Visions of Publishing Today and Tomorrow

Publishing leaders from companies big and small share their observations about the current state of the book business, strategies for moving ahead, and ambitions to build a stronger, more global industry.

PLUS! Book market snapshots | Developing issues in publishing | Interviews with global leaders
‘We’re All in This Together’

Just when we thought it was safe to go back into the waters of the business—buoyed by publishing’s growing digital aplomb—the international industry is facing yet another autumn of uncertainty.

As you’ll read in the comments of many of our global book industry leaders here, the United Kingdom’s vote to leave the European Union is a daunting development few foresaw when we were together last year in Frankfurt. As Penguin Random House UK CEO Tom Weldon tells us, “If there is anything that the summer of 2016 has reminded us, it is that change is the new normal and that market disruptors can come from anywhere.”

What’s heartening, however, as we’ve spoken to players in so many parts of the world, is a ready sense of response. “Neither our lists nor the platforms on which they are published can stand still,” says Hachette UK CEO Tim Hely Hutchinson.

As if in answer, Abuja-based publisher Bibi Bakare-Yusuf at Cassava Republic talks of changing ahead with book sales on mobile devices: Nigeria is mobile. And Nigeria is reading.

In Barcelona, Grupo Planeta’s articulate digital director Santos Palazzi has become an advocate of better exploiting intellectual property, generating film and television deals from Plane- ta’s vast list, even in a recovering Spanish market that has lost as much as 40 percent of its sales.

From the insights of former Soviet publishers—in Russia, Ukraine, Belarus, Kazakhstan, Georgia, and Armenia—to the powerful messages of the seven pivotal regions to be spotlighted on October 18 in The Markets: Global Publishing Summit, what we hear this year is determination, creative concern, and real collegial response: we’re all in this together, our interviewees are telling us.

As our colleague Juergen Boos, Director of the Frankfurt Book Fair, reminds us in his own commentary, we must “support our friends and colleagues on both sides of the border” in this shifting European landscape; and we must prioritize “a safe environment” for our business meetings in Frankfurt.

This is not the 2016 we thought we were preparing for at Frankfurt last year, no. But these are the challenges we have been handed. And we are the right people to take them on—a world publishing community newly toned and strengthened by the digital dynamic, tech-driven competitive forces, and waves of economic hurdles. We have only, as Boos reminds us, to face these issues head-on, eyes open, no blinders.

And I’d add that now is the moment to remember one of literature’s and publishing’s greatest gifts to the world: our sense of humor.

As we spoke with so many industry observers for our special edition, Profile Books’ managing director Andrew Franklin answered us in verse.

To be precise, he re-cast Blake’s iconic And did those feet in ancient time to persevere and to triumph. I’ll offer it to you here now, for the charm of its wry touch. How right Franklin is to remind us of just what’s at the core of the world publishing industry: the grace of cultural exchange and the intelligence of the linguistic arts.

I wish you good travels and prosperity until we see you in Frankfurt in October. •

Porter Anderson
Editor-in-Chief
Publishing Perspectives

And did those pounds in ancient time

By Andrew Franklin

With assistance from, and thanks to, William Blake

And did those pounds in ancient time
Pour through London’s City grey:
And was the hot new summer read,
On England’s creaking bookshelves seen!

And did the nine muses themselves,
Prance forth upon our trash-strewn hills?
And was th’Industry builded here,
Among these tax-evading shills?

Bring me my stall at Frankfurt Fair:
Bring me my contracts to rewrite:
Bring me my phone: O block imports!
Bring me my Independent Alliance!

I will not cease from Twitter Fight,
Nor shall my mouse sleep in my hand:
Till we rebuild the Industry,
In England’s lone & witless land.
THE MARKETS
GLOBAL PUBLISHING SUMMIT
FRANKFURT
18 OCTOBER 2016
FOCUS ON:
BRAZIL
FLANDERS & THE NETHERLANDS
POLAND
PHILIPPINES
SPAIN
UNITED ARAB EMIRATES
UNITED KINGDOM
THEMARKETS2016.COM
The Essential Fight for Freedom to Publish

Juergen Boos, Director of the Frankfurt Book Fair, urges the international publishing community to engage with efforts to protect the freedom to publish amid political and economic turbulence.

Editorial by Juergen Boos

Since we were together in Frankfurt last October, the world has changed in dramatic ways. We have witnessed repeated acts of terrorism, the United Kingdom has voted to leave the European Union, and the global economy has struggled to stay afloat amid the subsequent turmoil. In the publishing world, we have seen our own challenges with copyright infringement lawsuits, threats to freedom of speech, and the continued transition into new publishing formats for sharing stories and information. Although the situation both within the industry and throughout the world may continue to change, we can focus on our essential role as publishers, which remains the same.

We are here to foster the discussion of ideas. If the Frankfurt Book Fair’s claim to be “The Global City of Ideas” is useful for anything, it is not only to meet with international publishers throughout the year in their home countries, but also to bring together diverse voices each fall to share unique thoughts and experiences, to voice concerns, and to have the courage to unite and bridge the transition into the future. Together we can identify problems, support organizations that advocate the release of imprisoned writers, and work with governments with strict speech laws to loosen those constraints.

One of the biggest concerns currently is the fragile state of the freedom of speech, which is under attack. So, what can we do as an industry? We must interfere. As I said last year when I introduced novelist Salman Rushdie as our Opening Press Conference speaker for the Book Fair, authors are fighting for freedom of speech every day because it interferes with their literature. So, too, must the publisher. As publishing professionals, we should make every effort to integrate these issues into the general course of our business. It is essential to stay involved and fight those trying to impinge on the freedom to share information.

Regarding the United Kingdom’s decision to leave the European Union, we at the Frankfurt Book Fair were all greatly surprised by the referendum result. As there continue to be unanswered questions about the economic and political implications, both for those within the UK and those doing business with the UK, we will continue to support our friends and colleagues on both sides of the border during this uncertain time and hope that business can be conducted in a similar fashion to years past.

And, just as we hope that changing political and economic conditions won’t impact our ability to conduct business, the Frankfurt Book Fair is also striving to provide a safe environment in which to conduct our meetings. Security is a top priority for us as the organizers of the Frankfurt Book Fair, and we are working closely with our partners—the Frankfurt police department, Messe Frankfurt, and a private security company hired by them—to ensure the safety of all of our attendees and exhibitors. We hope that publishers will feel comfortable attending this fall in order to continue our long tradition of facilitating new relationships in the publishing marketplace and nurturing the development of new concepts for the future.

Juergen Boos, Director, Frankfurt Book Fair

“It is essential to stay involved and fight those trying to impinge on the freedom to share information.”
In Brief: Latest News from the Book World

**AMAZON’S NEW CRIME IMPRINT IN GERMANY** — Edition M, a new imprint for crime fiction, is the latest addition to Amazon Publishing in Germany. The imprint will focus on German-language crime titles. Amazon Publishing launched in Germany in 2014, and the company has since released 130 titles in Germany so far. By the holiday season of 2016, Edition M plans to publish an additional 60 titles, by both debut and established crime writers.

**INDIAN COURT DISMISSES CHARGES AGAINST PERUMAL MUGURAN** — As reported by BBC News in India, a high court in Chennai (Madras) has “dismissed an attempt to bring criminal charges” against novelist Perumal Murugan for the sexual content of his book called *One Part Woman*. Murugan is said by some critics to be one of the finest living Tamil authors.

**NEW DIVERSITY-FOCUSED IMPRINT AT RANDOM HOUSE** — Award-winning author and artist Christopher Myers will launch a new children’s book imprint at Random House called Make Me a World. The catalogue will showcase voices of diverse thinkers and artists from all walks of life. Myers is the son of celebrated children’s book author Walter Dean Myers, whose influence is at the core of this imprint’s mission.

**TAIWAN PLEDGES SUPPORT FOR PUBLISHING** — As book sales decline and bookstores are forced to close, Taiwan’s Minister of Culture Cheng Li-chiun has promised to help “improve the overall environment” for publishing, including higher salaries, fixed book prices, more sales channels, and support for digitization. One publisher says the problems partly stem from the educational system, which discourages reading for pleasure.

**RUSSIAN EDUCATIONAL PUBLISHERS PETITION ANTI-MONOPOLY SERVICE** — With the support of the country’s Book Publishers Association, several Russian education publishers have petitioned the Russian Federal Anti-Monopoly Service to investigate the business practices and government favoritism of the country’s largest producer of educational material, Prosveshenye.

**QUARO ACQUIRES BECKER & MAYER** — At the beginning of August, UK-based Quarto Group announced that it bought the publishing assets of Becker & Mayer from the McEvoy Group for $9.8 million. The purchase “increases Quarto’s children’s publishing revenues by close to 30 percent,” according to the company, and brings its US revenues up to 45 percent of the group’s total.
International Publishing Snapshots

**CANADA**
COPYRIGHT CHANGES HIT PUBLISHERS’ BOTTOM LINE
The effects of changes made to Canada’s Copyright Act in 2012 are becoming clear and have cost the country’s publishers an estimated $50 million in lost royalty payments. The updated law allows more content to be used in educational settings without paying the publishers or the content creators.

