



FEP General Assembly

13-14 November 2023

Agenda

14 November 2023

- Opening words by FEP President
- Adoption of the agenda of the meeting and adoption of the minutes of the Paris June 2023 meeting
- Recommendations from the Board
- Adoption of the 2024 FEP Budget
- Statistics (Frankfurt presentation)
- Updates on publishing in Ukraine
- Brussels files
 - EP – The Book report
 - Late Payment Regulation
 - Artificial intelligence
 - Accessibility
 - Deforestation Regulation
 - Geo-blocking
 - Digital education
 - Copyright
 - Digital Services Act and Digital Markets Act
 - Value Added Tax
- Tour de Table
- 2024 EU elections – FEP Manifesto
- Projects' updates (EUPL, Möbius, Aldus UP, Tales of EUkraine)
- YPPiB (Young Publishing Professionals in Brussels)
- STM Report
- IPA Report
- Next meetings



Opening words by FEP President

Adoption of the agenda of the meeting and adoption of the minutes of the Paris June 2023 meeting





Recommendations from the Board

Adoption of the 2024 FEP Budget



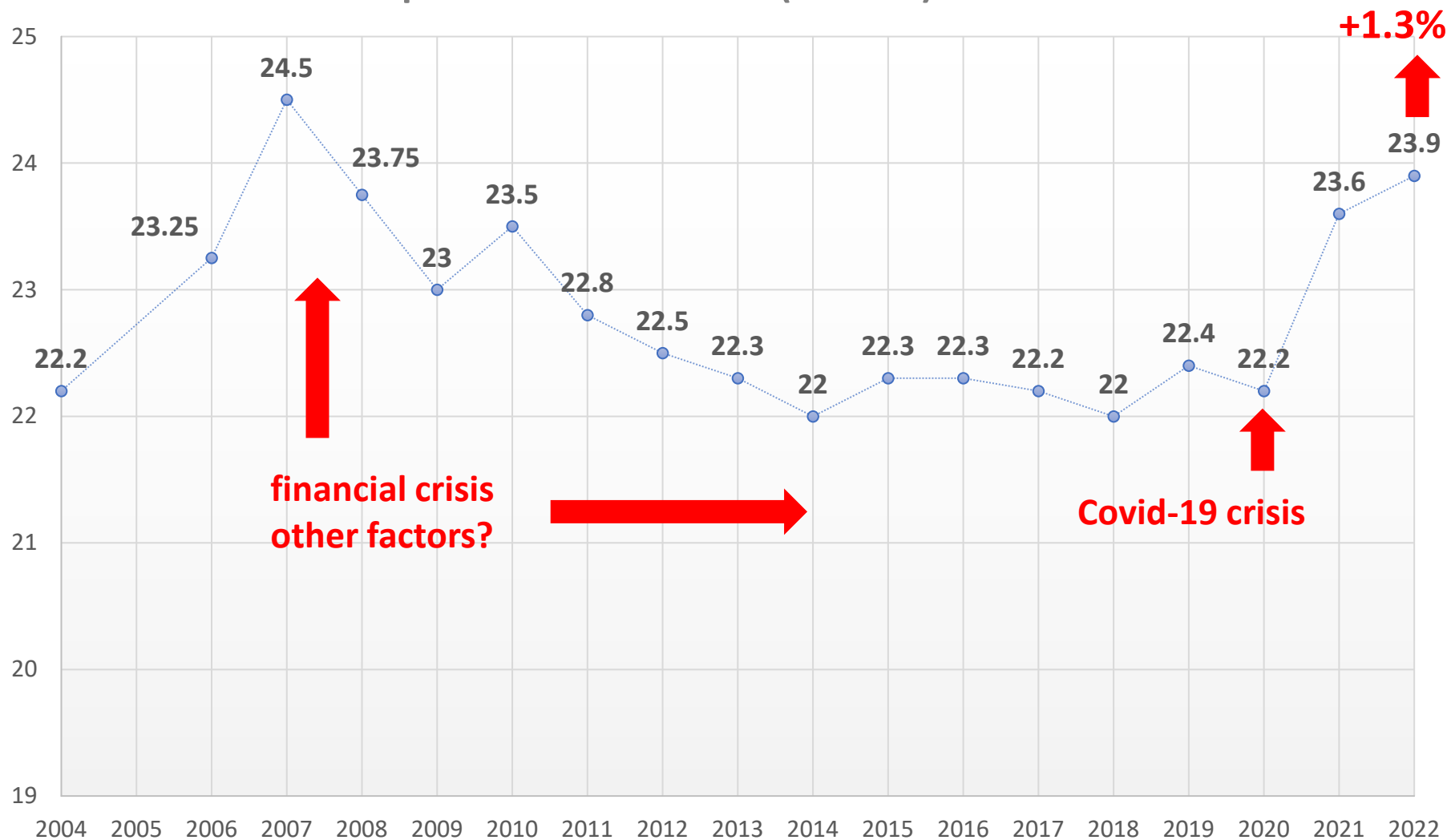


European Book Market Statistics 2022-2023



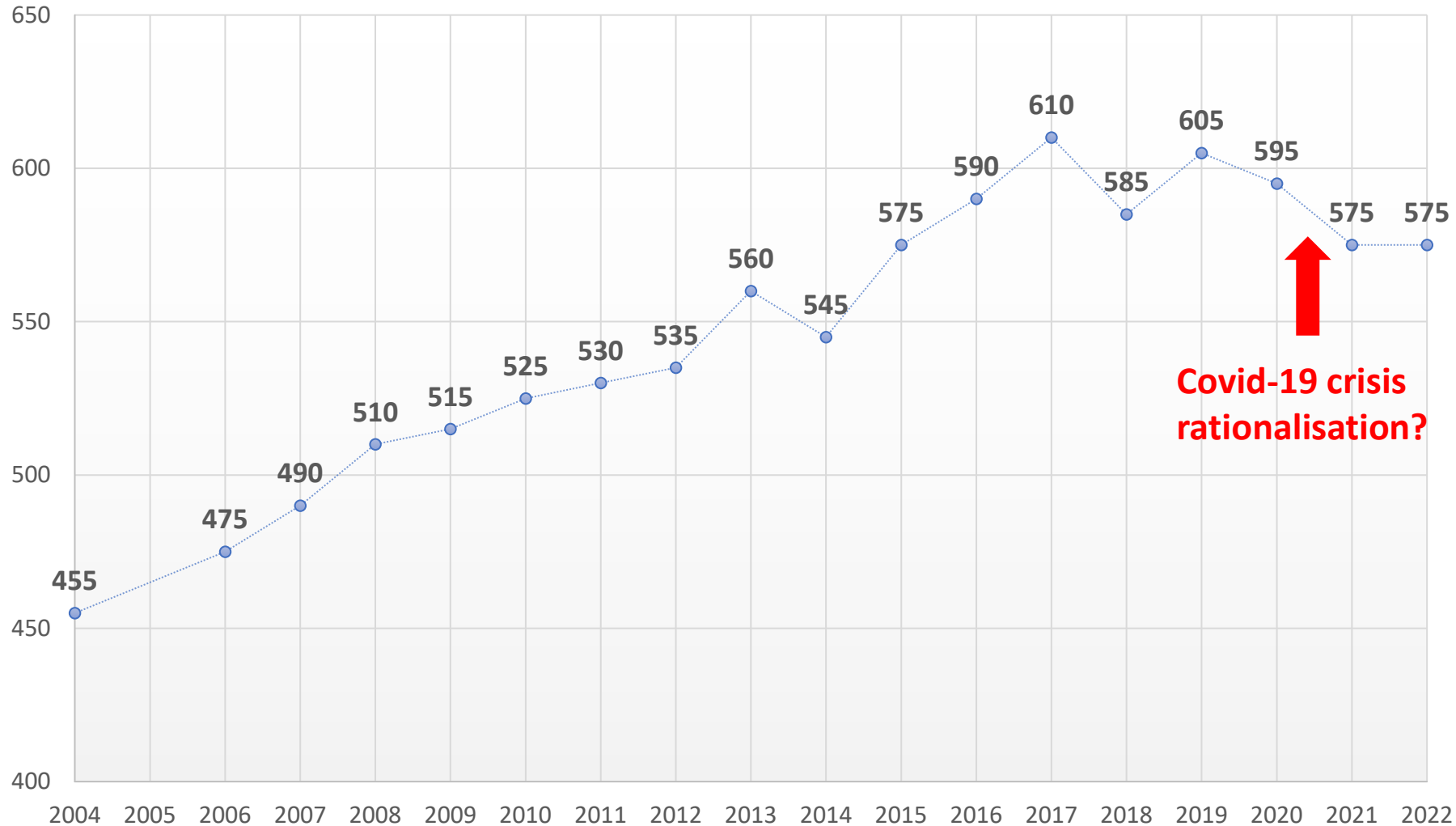
The core data

Net publishers' turnover (bln eur) 2004-2022



Market value at
cover price ca.
37-38 bln euro

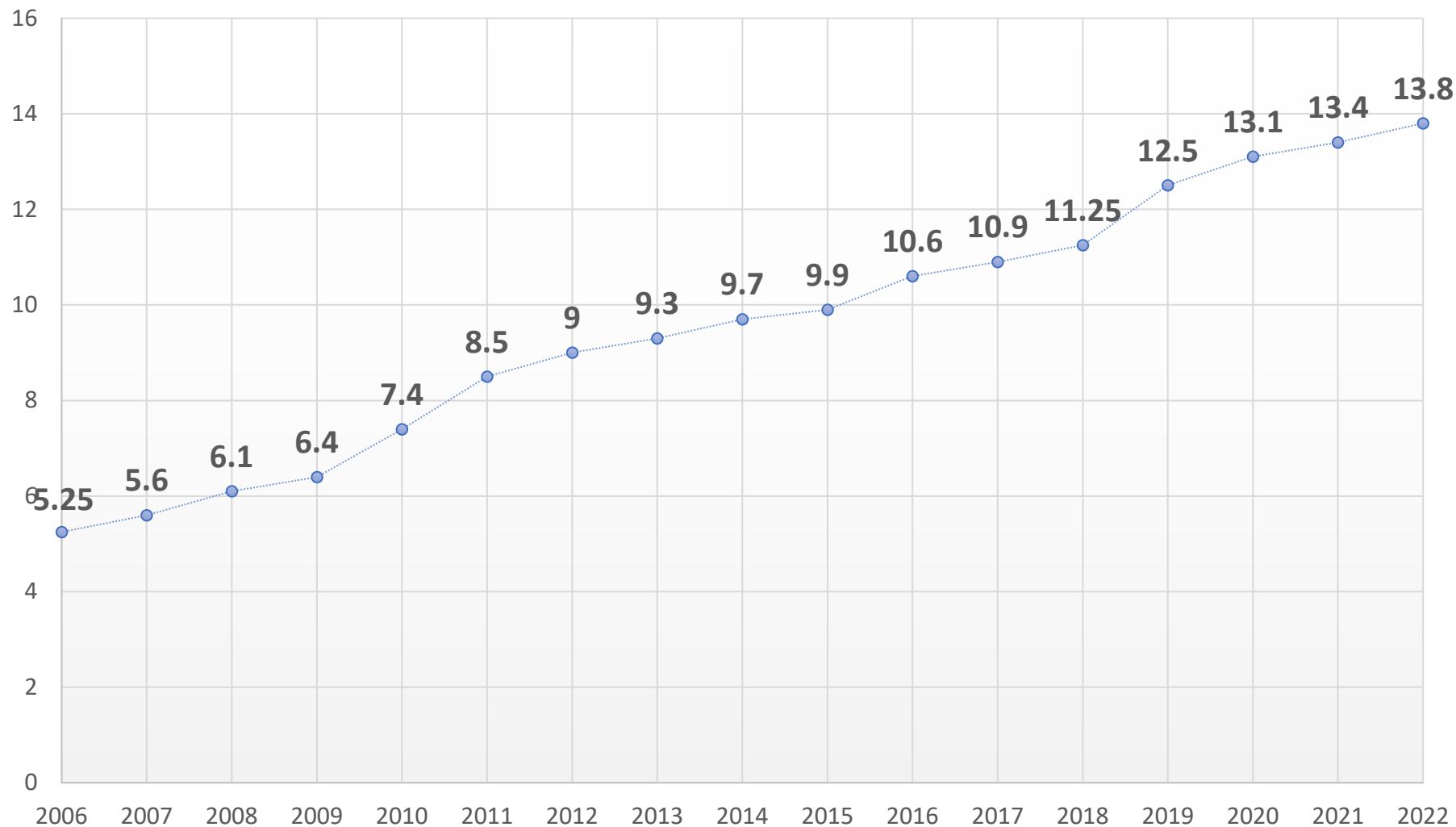
New titles ('000) 2004-2022



First editions in
print, all categories

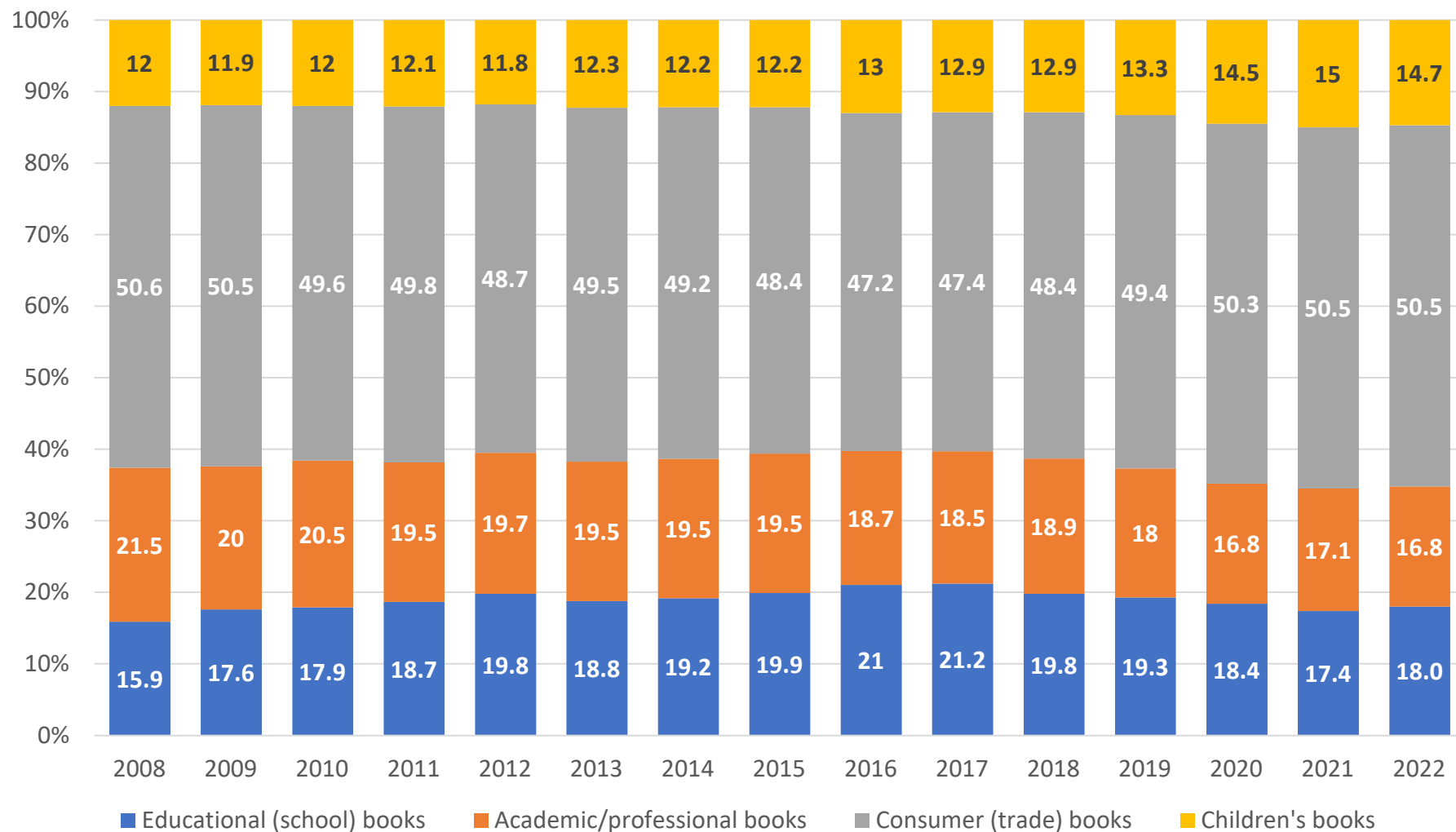
Copies sold in 2022
(all formats)
> 2.5 billion

Active catalogue (mio) 2006-2022



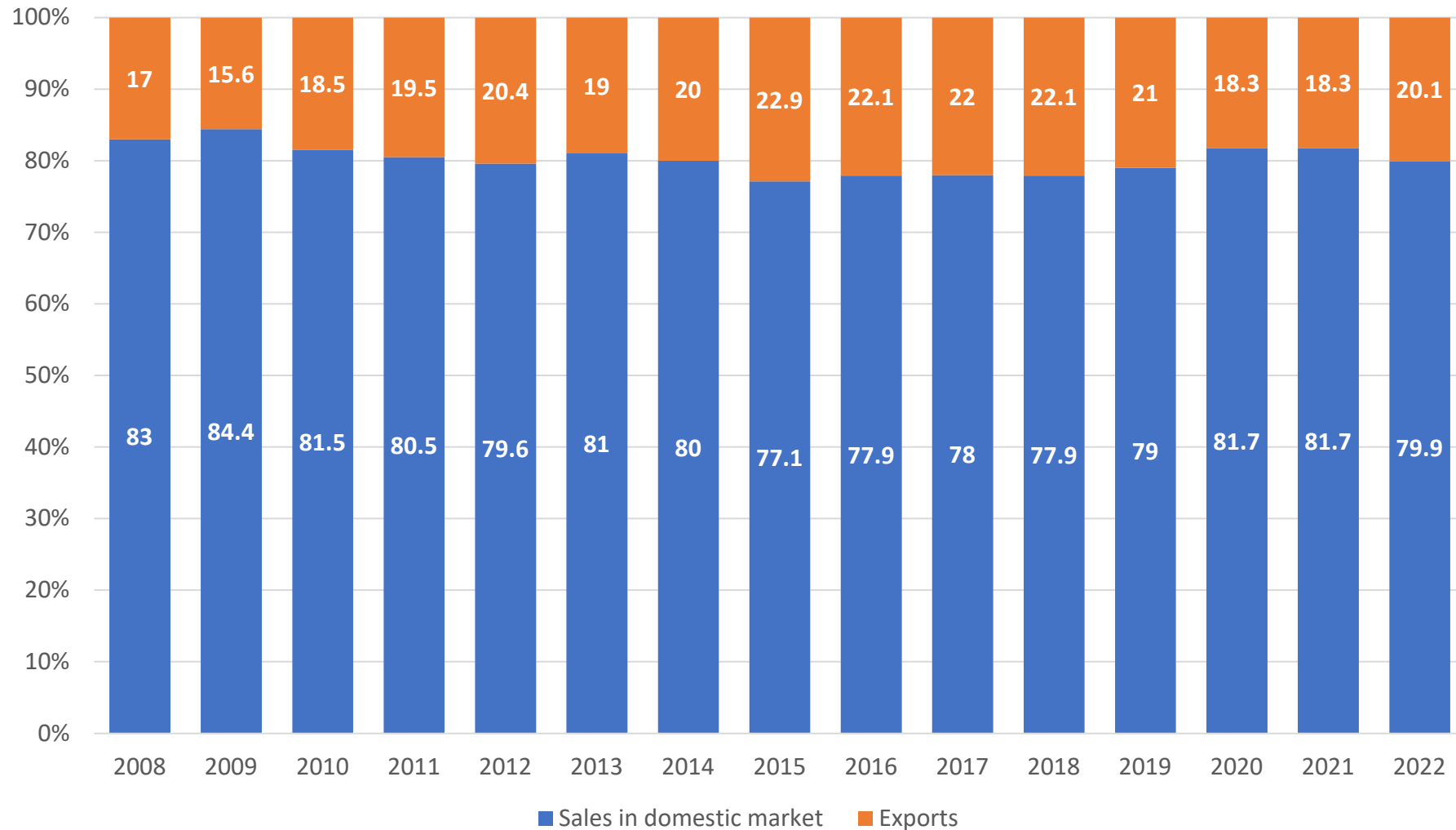
Of which some
3.2 million in
digital/audio format

