the new Copyright on the Digital Single Market Directive, copyright remains relevant in current legislative debates concerning platform regulation.

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 DG CNECT. In the Parliament, the relevant committees 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.

In April 2019, after two and a half years of intense negotiations, the Directive on Copyright in the Digital Single Market was adopted; marking the most significant European copyright review since 2001.

The adopted text introduced four new mandatory exceptions for illustrations 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.

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

Finally, authors were granted mandatory mechanisms to ensure they receive appropriate and proportionate remuneration; to request additional remuneration from their contractual partners when revenues generated by the work are too low; to settle disputes related to the application of obligations imposed on publishers and producers; and transparency obligations according to which authors would receive information on the exploitation of their work from their contractual partners. They were also granted 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 published guidance on 4 June 2021 for the implementation

of Article 17, following a stakeholder dialogue process in which FEP participated.

In December 2020, the Commission proposed two new Regulations to update the rules for online platforms. The Digital Services Act (DSA) covers the obligations of digital services and the Digital Markets Act (DMA) introduces ex-ante rules for “gatekeeper” services. Due to their large scope and the policy they modernise, this package is considered to be the most important EU digital reform in 20 years and will be politically sensitive. The texts are not expected to come into force before 2024.

The DSA updates the existing E-Commerce Directive (from 2000) while introducing new obligations in the field of content moderation and transparency. The existing liability regime is preserved, while the requirement for notice and action are harmonised. The new obligations for content moderation (including trusted flaggers and repeated infringers policies) on online platforms vary depending on the size of the platform with the biggest platforms being subjected to additional audits to prevent systemic risks.

The DMA defines a category of online services (the gatekeepers) which are deemed to be dominant on European markets and are therefore subjected to a number of obligations to protect the market from anti-

competitive behaviours (such as self-preferencing or most-favoured-nation clauses).

Both texts introduce important fines for services not respecting their rules; the DMA even going as far as imposing mandatory divestiture for gatekeepers that consistently break their obligations.

FEP is engaging with the co-legislators to ensure that these important texts reinforce the tools available for publishers to fight efficiently against online piracy and protect themselves from the abuses and anti-competitive behaviours of giant platforms. FEP also collaborates with other rightsholders and other organisations on common interests.

Beyond its consequences on the cultural sectors, the COVID-19 crisis also sparked copyright-relevant debates with some organisations weaponising the crisis to call for a reduction of copyright protection, despite the initiatives publishers (and other rightsholders) took to fulfil their societal responsibility (e.g., in the field of education). FEP remains vigilant against these unfair challenges and participates in a series of events to demonstrate on one hand, the consequences of COVID-19 for publishers and, on the other hand, the exceptional initiatives they took to help people access books legally.

The new European Commission made the creation of a European framework around

Artificial Intelligence (AI) one of its priorities for this mandate. Debates on AI have an impact on copyright, as these technologies are increasingly used in the field of cultural creation. While the new Copyright Directive 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.

Following the presentation of its Intellectual Property (IP) Action Plan in November 2020, the Commission ordered a study to explore the use of new technologies in rights data management and to explore the forthcoming challenges that AI sets on copyright.

EDUCATION

INTRO

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 a significant impact on publishers.

The EU plans to establish a European Education Area by 2025, and the Commission is working on the implementation of its recently updated 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. FEP attends relevant events and presents its position to the EU institutions. 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 is engaging with the Commission on the implementation of the new Digital Education Action Plan.

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 an alternative or antagonist to professionally produced content but can complement it. 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, as well as a threat to the independence and pluralism of education. Moreover, the notion

of OER should not lead to infringement on 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 overlap with broader discussions on copyright; in this context, FEP looks at the implementation of the exception for illustration for teaching.

The EU has 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); Council Conclusions (2014), encouraging 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 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; 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 the roadmap, also mentioning the potential of OER; Council conclusions on the Communication (2017) encouraged Member States to make 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), 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; Council conclusions (2018) on a European Education Area, recommending innovative use of digital technologies.