**UK**
THE FIRST EFFECTS OF ‘BREXIT’
In the months after the UK voted to leave the European Union, publishers are concerned about attracting top talent from Europe and protecting their exclusivity in the European market. The drop in value of the British pound also means that conducting business abroad—like printing, travel, or rights deals—has become more expensive.

**COLOMBIA**
RISE PUBLISHING OUTPUT AND GLOBAL OUTLOOK
The fourth-largest Spanish-language publishing market, Colombia saw a 14-percent increase in the number of titles published in the country last year. The Bogota Book Fair has doubled its attendance in the past five years and successfully added a rights center for the first time in 2016.

**NIGERIA**
VIBRANT LITERARY COMMUNITY FACES PIRACY
With publishers like Cassava Republic, Parrésia Publishers, and Kachifo, Nigeria is home to a vibrant literary community that reflects the worldview of African readers. Despite some government intervention to prevent piracy, publishers continue to lose revenue to piracy and illegal book copying.

**BRAZIL**
FOCUS ON RIGHTS AND READING IN A SLOW ECONOMY
As Brazil’s economy stagnates and government book purchases dramatically drop, publishers are looking for ways to make up the lost revenue. A favorable exchange rate means that selling rights is one promising area. Another focus is promoting reading. Statistics show consumer book buying is up.
Developing Stories Around the World

**GEORGIA**

**TEXTBOOK CONTROVERSY; TRANSLATION SUPPORT**
Several educational publishers in Georgia are fighting a government program to seize their digital textbook files and offer the content for free to students.

At book.gov.ge/en, the Georgian Book Center offers translation funding for fiction and nonfiction.

**CHINA**

**ONLINE LITERATURE BOOMING, DESPITE PIRACY**
Chinese readers often turn to the internet for reading material. Top-earning authors can make millions of US dollars each year in royalties from subscription-based, online platforms. However, over half of Chinese readers report consuming pirated content, costing writers billions of yuan in lost revenue.

**JAPAN**

**RAKUTEN AND KINOKUNIYA EXPAND GLOBALLY**
Rakuten continues to invest in publishing—most recently in getAbstract—despite a big write-down earlier this year.

Bookstore chain Kinokuniya reports strong sales at its Dubai location and is considering expanding in the Middle East and Southeast Asia.

**INDIA**

**GOING LOCAL: FOCUS ON INDIAN LANGUAGES**
The readership for India’s many local languages, as opposed to English, is growing, enabled partly by mobile technology that can deliver content across the country. Both local and multinational publishers in India are publishing and translating books in a wider range of Indian languages.

**AUSTRALIA**

**CONTESTED COPYRIGHT AND EXPORT CHANGES**
Many publishers and authors, along with the Copyright Agency, are criticizing a report from the Productivity Commission, which calls for a shakeup of Australia’s copyright laws, including broader “fair use” exceptions, reduction the length of copyright, and changes to parallel import restrictions.
View from the Top: How UK Publishing Leaders See the Industry in 2016

Helen Kogan, Managing Director, Kogan Page: ‘All Business Decisions Up in the Air’

Clearly Brexit is the major concern. We still don’t know what the real impact will be. The impact of possible tariffs on European sales may not kick in for a while, but the general uncertainty puts all business decisions up in the air. It’s a major shock to the system, and nobody really understands what the outcome will be.

I only hope that we can continue to have access to the European market and that we can still retain and attract the wonderful talent that sits on our doorstep in Europe. Putting Brexit aside for a moment, we are fairly optimistic about the next 12 months.

We have made significant headway in being able to reach our customers through an ongoing investment in new skills and infrastructure. We have better tools than we’ve ever had to support global marketing and sales channels, and I expect to see a return on this during the next 12 months—whether it’s through traditional retail channels and supply chains or direct sales.

We are also looking at some very interesting new platforms on which to deliver our content, and we should be able to launch these within the near future. •

—Roger Tagholm

Charlie Redmayne, CEO, HarperCollins UK: ‘Upping Our Investment’

The impact of the European Union referendum has definitely caused uncertainty in our economy—but our business remains strong. At HarperCollins, coming off the back of three very successful years, we will be upping our investment in authors and books and aggressively looking to accelerate our growth.

As we become a more global industry, our global publishing program becomes increasingly important—this has been hugely successful in growing our authors’ reach in multiple territories through coordinated publishing, social media plans, marketing, and promotion.

Of particular note is the phenomenal success of Karin Slaughter’s Pretty Girls, which was published in more than a dozen countries and outsold her previous book in every single one of those markets.

With ebooks seemingly plateauing in the more mature markets and physical books seeing some growth, our industry is showing resilience. However, it is also more unpredictable than ever. Big publishing brands are still hugely important, but the market is more and more impacted by proposition-based publishing trends which rise from nowhere, often powered by social media and digital channels.

Frankfurt remains very important for us, not least because it is the time when teams from our offices in 18 countries get together to meet colleagues and customers. This year we will have more than 120 of our global staff attending the fair. •

—Roger Tagholm

Tom Weldon, CEO, Penguin Random House UK: ‘Continue To Be Open to All’

If there is anything that the summer of 2016 has reminded us, it is that change is the new normal and that market disruptors can come from anywhere. It has also been a timely reminder of our importance and relevance as publishers. There has never been a greater imperative to do what we do best: help people make sense of the world.

Alongside this, we must also do our best to ensure that we continue to be open to all by tirelessly championing as wide a range of voices as possible in both our workforce and the authors and books we publish.

At Penguin Random House UK, we have already rolled out a number of initiatives to broaden our recruitment pool—from removing the requirement to have a degree to launching The Scheme, which is a program aiming to recruit on potential rather than on qualifications or experience.

We have already seen some early success, and in the months ahead, we will be taking our message around the UK with a series of unique career-advice sessions and writers’ workshops aimed specifically at people who are currently under-represented in both our workforce and our publishing programs.

It is a commercial imperative for us to make sure that our books and publishing reflect the society we live in. At the moment, they don’t. •

—Roger Tagholm
Tim Hely Hutchinson, CEO, Hachette UK: ‘More Consolidation in the Industry’

I am writing this in the aftermath of the UK’s European Union referendum, and now the initial shock has given way to resignation.

Our new Prime Minister has said “Brexit means Brexit” so we must prepare ourselves for whatever that brings—which will, I am afraid, certainly include depressed consumer and institutional markets for some time to come.

As has been widely reported, all publishers are experiencing a slowdown in revenues from ebooks—which is to do with the imposition of VAT at the full rate and the impact of new terms with customers and less to do with reduced consumer demand, although the most successful self-published ebooks are making some inroads into publishers’ ebook sales.

Looking ahead, the combination of these pressures—and Brexit—is likely to encourage more consolidation in the industry.

Social media is revolutionizing not just what we publish but how we publish and promote our books. There is fierce competition for leisure-reading-time, and we are becoming quicker in responding to trends, more nimble in publishing quickly and appropriately for the market, and more creative than ever to ensure we are delivering what people want to read, however and wherever they want to read it.

Neither our lists nor the platforms on which they are published can stand still.

On the trade side at Hachette, we are learning a lot from our colleagues at Neon Play, the mobile games company we acquired earlier this year. Their success and experience in the games market is helping us develop some of our next steps to become a more digital publisher. Our double award-winning educational business goes from strength to strength in primary and secondary education and is increasingly digital, too.

But traditional books and lifestyles are still important: the market for illustrated books on popular subjects, in the UK and in co-editions, remains buoyant, and we continue to invest time and resources in producing beautiful physical books.

I am writing this just before the worldwide publication of Harry Potter and the Cursed Child, which will be a global bestseller, bringing joy to millions of fans all over the world. Great storytelling translates into every language and travels to every market and the pride, pleasure, and passion involved in publishing great books is what motivates us all.

—Roger Tagholm

“We are becoming quicker to respond to trends...and more creative than ever.”

Tim Hely Hutchinson
Stephen Page, CEO, Faber & Faber: ‘UK Publishing Looking Strong’

In the coming year, it would be easy for British publishers to get overly preoccupied with the uncertainties of our own backyard post-Brexit vote. There will, of course, be reasons to be cautious about the scale of the UK high street market, but we cannot allow that to distract too much from the much bigger picture of continuing the industry’s evolution that was gathering good momentum before June 23.

UK publishing has emerged from the most recent phase of the digital revolution looking strong with a robust product in both physical and digital forms. The book in its many formats has proved highly resilient, valuable, and flexible.

Also, a sleeker, reimagined book trade has made impressive steps forward and offered a strong market for UK publishers, and publishers have begun to master modern marketing as a route to engaging readers.

Over the coming year, we have to continue to perfect and pursue this new ecology with great vigor and find ways to cope with whatever the UK economy throws at us. We have to battle commercially and intellectually to put books and ideas at the forefront of national culture, partner with writers and booksellers, and continue to invest both in making our businesses appropriate for the modern age and market, and in bringing the very best writing to readers across the world.

Finally, there will of course be a swing towards growing our markets outside the UK as pound sterling’s fall in value supports competitiveness in English-language markets generally.

A fall in consumer confidence in the UK will make this continued journey of change in the industry harder, but it mustn’t stop us from forging on with the good developments of the past year.