Turnover by category (%) 2008-2022



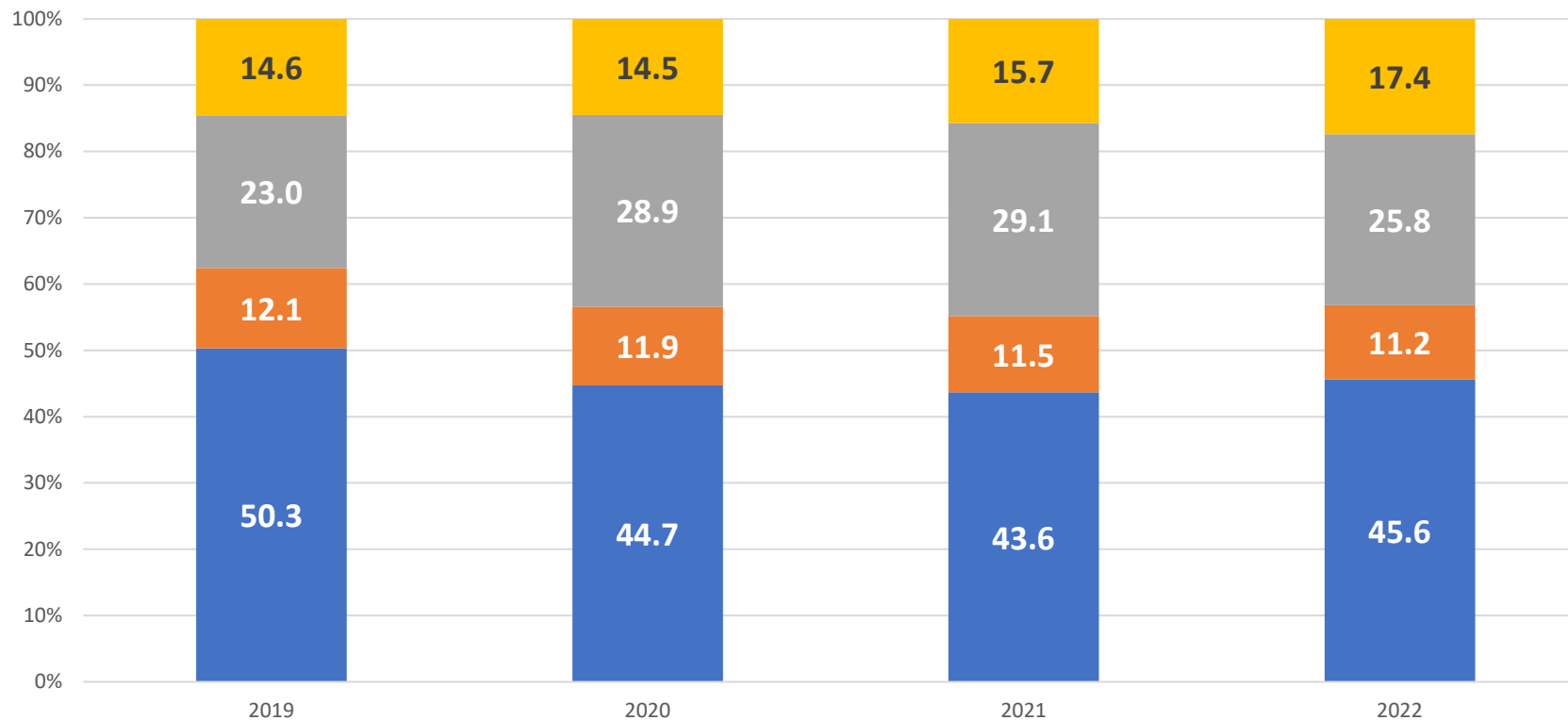
Children's books
still going strong

Turnover by destination (%) 2008-2022



A significant **export share** (on the rise)

Turnover by distribution channel (%) 2019-2022

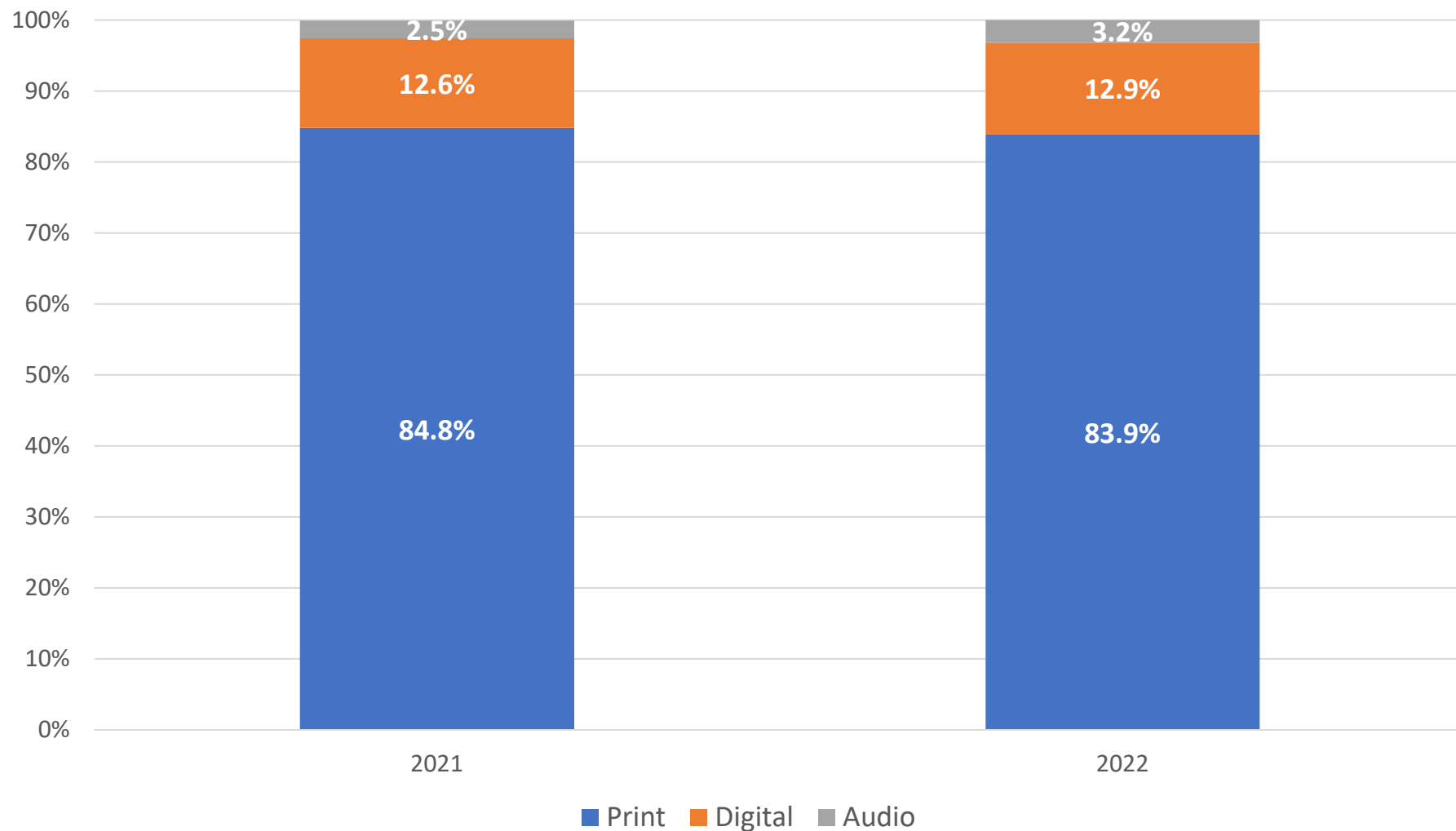


■ Sales in bookstores and specialised stores
■ Online sales

■ Sales in supermarkets and other stores
■ Direct sales (incl. libraries, book clubs)

Return to
bookstores?

Turnover by format (%) 2021-2022



Print books by far
largest share

The rise of
audiobooks

- **Biggest markets: turnover**

1. Germany
2. UK
3. France
4. Italy
5. Spain
6. Netherlands

- **Biggest markets: titles published**

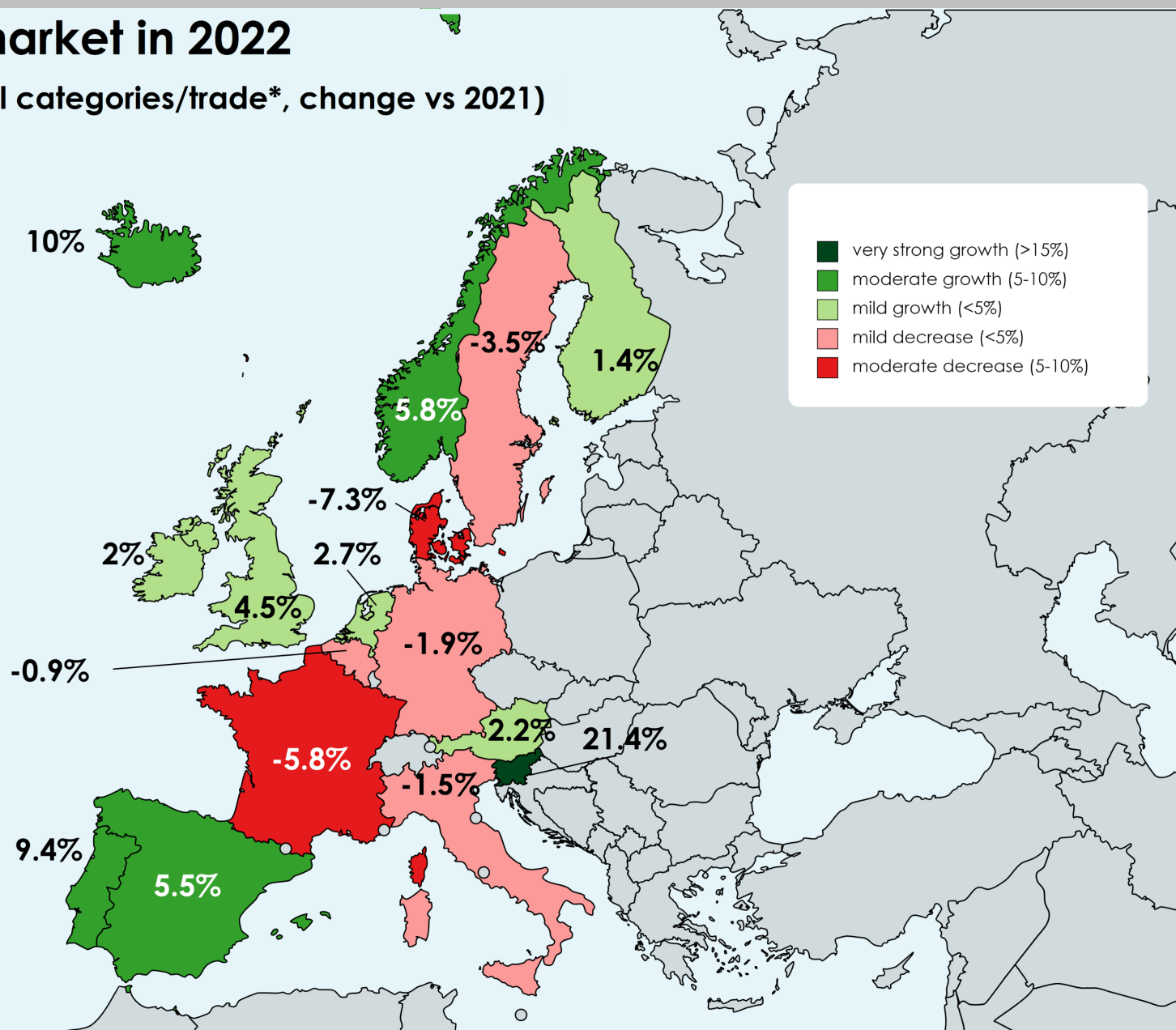
1. UK
2. Germany
3. Spain
4. Italy
5. France
6. Poland