In September 2020, the Commission adopted an update of the Digital Education Action

Plan, and a Communication on achieving the European Education Area by 2025. The updated DEAP's strategic priorities are to be reached via infrastructure, connectivity and high-quality learning content. There is no mention of OER, but a lot of emphasis on MOOCs and on quality content - and a proposal to develop a European Digital Education Content Framework. The vision for the EEA identifies six dimensions: quality; inclusion and gender equality; green and digital transitions; teachers; higher education; and a stronger Europe in the world. Not much is said about content but the document states that funding available through the Recovery and Resilience Facility should support investments in education, from infrastructure to trainings, digital devices or the funding for OER. The Parliament followed up with a report on Shaping Digital Education Policy (March 2021) and one on the EEA, due in mid-2021.

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 concerns 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.

EUPL

INTRO

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 European literary works. Each year, in a three-year cycle, the juries representing a selection of the 41 countries which participate in 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; and 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 began in 2019 and will be completed this year.

EUPL

Juries completed their first round of selection of the 2020 EUPL laureates when the first countries started to go into lockdown to try to curb the pandemic. When the Consortium called the winners a few days prior to the EUPL laureates' announcement in May 2020, we were still confident that we would meet with them in September for the ceremony, and that if we missed the London and Paris book fairs, Frankfurt would remain an opportunity to distribute the beautiful anthologies .

Day after day; week after week; month after month: we had to cancel all activities due to happen in physical locations and rescheduled them online. As we write these lines, we have yet to meet the 13 laureates for 2020: Nathalie Skowronek, Belgium; Lana Bastašić, Bosnia and Herzegovina; Maša Kolanović, Croatia; Stavros Cristodoulou, Cyprus; Asta Olivia Nordenhof, Denmark; Made (Mudlum) Luiga, Estonia; Matthias Nawrat, Germany; Shpëtim Selmani, Kosovo; Francis Kirps, Luxembourg; Stefan Bošković, Montenegro; Petar Andonovski, North Macedonia; Maria Navarro Skaranger, Norway; and Irene Solà, Spain.

Luckily, we managed to organise one event in Frankfurt during the book fair. The reading of Matthias Nawrat was hosted by the FEP President and gathered a very limited number of guests, as required by the sanitary measures in place, yet everyone attending the event was delighted - at last, a live event! Thanks to our long-standing collaboration with the book fair we were also invited to participate in their Saturday literary online festival with a film showing each of the 2020 laureates reading from each other's books and the viewer travelling around Europe to meet these emerging voices. The film can be seen on EUPL channels.



The ceremony had to be organised and broadcast online with several additional preparatory seminars organised by the Consortium members; FEP, the European Writers Council and the European and International Booksellers Federation.

In 2021, we had hoped to organise reading events in early May for the 2020 laureates. We are all aware that public events are not allowed in most European countries and instead we had to, once

more, organise online events. These included a collaboration with BOZAR on Europe Day and with the Brussels Book Fair's online festival, featuring a question on European literature asked to previous EUPL laureates by 2013 Belgian laureate, Isabelle Wéry, every day at 19.30. A positive outcome of the crisis would be that the content on EUPL YouTube channel grew exponentially.

TAXATION

INTRO

After the Directive (EU) 2018/1713 entered into force at the end of 2018, a wave of adoption of reduced rates of VAT on digital publications followed across Europe; made possible by the Directive. Up to May 2020, this resulted in 18 Member States, as well as several EEA and candidate countries, applying reduced rates of VAT to digital publications. This also includes the UK, with the largest e-book market in Europe.

The last twelve months have seen discussions in countries that still have not taken up the possibility, though no permanent changes have been made. However, the COVID-19 crisis has prompted several governments to implement temporary measures, including the decrease of VAT rates applying to all books from both standard and already reduced levels. [See map]

TAXATION

FEP campaigned unrelentingly for the Directive on VAT rates on e-publications 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 online access, which as electronic services must normally be taxed at the full rate. As of April 2021, 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, 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 e-books as well; while Luxembourg re-established the standard rate in May 2015.