—Roger Tagholm
2016 PREVIEW GUIDE: FRANKFURT BOOK FAIR

Find out what's new this year at the 2016 Frankfurt Book Fair, your global city of ideas. Bring this guide with you to the Book Fair!
Global Growth for Kids’ Media

Children’s books have provided the majority of growth for publishers worldwide in the last several years. This development is reflected at this year’s Frankfurt Book Fair, with books for children and young adults on display across the fair. Visit Hall 3.0, the traditional home of children’s and YA content in Frankfurt, as well as our expanded children’s hubs near the entrances to Halls 5.1 and 6.1. In both of these halls, you’ll find over 150 children’s publishers exhibiting across 1,400 and 2,700 square meters respectively.

France has a particularly strong presence in this children’s books area with leading publishers like Gallimard Jeunesse. Other children’s book publishers you’ll see in Frankfurt include Edelvives (Spain), Usborne and Top That (UK), and Becker & Meyer, Chronicle Books (US).

Four guided tours related to children’s media will be offered during the Book Fair week, each with a different regional or thematic focus. (For information on these events, see Tours & Events on page 22.)

Meet International Foodies at Frankfurt’s Gourmet Gallery

For the second time, the Frankfurt Book Fair and the World Cookbook Fair are joining forces this year to host the Gourmet Gallery in Hall 3.1. The innovative platform for the global cookbook and culinary community has developed into a major hub for networking, doing business and discussing all things food and drink. The Gourmet Gallery is set to host 80 exhibitors from more than 30 countries.

Organizers have seen an increased interest by international exhibitors, in particular from South America, where countries such as Peru are new, hot foodie destinations. The Show Kitchen will host famous chefs from all over the world, including Seppe Nobels and Flanders Kitchen Rebels representing the Guest of Honour country, Dario Ranza from Switzerland, and the well-known German chefs Tim Mälzer, Volker Mehl and vegan queen Sophia Hoffmann. Visitors will also gain insights into the cuisine from Indonesia, Malaysia, Australia, or The Wildbakers.

Trade visitors can check out the latest news and trends in food and wine publishing during free guided tours, as well as meet other relevant players exhibiting at the Gourmet Gallery.

In addition, the Gourmet Salon’s program of talks and presentations features experts and provides industry insights, such as a trend report by Edouard Cointreau, chairman of Gourmand International and president of the Gourmand World Cookbook Awards. For dedicated networking, pencil in Thursday, 19 October, for a special business breakfast and industry matchmaking. (For information on these events, see Tours & Events on page 22.)

Promoting Young Talent

In cooperation with leading trade magazines, the Frankfurt Book Fair is now supporting six young talent programs:

- The Bookseller’s Rising Stars initiative (UK)
- Publishers Weekly Star Watch program (USA)
- China Publishers’ Young Stars Award (China)
- Börsenblatt Young Excellence Award (Germany)
- PublishNews Brazil Jovem Talento Editorial (Brazil)
- Mee naar de Messe (Netherlands)

These programs bring a selected number of young publishing professionals to the Frankfurt Book Fair this year, where they participate in a range of activities.

In addition, the Fair’s own Frankfurt Fellows program is now in its 18th year and has attracted a record number of applications for 2016. One hundred editors, rights managers and literary agents from 34 countries applied for a spot in the Fellowship Program. Sixteen publishing representatives from 16 different countries—including, for the first time, industry representatives from Ukraine and Slovenia—will be given the opportunity to use the program to exchange ideas at an international level and to build a multinational professional network.

Hot Spots: Hubs of Innovation

The Frankfurt Hot Spots are vibrant nodes of innovation at the world’s largest gathering of publishing and media content professionals. Each Hot Spot focuses on one industry sector of emerging innovation: Hot Spot Digital Innovation (Hall 6.2), Hot Spot Education (Hall 4.2), Hot Spot Professional & Scientific Information (Hall 4.2) and Hot Spot Publishing Services (Hall 4.0). Registrations are still being accepted!
Can’t-Miss Events in Frankfurt

JUDGING A BOOK BY ITS COVER: 3RD BEAUTY & THE BOOK AWARD

The Beauty & The Book Award, initiated by the Frankfurt Book Fair and Stiftung Buchkunst (Book Art Foundation), is an international audience award for the most beautiful book. Nominate the book you think is most beautiful at www.beautyandbook.com and vote for those that have already been entered.

Votes and nominations are accepted until 16 September. The top ten titles will be announced on 30 September. The final vote will take place live at the Fair, and the winner will be announced on Saturday, 22 October.

CEO TALKS AT THE FRANKFURT BOOK FAIR

On 19 and 20 October, at 2 pm, the Business Club will welcome publishing executives for intimate, one-on-one interviews. Speakers will be interviewed for 60 minutes by the editors of Livres Hebdo, BookDao, The Bookseller, Buchreport, PublishNews Brazil, and Publishers Weekly, in the context of this year’s Global Ranking of the Publishing Industry, in cooperation with the Frankfurt Book Fair Business Club. The CEO Talks highlight global and local developments and trends, and offer a behind-the-scenes look into the international publishing world.

Jacob Dalborg, Chief Executive Officer of Bonnier Books, will be the sole speaker at the Wednesday edition of this year’s Frankfurt CEO Talk (19 October 2016, 2-3 pm, Frankfurt Book Fair, Hall 4.2, Room Dimension). The discussion will focus on Bonnier Books’ ambitions to be one of Europe’s leading book publishing groups, in the areas where Bonnier Books does business.

(See Publishing Perspectives’ interview with Dalborg on page 31.)

OPENING PRESS CONFERENCE FEATURING DAVID HOCKNEY

British painter, photographer, and multimedia artist David Hockney will speak at the opening press conference of the Frankfurt Book Fair on 18 October 2016. In conjunction with THE ARTS+ program, Hockney will present his large-format “SUMO” book from Taschen of his THE ARTS+ program, Hockney will present his opening press conference of the Frankfurt Book Fair on 22 October.

First-Ever Global Illustration Award at Frankfurt Book Fair

In partnership with the International Information Content Industry Association (ICIA), the Frankfurt Book Fair will host the first-ever Global Illustration Award (GIA) with a prize of 30,000 euros at this year’s Fair.

It is operated by IllusAlon, a global illustration platform that was set up in China in 2014 and is used by more than 1,000 professional illustrators from more than 50 countries and regions worldwide.

Mr. Mingliang Hou, founder of IllusAlon said: “In near two months, the Global Illustration Award has received nearly 10,000 distinctive works of art from thousands of illustrators and more than 50 countries. We are overwhelmed by the large number of submissions and the wide range of techniques from talented illustrators around the world.”

Together with the Illustrator’s Corner in the Fair’s Children and Young Adult Media section (Hall 3.0), this new award recognizes the importance of illustration and design for the creation of beautiful books in today’s visually dominated world. With its open and unique approach of including all genres and platforms, the award encourages creativity and sets new trends for the content industry.

Prizes in five categories—Cover Illustration, Children’s Book Illustration, Editorial Illustration, Scientific Illustration, and Theme Illustration—will be handed out during a ceremony at the Fair on 20 October, with the first-prize winner receiving 10,000 euros. Entries will be judged by six industry experts from the fields of illustration, art, publishing and the media. The shortlist will be posted online in October.

Frankfurt’s Next Guest of Honour Countries: 2017–2019

The Frankfurt Book Fair’s Guest of Honour initiative, which celebrates its 30th anniversary this year, is a major industry fixture providing guest countries with an unparalleled international platform to promote their literature and culture. While 2016’s program is all about Flanders & The Netherlands (see page 19), France, Georgia and Norway are set to become the next three Guests of Honour.

In 2017, France will again be Guest of Honour, having previously been the Guest of Honour country in 1998. The program will be coordinated and implemented by the Institut Français and previewed at a press conference in Frankfurt on 20 October. As a major international player in the literary world, the thematic focus will be on the French language in all its forms and global varieties.

Compared to the long-established infrastructure of programs in France, which supports the translation of French books around the world, the 2018 Guest of Honour Georgia is a “young” book market. However, it has seen steady growth in recent years, with the number of available titles almost quadrupling between 2008 and 2011, reaching 7.7 million.

A program to promote translations was set up in 2014, after Georgia was named the 2018 Guest of Honour country, and is being coordinated by the Georgian National Book Centre. More than 300 Georgian books will be translated in preparation for 2018, introducing the country’s authors and hidden treasures to the international market.

In May, Norway was announced as the 2019 Guest of Honour. The country has a long tradition of producing iconic literary voices of international acclaim, ranging from Henrik Ibsen and Nobel laureates Knut Hamsun to Jostein Gaarder, Karl Ove Knausgaard and Åsne Seierstad, to name just a few.

Strong government support boosts the promotion and preservation of literature and culture. An innovative scheme from the National Library, for example, has put 135,000 books still in copyright online for free while paying publishers and authors. Every new book that passes a quality control check is purchased by the Arts Council Norway and distributed to libraries.

Norway’s Guest of Honour presence in 2019 is coordinated by Norwegian Literature Abroad (NORLA), the export body for Norwegian literature. It aims to introduce new Norwegian voices alongside established authors and present a broad spectrum of Norwegian contemporary literature to the world.