The markets in 2022

The book market in 2022

(total turnover, all categories/trade*, change vs 2021)

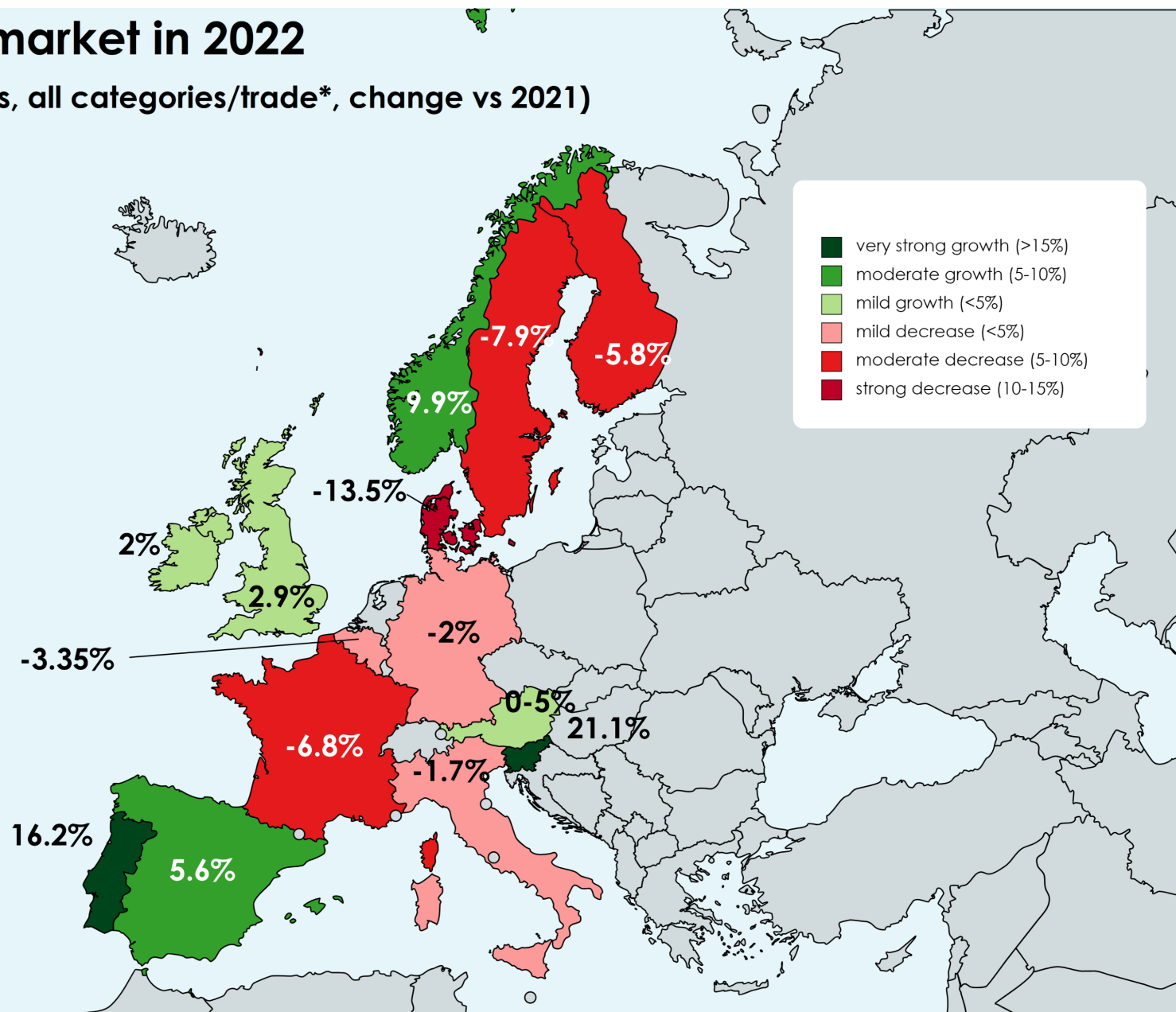


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Total +1.3%

The book market in 2022

(print book sales, all categories/trade*, change vs 2021)



Created with mapchart.net

Ebooks

- Denmark -15.5%
- Finland -5.5%
- France +4.4%
- Germany -0.2%
- Italy -8%
- Norway +13%
- Sweden -6.6%

Audiobooks

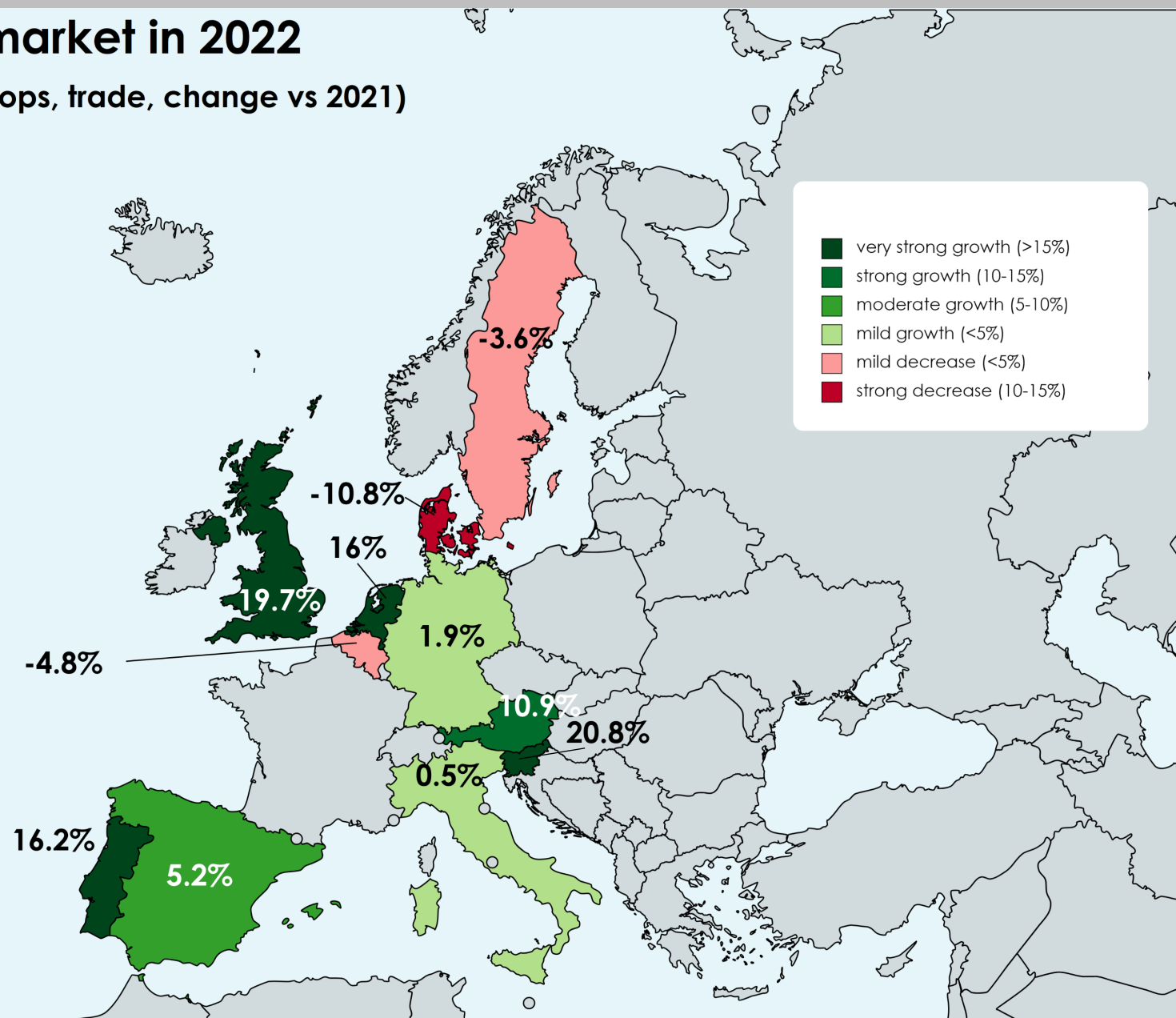
- Denmark +8.3%
- Finland +16.2%
- Germany +20.3%
- Norway +20%
- UK +8.1%



FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

The book market in 2022

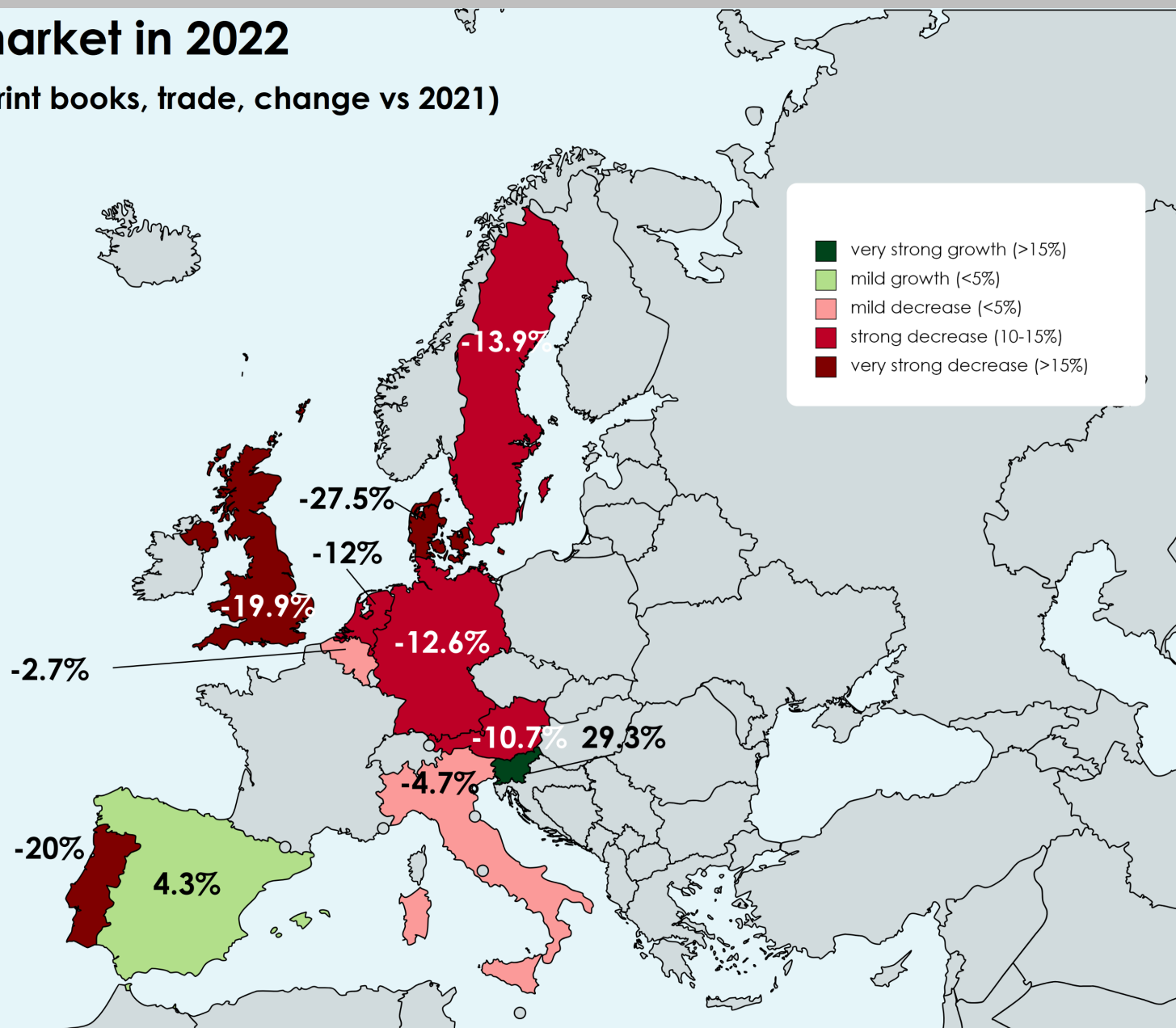
(sales in bookshops, trade, change vs 2021)