The Juncker 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 2017, 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 6 November 2018 amending Directive 2006/112/EC as regards rates of value added tax applied to books, newspapers and periodicals, entered into force on 4 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.

Adoption of the Directive is now widespread, with 20 countries applying reduced rates to e-books among EU Member States, candidate countries and the EEA. In a few cases, the decision was made in the framework of measures to face the COVID-19 crisis. In addition, several countries have taken temporary measures to tackle the COVID-19 crisis, affecting the rate that applies to books (Germany) or targeting books directly with specific reductions

ACCESSIBILITY

INTRO

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

Note this date – 28 June 2025. On this date, European legislation (called the “European Accessibility Act”, passed a month before the much better-known “Copyright in the Digital Single Market”) will apply to all e-books sold in the European Union (save a few exceptions such as e-books published by micro-enterprises* or which would require a fundamental alteration or for which accessibility would represent a disproportionate burden). This applies not just to e-books published in the European Union, but to e-books from all over the world being sold to European citizens.

So, how do we get there? Two paths. First, raise awareness. Second, train publishers. Raising awareness, as even today some publishers around Europe and many more around the globe are unaware of their future obligations. So, during the 2020 Frankfurt Book Fair, FEP and IPA organised a webinar with the participation of the European Commission and the World Intellectual Property Organisation as well as experts for the publishing sector and the whole e-book chain. In 2021, both organisations will again put their forces together to inform publishers about their obligations and give them hints on the way forward. The webinar is foreseen for 20 October. More information on

our social media and website closer to the date.

Raise awareness – take two: an ad hoc group was formed at the request of FEP members to discuss some interpretations of the legislation and to exchange best practices. The group has met every two months and is open to all FEP members. The group is also liaising with the Commission to exchange on its work and to support the current open formats as technical specifications as opposed to starting a new standardisation process (lengthy and possibly counter-productive).

Training publishers is obviously not something entering into FEP competences, yet we must be supportive of the various efforts happening in Europe. We can do that by coordinating with them: for example, by liaising with an Erasmus+ project aimed at producing open learning resources for the publishing sector or by organising a LIA webinar for FEP members on 1 June. Everyone involved in a training programme is welcomed to share it with FEP, so that we can all together move towards the goal of increased accessibility.

While we are doing all this positive, effective work to reach the objectives – at least for e-books – of allowing all readers to access an e-book at the same time and under the same conditions, the European Commission is considering

whether the current implementation of the 2013 Marrakesh Treaty (consisting of exceptions for visually impaired persons) is sufficient or whether it should be expanded to other works than the currently covered print works, or other disabilities. FEP's answer was loud and clear, as with the European Accessibility Act: the issue will be mostly addressed for e-books. We stressed that instead of considering whether to open the Treaty's implementation in Europe, the Commission should reflect on whether the implementation of this Directive has had a significant negative impact on the commercial availability of works in accessible

formats for beneficiary persons (as foreseen by the text in a report expected in 2023), especially in light of the increasing number of titles both accessible and commercially available. FEP keeps in touch with the Commission on this issue.

*A micro-enterprise is a business employing fewer than 10 people, and with an annual turnover or a total balance sheet which does not surpass 2 million Euros.

TRADE

INTRO

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 - 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 rightsholders' 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, to help address problems that EU industries encounter in their daily operations and 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 rightsholders.

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 as well as weak sanctions and penalties in a number of third countries. The report also takes stock of 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 November 2020, FEP submitted a new contribution for the 2020 update of the report.

In February 2020, the Commission launched a public consultation to update its Counterfeit and Piracy Watch List. The aim was to identify online and physical marketplaces (cyberlockers, stream-ripping websites, peer-to-peer, etc.) located outside of 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 in cracking down on IPR abuse as well as to raise awareness of problematic markets among consumers. In May 2020, FEP submitted a contribution to this list to reflect the challenges faced by publishers.