I PR License: Bringing Backlist to the Forefront

Jane Tappuni, IPR License

In April this year, the Frankfurt Book Fair acquired a majority share of IPR License, a London-based global rights and licensing platform where rights buyers can search for titles, authors or subjects and connect with rights-holders. The platform allows users to make offers and negotiate deals as well as complete transactions in full, including contracts and payments. Jane Tappuni, Head of Sales and Business Development, talks about the platform’s role within the industry and its future development.

Jane, how would you describe IPR’s role and purpose in the publishing ecosystem?

Our platform not only gives cost-effective, added global exposure to publishers’ content but also enables them particularly to publicize their backlist and monetize this valuable asset. When it comes to large publishing houses, we don’t see IPR License as a replacement for their rights teams but rather as an effective support function in the backlist; by John Donatich, Director of Yale University Press, on selling translations in the UK market and how success can be achieved in a difficult market against all odds.

One vital component of our service is the ability to provide analytics for publishers. We offer precise insights into, for example, which titles are being looked at the most or where in the world this interest comes from.

What are the advantages for buyers?

IPR License gives rights buyers free access to international content across genres and topics, all in one place and from the convenience of their laptops. About 500 members are currently listing their rights online with over 14 million records on the system that were in 2015 viewed by publishing houses in 171 countries across 132 different languages.

Looking ahead, where do you see IPR License in five years’ time?

With the Frankfurt Book Fair’s investment, we are now able to extend our global reach, and we have very clear strategic plan to achieve that. We will, for example, increasingly market the platform to editors, not just rights managers, and we’re also looking to expand our portfolio that currently focuses on STM publishers to include more trade publishers.

Likewise, we will shift the focus from so far mainly English-language publishers to other markets as well. Germany, for example, is an important market for us, and the recent sign-up of the leading academic publisher De Gruyter as the first major publisher in Germany to become a member of the platform was a very important step for IPR License. Reaching out to large publishers is also a growth area for us. Ultimately, we want to be the year-round online extension of what’s happening each October in a face-to-face context at the Frankfurt Book Fair, and to become the most important hub for the industry’s rights activities.

Frankfurt Rights Meeting: How to Overcome Challenges and Create Success

Celebrating its 30th anniversary this year, the Frankfurt Rights Meeting 2016 (FRM) takes place on 18 October and is all about “Surprising Successes in Challenging Times.” Among other stories, it will present a case study on surprise bestseller *Norwegian Wood* by Lars Mytting, a how-to guide for chopping and stacking wood that sold more than 500,000 copies in multiple languages worldwide and was named Non-Fiction Book of the Year 2016 at the British Book Industry Awards. Katharina Bielenberg, commissioning editor at the book’s UK publisher MacLehose Press, and Gudrun Hebel, founder of agentur literatur, will present the behind-the-scenes journey of this exceptional title and explore what made this book work, especially in the challenging UK market.

Also on the agenda are sessions by US rights expert and consultant Kris Kliemann on mining the backlist; by John Donatich, Director of Yale University Press, on selling translations in the USA; and by Libri Publishing’s Bence Sárközy, with a focus talk on the Hungarian market and on how success can be achieved in a difficult market against all odds.

The program also features a presentation on copyright licensing around the world by Michael Healy, Executive Director (International Relations) of Copyright Clearance Center, and a spotlight on how to promote translation rights through prizes. Isabelle Bleeker, VP and Director of International Rights at Perseus Books (Hachette Book Group, USA) will host this year’s Frankfurt Rights Meeting.

Find IPR License at the 2016 Frankfurt Book Fair:

- **18 October:** IPR License will be a Supporting Partner at the Frankfurt Rights Meeting (2-5pm), and the sponsor of the Rights Drinks that evening in the Literary Agents and Scouts Centre (LitAg).
- **19 October:** At 12 pm, Jane Tappuni will speak on the Publishing Perspectives Stage in Hall 6.0. Throughout the Fair, you can find IPR License in Hall 4.2 E19.

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Frankfurt Rights Meeting

- **Date:** Tuesday, 18 October 2016
- **Time:** 2 pm–5 pm
- **Location:** Hall 4.2, Room Dimension
- **Tickets and program info available online:**

A special program and networking day on 20 October, “A Book is a Film is a Game”, puts the spotlight on the adaptation business, bringing together film producers, game developers, publishers, and rights holders.

The event is organized in cooperation with the Netherlands Film Fund and features a mix of international case studies, presentations and networking sessions. Industry experts provide insights into the business of adapting content from all angles, including case studies on the book-to-film, game-to-book as well as game-to-film process. There’s also a special tour for film and games producers to meet interesting publishers and international business partners.

This free-of-charge event takes place THE ARTS+ area (read more on page 18) in Hall 4.1. Space is limited. To register, send an email to film@book-fair.com.

Focus on Southeast Asia: StoryDrive Asia’s Cross-Media Hub

After four events in Beijing, the successful StoryDrive Asia conference and exhibition will, for the first time, be held in Singapore on the 10–11 November 2016.

StoryDrive Asia, in cooperation with the Singapore Publishing Symposium, is designed as an international trade event for the publishing and media industries in the Asia-Pacific region and as a marketplace for the cross-media trade in rights and licenses. It will bring together key players across all content sectors and facilitate collaboration between the publishing, film and TV, gaming, and technology industries in Southeast Asia.

“With a population of more than 620 million, the Southeast Asian region with its ten countries remains an under-explored market with huge potential,” says Juergen Boos, Director of the Frankfurt Book Fair. “By hosting StoryDrive Asia in the media metropolis of Singapore, our strategic aim is to establish access for international publishers and other companies to entirely new players, and to help ASEAN companies to reach global markets more efficiently.” Boos considers the establishment of the ASEAN Economic Community (AEC) in 2015 a major milestone in the regional economic integration agenda in ASEAN, offering opportunities in the form of a huge market of US$2.6 trillion. “That’s why now is the right time to attract publishers and service providers to Singapore, as the ASEAN grouping establishes itself,” he said.

Apart from keynote presentations by international speakers, providing insights and forecasts on the future of media and content, there will also be workshops and seminars. This StoryDrive event in Singapore also features a new matchmaking Business Idea and Partner (BIP) program that takes place throughout the conference on 10 and 11 of November. It facilitates contact with future business partners, provides opportunities to boost business through buyers and sellers meetings, pitch sessions, and the opportunity to engage in one-to-one conversations with conference speakers in so-called “Expert Sessions”. Participants can also take part in “Co-Speed-Dating” sessions to identify opportunities for a variety of cooperations in different content sectors.

Tickets Now On Sale! StoryDrive Asia in Singapore

StoryDrive Asia:
10–11 November 2016 at The Arts House, Singapore. Program and registration at www.storydriveasiags.com

Meet the StoryDrive Asia team at the Frankfurt Book Fair:
Singapore Stand, Hall 4.0 C68

www.storydriveasiags.com
6.0
6.1
6.2
International Publishers
Australia
Great Britain
Ireland
India
Israel
Canada
New Zealand
South Africa
USA
Publishing Perspectives Stage (6.0)
Focus: Children's & Art Books (6.1)
Hot Spot Digital Innovation (6.2)

Operation and Security Center (OSC)
Hall 4.0
Police
Fire Brigade
First Aid

6.3
Literary Agents & Scouts Centre (LitAg)
Publishers Rights Corner

4.0
International Publishers
Africa
Asia

Publishing Solutions and Book Trade Services
Booksellers' Centre
Forum Production in Publishing
Hot Spot Publishing Services
Business Club (Room Europe)

4.1
Fiction and Non-Fiction
Azubistro
Reading Zone of Independent Publishers
Studying for Books
Art Books | Art | Design
International Book Art
Artist Books
THE ARTS+
Antiquarian Book Fair

4.2
STM & Academic Publishing,
Specialist Information
Hot Spot Professional & Scientific Information
International Library Centre (ILC)
Collective Stand Scientific, Technical, Medical

Education
Forum Science and Education
Classroom

Arts & Craft

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THE GLOBAL CITY OF IDEAS

www.book-fair.com
Planning as of August 2016
THE ARTS+: Marketplace for Cultural Business at the Frankfurt Book Fair

Will fine art experience similar disruptions as music, books and film in the digital age? How should we deal with intellectual property in this era of digitization? And what promising digital activities will emerge in the cultural and creative industries? Signs of the digital revolution can be seen at all levels of the international cultural economy.

In Frankfurt this year, this sector is about to get its own independent marketplace, in a partnership between media entrepreneur Christiane zu Salm and the Frankfurt Book Fair. THE ARTS+, located in Hall 4.1, is a trade fair, conference, and meeting place for the entire cultural and creative sector, addressing creative individuals, museums, galleries, architects, technology companies, and designers, as well as politicians, law firms, and financing experts.

3 QUESTIONS FOR HOLGER VOLLAND, CO-FOUNDER OF THE ARTS+:

How would you describe THE ARTS+ concept and event?