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The book market in 2022

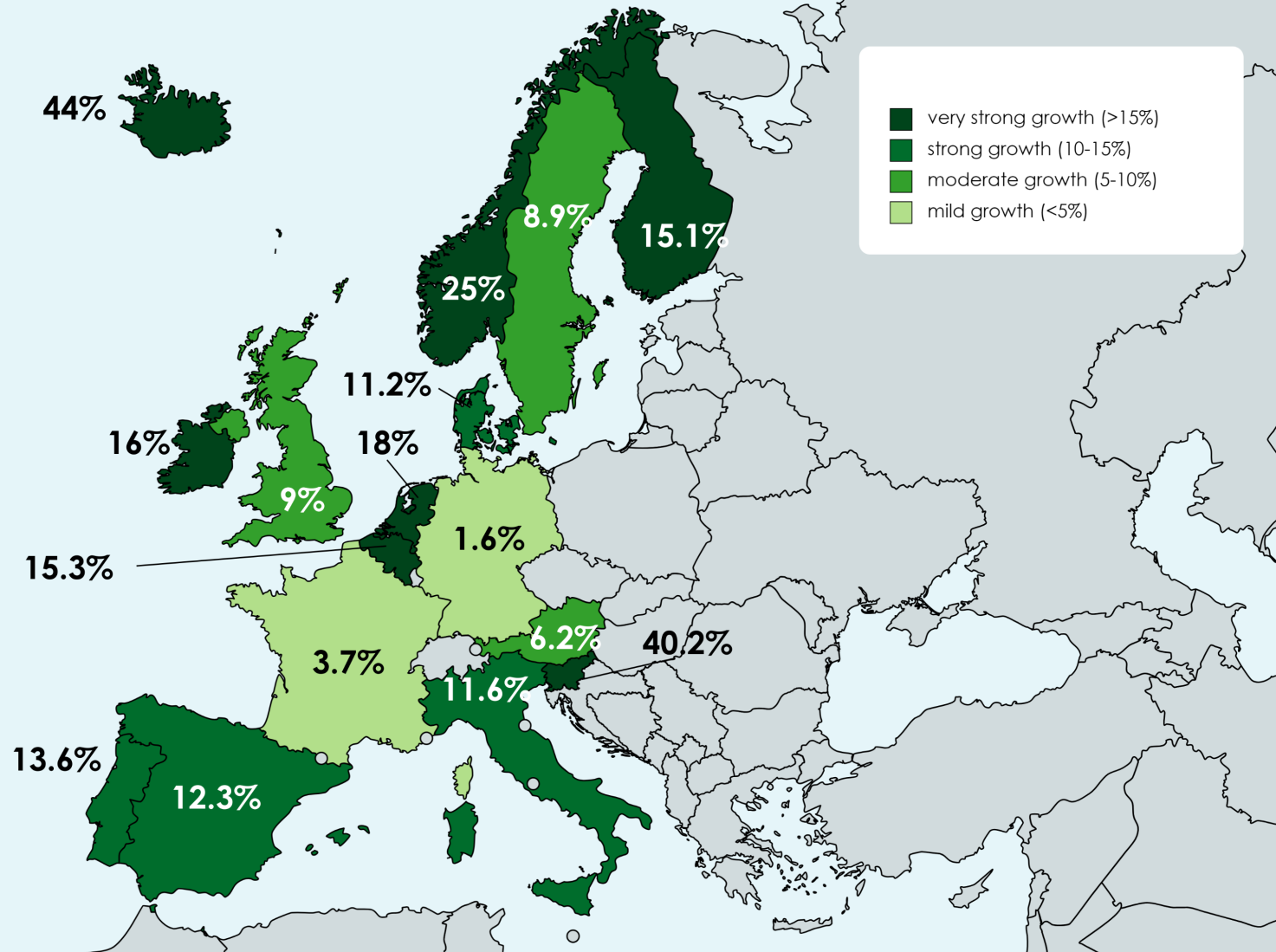
(online sales of print books, trade, change vs 2021)



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The book market in 2022

(total turnover, all categories/trade*, change vs 2019)

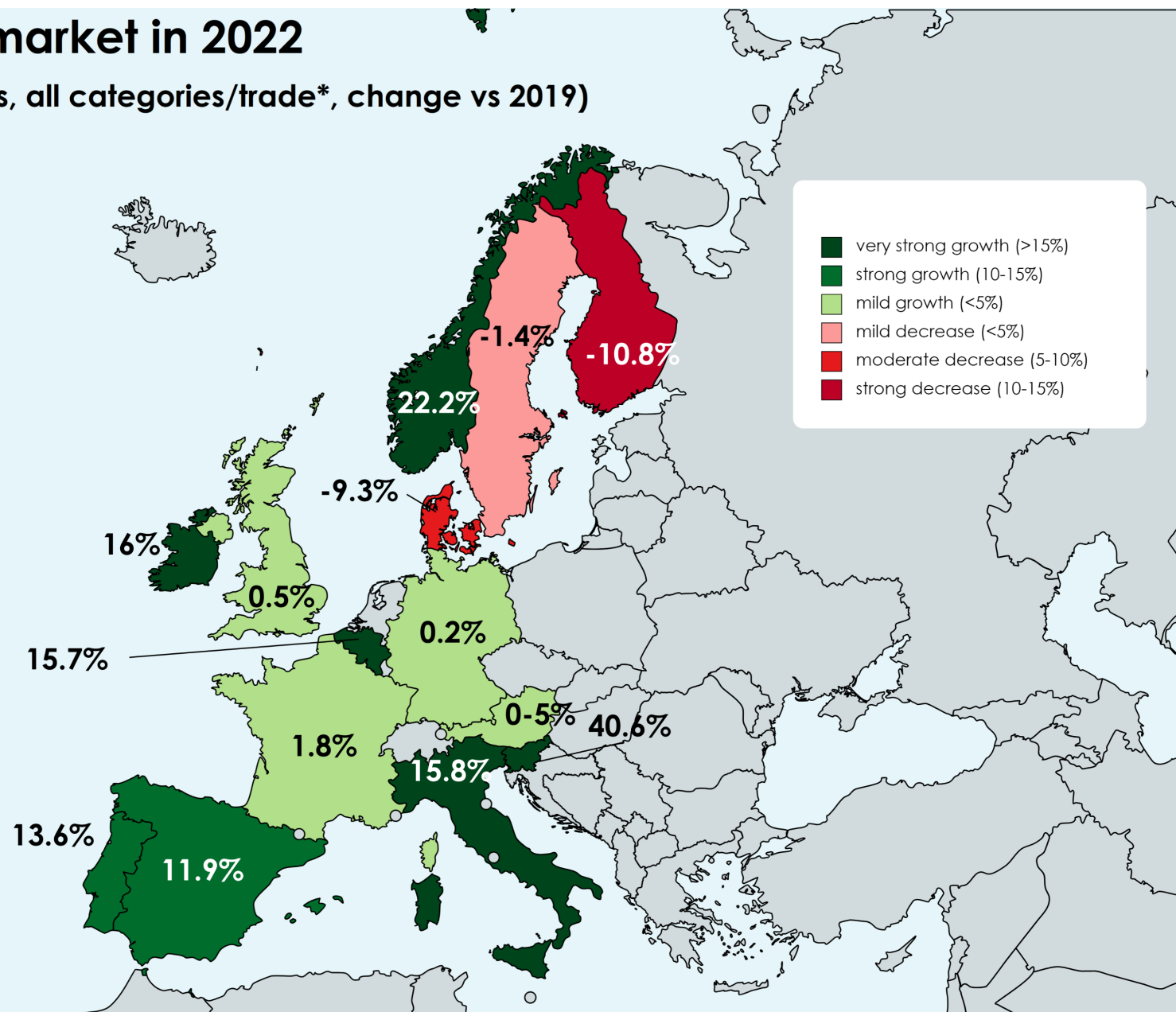


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2022 still better than
2019

The book market in 2022

(print book sales, all categories/trade*, change vs 2019)