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.

In September 2020, FEP organised events with IPKey Latin America to discuss the challenges for publishers in Latin America and how the new Copyright Directive could be used as a model for the continent. FEP praised the collaboration with DG Trade to help protect the rights of publishers in third countries and explained the effects of piracy in the region on European publishers as well as the numerous factors contributing to it in Latin America.

In March 2021, FEP organised a meeting with DG Trade together with IPA to do a general review of the current trade negotiations and processes involving IP protection and to share the difficulties faced by publishers in a number of third countries.

GEO-BLOCKING

INTRO

FEP closely follows the discussions around geo-blocking, as it directly impacts the commercial sustainability of European publishers. Geo-blocking 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 in finding the books they want in the digital single market.

GEO-BLOCKING

Putting an end to unjustified geo-blocking 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 geo-blocking practices in the book sector are justified by objective legal and practical constraints that would make an imposition of unrestricted digital book sales across borders in the entire EU unsustainable for many publishers and booksellers. This would also be unnecessary for consumers, given the high level of accessibility of digital books.

The European Commission acknowledged this in its first short-term review of the Geo-blocking Regulation, published in November 2020. The exercise was carried out to evaluate the implementation of the Regulation thus far and to assess the opportunity of extending its scope to digital copyrighted content. The report does not propose an extension of the scope of the Regulation, concluding that it would not necessarily bring substantial benefits to consumers and could be detrimental to some operators. Moreover, it is considered premature to talk about a review in scope after two years from the entry into force of the Regulation.

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 in 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 was subject to a two-year review clause accompanied by an assessment of whether to include them in the scope or not.

The Commission tasked a consortium of consultants to carry out a study on the scope of the Regulation to be delivered around December 2019. The review clause was to 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 was meant to factually analyse the situation in terms of geo-blocking, including concerning the exclusion of copyright protected digital content from the scope of the Regulation, with 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; it finally took place on 30 November 2020. The report does not propose to extend the scope of the Regulation to copyright-protected content and plans for a

new review in two more years, stating that further assessment and considerations are needed and there is insufficient evidence that copyright protected content would not suffer from inclusion. In the meantime, the Commission will look especially at the audiovisual sector, and launch an industry dialogue to explore the potential for improvement of the availability of content across borders. With regard to the e-book sector, the report confirms several points made by FEP: it acknowledges that the demand is low and that imposing a ban of geo-blocking would have a limited effect on consumers, and a detrimental impact on smaller booksellers.

A group of MEPs in the Internal Market committee of the European Parliament remain convinced of the need to abolish geo-blocking in the content sector at all costs. FEP will keep engaging with policymakers to explain the importance of addressing the issues that make it too complex or costly for publishers and booksellers to sell digital books across borders outside of homogeneous linguistic areas.

EU PROJECTS

INTRO

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; ASAP (Anticipatory Skills for Adapting the Publishing sector), just to name a few. FEP is always pleased to take part in initiatives that support innovation in publishing or that in general result in outcomes that are valuable for the publishing sector.

In 2020, six 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, expanding on its network of European book fairs; Strengthen Distribution of European Digital Comics (EUDICOM), aimed at providing capacity building for European comics publishers; Sustaining and Innovating cultural Diversity in literary Translations (SIDT), focusing on sharing information capacity building in the domain of literary translations; ECVET for Digital Publishing (EfDP), aimed at the development of a suite of new credit-based digital publishing qualifications; and Möbius, which intends to leverage the potential of prosumers to innovate the book sector.

ALDUS UP

Aldus Up, started in September 2020, continues the work of the previous Aldus project with its network of European book fairs, and is also co-funded by the European Union under the Creative Europe programme. The project will last until February 2024. FEP is a project partner, leading work on communication and dissemination, and responsible for organising information sessions for publishers and promoting the European Union Prize for Literature within the Aldus framework.