I call it a business incubator for creative people and the arts. The ARTS+ is a platform on which we can leverage the potential of digital cultural assets. And because this sector also has an immeasurable cultural and political value for society, we will be discussing it with all the relevant stakeholders, especially politicians and public representatives, as well as artists like the great David Hockney.

What can participants expect from THE ARTS+?

THE ARTS+ will have more than 2,000 square meters of exhibition space on which to make its subject matter tangible. There are many matchmaking and business sessions for professionals from all creative sectors. Visitors can experience virtual reality and 3D art, or new, digital creative and production tools for digital architecture, fashion and design. Or they can attend workshops on the role of museums and cultural institutions, like The Metropolitan Museum of Art in New York, or the Van Gogh Museum in Amsterdam. Many creative industry clusters will have a presence, and so will technology companies. Among the initial partners are art publishers like TASCHEN, as well as cultural platforms like EU-ROPEANA and the Google Cultural Institute.

Can you give us a preview of THE ARTS+ conference?

The conference is for those who want to talk directly to thought leaders and influencers about such topics as new payment methods, new production ecosystems, or the role of intellectual property in cultural business. We’re looking forward to contributions by the renowned collector of media art, Julia Stoschek, and by Bas Korsten, the creative director behind “The Next Rembrandt” – an algorithm that has learned how to paint like the master. Bestselling author and web futurist Jeff Jarvis will chair a panel that he first introduced at the World Economic Forum. Architects will talk about digital influences in their profession. And there’ll be artists too, and scientists from MIT.

Two in-depth sessions will concentrate on two very special and exciting projects. In one, Matthias Röder, CEO of the Elieette and Herbert von Karajan Institute and guardian of the Karajan legacy, talks about how to reshape the experience of classical music today by uploading the artistic knowledge of the conductor and by creating new intersections between music, technology, and data. In the other—the “hacking documenta”—we’ll work on a future strategy for the internationally renowned arts show that is probably the most important archive of contemporary public art (holding 1.5 million documents).

How to Join THE ARTS+

THE ARTS+ Trade Show:
Visit the exhibition at the Frankfurt Book Fair in Hall 4.1. Entry to THE ARTS+ is included with Frankfurt Book Fair tickets.

THE ARTS+ Conference:
19 October, 9:00 am to 5:45 pm at DECHEMA, Theodor-Heuss-Allee 25 (outside the exhibition site, close to Hall 4)

www.theartsplus.com
MEET OUR AUTHORS
THIS IS WHAT WE SHARE
FLANDERS AND THE NETHERLANDS ARE GUEST OF HONOUR AT THE FRANKFURT BOOKFAIR 2016

FLANDERS AND THE NETHERLANDS ARE GUEST OF HONOUR AT THE FRANKFURT BOOKFAIR 2016

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GERDA DENDOOVEN
ANNEKE BRASSINGA

DAVID VAN HEBROUCK
SASKIA DE COSTER
DOWEWRAISMA
GERDA DENDOOVEN
ARNON GRUNBERG

www.frankfurt2016.com
Classroom of the Future: Frankfurt’s Think Tank for STM and Education

The Frankfurt Book Fair’s Hall 4.2, is a global marketplace innovation in STM and academic publishing, specialist information, and education. It serves as an international think tank for these segments involving publishers, service providers and institutions. It’s also home to the International Library Centre (Hall 4.2 N75).

As a vital component of this think-tank spirit, the Classroom of the Future is a standout feature in Hall 4.2 and Frankfurt’s hub for innovation in education. It explores how the role of publishers has shifted from being providers of information to prompting and supporting learning experiences. Thus, it showcases the educational programs and ideas for the future, including everything from content and tools to the layout and furnishing of classrooms. This year’s Classroom, under the theme “Lighthouse for Ideas,” will be in collaboration with the European Learning Industry Group (ELIG). It offers learning expeditions for students and teachers, as well as interactive lessons that focus on science, technology and art, next-generation storytelling, and education for the senses. The Classroom will feature a new black-and-white design that will take on an ever more colorful look over the course of the week through the students’ creative projects.

The Classroom activities are flanked by numerous events throughout the Hall during the weekend. Trade visitors should head to the Hall’s stage, serving as a location for talks and presentations of the Hot Spot Education (Hall 4.2 C96) and Forum Science and Education (Hall 4.2 C90). This stage program was successfully launched last year and will again feature a high-calibre line-up of speakers and companies in 2016. In order to meet the new faces of education and to learn about the latest trends, there’s also an expert tour on 21 October. (For information on these events, see Tours & Events on page 22.)

Briefly Noted: International Updates from the Frankfurt Book Fair

Italy (Hall 5.0) will have a considerably larger presence at this year’s Fair with a national stand that has doubled in size. There you’ll find major players such as Mondadori and Rizzoli. This increase reflects the growing international demand for Italian books. In 2015, Italian publishing houses sold the rights to almost 6,000 titles overseas (+11.7% over 2014).

Over in Hall 4.0, last year’s Guest of Honour Indonesia now covers almost 270 square meters, and Asian publishers are planning exciting presentations. Taiwan will showcase a virtual reality experience, enabling readers to step into author and illustrator Jimmy Liao’s latest picture book. Trade visitors seeking to network with publishers from Southeast Asia and East Asia can meet relevant players at “Happy Hour Asia” or join a tour of Asian educational publishers and solutions providers.

Anyone looking to do business in the graphic novels and comics segment—another exhibition area at Frankfurt Book Fair that underwent major growth—should attend the graphic novels reception in Hall 5.1, as well as the comics and graphic novels tour. Publishers, illustrators, authors and agents will mingle at the reception, while the tours are led by industry experts, introducing its participants to major German and international publishers and facilitating networking. (For information on these events, see Tours & Events on page 22.)
Form Meets Function at Frankfurt’s Business Club

What’s at the top of the agenda for Frankfurt trade visitors? Networking is key at the international publishing industry’s biggest fair. Since its launch in 2014, the Business Club in Hall 4.0 with its suite of exclusive services designed to facilitate business discussions, networking and industry education has been attracting increasing numbers of delegates. The combination of a professional meeting environment, upgraded amenities, and access to know-how and industry experts via the program of events and talks seems to hit the sweet spot.

In 2015, the Business Club had 3,200 members from 50 countries. More than 1,200 meetings were reserved using the online table booking system. Over 130 speakers and experts took to the Club’s stage for talks and panel sessions. Providing services that add real value are at the core of what the Club is all about, and the comprehensive service package covers everything from early 8:30 a.m. access to happy hours, including a free lunch buffet and business breakfast as well as Wi-Fi, workspaces, and a cloakroom.

For the second time this year, the Business Club's Ambassadors program will bring together 12 international industry experts to create a vital network leading up to and during the Frankfurt Book Fair. Emma House, Director of Publisher Relations at the Publishers Association UK was one of the participants in last year's program. Here's how she sums up the experience: "Getting access to the Business Club via the Business Ticket was the perfect way to attend Frankfurt Book Fair as a professional attendee. Offering a wide range of interesting and relevant conferences and seminars as well as a quiet space to have meetings was extremely beneficial." This year, publishers, social media strategists, managing directors, and publishing experts from ten different countries will act as ambassadors for the Business Club.

Services At a Glance

A Business Club ticket offers professional services and exclusive access that can enhance your Frankfurt Book Fair experience:

- Lounge and working areas with Wi-Fi and a cloakroom
- Meeting facilities, including online tool to pre-book tables
- Complimentary food and drinks
- Networking at daily business breakfast and happy hour events
- Exclusive range of seminars and events with international experts
- Access to the Book Fair’s B2B conferences, THE MARKETS and the Frankfurt Rights Meeting, on Tuesday, 18 October

2016 Business Club Ambassadors

Follow this year's selection of ten Business Club Ambassadors on Twitter to get the latest offers and information from the Frankfurt Book Fair Business Club:

- Jose Fernando Tavares, Booknando Livros, Brazil // @FTavares
- Erhardt Heinold, Heinold, Spiller & Partner, Germany // @ehrhardtheinold
- Christine Seiler, Aufbau Verlag, Germany // @FrauSchneuclchen
- Catherine Fragou, Iris Literacy Agent, Greece // @CatherineFragou
- Prashant Pathak, Consultant, India // @pnarayanpathak
- Nashwan Al Maghafi, Yemen Bookshop, Yemen // @Nashwan_Ali
- Hariza Mohd Yusof, USIM, Malaysia // @PenerbitUSIM
- Michele Hutchison, Netherlands // @MHutchison
- John Bond, Whitefox, UK // @wearewhitefox
- Alison Jones, Practical Inspiration Publishing, UK // @bookstoesky
- Richard Nash, United States // @R_Nash
- Jaime Ivan Hurtado, HiperTexto, Colombia // @jaimeivan

www.book-fair.com/businessclub

BUSINESS CLUB DISCOUNT!
Buy your Business Club ticket before 23 September and save 25% with this code: FBF_SummerDisc_PP_25OFF

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Politics and Publishing: International Dialogue at the Weltempfang Stage

On 23 June 2016, the UK voted to leave the European Union. That day will stay in our memories for its huge significance in the continued development of a united Europe. Whichever side you take in the “Brexit” debate, the vote represents a major turning point for Europe and leaves us with many unanswered questions.