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Ebooks

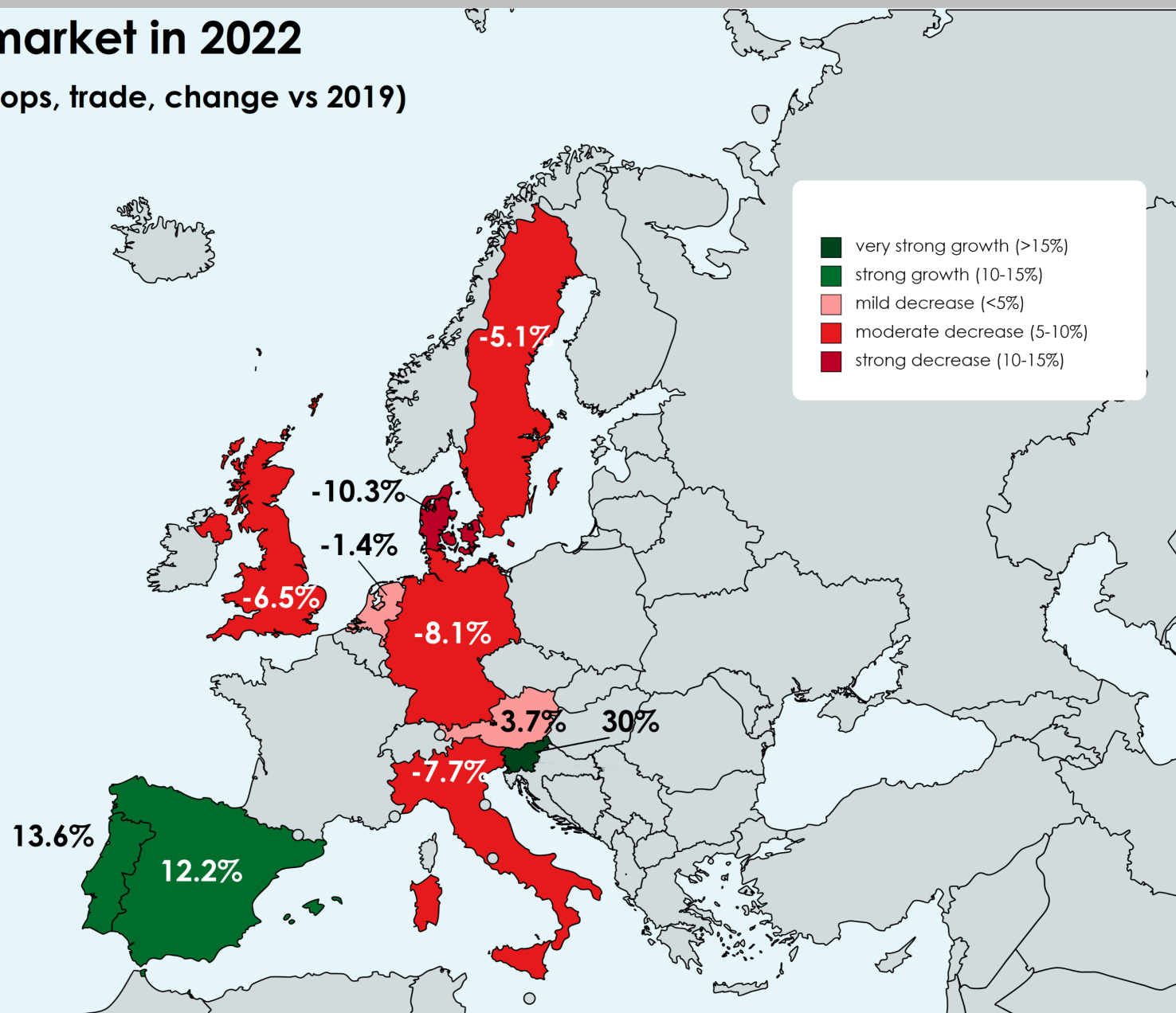
- Denmark -25.3%
- Finland +88.2%
- France +22.8%
- Germany +19.7%
- Italy +11.3%
- Norway +23%
- Sweden +21.5%

Audiobooks

- Denmark +112.8%
- Finland +225.6%
- Germany +91.5%
- Italy +177.8%
- Norway +80.1%
- UK +68.8%

The book market in 2022

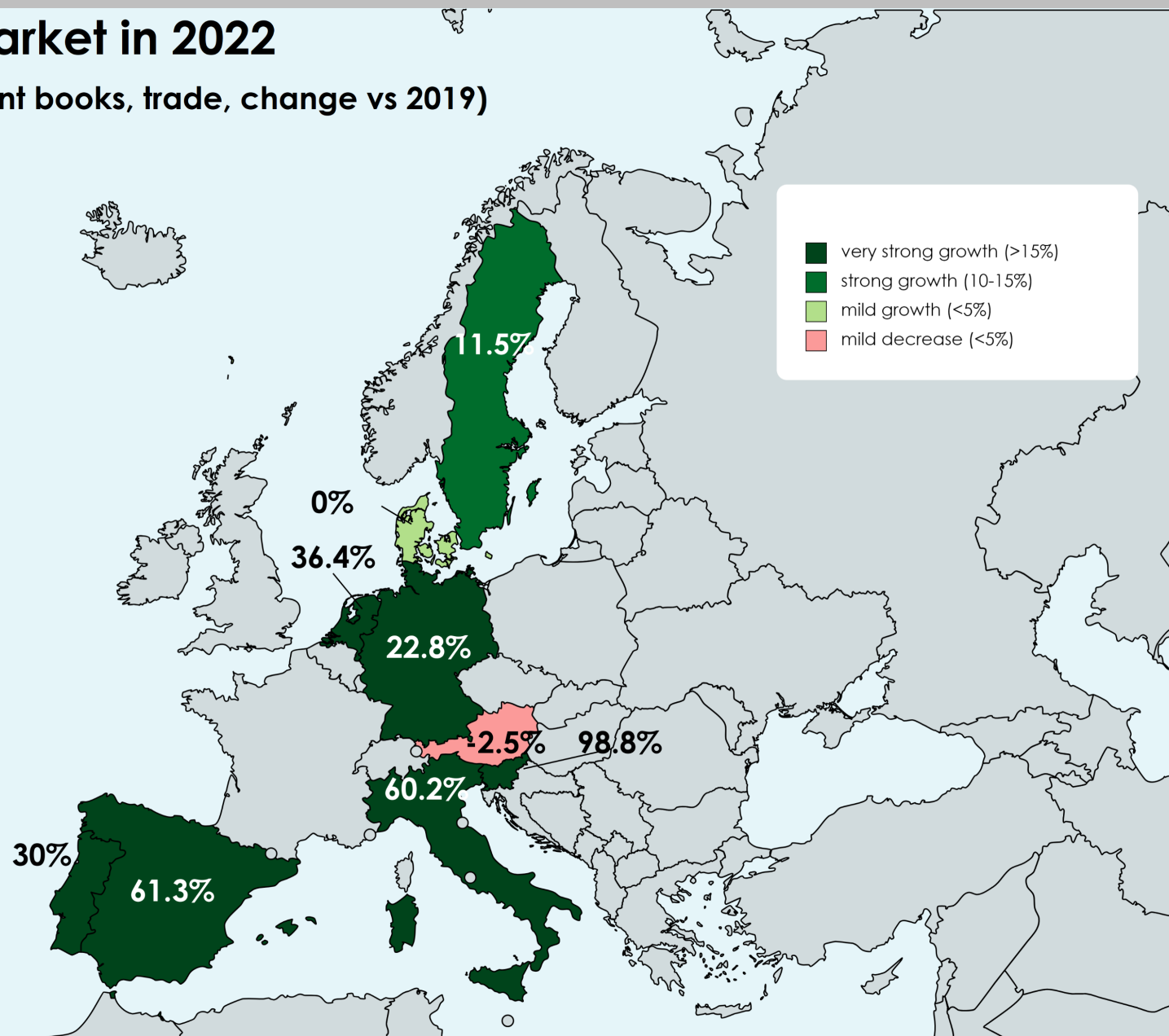
(sales in bookshops, trade, change vs 2019)



Created with mapchart.net

The book market in 2022

(online sales of print books, trade, change vs 2019)



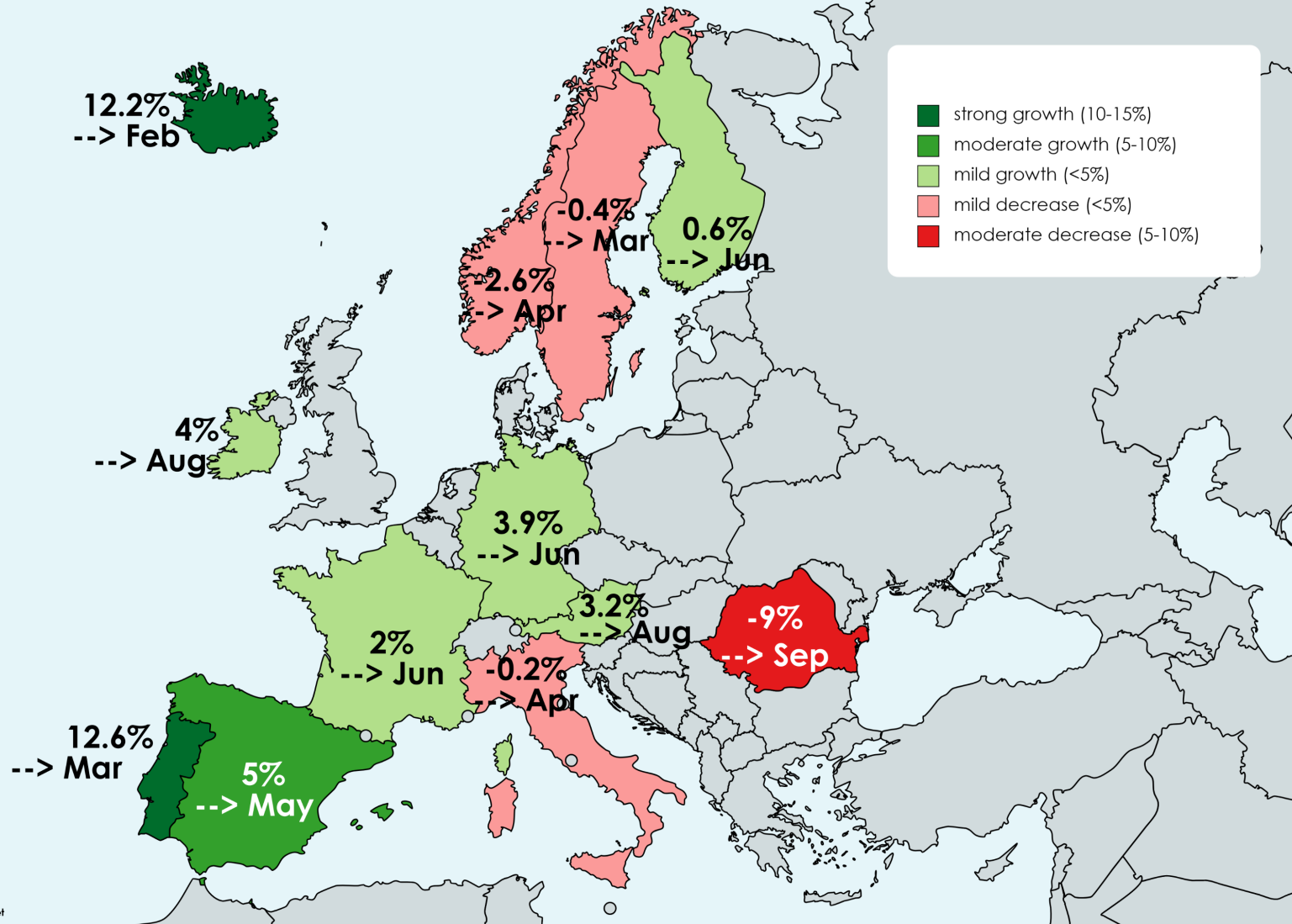
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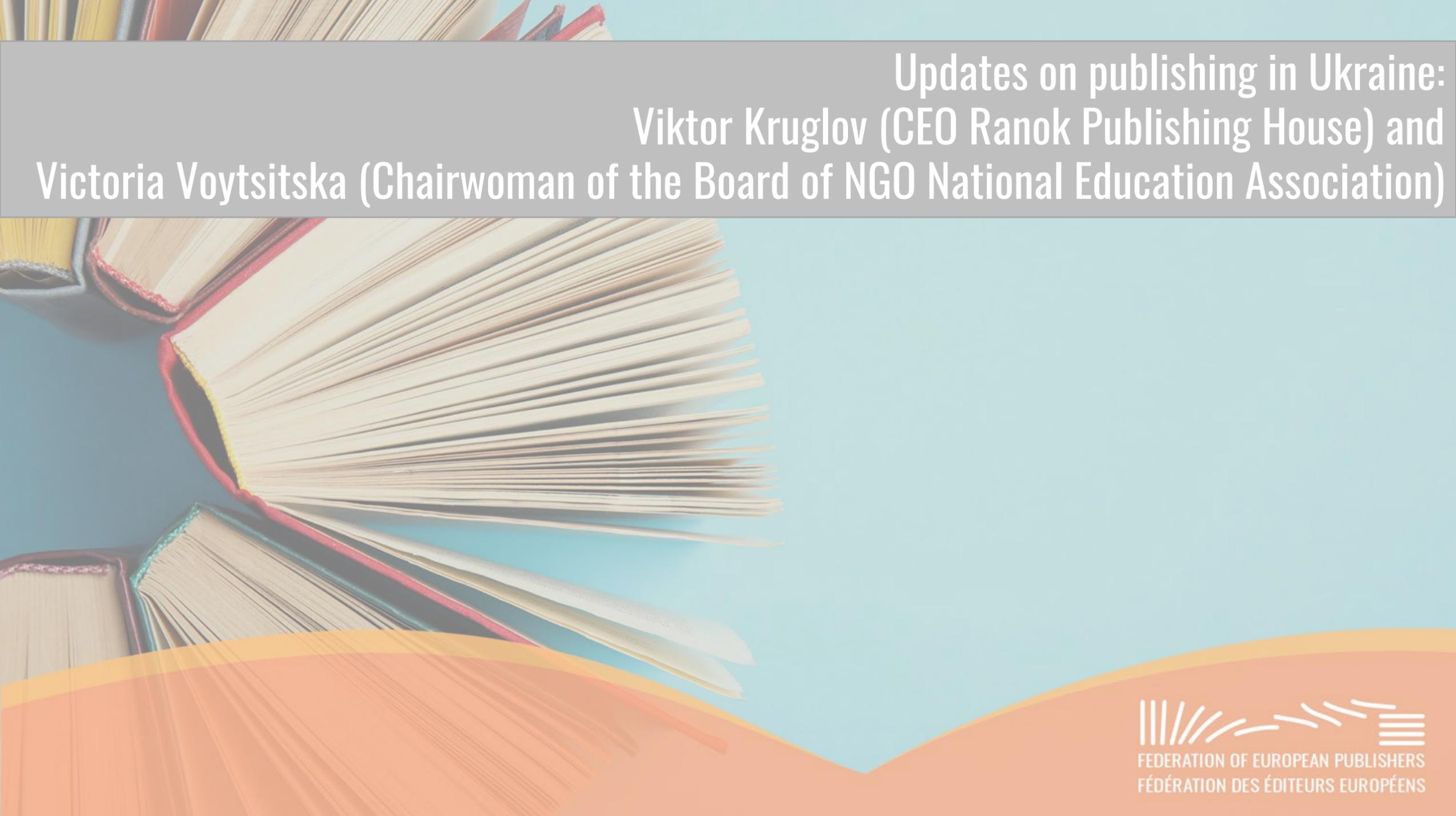
The markets in 2023