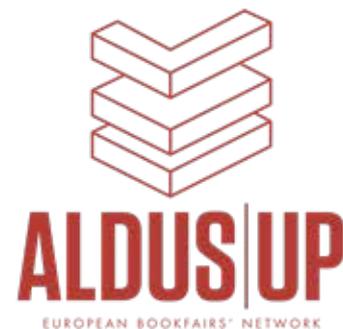
In this capacity, FEP has prepared the ground for the communication and dissemination activities of the project partners and provided several articles for the Aldus Knowledge Hub, the information resource developed by the consortium. FEP published a report on the impact of the pandemic on the publishing sector, to be promoted within the framework of the project. FEP is also examining the options for the organisation of relevant events, but as of April 2021 the COVID-19 crisis has drastically limited possibilities in this sense.

Aldus Up, coordinated by the Italian Publishers' Association, will address core topics for the book sector: translations and translation rights exchange; digitisation and its impact on reading habits; book and reading promotion; and inclusion. The first

objective of Aldus Up is broadening the Aldus network (which now covers 14 countries), involving further fairs (the network has grown so far to include 18 book fairs) or similar events in countries where proper book fairs do not exist. The second is to enrich the network with new content on cultural topics and to foster innovation in key areas such as internationalisation and audience engagement. In this framework, surveys will be carried out on translations, the effect of digitisation on reading habits, accessibility of book fairs for print impaired people and best practices on audience engagement in book fairs. The third objective is experimenting with new formats for professional events.

The overarching goals are to foster transnational mobility of works and professionals, audience development and capacity building in digital publishing. Other partners include several FEP members or associated companies (from Austria, Latvia, Lithuania, Norway, Portugal and Romania) as well as the Frankfurt and Bologna book fairs.

<http://www.aldusnet.eu/>



EUDICOM

Strengthen Distribution of European Digital Comics (EUDICOM) started in September 2020 and will last until August 2022. Co-funded by the European Union under the Creative Europe programme, the project aims to support publishers of comics in Europe in getting ready for distributing digital comics. FEP has a central role in the promotion, dissemination and exploitation of the project results, especially with regard to the engagement of the broader publishing community. FEP also has a leading role in the establishment of the knowledge basis on which the project is to build its main outputs.

FEP coordinated a quantitative survey on the comic books market in Europe and carried out a series of qualitative interviews to publishers, presenting the results of this exercise at an online event organised by the consortium during the International Rights Market of the Angoulême Festival (January 2021).

EUDICOM is coordinated by digital comics platform Izneo. Its main objectives are providing a capacity building programme to European comics publishers to understand how to manoeuvre the digital shift; helping comics publishers to carry out their first digital distribution experimentation on

a digital platform (before going to market); and building a cooperation network between European publishers, publishers' associations and authors to share best practices, knowledge, trainings, and to facilitate licensing and distribution across Europe.

Other objectives for the mid/long-term include strengthening the presence of European comics talents on e-comics platforms, improving distribution of European comics, spurring growth in the European comics sector and offering new creation and distribution opportunities to European comics authors through digitisation.

Project partners will research and exchange their experiences to offer an efficient capacity building programme primarily to publishers in Poland, Spain and Italy and promote the benefits of the programme to other EU countries via FEP. The project will make sure that comic publishers of European countries are on the same page regarding technology formats, distribution models and marketing opportunities in order to reach new audiences and make the most of revenues on the growing digital platforms in Europe and worldwide.

The main expected outcomes of the project are therefore to understand the state of the art of comics publishers in Europe and their needs towards digitalisation; offer a capacity building

programme to European comic publishers; and allow them to beta-test their offering and catalogue on the Izneo digital platform in order to implement learnings from the capacity building programme. The Italian (AIE) and Spanish (FGEE) Publishers' Associations are also partners.

<https://eudicom.eu/>



SIDT

Sustaining and Innovating cultural Diversity in literary Translation (SIDT) started in October 2020 and will last until March 2022. Co-funded by the European Union under the Creative Europe programme, the project aims to build bridges between proven innovators and practitioners. FEP is a partner in the project, tasked with providing input for the research and analysis at the basis of the design of the training modules and with carrying out promotion and dissemination of the project outcomes in the publishing community.