At the Frankfurt Book Fair’s Weltempfang – Centre for Politics, Literature and Translation (Hall 3.1 L25), you will be able to follow many heartfelt, controversial and thought-provoking conversations that revolve around one central question: How do we want to continue living together in Europe?

Some highlight events:

**OPENING OF THE WELTEMPFANG: EUROPE AND ISLAM PANEL DISCUSSION**
**Wednesday 20 October 2016 at 4:30–5:30 pm**
Europe and the “Islamic World” – the two are often thought of as incompatible opposites. Freedom of opinion and freedom of the press, human rights and the situation of women: these are just a view of the keywords that demarcate the debate. What kind of relationship exists between Europe and the countries characterised as Islamic?

**HELL AND FRAGMENTS – EUROPE AND THE EXPERIENCE OF WAR**
**Thursday 21 October 2016 at 12:00–1:00 pm**
The 20th century was convulsed by two world wars which have since been etched into the collective memory, and which helped define the geopolitical order. Even the critics of a united Europe agree that the emergence of the European Union has ensured that most countries have enjoyed 70 years of peace. The question remains as to what influence the earlier experiences still have on today’s crisis hotspots in and around Europe?

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**Tours & Events**

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<th>Hall 3.1</th>
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<td><strong>Gourmet Gallery Expert Tours:</strong> 19–21 October, 12:00 pm–1:30 pm; Starts at Gourmet Gallery in Hall 3.1</td>
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<th>Hall 4.0</th>
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<td><strong>Gourmet Gallery Business Breakfast:</strong> Monday, 19 October, 8:15 am; Gourmet Gallery, Hall 3.1</td>
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<td><strong>Happy Hour Asia:</strong> Wednesday, 19 October, 5:30 pm; Hall 4.0, Café West</td>
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<td><strong>Asian Education Publishers &amp; Service Providers Tour:</strong> Friday, 21 October, 2:00 pm–3:30 pm; Starts at the Info Desk, Foyer, Hall 4.0</td>
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<td><strong>Virtual Reality Experience:</strong> &quot;HTC Vive x Jimmy Liao’s All of My World is You&quot;; Taiwanese stand, Hall 4.0, D50</td>
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<th>Hall 6.0</th>
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<td><strong>Publishing Perspectives Stage:</strong> Presentations by international publishing experts, 19–22 October, 10:00 am–5:00 pm; Hall 6.0 E11</td>
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<td><strong>Children’s Books Expert Tour:</strong> Friday, 21 October, 12:30 pm–1:30 pm; Starts at Creative Company stand, Hall 6.1 D2</td>
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**Download the Frankfurt Book Fair App**

Available for free at App Store and Google Play starting at the end of September, the Frankfurt Book Fair mobile app is packed with features to make your fair experience more productive and convenient:
- Free up-to-date fair catalogue
- Exclusive events
- Easy orientation
- Find your LinkedIn contacts at the fair

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**Join the Conversation, Join the FBF LinkedIn Group**

Join the Frankfurt Book Fair’s LinkedIn Group today and get the latest information about the global publishing industry’s biggest trade fair!

Connect with more than 6,000 members, expand your professional network, and stay up to date on the latest news and trends in the publishing and content industries. We want to hear from you!

[bit.ly/FBF_LinkedInGroup](bit.ly/FBF_LinkedInGroup)

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Editorial contributions by BConnects, Barbara Geier Content Services

This magazine contains information as of August 2016. This information is subject to change. Please check our website for the most up-to-date information.
Publishing in Post-Soviet Book Markets

Participants in the Frankfurt Book Fair’s Summer Academy bring you an insider look at post-Soviet book markets and the international ambitions of publishers working there. By Iryna Baturevych

RUSSIA
The Russian market is sizable, and it has a huge influence on neighboring markets. However, Russia has seen a decrease in book sales over the last few years. From 2014-2015, title production and book sales dropped to their lowest levels in seven years, and the forecast for 2016 isn’t much better. In addition, book exports to Ukraine, traditionally one of Russia’s largest book export markets, have recently diminished.

Increasing censorship (one example is a slate of anti-terrorism laws that took effect on July 20 and drastically increase the government’s surveillance abilities) is further narrowing opportunities for independent publishers.

UKRAINE
In 2015–2016, it became clear that the Ukrainian book market has changed course radically and chosen to accommodate the global publishing scene. Today, publishers have a strong desire to develop Ukrainian-language books in a market that was traditionally dominated by Russia.

“Some 70 percent of books on our market are translations,” says Anton Martynov, CEO of Nash Format publishing house in Kiev. “Unquestionably, buying rights in Russia is far easier and financially attractive, because there is no need to spend money on editorial work or to develop trade…but that is not a long-term perspective. That could be our biggest mistake.”

Encouragingly, the first half of 2016 showed an 11-percent increase in Ukrainian title production and an increase in the number of unit sales—up 77 percent compared to the same period in 2015.

By comparison, Russian-language publishing is declining in Ukraine. Unit sales of Russian titles have dropped by about half.

On the digital side, Ukraine is now the fastest growing IT market in Europe, and local digital publishers, like mobile ebook developer Gutenbergz, are doing more business abroad. Their books have been sold by Apple in 30 countries and have topped bestseller lists in 10 of them.

BELARUS
Belarus still trades actively with Russia, and Belarusian publishers are finding themselves in a state of unhealthy competition.

“A Russian book of the same quality as a Belarusian one is much cheaper because we can’t publish so many copies,” commented Mira-slav Lazouski, Assistant Director of Belaruski Knihazbor. “Russia is displacing us from the global market presence. There is a Russian equivalent in every sector.”

Another problem in Belarus is censorship. First, a publisher’s editor-in-chief must pass an exam given by the Ministry of Information to get a publishing license, and the exams are not always evaluated objectively.

Second, publishers can lose their license if they publish “unsuitable” literature by blacklisted authors or about sensitive political issues.

Third, propaganda from the state media can mislead the reading public about certain authors. “It’s a distorting mirror. That’s why some authors who are really successful and well-known abroad are blacklisted in Belarus,” says Zmicer Vishniou, Director of Halilafy publishing house. “This is an unhealthy situation that affects the popularity of books.”

KAZAKHSTAN
The Kazakh publishing situation is a complicated one: “We have no literary tradition; our literature has always existed in the form of folklore,” explains Aigerim Raimbekova, Development Manager of Aruna publishing house.

In addition, the development of national-language publishing faces competition from the Russian-language books on the market.

However, some of Kazakhstan’s publishers are optimistic. “I don’t consider it unhealthy competition,” says Raimbekova. “It is harder for us, of course, since we are mostly financially unable to print so many copies. But it always gives us a reason to be more creative and even selective.”

GEORGIA
In general, the Georgian market is strong compared to other post-Soviet markets, and the strong position of Georgian-language books means that Russian-language literature is less likely to dominate here.

However, publishers have a hard time competing with the dominance of Palitra Media.

Another problem is changing government policies. Diogene Publishing and several other text-book publishers in Georgia are facing bankruptcy as a result of a government program to offer free educational content.

According to a report from the International Publishers Association, “a 2013 decree...enables the state to seize [publishers’] digital textbook files without prior agreement, print the books and give them away for free.”

As in most Eastern European markets, there is a lack of objective statistics, making strategic planning impossible. Diogene’s director Tamar Lebanidze says that, due to a lack of data, their main “strategy” is to buy only English-language bestsellers, which adversely affect the range of Georgian content available to readers.

On a positive note, the preparations for Georgia’s Guest of Honour program at the 2018 Frankfurt Book Fair have led to the creation of the Georgian National Book Center, which supports foreign translations of Georgian literature.

ARMENIA
Despite being extremely small, the Armenian market is trying to develop international cooperation, most notably by entering the Russian market, and now it is also looking to the West. The market faces problems typical for small, post-Soviet states including a weak distribution network, lack of procurement for libraries, and low circulation (500 copies for literature, on average).

“We are looking for new markets”, says Khachik Grigoryan, Managing Director of Ankynurac publishing house. “I didn’t think I could find new partners here, but now I see that it really is possible.”
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Time: 9am to 6pm
Hall Number: 5.1
Stand: B152

From 19 to 23 October 2016

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Nigerian Publisher Bibi Bakare-Yusuf: ‘Getting Our Books Beyond Nigeria’

On the 10th anniversary of her publishing house, Bakare-Yusuf is focused on getting books into the hands of readers and partnerships with international companies. By Mark Piesing

Cassava Republic in Abuja, Nigeria is an independent publisher established in 2006 to challenge perceptions of African writing. Today, the company has an office and bookshop in London to promote its writers in the West.

Publishing Perspectives has spoken with founding publisher Bibi Bakare-Yusuf in her 10th anniversary year, to talk about present and future issues in African publishing, and to learn more about Cassava Republic.

Publishing Perspectives: What has been the greatest challenge you’ve faced?

Bibi Bakare-Yusuf: Perhaps the biggest challenge of publishing in Nigeria is that it is close to impossible to find a consistently reliable local printer. After several disastrous experiences, we made the decision to print overseas. Of course, that’s not without its challenges in terms of dealing with customs at the port, which can suck all the fun out of publishing.