The book market in 2023

(total turnover, trade*, change vs 2022)



Created with mapchart.net



Updates on publishing in Ukraine:
Viktor Kruglov (CEO Ranok Publishing House) and
Victoria Voytsitska (Chairwoman of the Board of NGO National Education Association)

Brussels files

EP – The Book Report

What is it ?

- Non-legislative CULT report on the book sector
- Does not cover copyright
- Reflects most of our priorities: societal importance of books, reading promotion, increased circulation of books and challenges for the future
- Request support for publishers on key topics (sustainability, accessibility, fair competition, etc), calls for cultural vouchers and more EU fundings

What impact ?

- Adopted almost unanimously in September 2023
- Sets a good reference point just before the EU elections
- The European Commission is working on its response to the report

Brussels files

Late Payment Regulation

- Proposal for a Late Payment Regulation (replacing Late Payment Directive) issued by EC on 12/09
- In the framework of the SME Relief Package, aiming at solving the problem caused by late payments to SMEs
- Introduces a mandatory maximum delay for paying invoices in B2B commercial transactions of 30 days, without possible derogations
- The parties could not agree longer terms and the rules could not be circumvented by delaying the invoicing; penalties and interests would apply automatically after 30 days
- This would cause huge, unnecessary disruption to the book sector
- Flexibility and long payment terms in the book value chain are based on the nature of the book as a product and the normal business practices between publishers and booksellers
- Information collected by FEP indicates that everywhere in Europe the payment terms between booksellers, distributors and publishers are longer than 30 days (sometimes much longer)

Brussels files

Late Payment Regulation

- File led by Internal Market (IMCO) committee in the EP
 - Rapporteur: Roza Thun (RE, Poland)
 - Shadow rapporteurs: Antonius Manders (EPP, Netherlands), Tsvetelina Penkova (S&D, Bulgaria), Claude Gruffat (Greens/EFA, France), Virginie Joron (ID, France), Eugen Jurzyca (ECR, Slovakia), Stelios Kouloglou (The Left, Greece)
- Hearing in IMCO on 25/10
- Timeline:
 - Consideration of draft report: 4/12
 - Deadline for AMs: 12/12
 - Vote in IMCO: 22/02
 - Vote in plenary: April 2024
- FEP joined forces with EIBF
- We have met BusinessEurope, EuroCommerce, SME United
- We have met the SME Unit in the European Commission
- We have met the rapporteur and one of the shadow rapporteurs
- We have drafted a position paper with arguments and data collected (we could use more; so far IE, BE, ES, CZ, EE, DK, SI, FR, DE, IT, PL, LV, FI, NL)
- We aim (for now) at a **sectorial derogation (how?)**

Brussels files

Artificial Intelligence

AI state of play

- Issues on input and output
- Visible impacts on the market
- European Commission considers TDM exception to be applicable to Gen AI
- Uncertainty among rightholders on the applicability of the TDM exception
- Authors take a hard position
- FEP has adopted a position paper

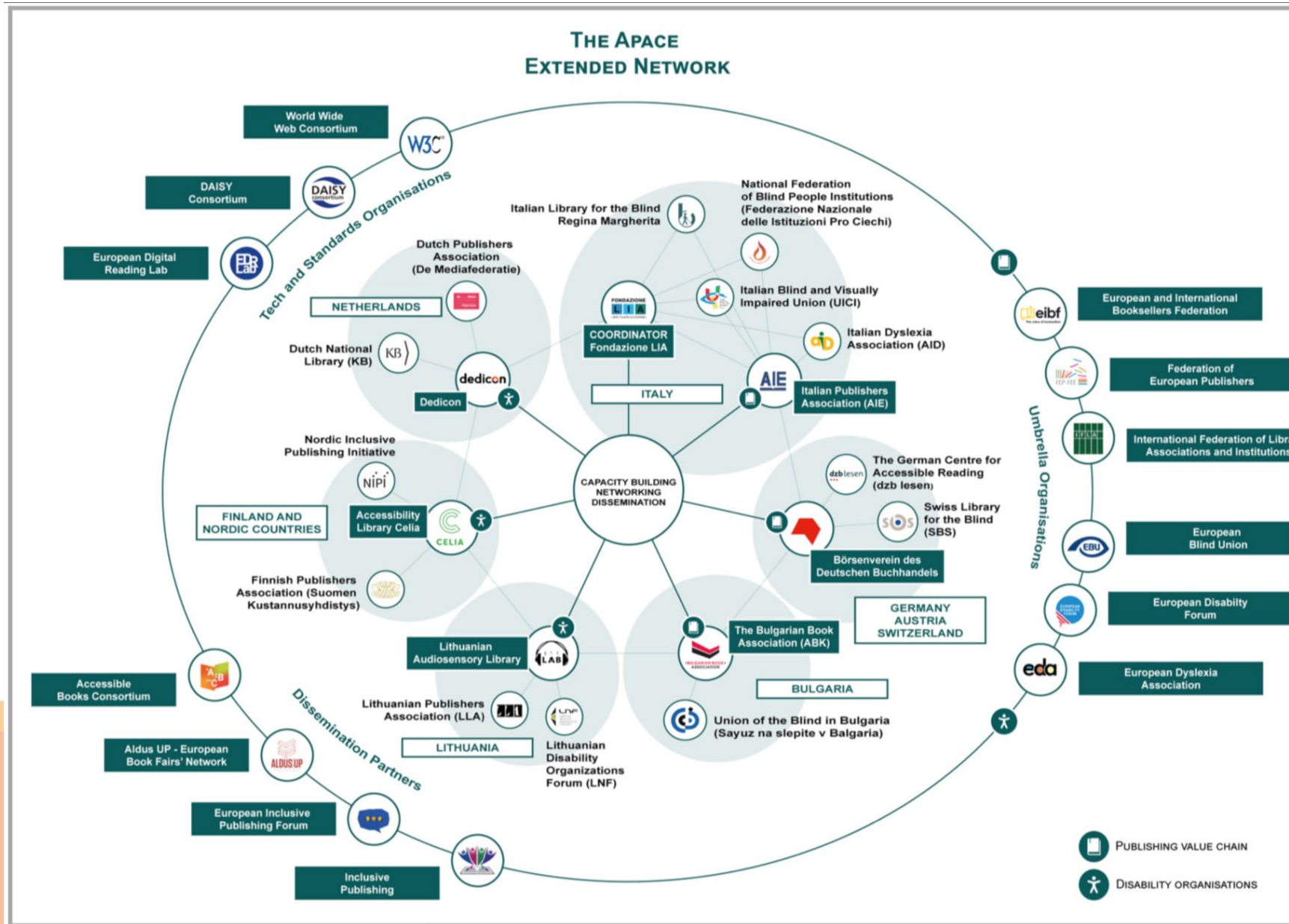
AI Act

- The EU's attempt to regulate AI according to their risks
- 4 trilogues so far, "final" one on 6 December
- Key priority: dataset transparency
- Helpful proposal from the Parliament facing resistance in Council
- FEP is working with other rightholders to push the issue
- Some progress but further improvement needed

Brussels files

Accessibility

- 28 June 2025 – all ebooks sold in the EU must be accessible
 - If accessibility involves a disproportionate burden or a fundamental alteration, publishers have to document it in order to be able to sell their ebooks in the EU
 - Micro-entreprises don't have such an obligation although it is hoped that many will do their utmost for their ebooks to be accessible
 - The Commission is insisting that the retailer is liable also for the content of its offer.
 - FEP, the European Parliament and several member States (France, Italy, Netherlands, Germany and Poland) consider that the responsibility of the accessibility of the ebooks lies with the sole publisher.
 - The risk if we were to follow the Commission is that much fewer ebooks, especially with complicated layouts, will be available on the EU markets
 - Make sure your governments are aware of the consequences
- EC is review the implementation of the Marrakesh Treaty and whether it should broaden it to include more disabilities (as it is limited to print disabilities)
 - FEP has insisted that the authorised entities should check the commercial availability of accessible copies before creating a new one.
 - FEP has also insisted that n exception that competes directly with the market is infringing the three step test.
 - The Commission should publish the results of its review in the coming weeks.
 - The LIA Foundation and some colleagues are involved in an EU project to support publishers.