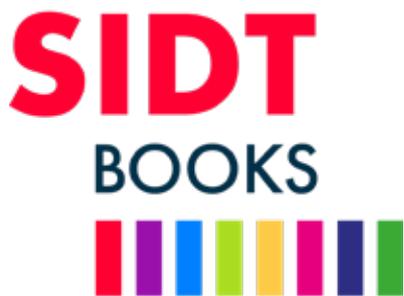
FEP has so far actively contributed to the design of the training modules and to the recruitment of trainers and trainees.

Book culture and business in Europe excels in bringing a rich diversity of voices and narratives to often highly specialised and segmented audiences. Between printed books and various digital editions catered to readers and listeners of all strands, books are produced and consumed in increasingly varied ways and formats. The vendors supporting these offerings are often relatively small organisations. Due to both their size and their vocation as highly specialised cultural services, finding their audiences is a challenge in view of their limited resources. In this situation, timely and continuous innovation is both a necessary and difficult task.

Researching new techniques and practices; experimenting with new models of authoring, production and distribution of books; and directly entertaining active communities of customers are all activities that are difficult to balance with the daily professional obligations of a small company.

With a mix of research and a set of hands-on training modules, SIDT Books - coordinated by Rüdiger Wischenbart Content and Consulting - is meant to identify and disseminate relevant best practice models and market analyses for small and medium-sized book publishing and retail companies. Topics for innovative practices will include new financing models, implementing cross-media, format agnostic publishing processes,

direct-to-consumer marketing, building and leveraging of consumer communities and exploring sources of critical information on publishing innovation. The consortium also comprises the Lithuanian Publishers' Association (LLA). <https://sidt-books.eu/>



CreativeShift

CreativeShift started in March 2020 and is due to finish in November 2021. The project is co-funded by the European Union as a Pilot Project "Platform(s) for cultural content innovation", having been voted by the European Parliament. It builds a European innovation network for cross-sector content. As a partner, FEP brings the perspective of the book publishing sector and is tasked with engaging the publishing community in the project as well as with disseminating its results.

FEP has so far contributed to building the community at the core of the project and participates in the work of the groups that are addressing the challenges identified.

CreativeShift was initiated by seven European partner organisations with backgrounds in publishing, music, gaming and audio-visual media coming together to hack the biggest tech-triggered challenges facing Europe's content sectors and shape the future landscape of content innovation.

Despite great inventiveness and a multitude of creative start-ups, very few innovations in the field of content development end up having a substantial impact on a sector-wide or even European level. Structural barriers to innovation represent some of the greatest obstacles standing in the way of progress: it is the project's goal to tackle these barriers. CreativeShift brings like-minded people from the creative industries together in a community of content innovation pioneers to pave the way for new ground-breaking ideas that all content sectors can benefit from.

CreativeShift has established ten taskforces that are working on cross-sectoral solutions for the following topics: fragmentation, silo mentality and internationalisation as the basis for collaboration across content sectors as well as countries; funding and financing; visibility for promoting the creative sectors and their innovation potential among policymakers and attractivity towards new talents and entrepreneurs; accelerators and incubators to help facilitate entrepreneurship;

adaptation and reinvention to find new ways to reach the audience and strengthen the market position and new models of content creation. As current developments are heavily affecting the creative industries, the community will further address the UN Sustainability Goals as well as the effects of COVID-19. The outcome of each taskforce can range from collaborative concepts, prototypes, event ideas or business models to policy recommendations and more.

<https://creativeshift.eu/>



EfDP

ECVET for Digital Publishing (EfDP) started in September 2020 and will last until August 2022. The project, co-funded by the European Union under the Erasmus+ programme, is meant to support the development of a suite of new credit-based Digital Publishing qualifications within the context of the European Qualification Framework (EQF) and related processes for European Credit Transfer for Vocational Education and Training (ECVET). FEP's role is to provide expertise to ensure that the course content and curricula

are up to date with the latest technological advances, business trends and international legislative requirements within the sector.