PP: How do you see the market for African literature developing over the next year, both in Africa and in Europe?

BBY: Many parts of Africa are suffering from an economic downturn, which will inevitably affect purchasing power and priorities. This is particularly the case with the Nigerian economy, which has suffered greatly from a slump in oil prices. Nigeria will weather the storm and rise again, but this is not likely to be next year.

Despite this, we’ve created a thirst in people to see their stories and worldview reflected in some of the things they consume. We’re hopeful about getting our books beyond Nigeria. We have already started that process with a partnership with Pan Macmillan to distribute our books in Southern Africa.

While many European publishers may be looking to developing economies for expansion, we see Europe as a big opportunity for our growth. There’s a massive African diaspora, both recent and better established. Mainstream Western publishers haven’t targeted this audience, and we want to do that while finding a broader base as well. Europe is a diverse continent, its cities are more mixed across racial, ethnic, religious lines. We want to invite all these groups to interact, connect, and engage each other through our books.

Outside of the British Isles, we’re happy that there’s been strong interest in translations of our titles. For instance, Easy Motion Tourist has been very well received in France, with repeated demand for the author to attend crime fiction festivals across the Channel and several inquiries about the film rights. We think that our presence in the UK will probably encourage more publishers to make their lists more diverse.

PP: In the coming year, what challenges does the publishing industry in Africa face and how easy will it be to overcome them?

BBY: Getting books to readers who want them in Nigeria and across Africa will continue to be a challenge. We don’t have a reliable, formal distribution system as there is in the West, and we have very few decent retailers. We’ll continue to have to expend a lot of resources and time getting our books to readers using salaried marketers traveling around the country. The lack of good bookshops to aid discovery and sales is still a problem.

These distribution challenges can be overcome by partnering with other non-bookshop outlets with large footfall to consider stocking selected books. We’ve partnered with supermarkets and cafes, and we have even sold our books at hairdressers. Quite a large number of books are also sold in traffic in the large cities, but unfortunately there are issues with piracy which make this a difficult distribution system to crack.

Publishers can come together to share warehousing and associated distribution cost.

PP: Can you share any of Cassava’s future plans with us? Are you planning to set up bases in countries other than the UK?

BBY: Our focus is to strengthen Cassava as a global brand. Over the past year, we’ve established sales and distribution channels in the UK, Europe, and the Middle East, as well as in East and South Africa. We’re planning to launch a list in the US in the spring of 2017. We are very excited about possibilities for our authors in the US—we have a strong support base there already and look forward to introducing our titles to the market in 2017.

We also are commissioning in new areas in which we believe there’s still a dearth of African authors—travel writing, crime, graphic novels. Given the strength of our brand, we also are considering a subscription model, along the lines of Granta.
THE MARKETPLACE FOR PUBLISHERS TO TRADE RIGHTS GLOBALLY

IPR License is the first fully transactional rights and licensing marketplace within the publishing industry. **Rights buyers** can search, offer, negotiate and complete deals for book and journal rights, licensing and permissions. **Rights sellers** can increase sales from their front and backlist—simply, quickly and cost-effectively.

IPR License is constantly developing its technology to ensure that it offers a complete rights solution to support the industry, and to help generate new licensing opportunities for its members.

Visit us at the Frankfurt Book Fair (Hall 4.2 E19) to learn more about our rights platform.

**BENEFITS OF BECOMING A MEMBER:**

- You can **list all the rights you wish to sell**, including translation, territorial, permissions, subsidiary rights and royalty deals.
- We have an **online support desk** on hand to help with any day-to-day queries or issues.
- Be included in our IPR Rights Magazine, distributed at all key book fairs.
- **We partner with key associations** such as the Independent Publishers Guild (IPG), Publishers Association, National Book Network, the Independent Book Publishers Association (IBPA), Association of Scientific, Technical and Medical Publishers (STM), the Copyright Clearance Center (CCC) and many more.
- This is a **low-risk investment** for a high level of service with guaranteed exposure.
- IPR provides the ability to **browse an online marketplace** for new content.

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**Featured Key Titles for the Frankfurt Book Fair 2016**

**Agriculture:**

**Business & Economics:**
- *Angel Financing in Asia Pacific*, by John Y Lo. 9781786351289. (Emerald, Aug 2016)

**Children’s:**

**Fiction:**

**Health:**
- *The Drug Conversation*, by Owen Bowden-Jones. 9781909726574. (The Royal College of Psychiatrists, May 2016)

**Humanities:**

**Language:**
- *Research Methods in Language Acquisition*, by Barbara Lust. 9783110415223. (De Gruyter, Jan 2016)

**Lifestyle:**
- *Natural Cosmetics Made Easy*, by Cosima Bellersen Quirini. 9783800103836. (Verlag Eugen Ulmer, Oct 2016)

**Medicine:**

**Science:**

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**Technology:**

**Featured Rights Deals of the Month**


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Books in Print Platform Coming to Brazil

A joint venture between Brazilian and German companies, Books in Print Brazil will provide a standardized metadata platform for publishers and booksellers. Interview by Hannah Johnson

Over 40 years ago, the Books in Print system was founded in Germany as an initiative of the German Publishers and Booksellers Association. Today, it has become a standard tool by which the entire publishing supply chain can share and use metadata.

Books in Print Brazil—a joint venture between German service provider MVB, the Frankfurt Book Fair, and Brazil’s Camara do Livro Brasil—will soon launch and offer this massive Latin American market the same metadata platform serving several other countries.

Publishing Perspectives spoke to Ronald Schild, CEO of MVB (a publishing services company owned by the German Publishers and Booksellers Association) about the motivation to launch this initiative in Brazil and its potential effects on the market.

Publishing Perspectives: Can you give us an overview of the Books in Print Brazil project?

Ronald Schild: The key objective of Books in Print Brazil (BIPB) is to allow publishers and booksellers to better market their books and increase their sales. To achieve this objective, we collect all the metadata from all the publishers, ingest it in one central database, eliminate inconsistencies, standardize key elements—such as author names, product categories and keywords—and provide booksellers with one single data source to build a comprehensive catalogue. Thus we make sure that new title information as well as updated book data find their way to booksellers in real time. We increase the discoverability of books thereby maximizing the chances of an individual title to sell. And we create cost efficiencies by automating processes that are handled manually today.

PP: What interest does MVB have in developing BIPB?

RS: The book market, formerly divided by language barriers, is fast becoming a global one. We have global bestsellers, global rights deals and—at least in the digital realm—global retailers. At MVB, we are convinced that this trend will continue and grow, and we want to support publishers and booksellers internationally by providing the infrastructure for metadata.

We believe we are in a position to do so as we relaunched our Books in Print platform in Germany 12 months ago. In the three years prior to that, we have completely rebuilt the platform using the latest technologies. As a result, we have one of the most advanced, if not the most advanced Books in Print platform worldwide.

PP: Which other organizations are involved in BIPB?

RS: BIPB is a joint effort of the Brazilian Publishers Association (CBL) and the German service provider MVB in cooperation with Frankfurt Book Fair. Each of the partners contributes their specific skills and competencies.

PP: How does the current Brazilian market function without a central bibliographic database?

RS: That was indeed a question we have often heard when presenting the project: “How have we been able to do business so far without a books in print?” Publishers and booksellers alike are facing a multitude of challenges without a BIP platform.

Publishers have to supply metadata in a variety of formats to individual booksellers. The processes are thus prone to errors, and there are time lags up to several weeks between publication date and sales start. Not to mention the cost that is involved to maintain these processes.

Booksellers, on the other side, face similar problems: they have to ingest a multitude of data feeds from individual publishers, often with inconsistent product categories and very limited capabilities to control the quality of the data. Above all these challenges, there are huge cost and efficiency issues. Without a BIP system, a lot of financial and human resources are necessary to make books discoverable and promote them.

PP: Why do you think the time is right to develop such a platform in Brazil?

RS: Metadata is the new gold standard in publishing. Publishers worldwide start to recognize that the ability to market individual titles increasingly depends on the quality of the metadata. Technology and data management are becoming key functions in publishing houses and retail companies alike.

PP: What positive effects will BIPB have on the Brazilian market?

RS: We are striving to make the Brazilian book market more efficient and cost effective. Books will find their way to readers more easily, thus enabling more sales for booksellers and publishers.

PP: Are there any challenges that the project is facing?

RS: The challenges are many-fold. First, we have to understand the specifics of the Brazilian market and build them into our platform. That part has been mostly finished, but then comes the main challenge: how do we overcome the chicken-and-egg problem? Booksellers are highly interested in subscribing to the BIP data services, provided that the majority of publishers are on the platform.

Vice versa, publishers require a significant reach among booksellers before supplying their data. For exactly this reason, we have discussed our plans for months with both publishers and booksellers in order to create the largest possible momentum from the start.

PP: Do you have any plans to expand this business beyond Brazil?

RS: For now, our priorities 1, 2, and 3 are the successful launch of our Books in Print Brazil. However, in the future, it might be a game changer for all of Latin America.

“The ability to market individual titles increasingly depends on the quality of the metadata.”