EP own initiative report (non-legislative) on the Implementation of the 2018 Geo-blocking Regulation

- Lead committee: Internal Market (IMCO)
 - Rapporteur: Beata Mazurek (ECR, PL)
- Opinion committees: Legal Affairs (JURI), Culture (CULT)
 - Rapporteurs: Karen Melchior (RE, DK), Sabine Verheyen (EPP, DE)
- CULT opinion very good (adopted July), with excellent points on the book sector; JURI opinion and IMCO report (adopted October) more hostile to geo-blocking, with focus on A/V sector and linguistic minorities

- Both JURI and IMCO texts retained the sentence “geo-blocking in the book sector does not constitute a concern for the vast majority of consumers” (an FEP amendment)
- Vote in plenary in November or December
- A/V sector greatly concerned, mounting PR campaign and last ditch attempt to amend report via CW!
 - FEP vigilant to retain positive elements
 - Can we live with the report as it is?

Brussels files

Deforestation Regulation

- To prevent placement on EU market of products from deforestation and forest degradation (supersedes the EU Timber Regulation)
- Obligations for operators and traders – esp. for publishers who buy paper /print books outside EU (role of paper producers, publishers big/small, booksellers big/small)
- Due diligence: documentation (traceability), risk assessment, risk management
- Political agreement between EP and Council **includes printed paper products**
- Formal adoption by co-legislators in May 2023; publication in OJ 9/6, entry into force 29/6
- Application 18 or 24 months later (large companies/SMEs): **December 2024/June 2025**
- **Check out our briefing and inform the publishers**
- **Get in touch with your surveillance authorities**
- **FEP applied to join Commission's Deforestation Multistakeholder platform, will participate in work on guidelines** (process delayed, replied this month)
- **FEP initiated a deforestation WG within the Print Media Group**

Brussels files

Digital education

European Commission / DEAP

- EC flagship initiative: Digital Education Action Plan
- Includes: Study on policy options for Digital Education Content (Ecorys consultants managing it)
- Ecorys set up a Stakeholder Consultation Group (FEP and several PAs and publishers joined): consultations, workshops, surveys, Task & Finish Groups, focus groups; now awaiting study
- Meeting with Digital Education Unit DG EAC in January, meeting with Commissioner Gabriel in February – FEP invited to EdTech Roundtable
- EC issued proposals for Council Recommendations on enablers of digital education and on digital skills – tried to lobby Member States (adoption 23 November)

Working with educational publishers

- Educational publishing group – join if interested
- Close cooperation with IPA EPF
 - Paris 1/12, focus on AI
- Looking into positioning with respect to "EdTech"

EUIPO

- IP in Education Network
 - Latest meeting 27/10, FEP intervened in workshop on education exception

Brussels files

Copyright

- **TDM – Opt Out:** FEP helped develop an opt-out protocol under the W3C. PAs and other organisations beyond book publishers are starting to officially recommend it to their members. An update to integrate the opt-out in Epub files is in the works.
- **E-lending:** The Commission has awarded the contract for the study financed as a Pilot project at the initiative of Pirate MEP Breyer. Work is intended to start to soon, with a delivery end of 2024.

Brussels files

Digital Services Act and Digital Markets Act

DSA

- The Commission designated 19 platforms as VLOPs, who had to start complying with the rules from September 2023
- First batch of transparency reports has been released
- For non VLOPS/VLOSE, the DSA will be applicable from 2024
- Be careful of the interplay between the DSA and copyright rules

DMA

- The Commission organised stakeholder meetings on various DMA obligations
- The Commission designated in September 6 gatekeepers (including Amazon), who have to be compliant within 6 months
- Talk to your national authorities to push our interpretation (and make YOU beneficiaries)
- Gather data !

Brussels files



Value Added Tax

- Directive amending Directive 2006/112/EC as regards rates of value added tax adopted in 2022, giving the Member States more freedom in setting their rates
- It allows any Member State to apply reduced or super-reduced/zero rates to books in all formats
- An opportunity to lobby, but also risk of competition with other products
- Several MS looking into rationalising their VAT rates system: threat and opportunity
- In 2023, Bulgaria got reduced rate on all books and Lithuania got the reduced rate extended to digital books
- Czech government proposed 0 VAT on all books (undergoing legislative process)
- Belgian plan to rationalise rates (would have raised VAT on books) dropped
- Romanian plan to raise VAT on books dropped
- Ireland to bring rate on digital books from 9% to 0
- Finnish plan to rationalise rates (including raise of VAT on books) going ahead

Reduced rates of VAT on books

- print and digital
- only print
- none



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ERATION OF EUROPEAN PUBLISHERS
ÉDITION DES ÉDITEURS EUROPÉENS

Tour de table – 5 minutes per country

- What is the proportion of sales of second-hand books in the total sales (France is estimating that one out of 5 books sold are second-hand)?
- What are the recent developments in your country related to the book sector?
- What are the trends of the book market in the last months?
- Are you aware to what extent your country already has or is considering developing language models based on the national language?
- How is the reduced VAT rate on books handled in the following situations:
 - the streaming service is i.e., part of a mobile phone subscription?
 - the books are part of a streaming service with other content; i.e. Spotify?

2024 EU Elections

FEP Manifesto

- FEP will prepare the Manifesto in the coming days basing itself on the EP report on the Future of the European Book Sector that contains most of the policies required at EU or Member States' level to support our sector.
- The Manifesto will be sent to the political parties at EU level before the Christmas break and we will encourage members to translate it and share it at national level with their own political parties.
- The Manifesto will be adapted to the welcoming campaign we will organise for the new MEPs and then again for the future Commission (likely to be formally appointed in December 2024).
- The newly appointed MEPs will be invited, inter alia, to join a new "GET CAUGHT READING" campaign.

Projects updates

EUPL

- EUPL at the Frankfurt Book Fair:
 - Anthologies distribution at LitAg on a dedicated desk on 18/10 and on the other days
 - Event with the EUPL 2023 Award Winner Martina Vidaić and the Director of DG EAC Georg Häusler
 - Anthologies distribution in 9 national stands
- EUPL at the Guadalajara Book Fair:
 - EU Guest of Honour
 - 10 EUPL authors participating from 27 to 29 November
 - Distribution of 300 boxes with leaflets presenting each author who participated in the EUPL from 2009 to 2023
- EUPL 2024, participating countries: Albania, Bulgaria, Denmark, Germany, Hungary, Iceland, Latvia, Malta, Netherlands, Portugal, Serbia, Slovenia, Tunisia – jury announcement **4 April 2024 in Brussels**



Projects updates

Möbius

- In a nutshell: developing methods and tools to leverage the potential of prosumers in innovation processes, promoting user-centric and user-driven perspectives in the design and delivery of new enriched media experiences
- Role of FEP: information on industry practices and insights, testing with professional users, workshops, IPR aspects; dissemination
- Möbius development is in its last phase; looking for feedback both online and in person
- The main aim for us: figure how to engage the readers meaningfully in the book value chain (as writers, reviewers, influencers, marketers, sources of data)
- **Publishers always welcome to test the project's outputs**
- **FEP engaged on legal framework, business models, and dissemination**
- **Positive feedback on its media experiences**
- **Follow Möbius for in-person opportunities to test its technology**
- **PIT presentation Today!**



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FEDERATION OF EUROPEAN PUBLISHERS
FÉDÉRATION DES ÉDITEURS EUROPÉENS

Projects updates

Tales of EUkraine

- Co-funding granted under Creative Europe
- Duration: 3 years (Expected end: Oct 25)
- Partners: FEP (coordinator), PAs of Bulgaria, Germany, Italy, Poland, Romania, Slovakia, and Ukrainian Book Institute
- **In a nutshell:** catalogue of Ukrainian children's books, rights to be acquired by publishers in target countries to publish bilingual editions, to be bought and distributed with project funds
- Many TEUK books have been published already!
- **Catalogue available on FBF Rights Platform**
- **FEP has funds to include more countries**
 - **TEUK is having a substantial impact and is being recognised internationally**
 - **TEUK presented at BCBF and FBF**
 - **Collaboration with Better Time Stories**
 - **Bring in more publishers!**

TEUK Blog



TEUK Catalogue



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FEDERATION
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PUBLISHERS
ÉDITEURS

Projects updates

ALDUS UP

- In a nutshell: book fair network, addressing core topics for the book industry
 - Role of FEP: dissemination, exploitation
 - FEP and members: broaden network, professional meetings, EUPL events at fairs, YPPiB
- **Developed and piloted methodology for reading habits surveys (ERICS – EuRoepan Item Core Set for Reading Surveys), analysis on Translation rights Market**
 - **Book fair events in synergy with EUPL**



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YPPiB 2024

- **13-14 May 2024** – YPPiB 3° Edition
- **December 2023 – February 2024:** application process for the PAs
- Co-financed by **Aldus Up**
- Aims:
 - Inspire and engage young publishing professionals from all over Europe
 - Enable networking among YPPs, FEP office and FEP members
 - Find the next generation of publishing professionals to support national and FEP's advocacy work in the future
- YPPiB in 2022:
 - 13 participants from 9 countries
 - Meetings with 9 MEPs and assistants and with Commissioner Breton
 - Dedicated sessions on sustainability and on the book sector in Ukraine

Young Publishing Professionals in Brussels



PIT Toolkit test

Möbius

Link to the PIT:

<https://mobius-pit.in-two.com/>



- Username: **TestUser**
- password: **TestPass20ro**

Link to Form

1: <https://forms.gle/bZ1d9RaM6hqNBKtv9>



Link to Form 2:

<https://bit.ly/impact-assessment-mobius-pit>



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STM Report



IPA Report



Next meetings and closing remarks

- **22 November 2023**
Dialogues Author-Publisher with Javier Cercas, Juan Cerezo (Tusquets Editores) and Luigi Brioschi (Guanda Editore)
- **FEP Online meeting – date to be confirmed (February or March 2024)**
- **13-14 May 2024**
3rd edition YPPiB
- **13-14 June 2024**
FEP General Assembly 2024 – Vilnius
- **28-29 November 2024**
FEP General Assembly - Brussels