FEP has started by providing general insights regarding to the course content and by outlining the current situation in terms of offer of training for the publishing sector.

The project will respond to the demand for digital skills within the publishing industry and related sectors by developing course curricula for a suite of new ECVET-based Digital Publishing qualifications focusing on 5 key areas: content; production; design; sales and marketing; and business models.

Following ECVET principles and processes, the project will work with VET Partners in 5 EU countries (Ireland, Italy, the Netherlands, Spain and the UK) to develop Digital Publishing VET qualifications that will enable learners to carry out training towards their target qualification. EfDP is coordinated by Capacity London.

Möbius

Möbius started in March 2021 and will last until February 2024. It is co-funded by the European Union under the Horizon 2020 programme and

aims to stimulate innovation in the publishing sector by leveraging the power of prosumers. FEP, as industry partner, is tasked with providing information on current industry practices and expectations with respect to user-driven methods; contributing to defining the piloting of tools and prototypes; offering insights for quantifying relevant aspects of co-production dynamics; supporting testing with professional users; and engaging with the publishing community for the exploitation of results.

Book publishing is the largest cultural industry in Europe, and European publishing (uniquely among European cultural industries) is a world leader. Nevertheless, the initiators of the project felt that the industry needed to revisit its traditional value chains and business models and to establish effective cooperation with prosumers; to reaffirm its place as a fundamental economic and cultural agent in the digital age. Möbius, coordinated by EURECAT, aims to contribute to a renewed and invigorated European publishing sector by providing it with methods and tools to

leverage the potential of prosumers in innovation processes and thus guaranteeing user-centric and user-driven perspectives in the design and delivery of new enriched media experiences.

Möbius will deliver three key innovations: a prosumer intelligence toolkit, built upon living labs qualitative methods and the analysis of a large dataset of prosumer online works and interactions; prosumer business models, grounded in thorough analysis of IP law, for steering a fair and sustainable ecosystem; and a Möbius book, allowing cross-media, interactive and immersive book experiences. These innovations will be exploited for direct use and commercialisation by several partners through a Möbius marketplace.

<https://mobius-project.eu/>



ACRONYMS

FEP - Federation of European Publishers

EU - European Union

IPA - International Publisher's Association

EEA - European Economic Area

UK - United Kingdom

EY - Ernst & Young

WIPO - World Intellectual Property Organization

DG CNECT - Directorate-General for Communications Networks, Content and Technology of the European Commission

DSA - Digital Services Act

DMA - Digital Markets Act

AI - Artificial Intelligence

IP - Intellectual Property

EUIPO - European Union Intellectual Property Office

OER - Open Educational Resources

EC - European Commission

ICT - Information and Communications Technology

EP - European Parliament

MOOCs - Massive Open Online Courses

DEAP - Digital Education Action Plan

EUPL - European Union Prize for Literature

VAT - Value-Added Tax

MEP - Member of the European Parliament

LIA - Fondazione Libri Italiani Accessibili

IPR - Intellectual Property Rights

DG TRADE - Directorate-General for Trade of the European Commission

SME - Small and medium-sized enterprises

ARROW - Accessible Registries of Rights Information and Orphan Works

UN - United Nations

ECVET - European Credit System for Vocational Education and Training

EfDP - ECVET for Digital Publishing

Aldus Up - European Book Fairs network

EQF - European Qualifications Framework

VET - Vocational Education and Training

LLA - Lithuanian Publishers' Association

SIDT - Sustaining and Innovating cultural Diversity in literary Translation

AIE - Italian Publishers' Association

FGEE - Spanish Publishers' Association

ASAP - Anticipatory Skills for Adapting the Publishing sector

EUDICOM - European Digital Comics Project

TISP - Technology and Innovation for Smart Publishing

EURECAT - Technology Centre of Catalonia

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Federation of European Publishers/ Fédération des Éditeurs Européens

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