Ronald Schild, CEO, MVB
The Markets: Global Publishing Summit

Get to Know THE MARKETS for 2016

Representatives from the countries to be featured at this year’s THE MARKETS Summit in Frankfurt offer insights into their publishing markets and ambitions for the future.

On October 18, leading voices from vibrant publishing regions will gather at THE MARKETS: Global Publishing Summit in Frankfurt to discuss issues and opportunities in the book business. Publishing Perspectives spoke with some of the experts who will speak at THE MARKETS this year to learn more about the dynamics in their unique markets.

Brazil

“In the past 15 years, because of competition among publishers, the growth of the country and its middle class—from 60 to 120 million people—along with the new scale of bestsellers, book prices remained the same while the cost of living more than doubled. The lower margins were offset by growth in the volume of sales and by a large-scale and unprecedented acquisition program of reading books by the government—two forces no longer in place and, unfortunately, not soon to be seen.”

—Tomás Pereira, Publisher, Editora Sextante

Poland

“As a children’s book publisher, we’re frustrated by the fact that culture and arts for children haven’t gained special status, nor are they considered by legislators or by government as a priority... Something is beginning to change in terms of a general recognition of picture books, and this is thanks to our book lovers and bloggers... although they remain at the margin of mainstream book criticism. We definitely need more opinionated and established children’s picture book ambassadors to keep on stirring a debate on the importance of reading—to children and by children.”

—Jadwiga Jędryas, Publisher and translator, Dwie Siostry

Spain

“In the last five years, we’ve seen a burst of digital innovation across the publishing sector. It’s extremely positive to see that many young entrepreneurs believe that there’s a promising future for publishing-related businesses in the digital age... Collaborating with them will allow traditional companies to gain a deeper understanding of the dynamic digital economy and of the business opportunities which arise daily in this new world.”

—Javier Celaya, CEO and Founder, Dosdoce

United Arab Emirates

“Distribution is a huge challenge for book accessibility in the Middle East because each country has its own unique set of barriers, making it difficult to impossible for publishers and booksellers to gain entry for their titles... Sharjah Publishing City’s integrated distribution company will allow for the free and unencumbered trade of books in Middle East, Asia and Africa—something that will have a tremendous positive impact on reading accessibility in the region.”

—Ahmed al Ameri, Chairman, Sharjah Book Authority

Date: October 18, 2016
Time: 10:00 am to 5:00 pm
Location: Frankfurt Book Fair Business Club, Hall 4.0

300 publishing and media executives from more than 20 countries will gather in Frankfurt for this full day of inspiring presentations, in-depth one-on-one conversations and facilitated networking opportunities.

Tickets and Program: www.themarkets2016.com
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Santos Palazzi, Head of the Digital Division at Grupo Planeta in Barcelona, says he's convinced that one of the main challenges the publishing industry is facing has to do with young readers. “We have to make reading sexy.”

Interviewed by Publishing Perspectives about the current situation of the Spanish market, he looks at both the international and national scenarios, and names four key points he says are critical.

**CONSOLIDATION: ‘THIS TREND WILL CONTINUE’**

“Part of the future of Grupo Planeta, and of the industry at large,” Palazzi says, “lies in the process of internationalization that we have been witnessing—either with acquisitions, partnerships, or some kind of agreements and collaborations. Content is more and more international and, as a consequence, it requires an international approach.

“Penguin Random House (PRH) was the first. Harper Collins is doing the same. And HarperCollins, through its Harlequin acquisition is now present in several countries. This trend will continue. We’re in France with Editis, and we have a partner in Italy, De Agostini. In Spain, the market is still extremely fragmented.

“Planeta has a 25-percent share of the market, and PRH has 16 percent. This means that the two biggest publishers, together, reach 41 percent of market share: not even half of the market. Given the situation, there is room for more concentration, so I foresee that there will be acquisitions, for sure.”

**DIRECT ACCESS TO READERS: ‘IMPERATIVE’**

“We are establishing a dialog with our readers and creating communities,” Palazzi says. “We must improve our engagement with them. This is key for us. The internet enables us to directly connect with the reader. We can rely on a permanent dialog. Not only do we know who they are, but now we can also talk to them and recommend other books. Engagement is crucial. It is strategic, and we are focusing our marketing efforts in this direction.”

**INTELLECTUAL PROPERTY: ‘WE MUST BE THE OWNERS’**

“We have to consider the publishing industry,” Palazzi says, “as a key agent in the development of content. We must be the owners of the IP.

“Take, for example, one of our most recent bestsellers, Palmeras en la nieve by Luz Gabas. In this case, we have discovered and nurtured a local voice. The movie based on this novel was last Christmas blockbuster and we sold hundreds of thousands of books.

“Another good example is El tiempo entre costuras by María Dueñas. We made a TV show out of this amazing book together with Antena3, and it has been exported to many countries. Having the IP of the content enables publishers to develop other media content based on these stories. This is a huge opportunity for all of us.”

**E-COMMERCE: ‘OF UTMOST IMPORTANCE’**

“E-commerce is getting traction in Spain and now accounts for 7 percent of our sales. Its channels are Amazon, Casa del libro, Fnac, El Corte Inglés. The leader is Amazon, but it is of utmost importance to maintain this diversity and rely on different channels.

“Amazon is very strong. It is an important partner, but it is a competitor at the same time. We must be able to manage this relationship. This is a big challenge.

“In my opinion there has to be a balance among digital players—it’s fundamental to me. The ebook will keep growing. Last year it grew by 20 percent. This year, so far, the rate is only 10 percent, but we still have six months ahead and we have to keep in mind that ebook sales strongly depend on best-sellers. We will have to wait until Christmas to evaluate its performance this year.”

While pleased to see the Spanish market stabilizing after losses of up to 40 percent, Grupo Planeta’s digital chief says that publishers have failed so far to make reading ‘sexy’ for young consumers—and he insists the industry must exploit its intellectual property rights fully. By Valentina Morotti
Bonnier Books CEO Jacob Dalborg: ‘Digitization Is Not Necessarily Evil’

By embracing technology and innovation, Dalborg believes that book publishers can focus more on great authors and books.  

By Marie Bilde

Jacob Dalborg is CEO of Bonnier Books. In that role, he chairs the board of Swedish Bonnierförlagen AB and Adlibris Group, Bonnier Publishing UK, German Bonnier Media GmbH, Bonnier Books Finland, and Cappelen Damm.

Publishing Perspectives asked for his views on the book business from the Stockholm offices of Bonnier’s top management.

Publishing Perspectives: After years of noise about digital disruption, does 2016 seem quieter in publishing?

Jacob Dalborg: I think everyone has come to terms with the fact that digitization is not necessarily evil. It’s generally accepted that it carries great opportunity.

“Digitization Is Not Necessarily Evil”

Jacob Dalborg, CEO, Bonnier Books

The term “disruption” itself, when used in a publishing context, is, in my opinion, often more a buzzword than a statement of facts. In reality, digital commerce only represents more selling points, not something very new and different from what we have always dealt with.

I think of publishing as a storytelling business before anything else. Our job has never been to publish as many books as possible, but to find and publish exactly the right books.

“Innovation (and I don’t mean revolution) is to keep striving to do better than ever before. Where do you think the most important innovation takes place today?”

JD: Typically, it’s not in the products themselves that you’ll find the innovation. There are, of course, still improvements to be done and changes to be made. As a publisher, I love ebooks because once they’re produced, you have them available forever, they have no inventory. However, the core publishing activities of acquiring, editing, and publishing stories remain the same. To the consumer, the reading experience is not very different.

Nevertheless, I see lots of potential for innovation in audio-books. Getting rid of the physical CD has already made both distribution and consumption so much easier and more convenient than it was. We now have the possibility of creating truly new ways of consuming. That could mean, for example, using a slightly augmented reading speed for those who have otherwise been too impatient to follow a narrator’s pace. It could also be an intelligent use of the snooze functionality, among other things, allowing you to fall asleep while listening.

I think audio holds a lot of this type of promise, not least for new readers. As a special case, there could be a market for abbreviated audiobooks for immigrants wanting to learn about a new language and culture.

Another area where innovation can significantly add value is in developing and optimizing internal processes for production, distribution, and inventory management.

Especially in small and linguistically closed markets like the Nordic countries, inefficiency is a serious challenge for publishers. A bestseller in Germany means 4 million copies sold, whereas the same in Finland represents unit sales of only 60,000 copies. You don’t see the same difference in resources spent on tools and operations. The important evolution (and I don’t mean revolution) is to keep striving to do better internally.

PP: You mentioned that people write more than they ever have.

Will you share your thoughts on self-publishing?

JD: Unfortunately, self-published books don’t figure into industry statistics. That would help us estimate the actual effect.

As we’ve traditionally worked in a market of carefully selected ranges of titles, it’s clear that the abundant number of titles “out there” is a new kind of challenge for publishers. How can we stay top-of-mind in this significantly larger amount of content?

In addition, all publishers should definitely look into the self-published market to identify the best authors and offer them their core service of career development. I am sure that we’re missing several good authors right now.

Finally, I would recommend anybody whose book has been rejected by a publisher or an agent, to self-publish. That will give you all the tools you need to build your own brand and reader relations, and it can get you both feedback and attention. A publisher might find you and contact you.
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